

Post OE Instructions

Contents

- Daily OE Processes 1
- OE Tickets..... 1
 - Life Events 1
 - Multiple Jobs – Primary Flag 2
- Notified Status, OOS and Health Plans Going Away 2
 - Agency Management of Employees in Notified Status 2
 - Current OOS Enrollees who Did Not Re-Enroll during OE 2
 - GHC South Central Wisconsin (GHC_SCW), Enrollees Who MUST Take Action 2
- Late Application Instructions 2
- Hires for the Remainder of the Year 4
 - Hires Through 12-1-23 (no access to OE event or within first 30 days during OE)..... 4
 - December 2 – December 31 Hires 6
- Timeline..... 6

Daily OE Processes

OE events in Entered Status will continue to be finalized on a nightly basis around 9:30pm through 11-17-23. Confirmation statements and confirmation statement emails will also be generated at that time.

Open Enrollment events will be open for agency entry through Tuesday, October 31st. If the employee submitted their OE elections, the OE event will be closed to agency entry, and you will need to create a ticket if any updates are needed.

All paper forms are available on the [DPM Employee Benefits Forms Page](#).

OE Tickets

If you need an OE event re-opened, submit a ticket, indicate reason that OE must be re-opened and attach applicable applications/documentation with SSNs redacted. Central Benefits staff will do all needed entry on OE event.

Life Events

Agencies should create a ticket due to life event or job changes that occur where documentation is required (i.e., proof of maternity/paternity, COBRA, etc.) throughout the rest of the year. Central Benefits will be monitoring and updating OE elections as needed.

Multiple Jobs – Primary Flag

Agencies should still NOT move an employee's benefits flag. If you need the flag moved, create a ticket. Central Benefits will communicate with agencies when they can start changing flags again (sometime in mid-January).

Notified Status, OOS and Health Plans Going Away

Agency Management of Employees in Notified Status

- Agencies received a list of employees who were in Notified Status when eBenefits closed. These are employees who saved but did not SUBMIT their elections. Agencies can also run CEN_BN_OE_NOTIF_ELECT_YES to see their employees and the elections that were saved.
- Agencies should contact these employees and request paper applications for any elections that they want
- Once applications are received, agency should go to the OE event in Perform Election Entry, confirm the elections match the applications (update as needed) and submit the OE event. **The OE Event will be open for agency entry through Tuesday, October 31st.**

Current OOS Enrollees who Did Not Re-Enroll during OE

- Run OE_2024_EM_OOS_OEOP (OE event open) and OE_2024_EM_OOS_OECL (OE event closed) to identify 2023 OOS enrollees who did not enroll in OOS during Open Enrollment (some may also be on the Notified Query)
- Contact the employees for an application – applications will be accepted through Tuesday, October 31st.

GHC South Central Wisconsin (GHC_SCW), Enrollees Who MUST Take Action

- All current enrollees in the above plan must select a health plan, or they will not have coverage in 2024.
- Run OE_2024_GHCSC_ENROLL and continue to follow-up with these employees to ensure they've picked a new plan for 2024 (some may be on the Notified query).
- Please try to enter all new health plan elections on the OE event no later than 10/31/23 to ensure they are sent to ETF on the OE health interface file that will be sent on 11/3/23.

Late Application Instructions

1. This information does not apply to new hires who start after the OE period (10/22/23 or later). See the [Hires for the Remainder of Year](#) section.

Note: If an employee is still within their initial 30 days of hire, all OE applications should be accepted through the later of the dates listed below or the end of the initial 30-day enrollment window.

1. Supplemental Plans (Dental, Vision, Accident Plan)
 - a. If a late application is received, the agency will determine if the reason for late enrollment is valid (ex. was out of office, family emergency, unexpected change...). "I forgot" is not a valid reason. Late applications should not be accepted if there is not a valid reason.

- b. **If agency determines late enrollment excuse if valid**
 - i. If OE event is still open, enter enrollment on OE event.
 - ii. If OE event is closed, create a ticket, and attach applications (redact SSN information if applicable). Central Benefits will do the entry.
 - c. **If agency determines late enrollment excuse is NOT valid....**
 - i. The Employer provides the Employee with notice of the late application, and instructions for requesting a review.
 - ii. The Employer will review and submit a ticket, attaching all documentation and **a cover memo outlining their actions to this point, and any circumstances they are aware of to support or refute the Employee's request.**
 - iii. Central Benefits will forward the request for review to ETF's Employer Services Section (ESS).
 - iv. ESS will review the request. If the circumstances fall outside the criterion outlined in ETF policy, ESS will forward the request to the Office of Strategic Health Policy (OSHP) for review.
 - v. ETF will advise Central Benefits of a decision within 30 days. If a late enrollment or change is allowed, premiums will be adjusted back to January 1st or date indicated on the approval letter.
 - vi. Central Benefits will update PS and the ticket.
2. Late Health Insurance Application
- a. Health insurance applications will be accepted through October 31st.
 - i. If OE event is still open, enter enrollment on OE event.
 - ii. If OE event is closed, create a ticket, and attach application (redact SSN information if applicable). Central Benefits will do the entry.
 - b. Applications received after 10/31 thru 12/31
 - i. The agency must submit a ticket and attach the completed health application and any other required documentation.
 - ii. Central Benefits will review and work with ETF to make changes in MEBS.
 - iii. Employee can rescind coverage through the end of the year – a written request from the employee or application with RESCIND at the top will suffice. A ticket should be submitted with all communications/applications.
 - iv. Coverage has not gone into effect yet, so CB and ETF are a little more flexible in making changes
 - c. Applications received after 12/31 must go through the normal appeals process:
 - i. See [Chapter 6 of the health manual](#) for full details.
 - ii. If a late health insurance application is received, follow the steps outlined in Section 604 of the health manual. Instead of sending the requests directly to ETF, **the agency must submit a ticket for all Late IYC Requests. DO NOT submit them directly to ETF.**
 - iii. Attach all related documentation to the ticket – redact all SSN information.
 - iv. ETF has 30-60 days to review. Once a decision is made, Central Benefits will update the ticket, do the entry in PS and verify MEBS has been updated.

3. Late Healthcare/Limited Purpose FSA and Dependent Care FSA
 - a. **If election made during OE** but wants to change Annual Pledge
 - i. Through November 16th (day before we send the OE file to Optum), submit ticket and indicate new Annual Pledge Amount – Central Benefits will correct election on OE Event
 - ii. Once OE file sent to Optum Financial, must go through Appeal Process (see below)
 - iii. *NOTE: if employee enrolled in wrong plan (in LPFSA and not in HDHP or in HDHP and enrolled in regular FSA), create a ticket and Central Benefits will make the correction.*
 - b. **If no election made during OE**, must go through the Appeal Process
 - i. All appeals must be received no later than 1-31-24.
 - ii. **All appeals must be sent to Dana Gehrmann** (dana.gehrmann1@wisconsin.gov). The appeals will be sent to Optum Financial on a weekly basis on Mondays.
 - iii. The following documents must be included in the email to the Central Benefits inbox (redact SSN on forms):
 1. Email Subject Line = Late FSA Appeal Form = Empl Name and Empl ID
 2. [Late Enrollment Request Form](#)
 3. [ERA Enrollment Form](#)
 4. Written cover letter outlining pertinent facts or details of circumstances as to why you are submitting the late enrollment request.
 5. Documentation that supports the cover letter
 - iv. If approved, Optum Financial will notify the employee and Central Benefits. Central Benefits will enter the election.
4. Late HSA or Parking/Transit ERA (or election change)
 - a. If OE event open, enter on OE event.
 - b. **If OE event closed and it is prior to November 17th** (date OE file sent to Optum Financial), submit a ticket to have the election entered (or updated) on the OE event
 - c. Once OE file sent to Optum Financial (as of 11/17/23), create a 1-1-24 HSA or 1-1-24 COM event and enter the Annual Pledge.
5. Rescinding Healthcare/LPFSA elections
 - a. Employee must submit a [rescind form](#) to their payroll office no later than January 1, 2024.
 - b. Agency should submit a ticket so Central Benefits can waive coverage on the OE event and ensure the enrollment file sent to Optum is corrected.

Hires for the Remainder of the Year

Hires Through 12-1-23 (no access to OE event or within first 30 days during OE)

The following will apply to late pay period hires in PP21 (9/24 – 10/7) and PP22 (10/8 – 10/21), and all hires in PP23 (10/22 – 11/4), PP24 (11/5 – 11/18), and part of PP25 (11/19– 12/2).

- **GHC-SCW Enrollments**
 - If a new hire enrolls in GHC-SCW and coverage is effective in 2023, they must also complete a [paper application](#) to enroll in a different plan for 2024.
 - Create a 1-1-24 ADM to enter the new plan and create a ticket to let Central Benefits know the reason for the ADM event. A copy of the application should be attached to the ticket.
 - GHC-SCW will display as a health plan option through the end of the year. Central Benefits will be monitoring enrollments.
- **Healthcare FSA, Dependent Care FSA**
 - Remind employees that coverage they enter on HIR event is effective in 2023
 - If they want coverage for 2024, 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**
 - Remind employees that coverage they enter on HIR event is effective in 2023
 - If they want coverage for 2024, collect a [paper application](#) and create a 1-1-24 COM event and enter election
- **HSA**
 - If coverage is effective in 2023, remind employee that coverage they enter on HIR is effective in 2023
 - They must complete a [paper application](#) for 2024 (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 1-1-24 HSA event and enter election
 - If coverage is effective in 2024, no additional action needed – HSA election will be entered on SHR event (or OE event if created for October hires)
- **Supplemental Plans (Dental, Vision, Accident Plan)**
 - **If hire date is after the end of OE (10/22/23 or later),** they must enroll in any supplemental plans they want on their HIR event. They are not eligible to enroll on an OE event because they were hired after the end of OE.
- **Opt-Out Stipend** – if eligible for the employer contribution in 2023, make sure the employee completes 2 [health insurance applications](#) opting out for both years – one for 2023 and one for 2024.

- Use the SHR event (or OOS event if employee has prior service) to enter 2023 election and a 1-1-24 OOS for the 2023 election.

December 2 – December 31 Hires

- 2024 HSA/FSA limits display on HIR event in eBenefits
- Coverage effective 1-1-24 or later so 2024 premiums display on event
- GHC-SCW **will not** display as a health plan under Plan Type 1U and 10 on December hire events. Central Benefits will be monitoring enrollments to ensure these plans are not showing.

Timeline

- **Oct 23rd– Oct 31st:** OE event still open to agencies to enter paper apps received on or before 10/20 (final date subject to change)
- **Oct 30th:** run PP22 WRS Lookback Report + do all associated processing
- **Nov 3rd:** 1st OE health election file sent to ETF
 - 12/24 – 1/1/24 SHR events open for entry.
- **Nov 9th:** 2nd OE health elections file sent to ETF (updates since 11/03 file)
- **Nov 10th:** Last day to submit OE health elections to ETF (5pm)
- **Nov 17th:** 1st OE enrollment file to Optum Financial
- **Nov 27th:** list of OOS enrollees sent to ETF for validation
- **Dec 1st:** OE file sent to DeltaVision
- **Dec 6th:** OE file sent to Delta Dental (includes Supplemental Dental, Preventive Dental)
- **Dec 8th:** 2nd OE Enrollment file sent to Optum Financial
- **Dec 17th:** 1st day of 2024 Pay Period 1
- **Dec 20th:** Send OE elections to Securian for Accident Plan
- **Jan 11th:** first check payable in 2024
- **Early January**
 - Central Benefits will begin health compare with ETF's system.
 - Re-send OOS list to ETF for validation (in case of changes)