

OE2025 Agency Job Aid

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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

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 "OE2025, 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 9-27-24.
- As of 9-24-24, **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 9/25 – 9/27 to help events move more quickly through the system.
- Complete the following by 9-26-24.
 - Complete entry on all open SHR events
 - For LTEs enrolling in health or OOS at 6 months – manually create/enter SHR events through 12-31-24.
 - Process all AGE events with an event date of 12-31-24 or earlier (preferably by 9/26)
 - Enter all life event applications as received (BIR, MAR, DIV)
 - 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 was run on 9-24-24 (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 9-24-24 until early 2025 (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.

Deduction begin dates

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.

PAY PERIOD NUMBER	EARNINGS PERIOD	CHECK DATE	LIFE	HEALTH, DENTAL, VISION, ACCIDENT PLAN, ICI, PRE-TAX SAVINGS ACCOUNTS
1A	12/15/24-12/28/24	01/09/25	FEB	JANUARY
2B	12/29/24-01/11/25	01/23/25		

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

The deduction begin date of the enrollment (or waive) will be 12-15-24 (12-1-24 for LEG).

The enrollment in eBenefits will look like this:

Vision

i IMPORTANT: Your enrollment will not be complete until you click SUBMIT and your choices are electronically sent to the Benefits Department. Please contact your Agency Payroll and Benefit Specialist with any questions.

Your Choice

You have chosen DeltaVision with Family coverage.

Your Estimated Per-Pay-Period Cost

Your Cost \$10.29

Your Covered Dependents

Dependent Information	
Name	Relationship

Notes

Once submitted, this choice will take effect on 01/01/2025. Deductions for this choice will start with the pay period beginning 12/15/2024.

Update Elections Discard Changes

Select the Update Elections button to store your choices.
Select the Discard Changes button to go back and change your choices.

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 12-15-24 (first day of 2025 PP1).

The enrollment in eBenefits will look like this:

Open Enrollment

Healthcare FSA

i IMPORTANT: Your enrollment will not be complete until you click SUBMIT and your choices are electronically sent to the Benefits Department. Please contact your Agency Payroll and Benefit Specialist with any questions.

Your Choice

You have chosen to enroll in the Healthcare FSA plan with an annual pledge of \$3,200.00.

Your Contributions

Your approximate per-pay-period contribution will be \$133.33.

Notes

Once submitted, this choice will take effect on 01/01/2025.
Deductions for this choice will start with the pay period beginning 12/15/2024.

Update Elections Discard Changes

Select the Update Elections button to store your choices.
Select the Discard Changes button to go back and change your choices.

Dean Prevea360 West- name change in 2025

Dean Health Plan - Prevea360 West and Mayo Clinic will now be known as Dean Health Plan- Medica West and Mayo Clinic Health System. If currently enrolled in this plan, you do not need to do anything to remain in it.

SMP – will continue to be available in Florence County in 2025

SMP (under Dean in 2024) will continue to be available in 2025 for Florence County.

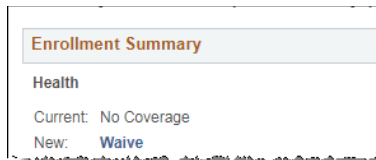
Opt-Out Stipend

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

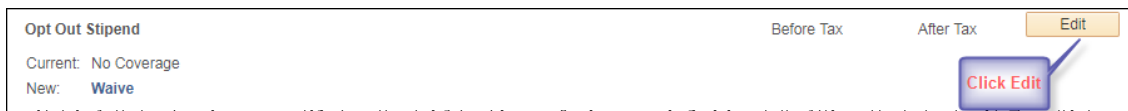
- During OE, employees will apply for OOS through eBN
 - Reminder- new hires must apply for stipend via paper health application. Agencies will enter OOS enrollment on either SHR or OOS event
- **NEVER enter Opt-Out Stipend directly to Additional Pay**
- Employees will be enrolled in the Opt-Out Stipend simple benefit plan
- Enrollment in the OOS plan will automatically 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 X

2025 Health Opt Out Stipend

Answer the questions below to confirm your eligibility for the Health Insurance Opt-Out Stipend for 2025. 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 2025 either as an employee, spouse or child?

Answer

No

Yes

Have you waived your health insurance in STAR for 2025?

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 2025.

- 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.

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

i 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

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

	<u>Benefit Plan</u>	<u>Coverage/Annual Election</u>	<u>Pay Period Pre-Tax Deduction</u>
Health	Waive		
State Group Life	Life - Basic+Suppl (2x salary)	\$166,000	\$15.77
State Group Life Additional	Life - 3 Additional Units	\$249,000	\$34.88
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		\$300.00

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).

Simple Benefits

Employee ID: _____ Benefit Record Number 0

Plan Type: A5 Opt Out Stipend

Coverage: Coverage Begin Date 01/01/2018 *Deduction Begin Date 12/10/2017

Coverage Election: Elect Waive Terminate *Election Date 10/25/2017

Benefit Program FTB WRS Eligible Non-LTE Employees
Benefit Plan OOS Health Opt Out Stipend

Create Additional Pay

Employee _____ Empl ID _____ Empl Record 0

Additional Pay Find | View All First 1 of 1 Last

*Earnings Code OOS Opt Out Stipend

Effective Date Find | View All First 1 of 3 Last

Effective Date 12/10/2017

Payment Details Find | View All First 1 of 1 Last

*Addl Seq Nbr 1 End Date

Rate Code Earnings \$83.34 Reason Benefits Administration Credit

Hours Hourly Rate

Goal Amount Goal Balance

Sep Check Nbr

OK to Pay Disable Direct Deposit Prorate Additional Pay

Applies To Pay Periods

First Second Third Fourth Fifth

Job Information

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 WILL get a new row on the Simple Benefits page (with a 1-1-25 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 01-01-2025 and an Additional Pay effective date of 12-15-24 – the first payment will be on the first check payable in 2025).

Simple Benefits

Employee ID 100102743 Benefit Record Number 0

Plan Type Find | View All 1 of 1 View All

Plan Type A5 Opt Out Stipend

Coverage Find | View All 1 of 3 View All

Coverage Begin Date 01/01/2025 *Deduction Begin Date 12/15/2024

Coverage Election

Elect Waive Terminate *Election Date 10/21/2024

Benefit Program FTB WRS Eligible Non-LTE Employees

Benefit Plan OOS Health Opt Out Stipend

Save Return to Search Notify Refresh Update/Display Include History Correct History

Additional Pay [Search] | [Back] [Forward] | 1 of 1 | [View All]

*Earnings Code [Search] Opt Out Stipend [Add] [Remove]

Effective Date [Search] | [Back] [Forward] | 1 of 2 | [View All]

Effective Date [Calendar] [Add] [Remove]

Payment Details [Search] | [Back] [Forward] | 1 of 1 | [View All]

*Addl Seq Nbr End Date [Calendar] [Add] [Remove]

Rate Code [Search] Reason [Dropdown]

Earnings [Add] [Remove]

Hours Hourly Rate

Goal Amount Goal Balance

Sep Check Nbr Disable Direct Deposit

OK to Pay Prorate Additional Pay

Applies To Pay Periods

First Second Third Fourth Fifth

- For the Legislature, the Additional Pay effective date is 12-1-24

Additional Pay [Search] | [Back] [Forward] | 1 of 1 | [View All]

*Earnings Code [Search] Opt Out Stipend [Add] [Remove]

Effective Date [Search] | [Back] [Forward] | 1 of 2 | [View All]

Effective Date [Calendar] [Add] [Remove]

Payment Details [Search] | [Back] [Forward] | 1 of 1 | [View All]

*Addl Seq Nbr End Date [Calendar] [Add] [Remove]

Rate Code [Search] Reason [Dropdown]

Earnings [Add] [Remove]

Hours Hourly Rate

Goal Amount Goal Balance

Sep Check Nbr Disable Direct Deposit

OK to Pay Prorate Additional Pay

Applies To Pay Periods

First Second Third Fourth Fifth

- 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 2025, the certification is called **25 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

The screenshot shows the 'Certificates' interface with the following details:
*Certificate ID: 25 OPT OUT
*Plan Type: Opt Out Stipend
*Effective Date: 01/01/2025
Value: 3
Certificate Maximum Value: 4
2025 Health Opt Out Stipend
Opt Out Stipend
*Status: Active
Expiration Date: [empty]
> Dependent/Beneficiary ID

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).

The screenshot shows the 'Certificates' interface with the following details:
*Certificate ID: 25 DENPREV
*Plan Type: Dental - Preventive(no health)
*Effective Date: 01/01/2025
Value: 1
Certificate Maximum Value: 2
2025 Preventive Dental Cert
Dental - Preventive(no health)
*Status: Active
Expiration Date: [empty]
> Dependent/Beneficiary ID

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.

The screenshot shows a dropdown menu for 'Plan Type A5 : Opt Out Stipend'. The selected option is 'Option Code 01' with a magnifying glass icon, and the description 'Health Opt Out Stipend (OOS)' is visible below it.

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.

Plan Type

Plan Type A5 Opt Out Stipend

Coverage

Coverage Begin Date 01/01/2025 *Deduction Begin Date 12/15/2024

Coverage Election

Elect Waive Terminate *Election Date 10/15/2024

Benefit Program FTB WRS Eligible Non-LTE Employees

Benefit Plan

Additional Pay

*Earnings Code OOS Opt Out Stipend

Effective Date

Effective Date 12/15/2024

Payment Details

*Addl Seq Nbr 1 End Date 12/15/2024 Reason Benefits Administration Credit

Rate Code

Earnings

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 2024 but not in 2025 (and didn't enroll in health for 2024)
- Will monitor OOS elections effective in the last quarter of 2024 to ensure they are notified of requirement to re-apply for 2025
- 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

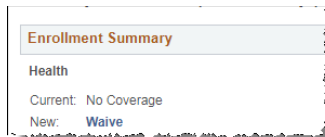
The agency must NEVER enter the stipend in Additional Pay. You must enroll the employee in the Opt-Out Stipend benefit program – this is what creates Additional Pay. When the employee terminates, enrollment in the OOS benefit plan will terminate and an end date will be populated in Additional Pay.

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).

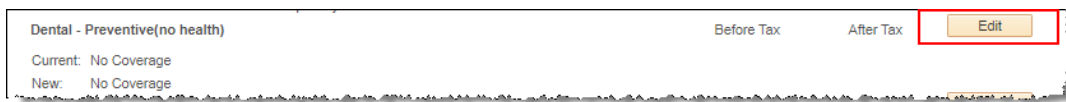
If enrolling in the plan for the first time or wants to change/waive coverage, the employee must take the following steps:

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

2025 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 2025?

Answer

No

Yes

If currently enrolled in Preventive Dental, do you want to waive coverage for 2025?

Selection

No

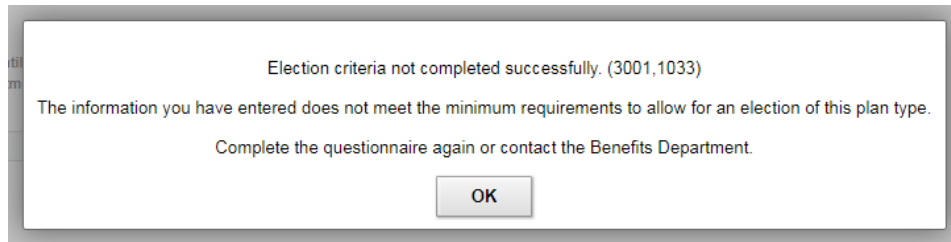
Yes

Not enrolled in plan

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

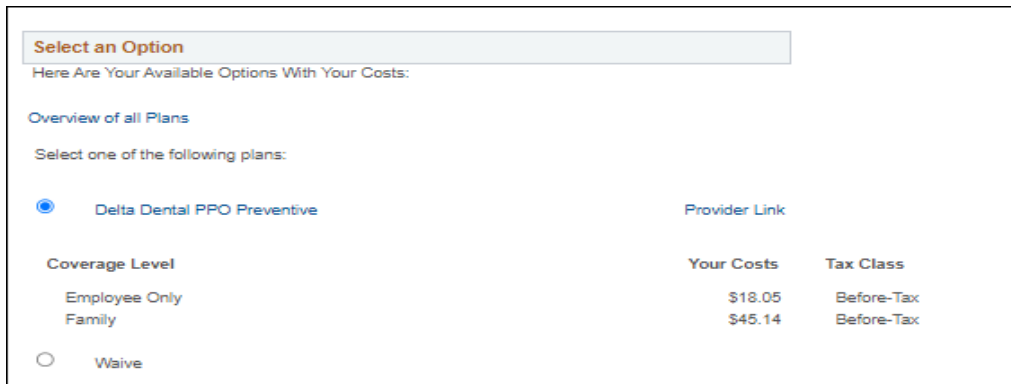
Agree **Decline**

- 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.



4. The employee then enrolls or waives coverage.

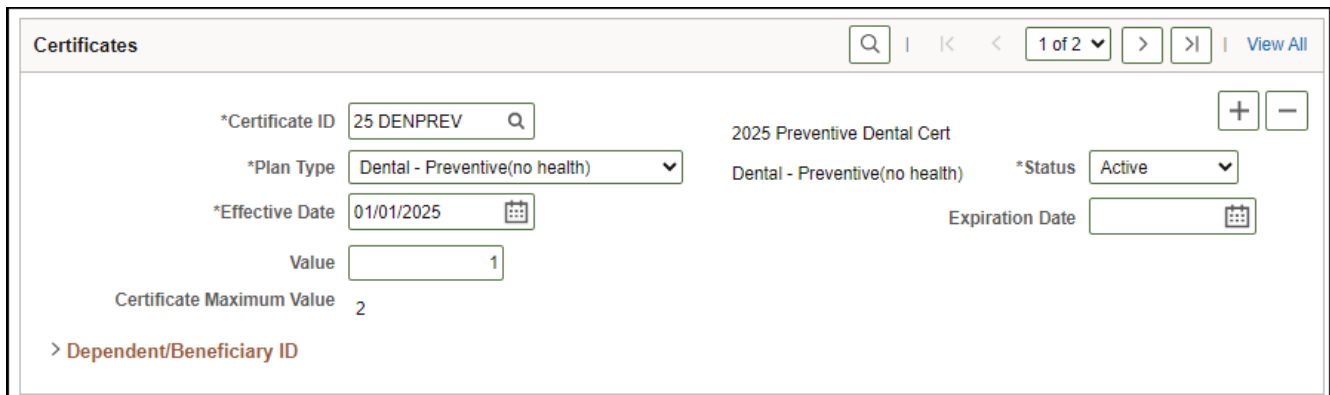
a. Note – unlike the Supplemental Plan, the coverage levels available are Single and Family



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 2025 = 25 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):

- If enrolled in health with dental, CB will waive enrollment in the preventive plan and contact the agency to reach out to the employee
- 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.

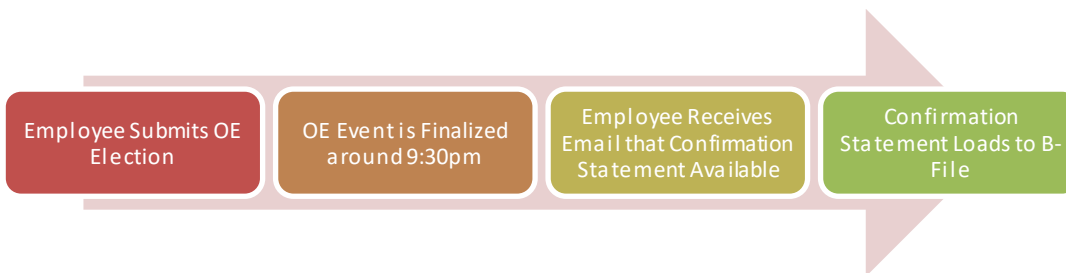
Retirees

- If you have an employee who knows they will be retiring on or before 1/1/25, they should complete paper applications to make benefit changes.
- The employee should not make changes within ESS because these changes will never go over to ETF.
- ETF is requesting retirees complete paper applications, and the agency send them to ETF for processing.
 - If faxing, be sure to include the EE name, ETF member ID and reason for fax (i.e., EE is retiring prior to 1/1/25).
 - ETF FAX number is 608-267-4549.
- *Per ETF: The instructions changed this year and are now documented in the [State Agency Health Insurance Standards, Guidelines and Administration Employer Manual \(ET-1118\)](#), Chapter 6, Section 601 F. Please review that section for information about how to complete the Continuation – Conversion Notice (ET-2311) for terminations after OE but before January 1.*

Confirmation Statements and Online Benefits File

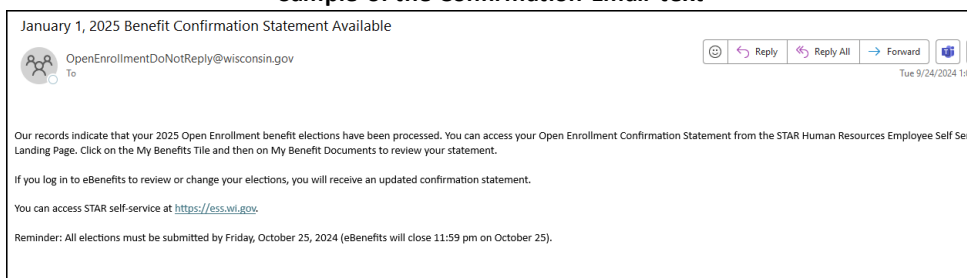
Every time an employee submits their OE elections, they will receive a Confirmation Statement. The process to finalize OE events and generate confirmation statements will occur around 9:30pm each night. If the employee submits their OE elections after 9:30pm, there will be a one-day delay in the generation of the confirmation statement. The statement is housed in an Online Benefits File.

Confirmation Statement Creation Process



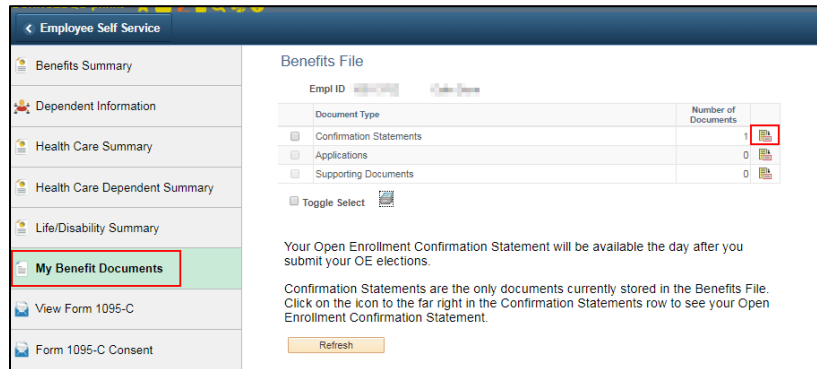
Below is the text that will be in the confirmation statement email.

Sample of the Confirmation Email text



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.

Confirmation Statements				
	Document Effective Date	Business Unit	Attached File	Status
<input type="checkbox"/>	01/01/2022	51500	OE2022_confirm_stmt_09-19-2021.pdf	Available
<input type="checkbox"/>	01/01/2021	51500	OE2021_confirm_stmt_09-30-2020.pdf	Available
<input type="checkbox"/>	01/01/2020	51500	OE2020_confirm_stmt_10-03-2019.pdf	Available
<input type="checkbox"/>	01/01/2019	51500	OE2019_confirm_stmt_11-15-2018.pdf	Available
<input type="checkbox"/>	01/01/2018	51500	OE2018_confirm_stmt_11-07-2017.pdf	Available
<input type="checkbox"/>	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

Last Name

4. Click on View Documents

Search Results							Personalize Find View All First 1 of 1 Last
Empl ID	Name	Payroll Status	Department	Department	Business Unit	Business Description	<input type="button" value="View Documents"/>
100000	Bob Example	Active	4351000355	Inform Arch PHIN Section	43500	Health Services	<input type="button" value="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 (OE2025) and 5-digit Business Unit. Department is optional. A wildcard value will not work for Dept ID. Click Run.

Print Confirmation Statements

Run Control ID: jap | Report Manager | Process Monitor | Run

Sched ID: OE2022 | Business Unit: 43500 | Department:

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

Process Scheduler Request

User ID: PERRYJKWXD | Run Control ID: jap

Server Name: | Run Date: 09/18/2020 | Recurrence: | Run Time: 2:00:35PM | Reset to Current Date/Time

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	Print Confirmation Statements	WL_STMT_PRT	Application Engine	Web	TXT	Distribution

OK | Cancel

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

Process List | Server List

View Process Request For

User ID: PERRYJKWXD | Type: | Last: | 1 Days | Refresh

Server: | Name: | Instance From: | Instance To:

Run Status: | Distribution Status: | Save On Refresh:

Select	Instance	Seq.	Process Type	Process Name	User	Run DateTime	Run Status	Distribution Status	Details
<input type="checkbox"/>	2820510		Application Engine	WL_STMT_PRT	PERRYJKWXD	09/18/2020 2:00:35PM CDT	Success	Posted	Details

5. Click on View Log/Trace

Actions		
09/18/2020 2:03:06PM CDT	Parameters	Transfer
09/18/2020 2:00:35PM CDT	Message Log	View Locks
09/18/2020 2:03:15PM CDT	Batch Timings	
09/18/2020 2:03:19PM CDT	View Log/Trace	

6. Click on the PDF that is created

Report				
Report ID	2887821	Process Instance	3346005	Message Log
Name	WI_STMT_PRT	Process Type	Application Engine	
Run Status	Success			
Print Confirmation Statements				
Distribution Details				
Distribution Node	PHRFIX	Expiration Date	12/19/2021	
File List				
Name	File Size (bytes)	Datetime Created		
AE_WI_STMT_PRT_3346005.log	789	09/20/2021 1:15:01.194521PM CDT		
AE_WI_STMT_PRT_3346005_0920131453.AET	4,179	09/20/2021 1:15:01.194521PM CDT		
OE2022_agency_50500_confirmation_statements.pdf	23,041	09/20/2021 1:15:01.194521PM CDT		

Sample Confirmation Statement

The confirmation statement includes ALL benefit elections as of 1-1-25.

CONFIRMATION OF 2025 ELECTIONS - Open Enrollment				
		Employee ID:	Statement Date: 9/24/2024	
		Department ID:	Effective Date: 01/01/2025	
			Event Class: OE	
<p>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 25, 2024. If all information is accurate, no action is required. Coverage listed below is effective January 1, 2025.</p>				
YOUR BENEFIT ELECTIONS AS OF JANUARY 1, 2025				
	Benefit Plan	Coverage/Annual Election	Pay Period Pre-Tax Deduction	Pay Period After-Tax Deduction
Health	Quartz-UW Health w/ Dental	Family	\$153.50	
Dental - Supplemental	Delta Dental PPO Select Plus	Employee + Spouse	\$21.61	
Vision	DeltaVision	Employee + Spouse	\$5.71	
State Group Life	Life - Basic+Suppl (2x salary)	\$162,000	\$10.53	
State Group Life Additional	Life - 2 Additional Units	\$162,000	\$16.20	
State Group Life Spouse & Dep	Life - 2 Units Spouse & Dep	2 Units		\$2.10
Health Savings Account	Waive			
ICI Standard	ICI Category 6	Up to 75% of Salary		
Accident Plan	Securian Accident Plan	Employee + Spouse		\$2.66
Healthcare FSA	Healthcare FSA	\$2,500	\$104.17	
Dependent Day Care FSA	Terminated			
Parking (Before Tax)	Waive			
Page 1 of 2				

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 = OE2025

The screenshot shows the 'Event / Participant Selection' tab in the Perform Election Entry system. The 'Select By Participant' section includes a 'Schedule ID' field with 'OE2025' entered, an 'Empl ID' field, and a 'Ben Record' field with '0'. There is also an 'Open Enrollment 2025' label and an 'Event ID' field. A 'Search' button is located below the 'Ben Record' field. To the right, the 'Data Entry Configuration' panel has three unchecked options: 'Defer Dep/Benef Enrollment', 'Defer Savings Investments', and 'Hide Unused Items and Links', and one checked option: 'Validate When Saved'. At the bottom, there are buttons for 'Validate Elections', 'Save', 'Notify', and 'Refresh'.

- 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 (2024) 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 2024 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 periods 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.

Plan Type 60 : Healthcare FSA

Option Code Healthcare FSA (ERAMED)

Annual Pledge If the Annual Pledge is correct, the deduction on the paycheck will be correct.

Employee Contribution Override

Contribution Worksheet

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
(<input type="text" value="\$2,400.00"/> - <input type="text" value="\$0.00"/>) / <input type="text" value="24"/> = <input type="text" value="\$100.00"/> = <input type="text" value="\$2,600.00"/> Annual				

Open protected fields for change. (These fields are normally determined by the system).

- **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.
- If the agency is entering paper applications and did not receive an application to enroll coverage in Healthcare FSA/LPFSA, Dependent care, Parking/Transit, Dental Supplemental or Vision you will need to waive coverage or you will see the following error messages for each plan:

An Election is required for Plan Type 6V. (4000,61)

The Event Rules for this Plan Type require that an election be made. If an election is not made for this Plan Type then the employee's entire enrollment will be in error, which may result in default elections being assigned.

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 PP21 – PP23 (9/22/24 – 11/2/24), 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
9-18-24	11/5 – 11/12
10-03-24	11/13 – 11/26
10-11-24	11/27 – 12/10
10-17-24	12/11 – 12/23
11-05-24	12/24 – 1/1

Hires Prior to 12-1-24 (no access to OE event or within first 30 days during OE)

The following will apply to late pay period hires in PP21 (9/22 – 10/5) and PP22 (10/6 – 10/19), and all hires in PP23 (10/20 – 11/2), PP24 (11/3 – 11/16), and part of PP25 (11/17– 11/30).

- Healthcare FSA, Dependent Care FSA
 - Remind employees that coverage they enter on HIR event is effective in 2024
 - If they want coverage for 2025, 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
 - If coverage is effective in 2024, remind employee that coverage they enter on HIR is effective in 2024
 - They must complete a [paper application](#) for 2025 (if not entered on OE event)
 - If they have an OE event, enter on OE event (agencies can do this until 11/1), otherwise create a ticket for Central Benefits to enter on the OE event.
 - If no OE event, collect a paper application and submit a ticket if prior to 12/28, if after 12/28 you must create a 1-1-25 COM event and enter election
- HSA
 - If coverage is effective in 2024, remind employee that coverage they enter on HIR is effective in 2024
 - They must complete a [paper application](#) for 2025 (if not entered on OE event)
 - If they have an OE event, enter on OE event (agencies can do this until 11/1), otherwise create a ticket for Central Benefits to enter on the OE event.
 - If no OE event, collect a paper application and submit a ticket if prior to 12/28, if after 12/28 you must create a 1-1-25 HSA event and enter election
 - If coverage is effective in 2025, no additional action needed – HSA election will be entered on SHR event (or OE event if created for October hires)
- Opt-Out Stipend – if eligible for the employer contribution in 2024, make sure the employee completes 2 [health insurance applications](#) opting out for both years – one for 2024 and one for 2025.
 - Use the SHR event (or OOS event if employee has prior service) to enter 2024 election and a 1-1-25 OOS for the 2025 election.

December 2 – December 31 Hires

- For employees hired 12/2 – 12/31, the 2024 FSA and HSA limits connect to their HIR event even though coverage is effective 1-1-25
 - Solution:
 - HSA – can change at any time so if employee wants to maximize, can create an HSA event to increase annual election (event date = 1-1-25 or later)
 - Parking/transit – create a 1-1-25 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 1-1-25, 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.

Payroll and Benefit Specialist with any questions.

Enrollment Summary			
Health (Waiting Period)	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: Waive			
New: Waive			
Health (100% Employee Paid)	Before Tax	After Tax	<input type="button" value="Edit"/>
Current: Waive			
New: Waive			
Delta Dental PPO	Before Tax	After Tax	<input type="button" value="Edit"/>

Complete your enrollment on this page [before](#) enrolling in the benefit plans listed above.

Select an Option

Here Are Your Available Options With Your Costs:

Overview of all Plans
To reduce the number of plans displayed on the page, use the filter below.

Filter Options By

Dental Coverage

- Show all plans
- Show plans with dental only
- Show plans without dental only

High Deductible Health Plan

- Show all plans
- Show HDHP plans only
- Show non-HDHP plans only

Select one of the following plans:

- Waive

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 and process the event the next day
- No tickets are necessary **during** OE
 - The OE event will automatically re-open once the life event is finalized – even if the event has not been reprocessed to pick up the new enrollments

During OE Central Benefits will monitor for events out of sequence and reprocess OE events as needed so the new or removed dependents will not be reflected on the OE event.

After Open Enrollment

- **After** OE, agency should submit a ticket on the day the life event is added to the BAS Activity Table (preferably early in the day).
- Central Benefits will open the event, agency can do entry on life event and then Central Benefits will finalize life event and immediately reprocess OE event – all in the same day (all benefits must be entered on the event)
- Reduces risk of employee doing entry on event that doesn't have most current elections
- **Ticket Name = OE2025 –Reprocess OE due to Life Event – Empl Name & ID**

- What happens if employee submitted OE elections BEFORE life event entry is done?
 - Central Benefits will capture enrollment made on the OE event, reprocess the OE event (this will delete all elections made on the OE event) and will re-enter the elections that were made on the OE event (considering new dependents).
 - A new confirmation statement will be generated, and the employee will receive a confirmation statement notification email
 - **Agency should direct employee to validate elections and print new confirmation statement**

When to Create a Ticket Specifically During Open Enrollment

You should create a ticket in the following situations:

- 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:
 - OE in Notified Status
 - HSA Follow-up (enrolled in HDHP but have not elected HSA for 2025)
 - 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 2025)
- Central Benefits will monitor and reach out to the agencies on the following:
 - Enrolled in HDHP but has other coverage (including Medicare) or is 65 years or will be turning 65 next year
 - Enrolled OOS + health insurance
 - Enrolled in health and supplemental preventive dental
 - Missing marital status and dependent information
 - Enrolled in Access Out of State for 2025
 - Enrolled in PreTax Parking and have Active Parking General Deduction
 - Enrolled in LPFSA and non-HDHP plan
 - Enrolled in HDHP and enrolled in regular healthcare FSA
 - Removing dependents under age 19 or a spouse but keep family coverage
 - Late year FSA elections

OE Timeline

- **Week of Sept 16th:**
 - Run PP19 WRS Lookback Report + do all associated processing
 - Agencies should finalize as many open events as possible (BIR, MAR, DIV, ELG, TER, RET, TRA, LOA, RFL ...)
 - 11/5-11/12 SHR events open for entry (enter as soon as HIR elections finalized)
 - Complete all open AGE events thru end of year
- **Sept 24th:**
 - (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 25th and 26th:**
 - Agencies should send out OE is coming email (9/25-9/27)
 - Agencies should finalize as many open events as possible (BIR, MAR, DIV, ELG, TER, RET, TRA, LOA, RFL...)
 - Deadline to process all AGE and SHR events by the agency (9/26)
 - Ben Admin runs at Noon and 5pm.
 - OE Training for agencies, 1:00pm-3:00pm (9/26)
- **Sept 27th (Friday)**
 - Central Benefits will finish outstanding AGE and SHR event entry – before noon
 - Agencies should finalize as many open events as possible (BIR, MAR, DIV, ELG, TER, RET, TRA, LOA, RFL...)
 - Ben Admin runs 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 28th, if no issues encountered)
 - IYC code added to any newly active employees (since process last run)
 - Run process to create ~ 33,000 OE events
 - Run all baseline audits and queries
- **Sept 28th (Saturday)**
 - Central Benefits and HCM benefits review to ensure OE events prepared correctly
 - System back open to users sometime mid-day
- **Sept 29th (Sunday)**
 - Main OE email sent via Employee Messaging (after 7pm)
- **Sept 30th (Monday)**
 - Start of OE period
 - eBenefits opens to employees at midnight

- **Oct 1st**: run PP20 WRS Lookback Report + do all associated processing
- **Oct 2nd**: 11/13 – 11/26 SHR events open for entry
 - **Do not use OE event in place of SHR event for January coverage**
- **Oct 10th**: 11/27 – 12/10 SHR events open for entry
- **Oct 14th**: run PP21 WRS Lookback Report + do all associated processing
- **Oct 16th**: 12/11 – 12/23 SHR events open for entry
- **Oct 25th**: Last day of OE...thousands of employees likely making their elections
 - Last day to cancel/waive benefits for 2025
 - eBN closes at 11:59pm
- **Oct 28th – Nov 1st**: OE event still open to agencies to enter paper apps received on or before 10/25 (final date subject to change)
- **Oct 28th**: run PP22 WRS Lookback Report + do all associated processing
- **Nov 4th**: 12/24- 1/1/25 SHR events open for entry
- **Nov 6th**: 1st OE health election file sent to ETF
- **Nov 11th**: run PP23 WRS Lookback Report + do all associated processing
- **Nov 13th**: 2nd OE health elections file sent to ETF (updates since 11/06 file)
- **Nov 15th**: Last day to submit OE health elections to ETF (5pm)
- **Nov 22nd**: 1st OE enrollment file to Optum Financial
- **Nov 25th**: list of OOS enrollees sent to ETF for validation
 - run PP24 WRS Lookback Report + do all associated processing
- **Dec 9th**: Run PP25 WRS Lookback report + do all associated processing
- **Dec 11th**: OE file sent to Delta Vision & Delta Dental (includes Supplemental Dental, Preventive Dental)
- **Dec 15th**: 1st day of 2025 Pay Period 1
- **Dec 18th**: Send OE elections to Securian for Accident Plan
- **Dec 26th**: 2nd OE enrollment file sent to OPTUM Financial
- **Early January**
 - Central Benefits will begin health compare with ETF's system
 - Re-send OOS list to ETF for validation (in case of changes)
- **Jan 9th**: first check payable in 2025