## Attendees

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| --- | --- | --- |
| Martha Alexander | Alexandra Kelly | Chris Burns |
| Betty Gibson | Janna Johnson | Debbie Morrison |
| Ashley Porson | Ninette Portales | Pattie Toller |
| Hollie Trussell | Vicki Welch | Angelia Alaniz |
| Jennifer Escamilla | Stacey Havel | Jennifer Valdez |
| Irma San Miguel | Helen Torres | Vicky Brinkman |
| Meredith Fox |  |  |

## Announcements & Completed Changes

* Added more visible warning when not re-electing FSA during open enrollment.
* Benefits Partner Dashboard is now available

## Upcoming Changes

* Add Announcements to the Benefits Dashboard
* Open Enrollment; Events with 9/1 benefits start dates will not include correct plans or rates until FY26 updates are loaded.
* Report Alert prior to OE to remind anyone Certifying Other to update their status if needed.

## Discussion Items

### Absence Due to Birth/Adoption & LOA Events in General (HAC)

* HR not notifying Benefits Partners, EE missing 31 day deadline
	+ Can we prevent duplicate to do if employee needs to submit multiple leave requests due to exhausting different time off types?
	+ What reasons are they using?
		- Sick > Birth/Adoption
		- Unpaid > Parental Leave
		- FMLA
	+ Notification or To Do step
		- TAMU/Ag prefer to do over notification to Benefits Partners
		- Also send notification to employee (personal and work email)
		- Option to Opt In/Out for workstations
		- Exclude if there is already a Birth/Adoption benefit event in the last 31 days
		- Way to prevent notification if employee has already submitted leave and received notification (exclude if already submitting time off request type within last 31 days?)

### ORP

* Losing ORP/TRS Eligibility notification/to do
	+ Add Step in the Staffing BPs to automatically send a to do if someone is moving out of ORP, send a link to the ORP Eligibility Reference Guide.
	+ Possibly separate step if the employee has ORP Vested Date ID (past date)
	+ Phase 2: does it need to be added to End Additional Job?
* Notification for expiring ORP enrollment period, HR12 or HR15 needed, etc.
	+ There is a notification for unsubmitted ORP events
	+ HR 12: Aknowledgement of ORP Offer
		- Send reminder if they have an open ORP event?
		- Tarleton has them submit the form during Onboarding, but would like reminders for them with uncompleted events
		- Can Workday generate this as a document and send to employee (similar to offer letter/hire document acknowledgements)
	+ HR15: Terminating Employee sent to vendor to release funds.
		- Currently Benefit Partners receive a To Do reminding them to complete HR15.
	+ HR18/HR14: Conditional routing for members based on who is completing form
* HR-15 ORP Acknowledgement Form
	+ Update Review Documents Step in Termination to go to fillable PDF instead of the Docx in Workday
	+ Possible to have some information pre-populated?
	+ Conditional Routing based on who is completing for each member

### Prevent Reprocessing for All Retirement Events

* + Test Do Not Reprocess for all events (prevent even in case of benefit group change)
	+ Is there a way to send a to do if an event is reprocessed?

### Onboarding Question Project

* Creating Committee to address optimization and refresh of Onboarding Questions relating to TRS/ORP and Benefits Elections
* Initial meeting to occur within the next 2 weeks.
* Implementation of changes within the next year.

### Notification/To Do when a hire date is corrected

* Is there any kind of notification sent when there is a correction to Hire affecting benefits?

### Wellness Credits for 12 over 9

* For wellness credits beginning after 9/1, they are not receiving the correct annual credit amount.
* Possible to use report to make 1 time correction on June pay?
* How frequently is this occurring?
* Who is responsible for determining who is owed a refund and who is responsible for making the adjustments to Payroll?

## Cross-Functional Items

### Staffing

* ORP
	+ Conditions to Change Job if ORP eligibility change happening
* Onboarding Questions Refresh Project
	+ Include a member of staffing team in discussions

### Time/Absence

* Add To Do/Notification when Employee uses Sick > Birth/Adoption, Unpaid > Parental Leave

### Reporting

* Report for 12 over 9 employees beginning wellness mid-year
	+ Identify affected employees
	+ Calculate refund owed

## Action Items

* LOA Events for Birth/Adoption
	+ WDS Discuss options for adding notifications or to do with Absence
	+ WDS write Preliminary Text for notification and to do to send to Training team
	+ Benefits Partners add comments if interested in Opt In/Out choice
* Prevent Reprocessing for All Retirement Benefit Events
	+ WDS research events which are being reprocessed and why.
	+ WDS test whether using No Reprocess checkbox prevents reprocessing in case of Benefit Group Change
	+ WDS research if To Do or Notification can be sent when event is reprocessed
* ORP
	+ WDS research if Review Documents step for Termination BP can be updated to use PDF form on SBA website
* Notification or To Do for Corrected Hire
	+ WDS Staffing is researching any existing notifications.
	+ WDS Benefits will dig into specific examples provided.
* Mid-year Wellness Credits for 12 over 9
	+ WDS Research the number of people affected,
	+ WDS Reporting build report to identify individuals and calculate refund

## Next Meeting: 09/17/2025

^July 16 meeting cancelled due to Open Enrollment