OE2023 Agency Job Aid

Contents

All open enrollment agency resources are available on the [Open Enrollment for Administrators Website](#).

Agency Resources

See the [Open Enrollment Administrator Website](#) for agency resources including:

- Links to ETF materials
- OE PowerPoint Template
- OE Toolkit

See the [OE Communications & Queries page](#) for the following:

- Emails sent via Employee Messaging
- Agency email templates and queries
- Vendor communications

Pre-OE/Start of OE Agency Checklist

Reminders

- All SSO tickets relative to Open Enrollment issues should start "OE2023, Employee Name, Empl ID"

Tasks Leading Up to the Start of OE/right at the beginning of OE

- ☐ Send [Pre-OE Announcement Email](#) to employees by 9-21-22
- ☐ As of 9-20-22, **do not move an employee's primary benefits flag to a different empl record – submit a ticket if this is needed**
- ☐ Run WRS Lookback on Mondays following payroll confirmation
- ☐ Run WI_BN_OPEN_EVENTS with a Schedule ID of EM2017 to manage events daily
    - Benefits Administration will also run at noon on 9/21 – 9/23 to help events move more quickly through the system
- ☐ Complete the following by 9-21-22
    - Complete entry on all open SHR events
        - For LTEs enrolling in health or OOS at 6 months – manually create/enter SHR events through 12-31-22
    - Process all AGE events with an event date of 12-31-22 or earlier (preferably by 9/21)
    - Enter all life event applications as received
    - Finalize all open termination events (TER, RET, TRA, TWB)
    - Finalize all events that need no entry
    - Encourage new hires to complete elections ASAP (OE event won't open until HIR and SHR (if applicable) entry is done)
- ☐ Create a ticket if you have an employee in the DEF benefit program who wants to enroll in Pre-Tax Savings Plan during OE

BAS Group ID and OE for Employees with Multiple Jobs

BAS Group ID

Only employees who have an IYC BAS Group ID on their job will have an OE event. All active employees who are NOT in the DEF benefit program will get an IYC code (exception: if in DEF but currently enrolled in a Pre-Tax Savings plan, will get an IYC code).

The process to add the BAS Group ID to job will be run on 9-20-22 (Tuesday). A process will run nightly during OE to populate this field and create an OE event for any newly eligible employees (new hires, newly WRS eligible).

Employees with Multiple Jobs

If an employee has more than 1 active job, the BAS Group ID is added to the benefits primary job.

- **Once the IYC code is on a job, agencies must not move the benefit primary flag to a different job**
- If there is no IYC code on the benefits primary job, the OE event will disconnect in the system and the employee won't be able to make their OE elections
  - Create a ticket if the benefits flag needs to be moved
- If the primary job is terminated but another job is active, create a ticket so the IYC code and benefits flag can be moved to the active job
- **From 9-20-22 until early 2023 (date TBD), agency must submit a ticket if the benefits flag needs to be moved**

Note: You may see NON, or DUP listed in the BAS Group ID Field. These people either have multiple benefit records or several active employment instances. These codes are added to make sure that only 1 OE event prepares for the person.

DEF Benefit Program

Employees in the DEF benefit program will NOT automatically have an OE event created for them (exception: if they are currently enrolled in a Pre-Tax Savings plan, they will get an IYC code). Most are only eligible for Parking/Transit Accounts. If in a non-LTE appointment, they are also eligible for Healthcare and Dependent Day Care FSA. If someone in the DEF benefit program wants to enroll in a Pre-Tax Savings plan during Open Enrollment, submit a ticket and Central Benefits will create an OE event for the employee and they will be able to use eBenefits to enroll.

Impact of 2022 December C Pay Period

Typically, all the benefit event rules in the system set the Deduction Begin Date of an enrollment to the pay period prior to the coverage effective date. If this happens to be a C pay period (when no benefit deductions are taken), deductions begin on the next A pay period.

24A	11/06/22-11/19/22	12/01/22	JAN	DECEMBER
25B	11/20/22-12/03/22	12/15/22		
26C*	12/04/22-12/17/22	12/29/22		--

PAY PERIOD NUMBER	EARNINGS PERIOD	CHECK DATE	LIFE	HEALTH, DENTAL, VISION, ACCIDENT PLAN, ICI, PRE-TAX SAVINGS ACCOUNTS
1A	12/18/22-12/31/22	01/12/23	FEB	JANUARY
2B	01/01/23-01/14/23	01/26/23		

The 2022 December C pay period required the adjustment of some of the deduction begin dates associated with Open Enrollment.

Health, Dental, Vision, Accident Plan, OOS Deduction Begin Dates

The deduction begin date of the enrollment (or waive) will be 12-18-22 (12-1-22 for LEG). No deductions will be taken on the 2022 PP26 – deductions will begin in 2023 PP1.

The enrollment in eBenefits will look like this:

Healthcare FSA/LPFSA, Dependent Day Care FSA, Health Savings Account, Parking/Transit Accounts

The deduction begin date of the enrollment (or waive/term) will be 12-18-22 (first day of 2023 PP1). This date had to be updated because the 2022 PP26 is in the 2022 Plan Year and the deduction begin date must coincide with the pay period start date of the 1st pay period payable in 2023.

The enrollment in eBenefits will look like this:

Note for LEG: Initially the deduction begin date for these plans will be set to 1-1-23. After Open Enrollment, Central Benefits will manage the process to update the deduction begin dates to 12-1-22.

WEA Trust East, WEA Trust West-Chippewa Valley, and WEA Trust West-Mayo Clinic no Longer Available in 2023

WEA Trust will be leaving the State of WI health insurance plan effective 12/31/2022. Employees currently enrolled in WEA Trust plans must select a new health plan for 2023. If no plan is selected, the system will terminate coverage. There are several monitoring queries available (see below)

Dean Health new administrator for Access Plan and State Maintenance Plan (SMP)

SMP – will be available in Florence County in 2023

SMP (under Dean in 2023) will be available again in 2023 in Florence County.

Health Plan Service Area Changes/Expansions

- Dean Prevea360 is now Dean-Prevea360 East and West
- GHC-EC has changed to Greater WI and River Region; partnered with Common Ground
- HealthPartners is now HealthPartners Southeast and West
- Security Health has returned to the State of Wisconsin Health Program for 2023

Monitoring Queries for plans leaving or changing

- **DeanPrevea360**
  - OE_2023_DEAN360_ENROLL- top of stack health election is DeanPrevea360
  - OE_2023_EM_DEANPREVEA360
  - EM: EM_2023_DEANPREVEA360
  - Sent Status: EM_2023_ DEANPREVEA360_09222022
- **GHC EC**
  - OE_2023_GHCEC_ENROLL – top of stack health election is GHC EC
  - OE_2023_EM_GHCEU
  - EM: EM_2023_GHCEU
  - Sent Status: EM_2023_ GHCEU_09222022
- **HealthPartners**
  - OE_2023_HealthPart_ENROLL – top of stack health election is HealthPartners
  - OE_2023_EM_HEALTHPARTNERS
  - EM: EM_2023_HEALTHPARTNERS
  - Sent Status: EM_2023_ HEALTHPARTNERS_09222022
- **WEA Trust**
  - OE_2023_WEATRUST_ENROLL – top of stack health election is WEA TRUST
  - OE_2023_EM_WEATRUST
  - EM: EM_2023_WEATRUST
  - Sent Status: EM_2023_ WEATRUST_09222022
- Additional monitoring queriers will be created that will be used for follow-up employee messages (10/8, 10/15, 10/20)

Opt-Out Stipend

Employees will apply for the Opt-Out Stipend through eBenefits. There is no need for an employee to complete a paper application to apply.

- During OE, employees will apply for OOS through eBN

    o Reminder- new hires must apply for stipend via paper health application. Agencies will enter OOS enrollment on either SHR or OOS event

- **NEVER enter Opt-Out Stipend directly to Additional Pay**

- Employees will be enrolled in the Opt-Out Stipend simple benefit plan

- Enrollment in the OOS plan will automagically create the OOS entry in Additional Pay

- When an employee terminates, the OOS plan enrollment and the OOS Additional Pay election will end when the TER/RET/TRA/TWB event is finalized.

The employee must take the following actions in eBenefits to enroll in the Opt-Out Stipend benefit plan.

1. Waive health insurance on the OE event (if not already waived)
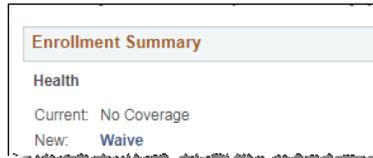
2. Click on the Edit button next to Opt Out Stipend
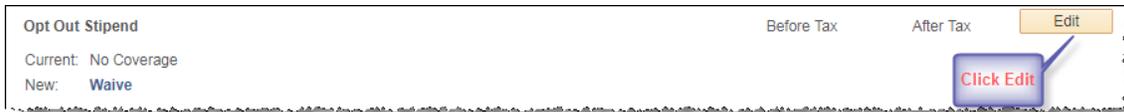
3. Answer the Opt Out Stipend validation questions correctly and click **Agree**
    a. Once the employee answers the questions correctly, the validation will never appear to the employee again this year.

Benefits Certificate

2023 Health Opt Out Stipend

Answer the questions below to confirm your eligibility for the Health Insurance Opt-Out Stipend for 2023. Prior to enrolling in the Opt-Out-Stipend, you must waive your health insurance in STAR.

Will you be covered by State or UW Health Insurance in 2023 either as an employee, spouse or child?

Answer
○ No
○ Yes

Have you waived your health insurance in STAR for 2023?

Answer
○ Yes
○ No

In 2015, if you were a state employee, were you covered by State Group Health Insurance?

Selection
☐ No
☐ Yes
☐ Not employee in 2015

I agree that I am eligible for the opt-out stipend and have waived my health insurance for 2023.

   Agree   Decline

    b.   If they answer incorrectly or click on Decline, the employee will get the following message. They will be able to try again if they click the Edit button again.

Election criteria not completed successfully. (3001,1033)

The information you have entered does not meet the minimum requirements to allow for an election of this plan type.

Complete the questionnaire again or contact the Benefits Department.

OK

4.   The employee then enrolls in the Health Opt Out Stipend plan.

ⓘ Important! Your current coverage is: No Coverage. You must re-apply for the Health Insurance Opt-Out Stipend every year.

Select an Option

○ No, I do not want to enroll
◉ Health Opt Out Stipend

  Update and Continue   Discard Changes

5.   Since there is no deduction associated with the plan, nothing will be listed in deductions on the eBN summary page; however total costs will be reduced by the amount of the stipend.

This table summarizes estimated costs for your new benefit choices.

Election Summary

Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	0.00	0.00	0.00
Your Costs	-83.34	-83.34	0.00

These costs do not include certain choices that are based on variable earnings.

6. The Opt-Out Stipend will appear on the employee's Confirmation Statement

	Benefit Plan	Coverage/Annual Election	Pay Period Pre-Tax Deduction
Health	Waive		
State Group Life	Life - Basic+Suppl (2x salary)	$166,000	$15.7?
State Group Life Additional	Life - 3 Additional Units	$249,000	$34.8?
State Group Life Spouse & Dep	Life - 2 Units Spouse & Dep	2 Units	
ICI Standard	ICI Standard Coverage 6	Up to 75% of Salary	
ICI Supplemental	ICI Supplemental 6	Up to 75% of Salary	
Healthcare FSA	Terminated		
Opt Out Stipend	Health Opt Out Stipend	$2,000 Stipend	
WI Deferred Comp Pretax	WI Def Comp		$300.0?

Once the OE event is finalized, the employee will be enrolled in the Opt-Out Stipend Benefit Plan and the OOS Additional Pay will automatically be created.

- **If employee is re-enrolling in the OOS (received stipend in prior year)**
  - Employee will **NOT** get a new enrollment in Simple Benefits or Additional Pay (because coverage is continuous). The coverage begin date will be the first time the employee began receiving the OOS (this could be January 1st of a year or any other time if the employee last enrolled as a new hire).

Note: If employee initially submits OE election and does NOT re-enroll in OOS, a termination row is added to the Simple Benefits page and a term date is added to OOS Additional Pay. When the employee goes back into their OE event and enrolls in the OOS, they <u>WILL</u> get a new row on the Simple Benefits page (with a 1-1-23 effective date), but they will NOT get a new row in Additional Pay (the process just removes the term date from the top of stack OOS Additional Pay row).

- **How OOS looks if enrolling for the 1st time**
    - Employees will have OOS enrollment effective 01-01-2023 and an Additional Pay effective date of 12-18-22 – the first payment will be on the first check payable in 2023).

- o For the Legislature, the Additional Pay effective date is 12-1-22

- o No End Date populates in Additional Pay when the employee enrolls. This date will populate either when the employee terminates or doesn't re-enroll in the OOS plan during Open Enrollment.

How to Access OOS Certification
Only employees who enroll in the OOS **through eBenefits** will have a certification stored in STAR. For 2023, the certification is called **23 OPT OUT**. If a paper application is received, you should keep the original application in the employee's file. You do NOT have to send a copy of the application to ETF.

Navigation: Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – Maintain Certifications

Note: If an employee enrolls in both the OOS and the Delta Dental – Preventive Plan via eBenefits, the employee will have two certificates – one for OOS and one for Preventive Dental. You will need to click View All to see all certificates (including certificates from other years).

Paper Application Entry of OOS

If an employee gives you a paper application, encourage the employee to use eBenefits to enroll. If you need to do entry, make sure you Waive health insurance and scroll to the bottom of the Perform Election Entry page and enroll the employee in the OOS Benefits Plan.

OOS Termination if No Election Made on OE Event

If someone is currently receiving the OOS and makes NO open enrollment election, enrollment in the OOS plan will terminate when the OE event is finalized. This will also terminate the Additional Pay enrollment.

OOS Validations

The following OOS eligibility validation will be done by Central Benefits:

- Confirm employee is not enrolled in both health insurance and OOS

- Look for employees who were enrolled in 2022 but not in 2023 (and didn't enroll in health for 2023)

- Will monitor OOS elections effective in the last quarter of 2022 to ensure they are notified of requirement to re-apply for 2023

- The list of open enrollment enrollees will be sent to ETF twice (in November and January). ETF will validate that the employee is not a covered dependent under the state health plan and confirm the employee is not on the list of people who are ineligible because they didn't carry health insurance in 2015 as an active state employee.

- A monthly file is also sent year-round to ETF to validate new enrollments.

Ongoing OOS Process

The agency must NEVER enter the stipend in Additional Pay. You must enroll the employee in the Opt-Out Stipend benefit program – this is what creates Additional Pay. When the employee terminates, enrollment in the OOS benefit plan will terminate and an end date will be populated in Additional Pay.

Delta Dental PPO – Preventive Plan

The Delta Dental PPO – Preventive Plan is only available to employees who are **not** covered by State Group Health Insurance as either an employee or dependent, regardless of whether they are enrolled in Uniform Dental. This plan has the same benefits as Uniform Dental, but the employee must pay the full cost (no employer contribution).

If enrolling in the plan for the first time or wants to change/waive coverage, the employee must take the following steps:

1. Waive health insurance on the OE event (if not already waived) if enrolling in Preventive Dental for the year.
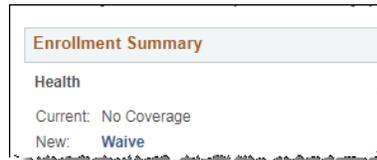
   Enrollment Summary

   Health

   Current: No Coverage
   New: **Waive**

2. Click on the Edit button next to Dental – Preventive (no health)
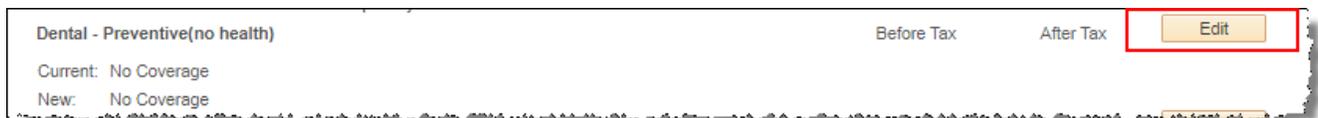
   Dental - Preventive(no health)   Before Tax   After Tax   Edit

   Current: No Coverage
   New: No Coverage

3. Answer the eligibility questions correctly and click **Agree.**

   a. Once the employee answers the questions correctly, the validation will not appear to the employee again this year. The employee will be taken to the enrollment page if they either answer "No" to the first question and/or "Yes" to the second question.

   Benefits Certificate   ✕

   2023 Preventive Dental Cert

   If you are enrolled in State Health Insurance, you must enroll in Health Insurance with Dental instead of this plan. This plan is only for people who are NOT covered by State Health Insurance.

   Will you be covered by State Health Insurance in 2023?

Answer
○ No
○ Yes

   If currently enrolled in Preventive Dental, do you want to waive coverage for 2023?

Selection
☐ No
☐ Yes
☐ Not enrolled in plan

   Click "Agree" to go to the page to enroll in or waive Preventive Dental coverage.

   Agree   Decline

   b. If they answer incorrectly or click on Decline, the employee will get the following message. They will be able to try again if they click the **Edit** button again.

Election criteria not completed successfully. (3001,1033)

The information you have entered does not meet the minimum requirements to allow for an election of this plan type.

Complete the questionnaire again or contact the Benefits Department.

OK
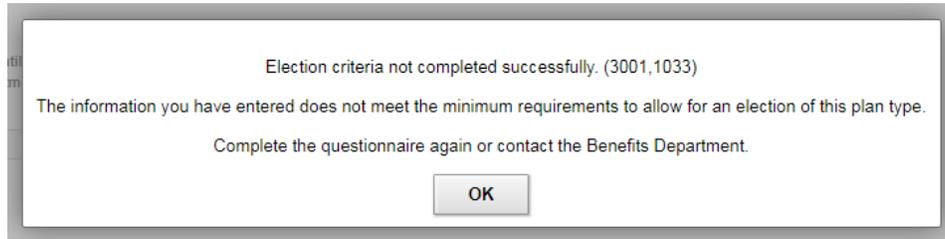
4. The employee then enrolls or waives coverage.

    a. Note – unlike the Supplemental Plan, the coverage levels available are Single and Family

5. Once the OE event is finalized, a record of the dental certificate is available (like the OOS)

    a. **Navigation:** Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – Maintain Certifications

    b. Certificate ID for 2023 = 23 DENPREV
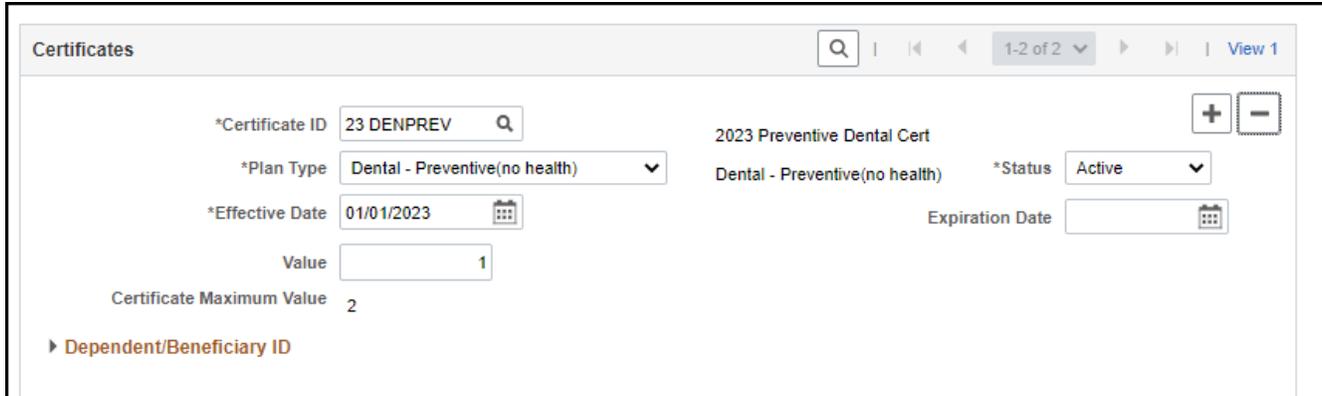
If currently enrolled in the plan:

- There is no annual certificate that must be completed (like the OOS) because coverage can remain continuous without any annual certification. Central Benefits monitors all Preventive Dental enrollments to ensure the employee is not also enrolled in State Group Health Insurance.

- If an employee is currently enrolled in the plan and clicks the "Edit" button in eBenefits for the plan, they will have to answer the questions to access the enrollment page.

Post Enrollment Validations

- Both during and after Open Enrollment, Central Benefits will monitor for employees enrolled in both health insurance as an employee and the Delta Dental Preventive Plan and take the following actions (below actions have been approved by ETF):

- o If enrolled in health with dental, CB will waive enrollment in the preventive plan and contact the agency to reach out the employee
- o If enrolled in health without dental, CB will waive enrollment in the preventive plan, add uniform dental to the health election and contact the agency to reach out to the employee
- Once the OE enrollment file is sent, ETF will compare the enrollments to everyone covered by state health insurance and adjustments will be made accordingly.

Confirmation Statements and Online Benefits File

Every time an employee submits their OE elections, they will receive a Confirmation Statement. The process to finalize OE events and generate confirmation statements will occur around 8pm each night. If the employee submits their OE elections after 8pm, there will be a one-day delay in the generation of the confirmation statement. The statement is housed in an Online Benefits File.

Confirmation Statement Creation Process

| Employee Submits OE Election | OE Event is Finalized around 8pm | Employee Receives Email that Confirmation Statement Available | Confirmation Statement Loads to B-File |

Below is the text that will be in the confirmation statement email.

Sample of the Confirmation Email text

January 1, 2023 Benefit Confirmation Statement Available

OpenEnrollmentDoNotReply@wisconsin.gov
To ● McKenna, Meghan - DOA

Our records indicate that your 2023 Open Enrollment benefit elections have been processed. You can access your Open Enrollment Confirmation Statement from the STAR Human Resources Employee Self Service Landing Page. Click on the My Benefits Tile and then on My Benefit Documents to review your statement.

If you log in to eBenefits to review or change your elections, you will receive an updated confirmation statement.

You can access STAR self-service at https://ess.wi.gov.

Reminder: All elections must be submitted by Friday, October 21, 2022 (eBenefits will close at 11:59PM on October 21st).

How an Employee Views Confirmation Statement

1. Employee Self Service Landing Page – My Benefits Tile – My Benefit Documents. Click on the Icon to view the document.
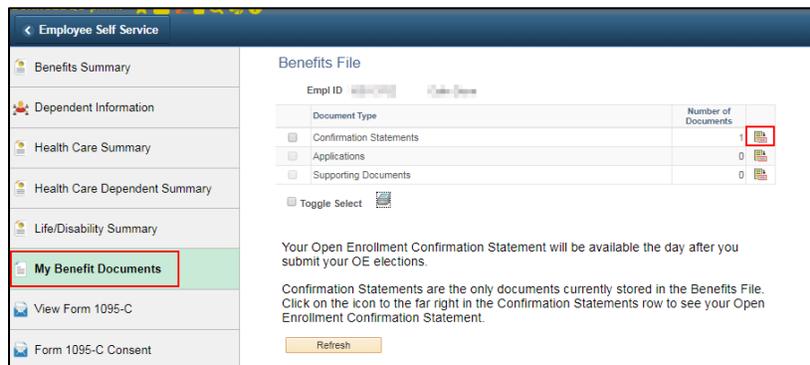
2. Click on viewer next to most recent statement
   a. Prior year confirmation statements will also be visible on this page.

	Document Effective Date	Business Unit	Attached File	Status	
☐	01/01/2022	51500	OE2022_confirm_stmt_09-19-2021.pdf	Available	📄
☐	01/01/2021	51500	OE2021_confirm_stmt_09-30-2020.pdf	Available	📄
☐	01/01/2020	51500	OE2020_confirm_stmt_10-03-2019.pdf	Available	📄
☐	01/01/2019	51500	OE2019_confirm_stmt_11-15-2018.pdf	Available	📄
☐	01/01/2018	51500	OE2018_confirm_stmt_11-07-2017.pdf	Available	📄
☐	01/01/2018	51500	OE2018_confirm_stmt_10-20-2017.pdf	Available	📄

☐ Toggle Select

Click on the View icon on the far right to see your Open Enrollment Confirmation Statement.

How Agency Can View Individual Confirmation Statement

1. Go to Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder - Employee Benefit Documents
2. Enter name or Empl ID
3. Click Search

Employee Benefit Documents

Search Criteria

Employee ID _____
First Name Bob
Last Name Example

[Search]

4. Click on View Documents

Search Results

Empl ID	Name	Payroll Status	Department	Department	Business Unit	Business Description	
100000	Bob Example	Active	4351000355	Inform Arch PHIN Section	43500	Health Services	View Documents

5. This brings you to the employee's benefits file. Follow step 2 in **How an Employee Views Confirmation Statement** to access the statement.

How to View/Print Confirmation Statements for Entire Agency or Department

When this process is run, only the employee's most recent confirmation statement will be included.

1. This process is running a report to generate a PDF of all confirmation statements. Go to the Nav Bar: Navigator and go to – State of Wisconsin (STAR) – Benefits Administration – Process – Print Confirmation Statements

Confirmation Statement Print

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value] [Add a New Value]

▼ **Search Criteria**

Run Control ID [begins with ▼] [_____]
☐ Case Sensitive

[Search] [Clear] Basic Search 🖉 Save Search Criteria

2. Enter Schedule ID (OE2023) and 5-digit Business Unit. Department is optional. A wildcard value will not work for Dept ID. Click Run.

3. Don't change any data values on Process Scheduler Request and click OK.

4. Once the process runs to success, click on Details.

5. Click on View Log/Trace

6. Click on the PDF that is created

Sample Confirmation Statement

The confirmation statement includes ALL benefit elections as of 1-1-23.

CONFIRMATION OF 2023 ELECTIONS - Open Enrollment

Employee ID:	Statement Date: 9/13/2022
Department ID:	Effective Date: 01/01/2023
	Event Class: OE

This notice is confirmation of the changes you made during the open enrollment period, as well as ongoing benefit elections. Please review this Benefit Confirmation carefully. It is your responsibility to report any errors to your benefits office by Friday, October 21, 2022. If all information is accurate, no action is required. Coverage listed below is effective January 1, 2023.

YOUR BENEFIT ELECTIONS AS OF JANUARY 1, 2023

Benefit Plan	Benefit Plan	Coverage/Annual Election	Pay Period Pre-Tax Deduction	Pay Period After-Tax Deduction
Health	HDHP HealthPart West w/Dental	Employee Only		$19.50
Dental - Supplemental	Delta Dental PPO Select Plus	Employee Only		$10.49
Vision	DeltaVision	Employee Only		$2.86
Health Savings Account	HSA HealthPtnrs West w/Dental	$4,000	$166.67	
ICI Standard	ICI Standard Coverage 6	Up to 75% of Salary		
ICI Supplemental	ICI Supplemental 6	Up to 75% of Salary		$5.14
Accident Plan	Securian Accident Plan	Employee + Spouse		$3.13
WI Deferred Comp Roth	WI Def Comp - Roth			$510.00
WI Deferred Comp Pretax	WI Def Comp		$510.00	
Total Deductions Per Pay Period			$676.67	$551.12

Note: This document reflects your benefit changes as of the effective date listed on the confirmation notice. Changes submitted after the date of this confirmation notice are NOT reflected in this document.

Page 1 of 2

CONFIRMATION OF 2023 ELECTIONS - Open Enrollment

IMPORTANT: While every effort has been made to report information accurately, the legal documents, policies or certificates pertaining to the benefits will prevail in the event of a discrepancy. This is not a legal document.

Confirmation Statements – What You Need to Know

- If previous coverage was Waive for the FSA/ERA/HSA plans and the OOS, if no enrollment was made on the OE event (either a Waive or an enrollment), coverage will display as **Terminated** on the confirmation statement.

- If there is no premium for a plan (ex. ICI Category 6), the per pay period amount will be blank.

Paper Application Entry

Agencies should encourage their employees to use eBenefits. If you do receive a paper application, you will enter it like any other paper application through Perform Election Entry (Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder – Perform Election Entry).

Important Reminders:

- The Schedule ID = OE2023

- IF OE event is not available for entry, submit an SSO ticket- Central Benefits will open the event for you
- Only plans with open enrollment are available for entry
- Current (2022) enrollments will be prepopulated on the OE event for the following plans:
  - Health (except for plans going away), Delta Dental Supplemental, Delta Dental Preventive, Accident Plan and Vision
- For all other plans (Pre-Tax Savings Account, HSA, OOS), the 2022 elections do not pull into the OE event because employees must re-enroll in these plans every year
- Never enter an override on HSA, Healthcare FSA, Limited Purpose FSA, Dependent Day Care FSA, Parking or Transit
  - Enter a POTT if you need to override the amount for any reason
- There is an issue with the Contribution Worksheet for the HSA/FSA/ERA Plans in Perform Election Entry. The number of pay period is correctly displaying this year but the total annual contribution does not calculate correctly. If the annual election is correct, the paycheck amount will be correct.

- **Never delete a dependent**
- Once you enter OE elections, if you need to do additional entry, you must submit a ticket for Central Benefits to re-open the OE event.
  - The employee can still make eBN elections after paper entry is done.

New Hires and OE

All events must be processed in date order. Encourage new hires to make their HIR eBenefits elections as soon as possible. Elections must be made in the following order: HIR ➔ SHR (if applicable) ➔ OE.

September/October Hires Who Have Access to an OE Event during OE

For employees who start in PP20 – PP22 (9/11/22 – 10/22/22), encourage them to make their new hire elections ASAP. Once the HIR event is finalized, the SHR event will open (if applicable). Watch for SHR events daily. Once entry is done on the SHR event, the OE event will open. This group will be handled like all other employees provided the OE event can be opened to the employee prior to the end of the OE period.

NOTE: If an employee is still within their initial 30-day enrollment period at the end of the OE period and the employee didn't submit their OE elections, you can still collect paper OE applications and have them manually entered on the OE event.

SHR Event Schedule for Remainder of Year

Date SHR Available	SHR Event Date Range
9-20-22	11/5 – 11/12
10-6-22	11/13 – 11/26
10-14-22	11/27 – 12/10
10-19-22	12/11 – 12/23
11-4-22	12/24 – 1/1

Hires Prior to 12-1-22 (no access to OE event or within first 30 days during OE)

The following will apply to late pay period hires in PP20 (9/11 – 9/24), all hires in PP21 (9/25 – 10/08), PP22 (10/09 – 10/22), PP23 (10/23 – 11/5), PP24 (11/6 – 11/19) and some hires in PP25 (11/20 – 12/3).

- Healthcare FSA, Dependent Care FSA

    o Remind employees that coverage they enter on HIR event is effective in 2022

    o If they want coverage for 2023, must complete a paper application within 30 days of hire (if no election made on OE event)

        ▪ Create a ticket, attach application and Central Benefits will do entry on either OE or ADM (depends on timing of receipt of application)

- Parking/Transit

    o Remind employees that coverage they enter on HIR event is effective in 2022

    o If they want coverage for 2023, collect a paper application and create a 1-1-23 COM event and enter election

- HSA

    o If coverage is effective in 2022, remind employee that coverage they enter on HIR is effective in 2022

        ▪ They must complete a paper application for 2023 (if not entered on OE event)

            • If they have an OE event, enter on OE event

- If no OE event, collect a paper application and create a 1-1-23 HSA event and enter election
    - If coverage is effective in 2023, no additional action needed – HSA election will be entered on SHR event (or OE event if created for October hires)

- WEA Trust
    - If a new hire enrolled in WEA Trust (hired prior to 12/1), the employee should enroll in WEA Trust on the HIR event.
        - They must complete a [paper application](#) for 2023 (if not entered on OE event)
            - If they have an OE event, enter on OE event
            - If no OE event, collect a [paper application](#) , create and enter the enrollment on a 01/01/2023 ADM and submit a SSO ticket to let Central Benefits know the reason for the ADM event and attach all applications.

- Opt-Out Stipend – if eligible for the employer contribution in 2022, make sure the employee completes 2 [health insurance applications](#) opting out for both years – one for 2022 and one for 2023.
    - Use the SHR event (or OOS event if employee has prior service) to enter 2022 election and a 1-1-23 OOS for the 2023 election.

December 2 – December 31 Hires

- For employees hired 12/2 – 12/31, the 2022 FSA and HSA limits connect to their enrollments even though coverage is effective 1-1-23
    - Solution:
        - HSA – can change at any time so if employee wants to maximize, can create an HSA event to increase annual election (event date = 1-1-23 or later)
        - Parking/transit – create a 1-1-23 COM event to enter updated annual election
        - Dependent Day Care - no limit change so no issue

WRS-Covered LTEs in First 6 Months

- If WRS-covered LTE in first 6 months as of 1-1-23, the OE event opens Plan Types 1U and 1V in the OE event and the employee will not be given an opportunity to make an election in health.

Life Events and OE

During Open Enrollment

If the employee has a life event where a dependent is added or removed AFTER the OE event is created, you should:

- Enter the life event on the BAS Activity Table
- Submit a ticket to Central Benefits **the same day** (Ticket Name = OE2023 – Reprocess OE due to Life Event+ Empl ID+EE Name)
  - Central Benefits will open the life event, agency will do entry, Central Benefits will finalize the life event and reprocess OE event

The new or removed dependents will not be reflected on the OE event until Central Benefits reprocesses the event.

After Open Enrollment

Central Benefits monitors for OE events that are out-of-sequence due to a life event. Central Benefits will make sure the dependent change is reflected on the employee's OE elections. It is not necessary to create a ticket, but the agency should feel free to create a ticket for tracking purposes.

When to Create a Ticket Specifically During Open Enrollment

You should create a ticket in the following situations:

- The employee adds/removes a dependent due to a life event during the Open Enrollment Period.
  - Central Benefits will reprocess the OE event to pick up the dependent changes
- The employee has a dependent listed more than once – create a ticket so Central Benefits can delete the dependent – **do not delete the dependent yourself**
- You need to make a paper OE election and the event is not open to you (attach application to ticket and redact SSN)
- You need to have an OE event created for someone in the DEF benefit program
- You need the benefits flag moved

Central Benefits Monitoring

Central Benefits will be doing the following monitoring/auditing during and after OE:

- OE events that are out of sequence due to life events or eligibility changes
  - Central Benefits will review, and re-process events as needed

- Central Benefits will monitor, and an email will be sent via Employee Messaging for the following:
    o OE in Notified Status
    o HSA Follow-up (enrolled in HDHP but have not elected HSA for 2023)
    o OOS Follow-up (currently enrolled in OOS but have not made an OE election yet OR currently enrolled in OOS but didn't elect OOS or health for 2023)
    o WEA Trust Follow-up (currently enrolled in WEA Trust but have not made an election to a new plan or waived coverage for 2023)
    o Dean Prevea360 Follow-up (currently enrolled in Dean Prevea360 but have not made an election to a new plan or waived coverage for 2023)
    o HealthPartners Follow-up (currently enrolled in HealthPartners but have not made an election to a new plan or waived coverage for 2023)
    o GHC-Eau Claire Follow-up (currently enrolled in GHC-Eau Claire but have not made an election to a new plan or waived coverage for 2023)
- Central Benefits will monitor and reach out to the agencies on the following:
    o Enrolled in HDHP but has other coverage (including Medicare) or is 65 years or will be turning 65 next year
    o Enrolled OOS + health insurance
    o Enrolled in health + preventive dental
    o Missing marital status and dependent information
    o Enrolled in Access Out of State for 2023
    o Very low FSA elections (under $50 minimum)
    o Enrolled in PreTax Parking + Active Parking General Deduction
    o Enrolled in LPFSA + non-HDHP plan
    o Enrolled in HDHP + regular healthcare FSA
    o Removing dependents under 19 or a spouse but keep family coverage
    o Late year FSA elections
    o Late year WEA Trust enrollees

OE Timeline

- **Sept 19th:**
    o Run PP19 WRS Lookback Report + do all associated processing
    o Agencies should finalize as many open events as possible (TER, RET, TRA, LOA, RFL…)
- **Sept 20th:**
    o OE Training for agencies, 10:30am-12:30pm
    o Agencies can start sending pre-OE email to employees
    o 11/5 – 11/12 SHR events open for entry (enter as soon as HIR elections finalized)
    o (After 5pm) IYC BAS Group ID added to all active employees who are NOT in the DEF benefit program (only added to DEF if employee currently enrolled in ERA plan)

- ▪ **Once IYC code is on job, agencies must no longer change primary job flag – create a ticket and Central Benefits will move the flag and IYC code (in effect through the end of the year)**

- **Sept 21st:**
  - Employee message will be sent to current WEA Trust enrollees (late in day)
  - Deadline to process all AGE events with an event date of 12-31-22 or earlier (Run WI_BN_OVERAGE_DEPEND_RPT with an as of date of 12-31-22 to see who is remaining)
  - Deadline to process all SHR events by the agencies
  - Ben Admin will run at Noon and 5pm
  - All 2023 benefit configuration in Production (tentative)

- **Sept 22nd:**
  - Ben Admin will run at Noon and 5pm
  - Central Benefits will finish outstanding AGE and SHR event entry

- **Sept 23rd: (Friday)**
  - Ben Admin will run at Noon and 5pm
  - **All users, except core central staff, will be locked out of HCM starting at 5pm** until notified (likely mid-day on September 24th if no issues encountered)
  - Add IYC code to any newly active employees (since process last run)
  - Run process to create ~ 32,000 OE events
  - Run all baseline audits and queries

- **Sept 24th**
  - Central Benefits and HCM benefits review to ensure OE events prepared correctly
  - System back open to users sometime mid-day

- **Sept 25th**
  - Main OE email sent via Employee Messaging (Morning)
- **Sept 26th** (Monday)
  - Start of OE period
  - eBenefits opens to employees at midnight

- **Oct 3rd**: run PP20 WRS Lookback Report + do all associated processing

- **Oct 6th**: 11/13 – 11/26 SHR events open for entry

- **Oct 14th**: 11/27 – 12/10 SHR event open for entry

- **Oct 17th**: run PP21 WRS Lookback Report + do all associated processing

- **Oct 19th**: 12/11 – 12/23 SHR event open for entry

- **Oct 21st:** Last day of OE….thousands of employees likely making their elections
  - Last day to cancel/waive benefits for 2023
  - eBN closes at 11:59pm

- **Oct 24th – Oct 25th**: OE event still open to agencies to enter paper apps (final date subject to change)

- **Oct 31st**: run PP22 WRS Lookback Report + do all associated processing

- **Nov 2nd**: 1st OE health election file sent to ETF

- **Nov 4th**: 12/24 – 1/1 SHR event open for entry

- **Nov 9th**: 2nd OE health elections file sent to ETF (updates since 11/02 file)

- **Nov 11th**: 3rd OE health elections file sent to ETF (updates since 11/9 file)

  - Last day to submit OE health elections to ETF (5pm)

- **Nov 18th**: 1st OE enrollment file to Optum Financial

- **Nov 28th**: list of OOS enrollees sent to ETF for validation

- **Dec 2nd**:

  - OE file sent to DeltaVision

  - 2nd OE enrollment file sent to Optum Financial

- **Dec 4th**: 1st day of 2022 PP26 (C pay period)

- **Dec 7th**: OE file sent to Delta Dental (includes Supplemental Dental, Preventive Dental)

- **Dec 18th**: 1st day of 2023 Pay Period 1

- **Dec 21st**: Submit OE elections to Securian for Accident Plan

- **Jan 12th**: first check payable in 2023 & 1st premiums for 2023 taken

- **Early January**

  - Central Benefits will begin health compare with ETF's system

  - Re-send OOS list to ETF for validation (in case of changes)