

BENEFITS ADMINISTRATION TRAINING

PART SIX: BENEFIT EVENTS

AGENDA

- Benefit Events
 - Types, How Event Rules Work, Event Life Cycle, How to Identify Events
- Monitoring Open Events
- Entering Benefit Elections
- eBenefits
- Reviewing Benefit Enrollments
- Benefit Events
 - Which Event to Use
- Interfaces

BENEFIT EVENTS

How Event Rules Work, Types of Events, Event Life Cycle, How to Identify Events

BENEFIT EVENT RULES

- Benefit events are used to update benefit elections.
 - All benefit elections must be made on a specific benefit event - **adding or deleting a dependent on the Update Dependent/Beneficiary screen will NOT change someone's benefit elections**
- There are event rules behind every benefit event that determine the following:
 - Whether or not changes can be made to a specific benefit plan
 - How elections can be entered on event (is eBenefits available)
 - How long the event stays open before it auto-closes
 - The effective date of coverage (based on event date)
 - The deduction begin date of coverage
 - When coverage terms (if connected to a term event)

EVENT RULES – AUTO CLOSE

- If no entry is made on an event, it auto-closes after a specific amount of time.
- If you enter a retroactive event date and it goes back too far, the event will never open to you.
- **Example** – If MAR event date = 2-5-XXXX but isn't entered until 3-15-XXXX, the event will NEVER open to you because it will close itself the same night that it is prepared. Must create a ticket to have event opened.

Benefit Event Quick Guide						
Event Name	Event Code	Event Date	Effective date	How Created	Description	Auto Close (Days)
Employee Turning 70	70Y	Employee's 70 th birthday	ICI: Coverage ends effective 1 st of month following event date SGL: S&D coverage ends on event date; EE "BASIC" coverage changes to Age70 coverage on event date	Passive	Terminates ICI & changes SGL coverage CB makes appropriate changes, notifies agency of what action was taken and to notify the employee of changes	999
Adoption	ADP	Date of adoption*	Most: On event date SGL: 1 st of month following 30 days after the event date	Manual	Add new dependents Agency must submit a ticket and attach the required adoption paperwork for review. CB will forward to ETF	60
Over-Age Dependent	AGE	Date of Dependents 26 th birthday	Coverage ends effective 1 st of month following event date	Passive	Remove overage children from all insurances Agency removes ineligible dependent(s) from insurances on the AGE event	30
Birth	BIR	Date of Dependent's birth*	Most: On event date SGL: 1 st of month following 30 days after the event date	Manual	Add new dependents Agency enters BIR event and adds dependent to insurances/adjusts coverage level for life insurance. If single parent, proof of maternity/paternity required. Submit a ticket with the required documentation.	60
Death of Employee	DEA	Effective date is the DAY AFTER the employees passing Ex: DOD = 7/23/XX; Eff date = 7/24/XX	Most: coverage ends effective 1 st of month following event date FSA: Coverage ends on event date	Job Data Change	Terminates insurances based on date of death	Date of Death
Divorce	DIV	Date Cobra notice is sent	Most: 1 st of month following event date SGL S&D: 1 st of month on or following event date	Manual	Removing ineligible dependents from all insurances Agency enters DIV event and removes ineligible dependents from insurances. The agency must submit a ticket and include a copy of the Health Insurance COBRA form. After review, CB will forward to ETF	30

Click on the [Quick Event Guide](#) for additional information.

TYPES OF BENEFIT EVENTS

- Benefit events can be created:
 - By Job Data Entry
 - Manually
 - Passively
 - By Annual Event Processing
- **Only one event can be open at any time.** It is extremely important that open events are monitored and processed as soon as possible.

EVENTS CREATED BY JOB DATA

Job changes that may affect benefits include:

- Hire/Rehire
- Leave of Absence
- Return from Leave of Absence
- Data Change
- Termination
- Retirement

The effective date of the change (ex. The hire date), is considered the benefit event date.

The screenshot shows a web form titled "Work Location Details" with a search icon and navigation controls (1 of 1). The form contains several fields:

- *Effective Date:** A date field with a calendar icon, containing the value "05/09/2022".
- Effective Sequence:** A numeric field containing the value "0".
- HR Status:** A text field containing the value "Active".
- Payroll Status:** A text field containing the value "Active".
- *Action:** A dropdown menu with the selected value "Hire".
- Reason:** A dropdown menu with the selected value "Hire No WRS".
- *Job Indicator:** A dropdown menu with the selected value "Primary Job".

There are also "Go To Row" buttons with "+" and "-" symbols.

MANUAL EVENTS

- Manual events are created by a benefits administrator by adding the event to the BAS Activity Table
- Typically used for life events
- Life events that may affect benefits include:
 - Marriage (MAR)
 - Birth/adoptions (BIR/ADP)
 - Divorce (DIV)
 - Loss of coverage (LST/LOC)
 - EOI approval (EOI)

PASSIVE EVENTS

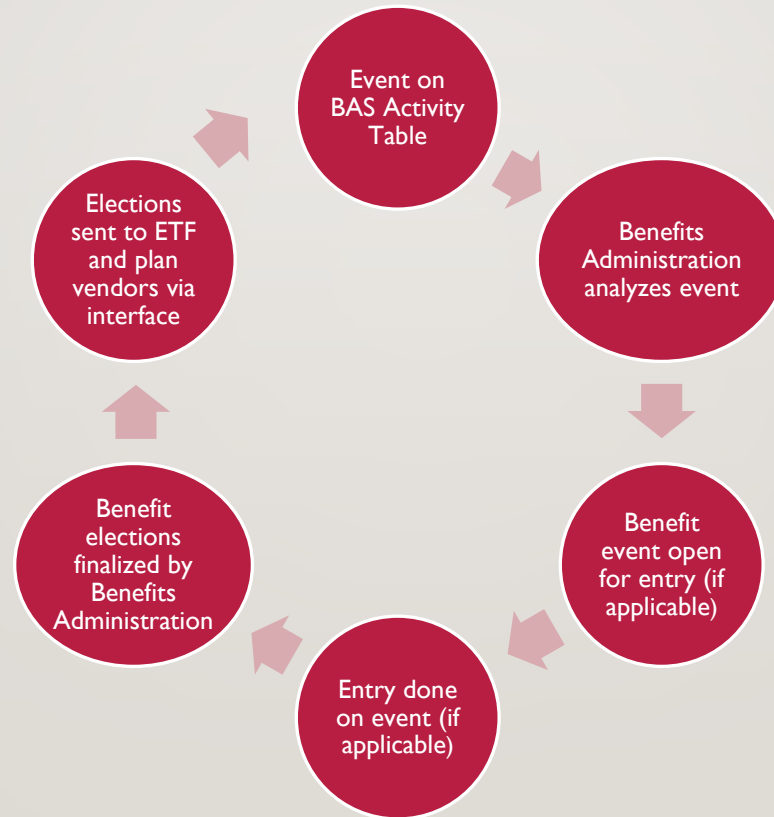
- A Passive Event is an event that is not generated by data entry – it's generated by a specific attribute of the employee. Central Benefits creates these events.
- AGE Event
 - Created when a dependent turns age 26 and is losing coverage
- SHR Event
 - Created when an employee has 2 months of service (according to the Benefits Service Date)
- 70Y Event
 - This is automatically created when the employee turns 70 years old. They are no longer eligible to be in ICI and get moved into Age 70 Life Plan.
 - Central Benefits manages 70Y events

ANNUAL EVENTS

Events created for an annual process:

- OE event
 - Will be opened for all eligible employees during the It's Your Choice Period.
 - Employees will be able to make elections via eBenefits
- ICI and DEF events
 - Used during ICI Annual Update and Deferred Enrollment period
 - Employees can enroll in ICI via eBenefits on DEF event

LIFE CYCLE OF AN EVENT (HIGH LEVEL)



LIFE CYCLE OF AN EVENT

EXAMPLE - HIRE

Day 1

- Hire/Rehire entered in Job Data
- HIR event added to BAS Activity Table as soon as job data is saved
- At 5pm, Benefits Administration runs – enrolls the employee in WRS (if applicable) and prepares HIR event

Day 2

- HIR event open for entry (eBN)
- Employee or administrator submits elections
- At 3:45pm, Benefits Administration finalizes HIR event and enrolls the employee in benefits

Day 3

- Can review benefit enrollments on Enroll in Benefits pages (this can also be done after the 3:45pm Benefits Administration run on Day 2)
- Delta Dental, Vision, SGL, FSA/HSA and WRS enrollments sent once/week via interface
 - Only eBN elections submitted by the employee for SGL will be sent via interface (if paper app received, must fax completed application to ETF)
- ICI enrollments sent 1-2x/month via interface
- Health enrollment sent to ETF if coverage effective immediately (normally a 2-day process)

BAS ACTIVITY TABLE

- The BAS Activity table is the temporary holding place for events before the event is analyzed and prepared by Benefits Administration.
- Employees appear on the BAS Activity Table for the following reasons:
 - A row was added to job
 - A manual event was entered on the table
 - A passive event was created
 - An annual event was created
- Displays unprocessed events only. As soon as the Benefits Administration process successfully creates the event, the system removes it from the BAS Activity table.
- **NOTE:** If you try to add an event that already exists for the same date, that event will never prepare and will have to be deleted from the BAS Activity Table. Must re-open original event (create ticket)

BAS ACTIVITY TABLE

Navigation: Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder - **Review BAS Activity**

Review BAS Activity

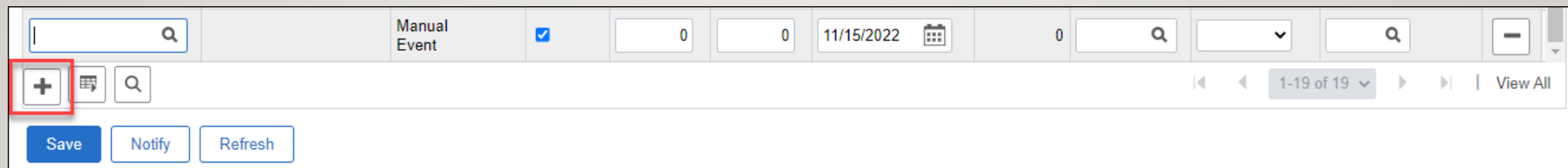
BAS Activity

1-18 of 18 | View All

*Empl ID	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date	Event Effseq	*BAS Action	Suppress Forms	COBRA Action	
<input type="text"/>	<input type="text"/>	Manual Event	<input type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	08/01/2022	10	WRS <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Manual Event	<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	10/21/2022	0	BIR <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Address Change		<input type="text" value="0"/>	<input type="text" value="0"/>	11/15/2022	0	ADR	<input type="text"/>		<input type="text"/>
<input type="text"/>	<input type="text"/>	Manual Event	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	08/14/2022	3	WRS <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Manual Event	<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	10/01/2022	0	LOC <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Address Change		<input type="text" value="0"/>	<input type="text" value="0"/>	11/14/2022	0	ADR	<input type="text"/>		<input type="text"/>
<input type="text"/>	<input type="text"/>	Manual Event	<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	10/14/2022	0	BIR <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Job Data Change		<input type="text" value="0"/>	<input type="text" value="1"/>	07/09/2022	0	TER	<input type="text"/>	TER	<input type="text"/>
<input type="text"/>	<input type="text"/>	Manual Event	<input checked="" type="checkbox"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	10/23/2022	0	LST <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

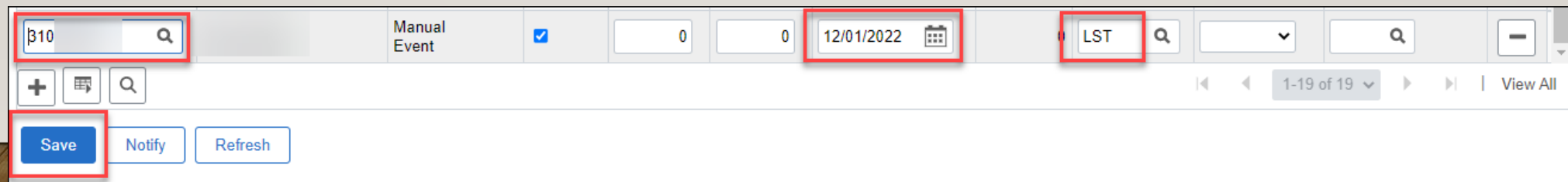
BAS ACTIVITY TABLE – HOW TO ADD AN EVENT

1. Go to BAS Activity Table: Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder – **Review BAS Activity**
2. Scroll to the bottom of the page and click on the plus sign (+) to add a new row



A screenshot of the BAS Activity Table interface. The table has several columns: Employee ID, Manual Event (checkbox), Event Date, and BAS Action. The 'Manual Event' checkbox is checked. The 'Event Date' is 11/15/2022. The 'BAS Action' is empty. A red box highlights the plus sign (+) button in the bottom left corner of the table, indicating where to click to add a new row. Below the table are buttons for 'Save', 'Notify', and 'Refresh'. The table shows 1-19 of 19 rows.

3. Enter the employee ID and click on the magnifying glass – select the person (the person's name will appear)
4. Enter the event date and the BAS Action (3 letter event abbreviation)
5. Click Save



A screenshot of the BAS Activity Table interface showing the form filled out. The 'Employee ID' field contains 'β10'. The 'Event Date' field contains '12/01/2022'. The 'BAS Action' field contains 'LST'. A red box highlights the 'Save' button in the bottom left corner of the table. The table shows 1-19 of 19 rows.

BAS ACTIVITY TABLE – ADDING AN EVENT FOR DUAL BEN RECORDS

If an employee has a second benefit record, you will need to:

- Uncheck the **All Jobs** box
- Change the **Benefit Record** number
- Change the **Empl Record** number, if necessary (enter the empl record associated with the benefit record)

Review BAS Activity

BAS Activity

1-19 of 19 | View All

*Empl ID	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date	Event Effseq	*BAS Action	Suppress Forms	COBRA Action
<input type="text"/>	<input type="text"/>	Manual Event	<input type="checkbox"/>	<input type="text" value="2"/>	<input type="text" value="3"/>	08/01/2022	10	WRS <input type="text"/>	<input type="text"/>	<input type="text"/>

HOW TO MONITOR EVENTS – BAS ACTIVITY TABLE AND REPORT

- Events should be monitored throughout the day on the BAS Activity Table or run the BAS Activity Report to review

Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query										Personalize	Find	View All	First	1 of 1	Last
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites						
WI_BN_BAS_ACTIVITY_RPT	BAS Activity Report	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite						

WHY MIGHT I WANT TO DELETE AN EVENT ON THE BAS ACTIVITY TABLE?

- A termination was entered on a job but benefits should remain continuous
 - Multiple jobs but one job remains active
 - Term/rehire actions used on job record and there is no break in service and employee is enrolled in benefits
 - If a termination event is prepared and finalized, it will term all benefits, even if the person is still actively employed
- An event date was entered wrong and will need to be corrected – you can stop the bad event from ever preparing

MONITORING OPEN EVENTS



HOW TO MONITOR EVENTS – OPEN EVENTS QUERY

- Open Events Query provides a list of all employees who currently have an open benefits event (can also access query on Benefit Enrollments Tile – Event Processing Folder)
- **Run query once per day in the morning** to review all open events

Query Viewer

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

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query									
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
WI_BN_OPEN_EVENTS	Open Benefit Events	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

Personalize | Find | View All | First 1 of 1 Last

HOW TO MONITOR EVENTS – OPEN EVENTS QUERY

WI_BN_OPEN_EVENTS - Open Benefit Events

Agency Number
Dept Id
Sched ID*

Agency	Department	Department Description	Emplid	Empl Rcd Nbr	Employee Last Name	Employee First Name	Benefit Program	Benefit Action	Benefit Event Date	Benefit Event Due Date	Event Status	Process Status	Event ID	Work Email Address	Home Address
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Agency Number = Enter 5-digit agency number (ex. 41000)

Department ID = enter department ID. If blank, will return all departments that are in your row level security

Sched ID = A schedule ID is required. For everyday maintenance, enter *EM2017*. During open enrollment, the schedule ID will be a different value

UNDERSTANDING THE OPEN EVENTS QUERY

- Event Status = Open for Processing (the event is open for entry)
- Process Status = status of the event
 - Prepared = event is open and no action has been taken
 - **Notified** = employee logged in to eBN and saved elections but did not submit them (monitor for this and contact employees)
 - Entered = election entered and will be finalized once Benefits Administration runs

Benefit Program	Benefit Action	Benefit Event Date	Benefit Event Due Date	Event Status	Process Status
P50	HIR	10/24/2022	2022-11-23	Open for Processing	Prepared
FTB	HIR	10/23/2022	2022-11-22	Open for Processing	Prepared
FTB	HIR	10/23/2022	2022-11-22	Open for Processing	Prepared
FTB	RFL	10/31/2022	2022-11-30	Open for Processing	Prepared
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Prepared
FTB	TER	11/12/2022	2022-12-12	Open for Processing	Prepared
FTB	SHR	12/24/2022	2023-01-23	Open for Processing	Prepared
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Notified
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Prepared
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Prepared
FTB	HIR	10/24/2022	2022-11-23	Open for Processing	Prepared

- Benefit Event Due Date = Benefits Event Date + 30 days for all events
 - Monitor this for hire-related events
- Event ID = every event is assigned a number
 - The employee's first event is 1, their second event is 2 and so on....

UNDERSTANDING THE OPEN EVENTS QUERY

Benefit Program	Benefit Action	Benefit Event Date	Benefit Event Due Date	Event Status	Process Status	Event ID
P50	HIR	10/24/2022	2022-11-23	Open for Processing	Prepared	3
FTB	HIR	10/23/2022	2022-11-22	Open for Processing	Prepared	6
FTB	HIR	10/23/2022	2022-11-22	Open for Processing	Prepared	2
FTB	RFL	10/31/2022	2022-11-30	Open for Processing	Prepared	13
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Prepared	2
FTB	TER	11/12/2022	2022-12-12	Open for Processing	Prepared	5
FTB	SHR	12/24/2022	2023-01-23	Open for Processing	Prepared	3
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Notified	2
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Prepared	1
FTB	HIR	11/7/2022	2022-12-07	Open for Processing	Prepared	2

OPEN EVENTS QUERY – WHAT AM I LOOKING FOR?

- HIR/HFA events that are about to expire for WRS-covered employees – reach out to employee to remind them of deadlines
- SHR events (enter ASAP)
 - If agency doesn't complete entry within 2 days, Central Benefits will complete
- Manual events that are open for entry
- Old events that may still be open
- Events that you don't expect to be there
- If there is an event that the date is wrong, send in a ticket to have the “bad” event voided.
 - You can add the correct event with the correct date out on the BAS activity table when you send in the ticket

HOW TO FINALIZE EVENTS THAT NEED NO ENTRY

- You will often see open events that need no entry
- You can wait for them to auto-close or you can finalize them and they will close overnight
- Go to Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder – **Update Event Status**
- Check box next to Finalize/Apply Defaults
- Event Status = Open for Processing (**Do NOT Change to Closed**)
- Click Save at bottom of page
- When Ben Admin runs overnight, event will be Finalized and Closed

Schedule ID	EM2017	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	10/31/2022		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	13		<input type="checkbox"/> Job Eligibility Changed
Event Class	RFL Return From Leave		<input type="checkbox"/> Event Out of Sequence
Event Priority	117		<input checked="" type="checkbox"/> Finalize/Apply Defaults
Benefit Program	FTB	Print Option	Print Both Forms
Process Status	Prepared	*Process	Normal Processing
Action Source	Job Data Change	*Event Status	Open for Processing

ENTERING BENEFIT ELECTIONS



ENTERING BENEFIT ELECTIONS – JOB AIDS

- See the [Quick Event Guide](#) for event options
- See the [Option Code Cheat Sheet](#) for all option codes for all benefit plans
- See the [Event Processing Job Aid](#) that breaks down most events and provides a checklist of what action is needed

ENTERING BENEFIT ELECTIONS

- Reminder – there must ALWAYS be an open event in order to enter benefit elections
- Go to the Perform Election Page once you know there is an open event
 - **Navigation:** Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder - **Perform Election Entry**

The screenshot shows a web form titled "Event / Participant Selection" with three tabs: "Event / Participant Selection" (active), "Option Election", and "Dependents / Beneficiaries". The form is divided into two sections: "Select By Participant" and "Select by Schedule".

Select By Participant (with a help icon):

- Schedule ID: (with a search icon) → **EM2017 (for now)**
- Empl ID: (with a search icon)
- Ben Record: → **Important if person has multiple benefit records**
- Event ID: → **Leave Blank**

A "Search" button is located below the input fields.

At the bottom of the form is a "Validate Elections" button.

WAIT, I CLICKED SEARCH AND NO EVENT OPENED!

- When this message comes up, the person does not have an open event
- Event may not be prepared yet

Event Maintenance 2017

Event ID

ch

Data Entry Configuration [?]

- Defer Dep/Benef Enrollment
- Defer Savings Investments
- Hide Unused Items and Links
- Validate When Saved

Invalid value -- press the prompt button or hyperlink for a list of valid values (15,11)

The value entered in the field does not match one of the allowable values. You can see the allowable values by pressing the Prompt button or hyperlink.

OK

Election

HOW TO REVIEW EVENT STATUS

- **Navigation:** Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder– **Update Event Status**

Update Event Status

Empl ID 10C Ben Record 0

Event Status Update ? 1 of 21

Schedule ID	EM2017	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	04/14/2019		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	15		<input type="checkbox"/> Job Eligibility Changed
Event Class	RFL Return From Leave		<input type="checkbox"/> Event Out of Sequence
Event Priority	117		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	FTB		Print Option <input type="text" value="Print Both Forms"/>
Process Status	Prepared		*Process <input type="text" value="Normal Processing"/>
Action Source	Manual Event		*Event Status <input type="text" value="Open for Processing"/>

Schedule ID	EM2017	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	03/03/2019		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	14		<input type="checkbox"/> Job Eligibility Changed
Event Class	POS Position Change		<input type="checkbox"/> Event Out of Sequence
Event Priority	104		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	FTB		Print Option <input type="text" value="Print Both Forms"/>
Process Status	Finalized - Prepared None		*Process <input type="text" value="Normal Processing"/>
Action Source	Job Data Change		*Event Status <input type="text" value="Closed to Processing"/>

Schedule ID	EM2017	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	03/02/2019		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	13		<input type="checkbox"/> Job Eligibility Changed
Event Class	DEF ICI Deferred Enrollment		<input type="checkbox"/> Event Out of Sequence
Event Priority	130		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	FTB		Print Option <input type="text" value="Print Both Forms"/>
Process Status	Finalized - Enrolled		*Process <input type="text" value="Normal Processing"/>
Action Source	Job Data Change		*Event Status <input type="text" value="Closed to Processing"/>

AN EVENT IS CLOSED AND I NEED IT OPEN....

- Central Benefits can re-open events – submit a ticket to have the event re-opened
- **WARNING** – if an employee used eBN to enroll in benefits at hire, HIR event must be re-opened to the employee to complete entry within the initial 30-day enrollment period
 - Benefits specialist should NOT do entry on the same event that an employee used to enroll through eBN
 - Election source is based on the last person who touched the event
 - Only eBN life elections are sent to ETF so if the benefit specialist is the last person to touch the event, a paper life application is required and must be sent to ETF

BACK TO PERFORMING ELECTION ENTRY

- Once the event opens for entry, you will be taken to the Option Election tab of the Perform Election entry page.
- Before you do any entry, confirm that you are doing the entry on the **correct event with the correct event date**
 - We've seen a lot of entry done on the wrong event

Event / Participant Selection	Option Election	Dependents / Beneficiaries					
Sched ID	EM2017	Empl ID	Christina Rothe	Ben Record	0	Event ID	3
Event Data	12/24/2022	2 Month Service Anniversary	←	Confirm it is the correct event	Rollover To	Cash	

ELECTION ENTRY

- You should NEVER perform election entry on any of the following events:
 - Demotion (DEM)
 - Data Change (DTA)
 - Pay Rate Change (PAY)
 - Position Change (POS)
 - Promotion (PRO)
 - Transfer (XFR)

DOES THE EMPLOYEE HAVE DEPENDENTS?

- If you need to add dependents, do that BEFORE you enter any benefits elections.
- Go to the Dependents/Beneficiaries tab and click on the Change/Add Dependent Data Link

[Event / Participant Selection](#) [Option Election](#) **Dependents / Beneficiaries** [New v](#)

Schedule ID EM2017 Employee ID 100105491 Ariana Eldred
Event ID 6 Event Data 10/23/2022 Hire
Benefit Record 0 Excess Credit Rollover To Cash

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth

[Change/Add Dependent Data](#)

DOES THE EMPLOYEE HAVE DEPENDENTS?

- If the employee doesn't have any dependents on record, the screen will look like this

The screenshot displays the 'Dependent/Beneficiary' form for Ariana Eldred (Person ID 100105491). The form is divided into sections: 'Name', 'Address', and 'Personal Profile'. The 'Name' section is active, showing the dependent's name 'Ariana Eldred' and their ID '01'. Below this, the 'Name History' section contains a table with one entry. The entry has an effective date of '10/23/2022' and a format type of 'English'. A red callout box points to the effective date field with the text 'For new hires, effective date must be the hire date'. There is also an 'Edit Name' button. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons. The form also includes a search bar and pagination controls (1 of 1) for both the dependent list and the name history.

Dependent/Beneficiaries	
*Dependent/Beneficiary ID	01

Name History	
*Effective Date	10/23/2022
*Format Type	English
Display Name	

EFFECTIVE DATE OF THE DEPENDENT

- The effective date of the dependent can be no later than the event date that is being used to add the dependent to coverage (important for life events such as BIR or MAR)
- New hires – effective date defaults to date of hire

Dependent/Beneficiaries

*Dependent/Beneficiary ID 01

Name History

*Effective Date 10/23/2022

*Format Type English

Display Name

Edit Name

DOES THE EMPLOYEE HAVE DEPENDENTS?

- Don't click OK yet....go to Address tab. You need to enter something here – either click on the box that the dependent has the same address/phone as the employee or enter dependent specific information.

Name Address Personal Profile

Dependent/Beneficiaries

Person ID

Dependent/Beneficiary ID 01 Name

Address History

*Effective Date 10/23/2022

Same Address as Employee Address Type Home

Employee's Current Address

Country USA United States
Address Elkhorn, WI 53121 USA

Phone Information

Same As Employee	Phone Type	Telephone	Extension	Preferred
<input checked="" type="checkbox"/>	Employee's Hom			<input type="checkbox"/>

Email

Email Type	Email Address

OK Cancel Apply

DOES THE EMPLOYEE HAVE DEPENDENTS?

Personal Profile

Person ID

Dependent/Beneficiary ID 01 Eric Chruch

*Date of Birth 05/05/1970 Birth Location Birth Country Birth State Date of Death

Riders/Orders exist

Personal History

*Effective Date 10/23/2022

*Relationship to Employee Spouse

*Gender Male

*Marital Status Married As of 07/15/2000

Disabled

National ID

*Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	123-33-4567	<input checked="" type="checkbox"/>

OK Cancel Apply

- Wait...don't click OK...go to the Personal Profile tab
- If marital status is anything other than Single, an "As of" date must also be entered. For a spouse, this must match the marital status as of date of the employee
- SSN required for a spouse (will not go through health interface without it)
- SSN is required for children over Age 1 and must be entered if known.

DOES THE EMPLOYEE HAVE MULTIPLE DEPENDENTS?

- If the employee has additional dependents or you are adding a dependent due to a life event, you follow the same process
- Click on the “+” sign to add a row and you will see the Dependent ID change to next successive number

The screenshot shows a web application window titled "Dependent/Beneficiary" for the employee Ariana Eldred (Person ID 100105491). The interface includes tabs for "Name", "Address", and "Personal Profile". The "Dependent/Beneficiaries" section displays a table with one row. The table has a search icon, navigation arrows, and a dropdown menu showing "2 of 2". A red box highlights the "2 of 2" dropdown. To the right of the table is a red box around a "+" sign and a "-" sign. Below the table is the "Name History" section, which also has a search icon, navigation arrows, and a dropdown menu showing "1 of 1". The "Name History" section includes fields for "*Effective Date" (10/23/2022), "*Format Type" (English), and "Display Name", along with an "Edit Name" button. At the bottom of the window are "OK", "Cancel", and "Apply" buttons.


PERFORM ELECTION ENTRY

- Once all dependents are entered, you go back to the Option Election tab to start enrolling the employee in benefits
- On a HIR/HFA/ELG event, you are required to make an election on health (Plan Type 10 or Plan Type 1V), all three life plans (Plan Types 20, 21 and 25) and ICI (Plan Types 30 and 31)

PERFORM ELECTION ENTRY – HEALTH INSURANCE

- If a new hire has no prior WRS service, you will see 2 health enrollment options
 - Plan Type IV: Health (Waiting Period)
 - Plan Type IU: Health (100% Employee Paid)

Plan Type 1V : Health (Waiting Period)

Option Code 


Health Provider ID Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text"/> <input type="button" value="Q"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

Plan Type 1U : Health (100% Employee Paid)

Option Code 

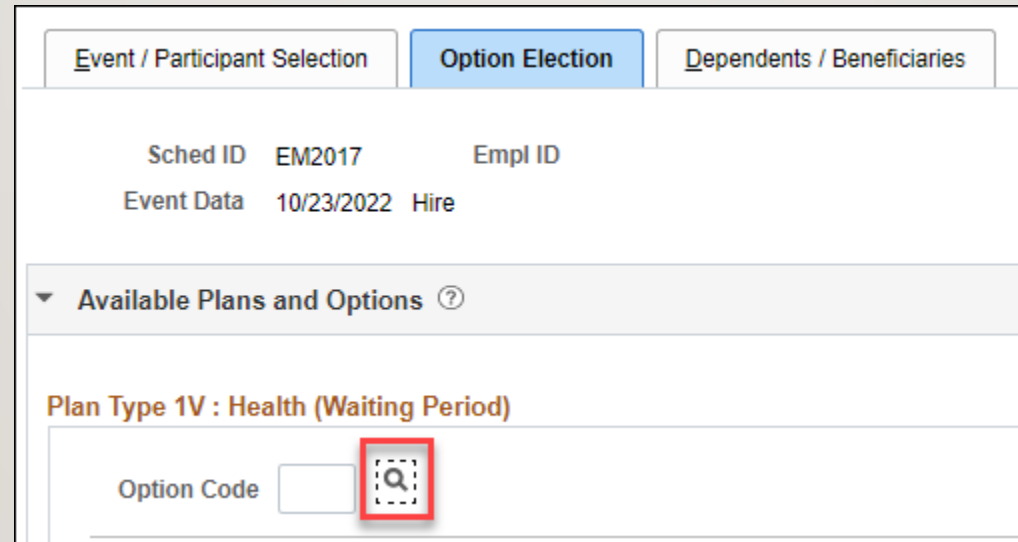
Health Provider ID Previously Seen

PERFORM ELECTION ENTRY – HEALTH INSURANCE

- Required to make election on Plan Type IV (Waive or Health Plan Election)
- Only required to make election on Plan Type IU if employee is enrolling in coverage right away
- If the employee has at least 2 months of WRS service (based on benefits service date), only regular health insurance (Plan Type IO) will be an enrollment option
 - Employee has 2 months service but IU and IV options appear? Submit a ticket – the HIR event will need to be reprocessed
 - The benefits service date was not correct when the HIR event prepared

PERFORM ELECTION ENTRY – HEALTH PLAN FILTER

- Use the health plan filter to reduce the number of health plans available for selection.
- Click on the magnifying glass to bring up the filter



The screenshot shows a web application interface for health plan election. At the top, there are three tabs: "Event / Participant Selection", "Option Election" (which is selected and highlighted in blue), and "Dependents / Beneficiaries". Below the tabs, there is a section for identifying the user and event, with fields for "Sched ID" (EM2017), "Empl ID", and "Event Data" (10/23/2022 Hire). A dropdown menu labeled "Available Plans and Options" is expanded, showing a section for "Plan Type 1V : Health (Waiting Period)". Within this section, there is an "Option Code" input field. A red square highlights a magnifying glass icon next to the input field, indicating that clicking it will open a search filter.

PERFORM ELECTION ENTRY – HEALTH PLAN FILTER

- Select the applicable data elements and click “Apply Filter” to reduce the number of available health plans.

Option Code Search ×

[Help](#)

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

Filter Options By

Coverage Level

All plans

Employee Only

Family

Dental Coverage

All Plans

With Dental

Without Dental

High Deductible Health Plan

All Plans

HDHP plans

Non-HDHP plans

Note: Click Apply Filter to load the grid below.

1-21 of 21

	Option Code	Benefit Plan	Description	Coverage Code
1	14	ASCOHD	HDHP Access OutState w/Dental	4
2	6	ACCSHD	HDHP Access w/Dental	4
3	525	ASPHD	HDHP Aspirus with Dental	4
4	36	CMGRHD	HDHP Common Ground w/Dental	4

PERFORM ELECTION ENTRY – HEALTH INSURANCE

- You can also use the [Option Code Cheat Sheet](#) to get the correct option code for health and all other benefit plans
- How do I find the correct option code? You need to know:
 - The employee's benefit program
 - Health plan election (dental/no dental, regular or HDHP)
 - Coverage level (Single/Family)

PERFORM ELECTION ENTRY – HEALTH INSURANCE

- If you select family coverage, click on **Enroll All** and all eligible dependents will auto-populate
- If enrolling in family health insurance, an employee can't exclude an eligible dependent. This includes employees who are separated or going thru a divorce.

Dependents/Beneficiaries


Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Eric Church	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>

PERFORM ELECTION ENTRY – SUPPLEMENTAL PLANS


- Always review the coverage level associated with the option code
 - More variation in supplemental plans (ex. Employee + Children, Employee + Spouse)
 - The full description of the coverage level populates on the page once selected

Plan Type 13 : Dental - Supplemental

Option Code 

Delta Dental PPO Select (SELECT) (Employee + Spouse)

Plan Type 14 : Vision

Option Code 


DeltaVision (VISION) (Employee + Spouse)

PERFORM ELECTION ENTRY – STATE GROUP LIFE

- There are 3 life insurance plans
 - Plan Type 20 – Basic and Supplemental
 - Plan Type 21 – Additional
 - Plan Type 25 – Spouse & Dependent (Do not click “Enroll All”)

Plan Type 25 : State Group Life Spouse & Dep

Option Code Life - 2 Units Spouse & Dep (SDL2U)

Flat Amount 

[Special Requirements](#)

Dependents/Beneficiaries


Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Percentage	Flat Amount	Contingent	Excess	
<input type="text"/>	<input type="text"/>		<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="button" value="-"/>

PERFORM ELECTION ENTRY - ICI

- The option that appears is based on the value in Elig Fld 2 on Benefit Program Participation Page.
 - If blank, ICI will NOT appear
 - Plan Type 30 will appear for all employees
 - Plan Type 31 (Supplemental ICI) will appear for employees whose Elig Fld 2 indicates eligibility for supplemental coverage.

Plan Type 30 : ICI Standard



Option Code	1	ICI Standard Coverage 1 (ICIB1A)	
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[Special Requirements](#)

PERFORM ELECTION ENTRY – ERA & HSA PLANS


- When you enter a HSA or ERA/FSA enrollment, a contribution worksheet appears on the page. It does not always calculate correctly.
 - As long as the Annual Pledge is correct, the deduction will be correct on the paycheck
- Never enter an Employee Contribution Override – use POTT to adjust per pay period contribution amount if there is a change. A ticket is required for FSA Medical, Parking and Transit changes.
- On a COM and HSA event, if changing the annual election, the amount can't go below the YTD amount listed.


Plan Type 60 : Healthcare FSA

Option Code  

Healthcare FSA (ERAMED)

Annual Pledge

Employee Contribution Override  Annual

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="\$200.00"/> -	\$0.00) /	2 =	<input type="text" value="\$100.00"/> =	\$2,600.00 Annual

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

PERFORM ELECTION ENTRY – COORDINATION OF BENEFITS

- Once all entry is done and you've clicked on Save, the Coordination of Benefits page will appear (if enrolling in health)
- Required to indicate Yes or No for both Other Health Insurance and Medicare
 - If unknown, answer No
 - If yes to Other Coverage, enter applicable information
 - Not required to enter physician or clinic information
 - If yes to Medicare – all fields are required

The screenshot shows a web form titled "Coordination of Benefits" with a close button (x) in the top right corner. A "Help" link is also present. The form is divided into two main sections: "Coordination of Benefits - Employee" and "Physician Details".

Coordination of Benefits - Employee

- Other Health Insurance:
- Medicare:

Physician Details

- National Provider ID: [Lookup Provider ID](#)
- Clinic Name:
- Physician First Name:
- Physician Last Name:

At the bottom right of the form is a "Save and Continue" button.

PERFORM ELECTION ENTRY

- Once all entry is done, you will be taken back to Event/Participant Selection Tab
- Confirm that Process Status = Entered

The screenshot displays the 'Event / Participant Selection' interface. At the top, there are three tabs: 'Event / Participant Selection' (active), 'Option Election', and 'Dependents / Beneficiaries'. Below the tabs, there are two selection methods: 'Select By Participant' and 'Select by Schedule'. Under 'Select By Participant', there are input fields for 'Schedule ID' (EM2017), 'Empl ID' (1100), 'Ben Record' (0), and 'Event ID' (6). A 'Search' button is located below these fields. To the right, under 'Data Entry Configuration', there are four checkboxes: 'Defer Dep/Benef Enrollment', 'Defer Savings Investments', 'Hide Unused Items and Links', and 'Validate When Saved' (checked). Below the search fields, there is a 'Validate Elections' button. At the bottom right, there is a dropdown menu for '*Excess Credit Rollover To' set to 'Cash'. Below this is a table titled 'Available Events' with a '1 of 1' dropdown. The table has columns: 'Ben Record', 'Event ID', 'Event Date', 'Event Classification', 'Benefit Program', 'Process Status', and 'Process Indicator'. The data row shows: 'Selected', '0', '6', '10/23/2022', 'HIR Hire', 'FTB FT PreTax', 'ET Entered', and 'N Normal Prc'. At the bottom left, there are three buttons: 'Save', 'Notify', and 'Refresh'.

Ben Record	Event ID	Event Date	Event Classification	Benefit Program	Process Status	Process Indicator	
Selected	0	6	10/23/2022	HIR Hire	FTB FT PreTax	ET Entered	N Normal Prc

EBENEFITS

Available on HIR, OE and DEF Events

EBENEFITS

- Strongly encourage use of eBenefits whenever available
- Employee access:
 - STAR Employee Login: <https://ess.wi.gov>
 - Employee Self Service Homepage – My Benefits Tile
- Look for employees in Notified Status on Open Events Query – these people saved but did NOT submit their eBenefits elections
- [New Hire eBN Job Aid \(for employees\)](#)



EBENEFITS

Benefit Enrollment Page

- Benefits Summary
- Dependent Information
- Health Care Summary
- Health Care Dependent Summary
- Life/Disability Summary
- My Benefit Documents
- View Form 1095-C
- Form 1095-C Consent
- Benefits Enrollment**

New Hire

Welcome to your eBenefits enrollment. You have 30 days from your hire date to enroll in benefits. Please review the [New Hire eBenefits Quick Guide](#) and the [Your Benefits at a Glance Quick Guide](#) before you start your enrollment.

[JBM Benefits Mentor](#) is an interactive benefits counselor who can help you find the benefit plans that are right for you.

Here are some tips to help you successfully complete your benefit enrollment:

- You should review all benefit plan materials and know what benefits you plan to enroll in PRIOR to making your benefit elections online.
- You will need COMPLETE Personal Information for All Dependents you are enrolling into your benefit elections. You should have the following information available for all of your dependents before starting the enrollment process: - legal name, social security number, date of birth, marital status, etc.
- Your session will time out due to inactivity longer than 30 minutes.

The Select or Edit button next to an event means that benefit election is currently open for your enrollment.

To begin enrolling in benefits online, click **Select**.

Open Benefit Events

Event Description	Event Date	Event Status	Job Title	
Hire	11/07/2022	Open	FINANCIAL EXAMINER	Select

Summary Page

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.

Enrollment Summary

Health (Waiting Period)	Before Tax	After Tax	Edit
Current: No Coverage			
New: No Coverage			
Health (100% Employee Paid)	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive			
State Group Life	Before Tax	After Tax	Edit
Current: No Coverage			
New: No Coverage			

EBENEFITS – ENROLLMENT PAGES

New Hire

Health (Waiting Period)

The State Group Health Insurance program offers hospital, surgical, medical and prescription coverage. The program is administered by the Department of Employee Trust Funds (ETF).

Each health plan (regular and HDHP) is available with or without Dental benefits.

Your coverage level (i.e. single, family) will be automatically determined by the dependents you enter at the bottom of this page.

Our records indicate that you have no prior Wisconsin Retirement System (WRS) state service. You must have 2 months of WRS state service before you are eligible for the employer contribution towards your health insurance premium. If you want to enroll in health insurance when eligible for the employer contribution, select your health plan below.

If you want immediate health insurance coverage and pay the full premium until you have 2 months of state WRS service, enroll in your selected health plan on this page and then go to the Health (100% Employee Paid) page and enroll in the same health plan that you selected on this page.

Please note that you must make an election on this page before you make your election on the Health (100% Employee Paid) enrollment page.

WARNING: All available health plans are listed below. You should confirm that your health plan and providers are available in your county. See [ETF's 2022 Health Plan Search](#) to review health plan providers in your county.

Health Insurance Resources for 2022 Coverage

- [2022 Health Benefits Decision Guide](#)
- [2022 Health Insurance Website](#)
- [Choosing a Health Plan Design Video](#)
- [Breakdown of Your Costs](#)

High Deductible Health Plan (HDHP) Enrollees

If you enroll in an HDHP, you are also required to enroll in a [Health Savings Account](#).

Opting Out of Health Insurance?

If you opt-out of health insurance and want to apply for a \$2000 opt-out stipend (prorated if not employed for entire year), you must "Waive" coverage below AND complete a [health insurance application](#) to indicate that you are opting out of coverage (complete sections 1, 12 & 13). Submit this application to your agency payroll and benefits within 30 days of hire.

In order to cover your eligible family members, you must enroll your dependents below. If you select family coverage, you are REQUIRED to enroll all eligible family members.

Select an Option

Here Are Your Available Options With Your Costs:
(Your cost = Full benefit cost - Credits)

[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

Apply Filter

Select one of the following plans:

Aspinus with Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$62.00	Before-Tax
Family	\$128.50	Before-Tax

Dean w/Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$62.00	Before-Tax
Family	\$128.50	Before-Tax

Common Ground w/Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$62.00	Before-Tax
Family	\$128.50	Before-Tax

Dean Prevea360 West w/Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$62.00	Before-Tax
Family	\$128.50	Before-Tax

Access w/Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$122.50	Before-Tax
Family	\$304.00	Before-Tax

Access Out of State w/Dental

Coverage Level	Your Costs	Tax Class
Employee Only	\$79.00	Before-Tax
Family	\$198.00	Before-Tax

Waive

Enroll Your Dependents

The following list displays your dependents on record. If a dependent is missing from the list, click on the **Add/Review Dependents** button to add a dependent(s). You may also use this button to review the details of the dependent.

If a dependent is listed more than once or there is missing or incorrect information on a dependent, contact your Payroll and Benefits Office to make the correction.

NOTE: Do not add yourself as a dependent and do not add a dependent more than once.

You may enroll any of the following individuals for coverage under this plan by checking the **Enroll** box next to the dependent's name.

If you do not want a dependent covered by the plan, uncheck the **Enroll** box next to the dependent's name.

Dependent Beneficiary		
Enroll	Name	Relationship
<input type="checkbox"/>		

Add/Review Dependents

Update and Continue **Discard Changes**

EBENEFITS – ENROLLMENT PAGES

Summary of health enrollment

New Hire

Health (Waiting Period)

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 Access w/Dental with Employee Only coverage.

Your Estimated Per-Pay-Period Cost

Your Cost	\$122.50
-----------	----------

Notes

Once submitted, this choice will take effect on 02/01/2023. Deductions for this choice will start with the pay period beginning 01/15/2023.

[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.

Enrollment Summary

Enrollment Summary			
Health (Waiting Period)	Before Tax	After Tax	Edit
Current: No Coverage			
New: Access w/Dental:Empl Only	122.50		
Health (100% Employee Paid)	Before Tax	After Tax	Edit
Current: No Coverage			
New: Waive			
State Group Life	Before Tax	After Tax	Edit
Current: No Coverage			
New: Life - Basic+Suppl (2x salary)	15.12		
State Group Life Additional	Before Tax	After Tax	Edit
Current: No Coverage			
New: Life - 2 Additional Units	22.40		
State Group Life Spouse & Dep	Before Tax	After Tax	Edit
Current: No Coverage			
New: No Coverage			

EBENEFITS – SUBMIT PAGES

New Hire

Submit Benefit Choices

You have almost completed your enrollment. If you have no further changes, select the **Submit** button at the bottom of this page to finalize your benefit choices.

You must click the Submit button below to finalize and submit your benefit elections.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

If you need to make changes to any of your elections once you submit them, you must contact your agency payroll and benefits office. All new hire benefit elections must be submitted within 30 days of hire.

Once your 30-day new hire enrollment period ends, you will have limited opportunities to make benefit changes until the next Open Enrollment period or if you have a qualified family status change.

Authorize Elections

By submitting your benefit choices you are authorizing the State to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

By Clicking SUBMIT you agree to the following and have read the terms and conditions relevant to application for benefits through the Department of Employee Trust Funds: To the best of my knowledge, all statements and answers in this application are complete and true. I understand that if I provide false or fraudulent information, misrepresentation or fail to provide complete or timely information on this application, I may face action, including, but not limited to, loss of coverage, employment action, and/or criminal charges/sanctions under Wis. Stat. § 943.395.

Submit

Cancel

Select the **Submit** button to send your final choices to the Benefits Department.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

New Hire

Submit Confirmation

Your benefit choices have been successfully submitted to the Benefits Department.

Please note that depending on the timing of your enrollment, additional premiums may be taken from one of your next paychecks.

To return to the Benefits Enrollment page, click the **OK** button below.

OK

EBENEFITS

- For a HIR event, once an employee submits their elections and the event is finalized over night, the employee can NOT go back in to eBenefits to update their elections
 - Solution = agency should submit a ticket to have HIR event re-opened so employee can make updates to elections (must be within 30 days of hire)
 - Agency should NEVER make updates to elections on HIR event once employee has made elections through eBenefits on that event

REVIEWING BENEFIT ENROLLMENTS

Benefits Summary, Enroll in Benefits

HOW DO I KNOW WHEN THE EMPLOYEE ENROLLED?

- For an individual employee
 - See the status of all open events on the WI_BN_OPEN_EVENTS query; or
 - Go to the Enroll in Benefit Pages (Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – **Health Benefits**); or
 - Go to Update Event Status page to check on current status of event (Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder – **Update Event Status**)

Event Status Update ? 1 of 3

Schedule ID	OE2023	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	01/01/2023		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	0		<input type="checkbox"/> Job Eligibility Changed
Event Class	OE Open Enrollment		<input type="checkbox"/> Event Out of Sequence
Event Priority	900		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	FTB	Print Option	Print Both Forms
Process Status	Program Elig Assigned	*Process	Normal Processing
Action Source	Open Enrollment	*Event Status	Closed to Processing

Schedule ID	EM2017	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	11/07/2022		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	1		<input type="checkbox"/> Job Eligibility Changed
Event Class	HIR Hire		<input checked="" type="checkbox"/> Event Out of Sequence
Event Priority	128		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	FTB	Print Option	Print Both Forms
Process Status	Entered	*Process	Normal Processing
Action Source	Job Data Change	*Event Status	Open for Processing

HOW DO I KNOW WHEN THE EMPLOYEE ENROLLED?

Employee Process Status Rpt

Run Control ID Report Manager Process Monitor

Language

Schedule ID (Leave blank for all schedules)

Process Status to Include:

(Leave all boxes unchecked to include all)

<input type="checkbox"/> Assign None	<input type="checkbox"/> Elections Entered
<input type="checkbox"/> Assign Error	<input type="checkbox"/> Election Error
<input type="checkbox"/> Assigned	<input type="checkbox"/> Re-Enter
<input type="checkbox"/> Prepare Error	<input type="checkbox"/> Finalized - Benefit Prog None
<input type="checkbox"/> Prepared	<input type="checkbox"/> Finalized - Prepare None
<input type="checkbox"/> Notified	<input checked="" type="checkbox"/> Finalized - Enrolled

- **For all employees** – run the Employee Status Report (Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Reports & Queries Folder – Employee Status Report)
- Enter Schedule ID: EM2017
- Check box next to Finalized – Enrolled
- Click Run

EMPLOYEE PROCESS STATUS REPORT

- Change output to CSV so you get the results in Excel

Process List						
Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Employee Processing Status	BAS027	SQR Report	Web <input type="text" value="v"/>	CSV <input type="text" value="v"/>	Distribution

- You get all events that have been finalized but you can sort by Event Class and Event Date to look for recent results

Schedule ID	Event ID	Event Date	Event Class	Event Status	Process Indicator	Benefit Program
EM2017	1	6/11/2017	SPL	C	N	FTB
EM2017	2	6/11/2017	PAY	C	N	FTB
EM2017	3	12/31/2017	POE	C	N	FTB
EM2017	6	8/1/2020	LOC	C	N	FTB
EM2017	3	2/1/2019	ADM	C	N	FTB
EM2017	4	4/18/2019	LOA	C	N	FTB
EM2017	5	5/10/2019	RFL	C	N	FTB
EM2017	7	6/2/2020	TER	C	N	FTB
EM2017	8	5/10/2021	HIR	C	N	FTB
EM2017	9	5/10/2021	WRS	C	N	FTB
EM2017	2	8/2/2017	RET	C	N	FTB
EM2017	1	6/11/2017	SPL	C	N	FTB
EM2017	3	6/24/2018	PAY	C	N	FTB

BENEFITS SUMMARY


- **Navigation:** Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – **Benefits Summary**
- This is the employee’s benefits summary as of **TODAY**
- You will NOT see future dated enrollments on this page
- You can view Benefit Plans by Tile or List
- 2 tabs
 - Benefit Enrollment Summary
 - Benefit Deduction Summary
- Good tool to see an overview of an employee’s benefits

The screenshot displays the 'Benefits Summary' interface. At the top, there are two tabs: 'Benefits Summary' (highlighted in blue) and 'Deduction Summary'. Below the tabs, a message reads: 'To view benefits as of another date, enter the date and select Refresh.' This is followed by a 'Benefits On' field containing '11/16/2022' and a calendar icon, with a blue 'Refresh' button to the right. Below this, the following information is displayed: 'Primary Empl Record 0', 'Benefits System Benefits Administration', 'Benefit Program FTB WRS Eligible Non-LTE Employees', and 'Benefits Status Active'. At the bottom, under the heading 'Benefit Plans', there are two view options: a 'Tile' view (selected) and a 'List' view. A red box labeled 'Tile or List' with an arrow points to the 'List' view option.

BENEFIT ENROLLMENT SUMMARY

Benefits Summary Deduction Summary

To view benefits as of another date, enter the date and select Refresh.

Benefits On 

Primary Empl Record 0
Benefits System Benefits Administration
Benefit Program FTB WRS Eligible Non-LTE Employees
Benefits Status Active

Benefit Plans

Enrollment Type	Plan	Coverage / Participation	Dependents or Beneficiaries	Coverage Begin
Health	Quartz-UW Health w/ Dental	Family	1 Dependents	08/01/2020
State Group Life	Life - Basic+Suppl (2x salary)	Salary X 2		09/01/2017
State Group Life Additional	Life - 2 Additional Units	Salary X 2		08/01/2019
State Group Life Spouse & Dep	Life - 2 Units Spouse & Dep	Enrolled		08/01/2019
ICI Standard	ICI Standard Coverage 6	75% of Salary		09/01/2017
ICI Supplemental	ICI Supplemental 6	75% of Salary		04/01/2019
Dental - Supplemental	Delta Dental PPO Select Plus	Employee + Spouse	1 Dependents	01/01/2021
Vision	DeltaVision	Employee + Spouse	1 Dependents	01/01/2020
Accident Plan	Accident Plan - Empl+Spouse	Enrolled		01/01/2020

BENEFIT DEDUCTION SUMMARY

Benefits Summary		Deduction Summary					
				Primary Empl Record 0			
				Payroll System Payroll for North America			
				Pay Group 505 Dept of Administration			
				Payroll Status Active			
Latest Deductions							
Plan Type	Benefit Plan	Dedn Code	Description	Class	Coverage Base	Last Deduction	Pay Period End
10	QRZ	MEDIC	Medical	Before-Tax		123.00	11/05/2022
				Nontaxable Benefit		818.92	11/05/2022
13	SELPLS	DELDEN	Del Dent	Before-Tax		20.98	11/05/2022
14	VISION	VISION	Vision	Before-Tax		5.71	11/05/2022
20	BASSUP	BASLIF	Life Ins	Before-Tax	146000.00	8.76	11/05/2022
				Nontaxable Benefit	146000.00	4.49	11/05/2022
				Taxable Benefit	146000.00	7.20	11/05/2022
21	ADLIF2	ADDLIF	Addl Life	Before-Tax	146000.00	13.14	11/05/2022
				Taxable Benefit	146000.00	10.95	11/05/2022

ENROLL IN BENEFITS PAGES

- Most often referred to as “Base Benefits” by Central Benefits
- These pages show you the most current enrollments, covered dependents, effective begin date, deduction begin date
- Check Include History to see enrollments over time

The screenshot displays the 'Review Employee Benefits' application interface. On the left, a navigation sidebar lists several options: 'Event Processing', 'Review Employee Benefits', 'Benefits Summary', 'Employee Benefit Documents', 'Review ABBRs', 'Update Dependent/Beneficiary', 'Health Benefits', 'Life and AD/D Benefits', 'Disability Benefits', 'Simple Benefits', 'Spending Accounts', 'Savings Plans', 'Retirement Plans', 'Create Additional Pay', and 'Review Paycheck'. The 'Health Benefits' option is highlighted in green and enclosed in a red box. The main content area is titled 'Health Benefits' and contains a search form. The search form includes a 'Find an Existing Value' button, a 'Search Criteria' section with various dropdown menus and input fields, and an 'Include History' checkbox, which is also highlighted with a red box. The search form also includes a 'Search' button and a 'Clear' button.

Event Processing ▾

Review Employee Benefits ▲

Benefits Summary

Employee Benefit Documents

Review ABBRs

Update Dependent/Beneficiary

Health Benefits

Life and AD/D Benefits

Disability Benefits

Simple Benefits

Spending Accounts

Savings Plans

Retirement Plans

Create Additional Pay

Review Paycheck

Health Benefits

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

Find an Existing Value

▾ **Search Criteria**

Empl ID **begins with** ▾

Benefit Record Number **=** ▾

Name **begins with** ▾

Last Name **begins with** ▾

Business Unit **begins with** ▾

Department Set ID **begins with** ▾ 🔍

Department **begins with** ▾ 🔍

Organizational Relationship **=** ▾ ▾

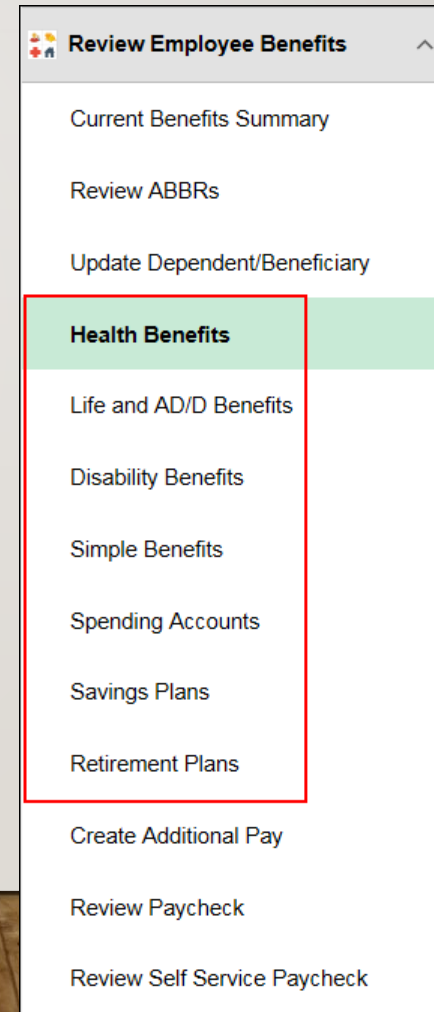
Alternate Character Name **begins with** ▾

Include History Correct History Case Sensitive

Search **Clear** Basic Search Save Search Criteria

ENROLL IN BENEFITS

- **Navigation:** Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder
- **Health** = Health, Supplemental Dental, Vision
- **Life** = State Group Life, Accident Plan
- **Disability** = ICI – Standard and Supplemental
- **Simple** = Opt Out Stipend
- **Spending Accounts** = accounts administered by Optum – FSA and HSA (including parking/transit)
- **Savings Plans** = WDC
- **Retirement** = WRS and Sick Leave Credit enrollment



The screenshot shows a dropdown menu titled "Review Employee Benefits" with an upward arrow icon. The menu items are: "Current Benefits Summary", "Review ABBRs", "Update Dependent/Beneficiary", "Health Benefits" (highlighted in green), "Life and AD/D Benefits", "Disability Benefits", "Simple Benefits", "Spending Accounts", "Savings Plans", "Retirement Plans", "Create Additional Pay", "Review Paycheck", and "Review Self Service Paycheck". A red rectangular box highlights the "Health Benefits" section and its sub-items.

- Review Employee Benefits ^
- Current Benefits Summary
- Review ABBRs
- Update Dependent/Beneficiary
- Health Benefits**
- Life and AD/D Benefits
- Disability Benefits
- Simple Benefits
- Spending Accounts
- Savings Plans
- Retirement Plans
- Create Additional Pay
- Review Paycheck
- Review Self Service Paycheck

ENROLL IN BENEFITS - HEALTH

Health Benefits

Employee ID: [] Benefit Record Number: 0

Plan Type: 10 Health

Coverage: *Coverage Begin Date: 08/01/2020 *Deduction Begin Date: 07/05/2020

Coverage Election: Elect Waive Terminate *Election Date: 07/09/2020

Benefit Program: FTB WRS Eligible Non-LTE Employees
Benefit Plan: QRZ Quartz-UW Health w/ Dental
Coverage Code: 4 Option Code: 209

Health Provider ID: [] Family Previously Seen

Employee Status: Active

[Enroll All Dependents](#)

Dependent/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Fig
01		Spouse	[]	<input type="checkbox"/>	Spouse	N

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

- You should be reaching out to your employee for proof of maternity/paternity when completing the SHR Event.
- This applies to employees who have enrolled in family health insurance and their marital status is single, divorced or widowed.

ENROLL IN BENEFITS TIP

- There are often questions about when an employee changes benefit programs (FTB-P50 or DEF-LTE) that the base benefits page isn't correct. This page is a **snapshot of the employee on the deduction begin date of the enrollment.**
- **Example** – enrolled in health when in P50 then changed to FTB. No row added to health enrollment page when benefit program changes.

Benefit Program Participation Details ?

1-3 of 3 | View 1

*Effective Date	05/26/2019	Currency Code	USD	+ -
*Benefit Program	FTB	WRS Eligible Non-LTE Employees		
*Effective Date	11/29/2015	Currency Code	USD	+ -
*Benefit Program	P50	Less than 50% FTE PostTax LTE		
*Effective Date	07/15/2013	Currency Code	USD	+ -
*Benefit Program	P50	Less than 50% FTE PostTax LTE		

Coverage

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

Coverage Election

Elect Waive Terminate *Election Date 09/29/2017

Benefit Program 50%PostTax

Benefit Plan QRZCHD HDHP Quartz Community w/Dental Option Code 611

Coverage Code 4 Family

Health Provider ID Previously Seen

Ben Admin xref

Sched ID OE2018
Event ID 0

Employee Status Active

BENEFIT EVENTS

Which Event Do I Use?

GENERAL BENEFIT EVENT GUIDANCE

- When adding dependents to coverage, the effective date of the dependent must be on or before the event date of the event you are using to add the dependent
 - Always enter dependent info in STAR before adding dependents to coverage
- SSN requirements
 - Must enter SSN for spouse
 - SSN is required for children over age one. SSNs for newborns should be added when known
- NEVER delete a dependent – remove the dependent from coverage if no longer eligible for coverage
 - If there are dependent entry errors or duplicates, submit a ticket to correct (DO NOT CORRECT YOURSELF)
- Always review the deduction begin date of coverage and confirm the correct premiums are taken

ENROLLING THE EMPLOYEE IN COVERAGE



EVENTS TO ADD COVERAGE FOR THE EMPLOYEE

HIR Event

New Hire

HFA Event

Hire From Affiliate,
Rehired within 30 days

SHR Event

Used to Move To Plan
Type 10 Health after 2
Months

LST Event

Employee Loss of
Coverage

OOS Event

Enroll in Opt-Out
Stipend

HIR EVENT

- HIR event is created when an employee is hired for the first time in STAR (or an additional employment instance is added) or the employee is rehired (> 30-day break in employment)
 - If additional employment instance is added (employee working in multiple jobs), the HIR event should be finalized immediately by the agency (it opens in eBN but no elections should be made)
- Opens in eBN to the employee
 - Encourage the employee to use eBN
- If employee doesn't use eBN and gives you paper apps, use the HIR event to enroll the employee in benefits
 - Must send copy of life app to ETF or designated agency contact

DETAILED BREAKDOWN OF HIR EVENT RULES

Benefit Plan	Benefit Plan Code	Effective Date	Comments
Health	10	1 st of month on or following event date	This plan will show in eBenefits if the Benefits Service Date in Job Data shows that the employee has at least 2 months of state service. The employee is required to enroll in or waive coverage in eBenefits.
Health (early coverage – no ER contribution)	1U	1 st of month on or following event date	This plan will show in eBenefits if the Benefits Service Date in Job Data shows that the employee DOES NOT have at least 2 months of state service. The employee elects this plan if they want coverage before eligible for the employer contribution.
Health (wait until eligible for ER contribution)	1V	1 st of the month on or following the completion of 2 months of state service (based on the date in the Benefits Service Date field)	This plan will show in eBenefits if the Benefits Service Date in Job Data shows that the employee DOES NOT have at least 2 months of state service. The employee will elect this plan if they want coverage effective when eligible for the employer contribution. If the employee elects the 1U plan, the employee will have to make an election in this plan prior to enrolling in the 1U plan. The employee is required to enroll in or waive coverage in eBenefits.

DETAILED BREAKDOWN OF HIRE EVENT RULES

Benefit Plan	Benefit Plan Code	Effective Date	Comments
Life (Basic & Supplemental)	20	1st of the month following the 30-day enrollment period that begins on the hire/rehire date	The employee is required to enroll in or waive coverage in eBenefits. The employee must enroll in Plan Type 20 before enrolling in any other coverage level.
Life (Additional)	21		
Life (Spouse & Dependent)	25		
ICI Standard ICI Supplemental	30 31	1 st of month on or following event date	The employee is required to enroll in or waive coverage in eBenefits. If eligible for Supplemental coverage, Plan Type 31 (Supplemental) will open.
Delta Dental Vision	13 14	1 st of month on or following event date	

DETAILED BREAKDOWN OF HIR EVENT RULES

Benefit Plan	Benefit Plan Code	Effective Date	Comments
Accident Plan	27	1 st of month on or following event date	This is the enrollment period/effective date for new hires only. Any enrollment made outside for the initial 30-day enrollment period due to hire will be effective on the 1 st of the month on or following receipt of the application.
HSA	67	1 st of month on or following event date	Must be enrolled in HDHP. Will be required to make an election if HDHP is elected. Central Benefits will manually change the effective date of HSA coverage effective date if it's not the 1st of the month on or following the HIR date.
Healthcare FSA/LPFSA	60	1 st of month on or following event date	Both options will open to employees. If enrolled in HDHP, employee should enroll in LPFSA. Central Benefits audits enrollments to ensure employees are in the correct plan..
Dep Care FSA	61	1 st of month on or following event date	
Parking (Pre-Tax) Transit (Pre-Tax)	6V 6Y	1 st of month on or following event date	

HIR EVENT AND WRS-COVERED LTES

- In general, WRS-covered LTEs should **NOT** use eBN if a HIR event opens
 - If the employee has no prior WRS service, IU and IV health elections will open and the HIR event will set the health insurance coverage effective date incorrectly
 - Because of this, **do NOT** enter the health election on the HIR event for LTEs
- If a WRS-covered LTE has at least 6 months of WRS service, can use eBN if a HIR event opens (immediately eligible for employer contribution towards health – Plan Type 10)

HIR EVENT TIPS

- If the employee enrolls via eBN but forgets to enroll in something...
 - AND is still within 30-day enrollment period
 - Create a ticket and Central Benefits will re-open the event to the employee in eBN
 - BUT is no longer within the 30-day enrollment period (but app was rec'd within the enrollment period)
 - Create a ticket and Central Benefits will work with you to add the enrollment to the system
- NEVER enter apps on a HIR event after the employee has already made some elections via eBN – important for life enrollments
 - The last person who touches the event determines how the election is saved (eBN vs. entered by administrator)
 - Only eBN life insurance elections are sent to ETF via interface
 - If life enrollment not labeled as eBN (election source = web), must submit a paper app to ETF

HOW DO I KNOW HOW ELECTION ENTERED?

- Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Enrollment Tile – Event Processing Folder – **Employee Event Detail**
- Online = entered by Benefits Specialist
- Web = entered via eBN
- None entered = event auto-closed with no election

Event Information		Eligibility Information	
ID	1	Empl Record	0
Status	Closed to Processing	Date	05/09/2022
Class	HIR Hire	Effseq	0
Source	Job Data Change	Priority	128
<input type="checkbox"/> Multi-Activity Indicator			

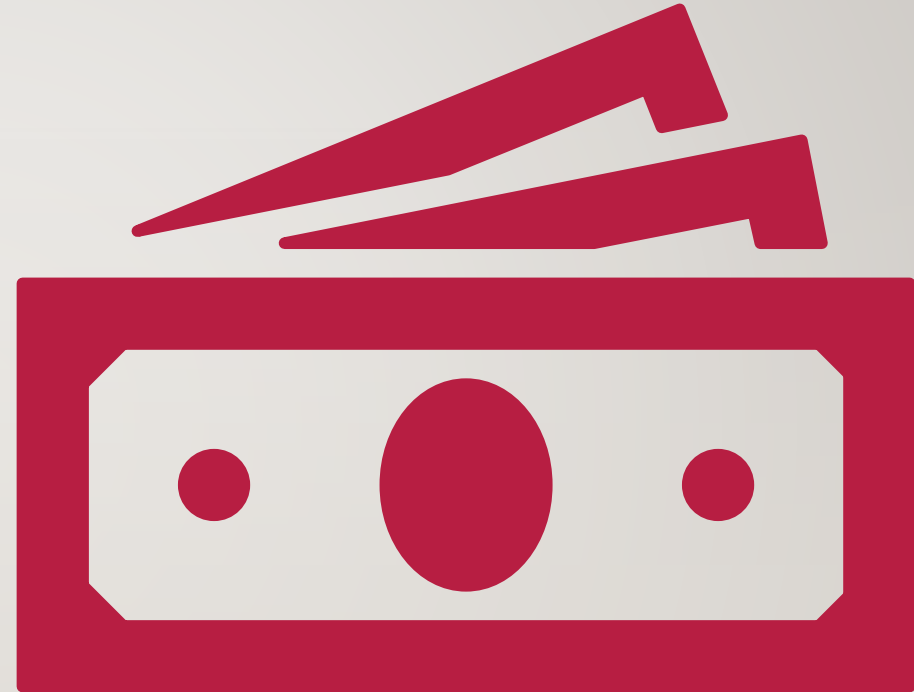
Processing Information		Eligibility Information	
Benefit Program	FTB WRS Eligible Non-LTE Employees	<input type="checkbox"/> Address Eligibility Changed	
Process Status	Finalized - Enrolled	<input type="checkbox"/> MultiJob Indicator Changed	
Status Date	06/05/2022	<input type="checkbox"/> Job Eligibility Changed	
Process Indicator	Normal Processing	<input checked="" type="checkbox"/> Event Out of Sequence	05/09/2022
Election Source	Web	<input type="checkbox"/> Event Disconnected	
Excess Credit	Cash	<input checked="" type="checkbox"/> Available through Self Service	
Option Notify	05/24/2022	Election Rcvd	06/05/2022
Confirm Notify	11/08/2022	Confirm Rcvd	
Suppress Forms	Print Both Forms	<input type="checkbox"/> Finalize/Apply Defaults	
		Enrl/Print Days	0

Event Information		Eligibility Information	
ID	3	Empl Record	0
Status	Closed to Processing	Date	07/09/2022
Class	SHR 2 Month Service Anniversary	Effseq	0
Source	Passive Event Service Date	Priority	134
<input type="checkbox"/> Multi-Activity Indicator			

Processing Information		Eligibility Information	
Benefit Program	FTB WRS Eligible Non-LTE Employees	<input type="checkbox"/> Address Eligibility Changed	
Process Status	Finalized - Enrolled	<input type="checkbox"/> MultiJob Indicator Changed	
Status Date	07/15/2022	<input type="checkbox"/> Job Eligibility Changed	
Process Indicator	Normal Processing	<input type="checkbox"/> Event Out of Sequence	
Election Source	Online	<input type="checkbox"/> Event Disconnected	
Excess Credit	Cash	<input type="checkbox"/> Available through Self Service	
Option Notify		Election Rcvd	
Confirm Notify	11/08/2022	Confirm Rcvd	
Suppress Forms	Print Both Forms	<input type="checkbox"/> Finalize/Apply Defaults	
		Enrl/Print Days	0

HIR EVENT TIPS

- Always watch the 1st paycheck that includes benefit deductions
 - Central Benefits monitors all enrollment changes (including hires) and triggers and overrides retro as needed



HIRE FROM AFFILIATE (HFA) EVENT

- HFA event created when one of the following is used:
 - Hire from Affiliate action
 - Rehire within 30-day action reason (only use for WRS-covered employees)
- **HFA event does NOT open in eBN**
- If coming from another payroll center, **must submit paper apps within 30 days of hire**
 - Coverage effective 1st of month on or following HFA event date (does NOT matter what the transfer record says)
 - Employee limited to current enrollments and any plan not offered by former payroll center
 - ABBRs - must review all ABBRs to confirm for accuracy
 - ICI = ABBR should be based on new projected salary
 - SGL = ABBR should be based on coverage level on transfer record
 - If correcting ABBR, a ticket is required. Do NOT add a new row to correct.

SHR EVENT

- Used to move employee from Plan Type IU (immediate coverage) or IV (when employer contributes) health insurance to Plan Type IO health insurance.
 - Also used to enroll in Opt-Out Stipend (must receive paper application to apply for stipend within 30-day enrollment period)
- SHR events created twice a month
 - Created for all employees subject to the 2-month waiting period for health insurance
 - Agencies notified via email when events are available for entry
 - Enter elections prior to the pay period that pays for the coverage month

SHR EVENT (EMPLOYEE ENROLLS WHEN ELIGIBLE FOR EMPLOYER CONTRIBUTION)

Employee enrolls in Plan Type IV health coverage on HIR event

SHR event is created by Central Benefits


Benefits Specialist enters health (HSA if applicable) election on SHR event (Plan Type 10)


Enrollment sent to ETF via Health Interface

SHR EVENT AND LTES

- SHR events are **NOT** automatically created for WRS-covered LTES when they reach 6 months of service
- If you need to enroll an LTE in health or the OOS, you must manually create a SHR event with an event date = the date the employee has 6 months of service
 - Don't create the SHR event at the time of hire – wait until closer to when the employee has 6 months of service
- Query to identify LTES with 6 months of service: WI_BN_6_MONTH_LTE_SHR
 - Enter a timeframe range to find employees (ex: 7/1/XX – 7/31/XX will return all WRS eligible LTE's who will have 6 months of service between 7/1/XX and 7/31/XX)

WI_BN_6_MONTH_LTE_SHR

Ben Srv Dt +6 Months Begin 

Ben Srv Dt +6 Months End 

SHR EVENT

- The SHR event does NOT bring forward IU or IV health elections – must make an entry on the SHR event if the employee is enrolling in health
- Enter health and HSA (if applicable) – remember to select the correct HSA plan (don't enter “V” HSA option)
- If electing OOS, also enter Waive (W) for health insurance

Sched ID EM2017 Empl ID Ben Record 0 Event ID 3
Event Data 12/10/2022 2 Month Service Anniversary Excess Credit Rollover To Cash

Available Plans and Options 1 of 3

Plan Type 10 : Health

Option Code

Health Provider ID Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

[Enroll All](#)

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>
<input type="button" value="+"/>							<input type="button" value="-"/>

Plan Type 67 : Health Savings Account

Option Code

Annual Pledge

Employee Contribution Override

[Contribution Worksheet](#) [Special Requirements](#)

Plan Type A5 : Opt Out Stipend

Option Code

[Special Requirements](#)

EMPLOYEE LOSS OF COVERAGE (LST) EVENT

- LST event used when **employee** loses other coverage and has an opportunity to enroll with the State (ex. due to divorce, spouse losing job...)
 - If enrolled in Opt-Out Stipend, waive enrollment on LST event if employee enrolling in health insurance and event date is = 1st of month
 - If LST event date is something other than the 1st of the month, the OOS must be waived the 1st of the month prior to coverage going into effect. Example: LST event date = 7/16/xx, enter a 7/1 OOS event and waive enrollment
- Event Date = 1st day the employee should have coverage in STAR (review documentation for correct date)
- Make sure that the employee's marital status is correct
- If enrolling in health, agency must submit a ticket and attach supporting documentation
- **The elections won't be sent to ETF until after the event date** – ETF's system won't accept the enrollment prior to the event date
 - HSA enrollments will not be sent to Optum until after the 1st deduction is taken on payroll

OOS EVENT

- Enrollment in the Opt-Out Stipend plan is done on the SHR, OE or OOS event. The following occurs at enrollment:



Reminder – Never do any OOS entry directly in Additional Pay

OOS ENROLLMENT

- **Navigation to OOS Enrollment:** Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – **Simple Benefits**

- **Navigation to Additional Pay:** Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – **Create Additional Pay**

Simple Benefits

Employee ID Benefit Record Number 0

Plan Type A5 Opt Out Stipend

Coverage

Coverage Begin Date 01/01/2023

***Deduction Begin Date 12/18/2022**

Coverage Election

Elect Waive Terminate

*Election Date 11/16/2022

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

*Earnings Code OOS Opt Out Stipend

Effective Date

Effective Date 12/18/2022

Payment Details

*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 Disable Direct Deposit Prorate Additional Pay

OK to Pay

Applies To Pay Periods

First Second Third Fourth Fifth

OOS EVENT

- Will typically use the OOS event for new hires immediately eligible for the employer contribution towards health insurance who apply for the stipend
 - Must waive health insurance on HIR/HFA event and use the OOS to enroll in the OOS plan
 - Use SHR event for new hires with no prior service to enroll in OOS
- Agency should have a paper application from the employee indicating they want to apply for the Opt-Out stipend
- Event date = 1st of the month employee is eligible for employer contribution towards health
- If OOS entered retroactively, retro pay should automatically calculate any retro OOS pay owed
- [OOS Job Aid](#)

CANCELING COVERAGE



CAN EVENT (CANCEL/WAIVE COVERAGE)

The CAN event is used to:

- Cancel or reduce State Group Life Insurance coverage levels.
- Cancel ICI or drop back to the Standard ICI plan only (if enrolled in the Supplemental Plan).
- Cancel health insurance if premiums are taken **POST-TAX**. HSA will also open. Remember to waive HSA enrollment if the employee is enrolled in a HDHP plan and is canceling health coverage.

CAN EVENT

- **The CAN event date = 1st day of the month that the employee is canceling or reducing coverage.** The event date should ALWAYS be the 1st of a month.
- All plans open in the CAN event – even if the employee is not currently enrolled
- You can't waive supplemental plan coverage on the CAN event.
 - Delta Dental
 - DeltaVision
 - Accident Plan

CANCELATION RULES BY PLAN

- **Health** – can cancel coverage mid-year if premiums taken POST-TAX. Coverage ends on the end of the month in which the application is received. If received on the last day of the month, coverage ends on the last day of the month.
 - Example - if application received June 25th, coverage ends on June 30th and you will use a 7-I-XXXX CAN event to waive coverage effective July 1st.
 - Note – cancelations can only be prospective - NOT retroactive
- **State Group Life** – coverage ends at the end of the month in which the employer receives the application to cancel (or reduce) coverage
 - Example - if application received June 15, coverage will end on June 30th and you will use a 7-I-XXXX CAN event to waive coverage effective July 1st.
- **ICI** – cancelation is effective on the 1st of the month on or after the application receipt date
- **Supplemental Plans** – use OTH to cancel coverage – can cancel if enrolled in comparable coverage. If no other coverage, the employee must stay enrolled for the entire plan year.

ADDING NEW DEPENDENTS TO COVERAGE



ADDING NEW DEPENDENTS TO COVERAGE

- There are several events that allow you to add new dependents to coverage
 - BIR – birth
 - ADP – adoption
 - MAR – marriage
 - LOC – add dependent who has lost other coverage
 - MSN – add children due to medical support notice
 - PAC – add children due to paternity acknowledgement

BIR, ADP, AND MAR EVENTS

- Event Date = date of birth, adoption or marriage
- Use to enroll new dependents in coverage or enroll in new plans (if eligible)
- Must update marital status and marital status “as of” date for the employee for MAR events
 - This date must match the date entered for the spouse
- BIR/ADP event – agency must submit a ticket and attach the health application and birth certificate (single parent) or adoption paperwork
 - ETF will not process enrollment without it
 - The application can be accepted after 60 days and up to one year per IRS (this is only for a BIR/ADP event)
- Reminder: single/divorced/widowed parents are required to submit proof a maternity/paternity when adding a new baby
 - Proof of maternity/paternity could be required if there are other dependents

BIR, ADP, AND MAR EVENT

- State Group Life
 - All coverage levels will open on event – you need to determine what the employee can enroll in
 - If not enrolled in employee coverage – can enroll in Basic & 2 Units of Spouse & Dep
 - If enrolled, can add one level of employee coverage
 - Enroll in Spouse & Dependent or add unit of S&D coverage
 - Do not click the enroll all button to add the dependent – this information is not needed
 - Coverage effective on the 1st of the month following the 30-day enrollment period
 - **Must fax completed application to ETF** or agency contact
 - This includes completed Employer section of application with agent signature

BIR, ADP AND MAR EVENTS – CHANGING HEALTH PLANS

- If changing health plans and employee already covered
 - Add new dependent(s) effective date of birth, adoption or marriage
 - **Once that event finalizes, add another BIR/ADP/MAR event with an event date = 1st of month that new health plan coverage effective**
 - Use this event to change health plans
 - Health plan changes due to a life event must always be effective on the 1st of a month after receipt of application received within enrollment period
 - Example: Marriage date: 4-27-XX, application received 5-15-XX
 - 4-27-XX MAR event – add spouse
 - 6-1-XX MAR event - change health plan

LOC EVENT

- Use LOC event to **add a dependent** to coverage due to loss of other coverage
- Event Date = 1st day the dependent should have coverage under the plan
 - Review supporting documentation to confirm when previous coverage ended so you can enter the correct event date. It may not always be on the 1st of the month
- A ticket should be submitted with the supporting health application and loss of coverage documentation. ETF will not process enrollment without it.
- Do NOT use this event to enroll the employee in new benefit plans – this is only used to add dependents to current benefit plans
- Reminder: single/divorced/widowed parents are required to submit proof a maternity/paternity when adding new dependents

SPOUSE TO SPOUSE TRANSFERS – BOTH COVERED BY STAR – SPOUSE TERMINING EMPLOYMENT

1. If one spouse is termining employment, let their health term via the TER/RET event
2. Confirm that the termination date reported to ETF
3. If active employee has single health, use LOC event to add spouse and enroll in family coverage
 - Event Date = 1st day of month family coverage effective
4. If terminating employee has family coverage, use a LST event to enroll the active employee in family health insurance as the subscriber
 - Event Date – 1st day of month family coverage effective
5. Submit a ticket so Central Benefits can monitor MEBS

SPOUSE TO SPOUSE TRANSFERS – BOTH COVERED BY STAR – SPOUSE GAINING EMPLOYMENT AND ENROLLING IN HEALTH INSURANCE

1. If newly hired employee is picking up health insurance and spouse is already subscriber in MEBS:
2. Subscriber needs to submit application to cancel coverage. Agency should use an OTH event. Event date = effective date of spouse's health coverage (always the 1st of the month)
3. Confirm that the termination date reported to ETF for current subscriber
4. Submit a ticket so Central Benefits can monitor MEBS for term and to resend enrollment for newly hired employee
 1. This is a multi-day process (3-5 days)

SPOUSE TO SPOUSE TRANSFERS – BOTH COVERED BY STAR – SPOUSE LOSES ELIGIBILITY FOR COVERAGE/PREMIUM INCREASES

1. Use an OTH event to waive coverage for employee who will no longer be carrying coverage
 - Event date = 1st day of month employee will no longer have coverage as the subscriber
2. Confirm that the termination date reported to ETF
3. If other employee has single health, use LOC event to add the spouse and enroll in family coverage
 - Event Date = 1st day of month family coverage effective
4. If employee waiving coverage has family coverage, use a LST event to enroll the other employee in family health insurance as the subscriber
 - Event Date – 1st day of month family coverage effective

SPOUSE TO SPOUSE TRANSFER – 2 STATE EMPLOYEES - DIFFERENT PAYROLL CENTERS

1. If STAR employee is terming and moving coverage to spouse, no action needed
2. If STAR employee is losing eligibility for coverage or there is a premium increase, use a OTH event to waive coverage
 - Event Date = 1st of month coverage should be waived
3. If STAR employee has single coverage and is adding spouse, use LOC event
 - Event date = 1st of month coverage should be effective
4. If STAR employee enrolled in family plan under spouse, use LST event
 - Event date = 1st of month coverage should be effective

2 STATE EMPLOYEES MARRY (BOTH COVERED BY STAR) AND COMBINE HEALTH INSURANCE INTO FAMILY CONTRACT

1. Use OTH event to waive coverage for one employee
 - Event Date = 1st of month coverage waived
2. Wait until you see coverage waived in ETF
3. Use LOC event to add spouse to other employee's coverage
 - Event date = 1st of month family coverage effective

MSN EVENT (NATIONAL MEDICAL SUPPORT NOTICE)

- MSN event – use when you receive a National Medical Support Notice to add a child to insurance
- Event date = the earlier of the 1st of the month following receipt of the application or the date specified on the Notice
- A ticket should be submitted with the supporting health application and MSN Notice. ETF will not process enrollment without it.

PAC EVENT (PATERNITY)

- PAC event – use when a single father is establishing paternity
- Event Date =
 - Date of birth if supporting documentation is received and application is filed within 60 days of birth
 - 1st of month following receipt of application if paternity established outside of the initial 60-day window
- A ticket should be submitted with the supporting health application and proof of paternity. ETF will not process enrollment without it.

REMOVING DEPENDENTS FROM COVERAGE



REMOVING DEPENDENTS FROM COVERAGE

- There are a few events that allow you to remove a dependent from coverage:
 - AGE event – remove adult dependent children
 - DIV event – remove former spouse and their children
 - DOP event – remove dependent due to death
 - ADM event – use when nothing else applies
 - OTH Event – use to remove dependents who have other coverage

AGE EVENT

- See [Process for Overage Dependent](#) job aid for full details
- AGE event created by Central Benefits
- Used to remove a 26-year-old child from insurance plans
- Change in coverage is effective the first of the month following the dependent turning age 26.
- **Do NOT delete the dependent from STAR** – you will remove the child from coverage on the AGE event
- Run the Over Age Dependent Query (WI_BN_OVERAGE_DEPEND_RPT) on a monthly basis to identify the children who should be removed from coverage
 - Can also access query under Reports and Queries on Benefit Enrollments Tile
 - When you run the query, you must enter an “As of” date – the query will return all children who are 26 as of that date
- You can also review the Open Events Query

AGE EVENT

- Use AGE event to remove the child from all applicable plans
 - Remember to change the option code if the coverage level is changing
 - If this is the last dependent for health insurance, an application must be completed to change to single coverage. A ticket must be submitted with health application attached.
 - Can waive Spouse & Dependent (Plan Type 25) coverage if adult child is last dependent (must receive paper app and send copy to ETF)
- Agency must send COBRA notice to children for all affected plans
- Central Benefits sends out a reminder to agencies to run report at the start of each non-payroll week

AGE EVENT – DISABLED DEPENDENTS

- Disabled dependents will continue to appear on report until you indicate that the child is disabled on Update Dependent/Beneficiary Page
 - The box should be checked once the dependent is 26 or older
 - **(Navigation: Workforce Administrator – Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder – Update Dependent/Beneficiary)**
- Must also submit proof to insurers to keep child on coverage
 - Need to start this process several months before the child turns 26

Personal History

1 of 2 | View All

*Effective Date 11/20/2022

*Relationship to Employee Child

*Gender Male

*Marital Status Single

Disabled

+

-

Add a new row and check the box next to disabled

DISABLED DEPENDENTS - PROCESS

- **Disabled Dependent (child age 26 or older):** Coverage is effective the date the health plan approves the dependent's disabled status.
- The SUBSCRIBER must submit an application to their agency. The agency will create a ticket and Central Benefits will forward the request to ETF. ETF will forward to the health plan to have them complete their disability review process. When the health plan has reviewed the child's disability status, ETF will update the coverage accordingly.
- Documentation to support the disability is required as outlined in the [Life Change Events and Documentation Requirements \(ET-2846\)](#) online.
- See Chapter 5 of the [Health Administration Manual](#) for details

REMOVING UNDER AGE 19 DEPENDENT PROCESS

- ETF has provided guidelines below on removing a dependent minor (under age 19) on a health insurance contract.
 - If the employee is enrolled in Badger Care and if the Badger Care authorization/release of information path is followed it may potentially be retroactive to remove the dependent, but all the steps outlined below need to occur and then a decision is made by the Office of Strategic Health Policy.

ETF requires from the employee:

- ET-2301 health application
- ET-7414 Authorization to Disclose Medical Information - <http://etf.wi.gov/publications/et7414.pdf>
- Letter of explanation of why subscriber wants to drop dependent(s)
- Have any claims been denied? Explain
- Documentation from Medicare-that shows member number and when coverage began and which plan they are enrolled in.
- Information from the subscriber (member) of the relationship to the dependent. Does the dependent live with the subscriber? If not, explain
- Copy of Letter from State of WI-regarding benefits

- Once the employer would have the documents and letter the request should be sent to:

ETFSMBSTARINSURANCE@ETF.WI.GOV

DIV EVENT

- Use to remove a former spouse (and their kids) due to divorce from all applicable plans
 - Can waive Spouse & Dependent (Plan Type 25) coverage if no more dependents to cover (must receive paper app and send copy to ETF)
- Do NOT use this event to enroll an employee in coverage due to divorce – a LST event is used in this situation
- State Group Life (employee coverage) does NOT open in DIV event
 - Use CAN event if canceling employee coverage (must receive paper app)
- Event date = **the date the COBRA notice is sent to the ex-spouse**. Coverage ends at the end of the month in which the COBRA notice is sent
 - **Note:** if removing final dependent for life insurance purposes, DIV event date must be in the month of the actual divorce. Will need to create a 2nd DIV event to remove former family members from health insurance if COBRA not sent in same month of divorce.
- Must update the employee's marital status to divorced with the actual date of divorce.
 - Do NOT change the employee's marital status to single

DIV EVENT

- **Do not create the DIV event until COBRA forms sent to former dependents**
- Do NOT delete the dependent from STAR – you will remove the former dependents from coverage on the DIV event
- Change relationship of former dependents with an effective date of the date of divorce
 - Former spouse must be changed to “ex-spouse”
 - Former stepchildren children must be changed to “Ex Stepchild”
- Agency must send COBRA notices to all former dependents (can send one COBRA notice if all dependents are listed on form)
- A ticket should be submitted with the supporting health application and COBRA form. ETF will not process enrollment without it.

DIV EVENT

- Always add a row when changing the relationship of a dependent. **Never over-write the current relationship (history will be lost)**

Personal History

1-2 of 2 | View 1

*Effective Date	11/16/2022	← Date of divorce	+ -
*Relationship to Employee	ExSpouse		
*Gender	Male		
*Marital Status	Divorced		
<input type="checkbox"/> Disabled			

*Effective Date	01/01/2020		+ -
*Relationship to Employee	Spouse		
*Gender	Male		
*Marital Status	Married	As of 06/22/2019	
<input type="checkbox"/> Disabled			

As of

DOP EVENT

- Use to remove a covered dependent who has died from applicable plans
 - Can waive Spouse & Dependent (Plan Type 25) coverage if adult child is last dependent (must receive paper app and send copy to ETF)
- Do NOT use to enroll an employee in coverage due spousal/DP death – a LST event is used in this situation
- Event date = date of dependent death
- If spouse dies, update the employee's marital status and marital status “as of” date to the date of spouse death
- Coverage for the dependents ends at the end of the month in which the death occurs
- Remove the former dependent from all applicable plans
 - State Group Life does not open on DOP event – use CAN event if canceling Spouse & Dependent coverage
- **Do NOT delete the dependent** – enter the date of death on the dependent's profile

DOP EVENT – ADD DATE OF DEATH

Name Address **Personal Profile**

Person ID

Personal Profile | < << 1 of 1 >> > | View All

Dependent/Beneficiary ID 01

*Date of Birth 03/01/1977

Birth Location

Birth Country

Birth State

Riders/Orders exist

[Riders/Orders](#)

Personal History | < << 1 of 1 >> > | View All

*Effective Date 01/01/2020

*Relationship to Employee Spouse

*Gender Male

*Marital Status Married

Disabled

As of 06/22/2019

As of

OTH EVENT

- The OTH event is used to cancel employee coverage or remove a dependent (19 and older in most cases) from coverage if he or she is eligible for other coverage.
- **The OTH event date = 1st day of the month that the employee is canceling coverage or that the dependent should be removed from coverage.** The event date must ALWAYS be the 1st of a month.
- **Reminder** – if enrolled in an HDHP plan and the employee is waiving health coverage, you also need to waive enrollment in the HSA plan.
- A ticket should be submitted with the supporting health application and proof of other coverage. ETF will not process enrollment without it.

OTH EVENT

The following plans will open in the OTH event:

- Health Insurance
- Health Savings Account
- Delta Dental PPO
- Vision

Note: Even if the employee is NOT enrolled in one of the above plans, the plan will open up in the OTH event. If not enrolled, the only option that will appear is the Waive option. You should not “Waive” coverage for a plan in which the employee is not enrolled. Only waive coverage or remove the dependent from plans in which they are enrolled.

CHANGING PLANS DUE TO MOVE FROM SERVICE AREA

MOV Event

MOV EVENT

- Used when changing health insurance due to a move from the service area
- Event date = application receipt date
- Coverage change is effective first of the month following application receipt date
- If enrolled in an HSA, make sure to change the HSA election as well

COMMUTER, HSA, AND FSA CHANGES



COM AND HSA EVENTS

COM Event	HSA Event
Used to change pre-tax parking or transit election	Used to change HSA election
Event Date = application receipt date	
Effective Date = 1 st of month on/following event date (<i>event rule will set effective date based on event date</i>)	
Annual elections is split evenly over remaining pay periods (deductions taken 24x/year)	
Change must always be prospective (will always be effective on 1 st of month)	
Never enter an annual election that is less than the current YTD contributions when trying to stop future deductions – since change is prospective and effective on the 1st of a month, may need to account for 1 or 2 more deductions before change is effective	
Never enter a value in the Employee Override Amount Box – if the employee wants to change HSA contribution for a short amount of time, enter a POTT to override regular elections	

COM & HSA EVENTS – REVIEWING YTD CONTRIBUTIONS

- Review on Enrollment Page
- Workforce Administrator Homepage – Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – Spending Accounts

Review in COM or HSA Event

Plan Type 6V Parking (Before Tax)

Coverage

*Coverage Begin Date 03/01/2019 *Deduction Begin Date 02/17/2019

Coverage Election Elect Waive Terminate *Election Date 03/01/2019

Benefit Program WRS Eligible Non-LTE Employees App Received Date


Benefit Plan PARKBT Parking (Pre-Tax) Option Code 1

Contribution Level		Account Information	
Annual Pledge	\$2750.00	FSA Account Status	Active
Credit Rollover Included in Pledge	\$0.00	Contributions YTD	\$1250.00
Employee Contribution Override	Monthly	Employee Status	Active

Plan Type 6V : Parking (Before Tax)

Option Code 1 Parking (Pre-Tax) (PARKBT)

Annual Pledge \$2,750.00

Employee Contribution Override  Monthly

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
(\$2,750.00	- \$1,250.00) /	12 =	\$125.00	= \$270.83 Monthly

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

COM AND HSA – STOP DEDUCTIONS – KEEP ACCOUNT ACTIVE

- Parking/Transit – employee wants to stop contributions but keep account active to continue to receive reimbursement
- HSA – employee wants to stop contributing but continues to receive employer contribution
- Do NOT waive coverage – change annual election to YTD contributions
 - Note: You may need to take into account another payroll deduction based on the effective date of the change (always effective the 1st of a month)

Plan Type 6V : Parking (Before Tax)

Option Code Parking (Pre-Tax) (PARKBT)

Annual Pledge

Employee Contribution Override Monthly

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="\$1,250.00"/>	<input type="text" value="\$1,250.00"/>	12	<input type="text" value="\$0.00"/>	\$0.00 Monthly

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

HEALTHCARE & DEPENDENT CARE FSA CHANGES

- Employees can only change their FSA annual election if there is a qualifying event
- Change the employee FSA election on the event associated with the qualifying event (ex. BIR, MAR, DIV....)
- If there is no applicable event, use an ADM event and create a ticket to explain why the change is being made
 - Event date = 1st of the month in which the new annual election or coverage is in effect
 - The application should be attached to the ticket for review


ELG, EOI AND DISABILITY PREMIUM WAIVERS



ELG EVENT – CHANGE TO ELIG CONFIG FIELD

- Whenever an update is made to an Elig Config Field, a row must be added with an Action Reason = Data Change/Benefits Eligibility Config
- Use this row to update the applicable Elig Config Field
- Creates ELG event



Work Location Details ?


*Effective Date 11/20/2022 


Effective Sequence 0


HR Status Active

Payroll Status Active

Go To Row  

*Action Data Change 

Reason Benefits Eligibility Config 

*Job Indicator Primary Job 

Benefits Administration Eligibility ?

BAS Group ID 

Elig Fld 1 30_GENERAL 

Elig Fld 2 ICICATGRY1 

Elig Fld 3 

Elig Fld 4 

Elig Fld 5 ICIPRW 

Elig Fld 6 

Elig Fld 7 

Elig Fld 8 

Elig Fld 9 

ELG EVENT – CHANGE TO ELIG CONFIG FIELD

- NEVER change an Elig Config Field without using the correct Action Reason – risk of termination of benefits if other reasons used
- Common reasons for ELG event
 - WRS Lookback
 - Eligibility for Disability Premium Waivers
 - WRS Category Change
 - Need to correct ICI Category when approved for ICI through Evidence of Insurability
 - Employee loses employer share after 3 months due to LOA

DISABILITY PREMIUM WAIVERS (ELG EVENT)

- When you receive notice that an employee is eligible for a disability premium waiver for ICI, you need to enroll the employee in the ICI Premium Waiver Plan
- This will stop deductions from coming out (or arrears generating) while the employee is eligible for a premium waiver
- Central Benefits will not approve POTTs for ICI refunds unless the ICI premium waiver values are on job data
 - This helps with the ICI annual process
- If the ICI premium waiver is more than 30 days old, the ELG event will open and close overnight
 - You will need to create a ticket to have the event reopened

ADDING ICI PREMIUM WAIVER ELIGIBILITY TO JOB

- Add a row to job data
 - Effective date = the deduction begin date of the coverage month in which the person is first eligible for a premium waiver
 - Action = Data Change
 - Reason = Benefits Eligibility Config
- You will need to update Elig Fld 5 on the Benefits Program Participation Page = ICIPRW
- Update the ICI ABBR with a row equal to the effective date on job data for the ICI premium waiver. The ABBR rate should equal the current rate (do not change the current rate).

ADDING ICI PREMIUM WAIVER ELIGIBILITY TO JOB

- Example: Waiver effective 7/1/xx

Work Location Details ?

*Effective Date 06/19/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Data Change

Reason Benefits Eligibility Config

*Job Indicator Primary Job

Go To Row + -

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1 30_GENERAL

Elig Fld 2 ICICATGRY1

Elig Fld 3

Elig Fld 4

Elig Fld 5 ICIPRW

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Elig Cfg Value	Description
B50SUP	SGL 50% SUPP GRANFATHERED
ICI&SGLWAV	ICI & SGL PREMIUM WAIVER
ICIPRW	ICI PREMIUM WAIVER
SGLPRW	SGL PREMIUM WAIVER

Add the applicable value to Elig Fld 5 – if just eligible for ICI waiver, enter ICIPRW

ENROLL IN ICI PREMIUM WAIVER PLAN ON ELG EVENT

- This will create an ELG event
- Use this event to enroll employee in ICI Premium Waiver Plan

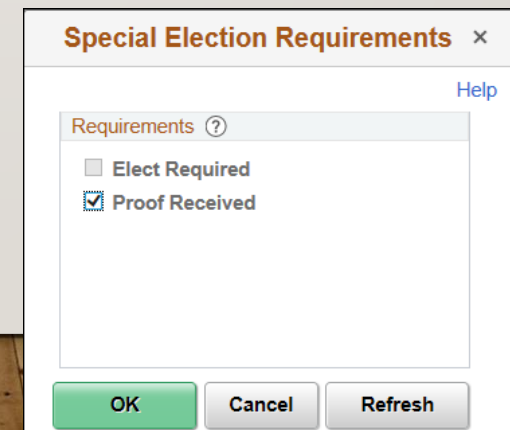


Plan Type 30 : ICI Standard

Option Code ICI Premium Waiver (ICIPRW)

[Special Requirements](#)

- Click on Special Requirements and check the box next to Proof Received. Click OK.



Special Election Requirements

[Help](#)

Requirements

Elect Required

Proof Received

ENROLLMENT IN ICI PREMIUM WAIVER PLAN

- Once enrolled in the premium waiver plan, retro benefits will refund any premiums paid in error
 - Need to monitor because if arrears were generated and deleted, the system may try to refund premiums that were never actually paid

The screenshot displays a web application interface for plan enrollment. It features several sections:

- Plan Type:** Shows "Plan Type 30" and "ICI Standard".
- Coverage:** Includes fields for "*Coverage Begin Date" (07/01/2019) and "*Deduction Begin Date" (06/09/2019), both with calendar icons and refresh symbols.
- Coverage Election:** Contains radio buttons for "Elect" (selected), "Waive", and "Terminate", along with an "*Election Date" field (06/20/2019) and an "App Received Date" field.
- Benefit Program:** Displays "FTB" and "WRS Eligible Non-LTE Employees".
- Benefit Plan:** Shows "ICIPRW" and "ICI Premium Waiver".
- Option Code:** Displays "13".

Navigation elements include search icons, pagination (1 of 1), and "View All" links.

EMPLOYEE LOSES ELIGIBILITY FOR ICI PREMIUM WAIVER

- When the employee is no longer eligible for the premium waiver, you repeat this process but you create the ELG event by adding a job row and DELETING the value in Elig Fld 5
- A sequenced row should be used if the effective and reinstatement date are the same
- You will then re-enroll the employee in the regular ICI plan using the ELG event

EVIDENCE OF INSURABILITY (EOI) – LIFE INSURANCE

- Typically, EOI approval for life insurance is entered by Central Benefits Staff
 - All Securian-related correspondence comes to Central Benefits before it is sent out to the agencies
 - A copy of the approval (or denial) is sent to agency
 - The deduction begin date is set to generate the correct retro premium due
 - If you look on the employee's Update Event Status page, you will see an EOI event with an event date = the coverage effective date (based on EOI approval notice)

EOI - ICI

- Typically, EOI approval for ICI is sent to and entered by the agency
- Event used to enter enrollment dependent on whether or not the correct ICI category is already in Elig Fld 2 on Job (EOI vs. ELG event)
 - If Elig Fld 2 is populated correctly, use EOI event (Event Date = 1st day of coverage month)
 - If Elig Fld 2 is NOT populated correctly, add a row to Job to enter correct Elig Fld 2 value and enter election on ELG event
 - **Effective date of Job Row** = the deduction begin date of the coverage month in which the person will first be enrolled in ICI
 - **Action** = Data Change, Reason = Benefits Eligibility Config
 - Enter correct Elig Fld 2 value on this job row on the Benefits Program Participation Page
 - **DO NOT use the Action Reason of Data Change – ICI Category Change** (this is only used for the ICI annual update process)
- Remember to add ICI ABBR effective the deduction begin date of the 1st active coverage month

LEAVE OF ABSENCE EVENTS



LEAVE OF ABSENCE EVENTS

LOA	LML	LPS	MIL	RFL	MED
Created when Leave of Absence entered on Job	Created when Military Leave of Absence Entered in Job	Manual event used to Lapse benefits for non-military LOA	Manual Event used to lapse benefits for <u>military</u> LOA	Created when Return from Leave entered on Job + can be Manual Event to re-enroll employee in lapsed benefits	Manual event to re-enroll employee in health insurance upon return from military leave only
Not used to manage benefits – auto-closes on event date	Can be used to lapse benefits that will be lapsed as of 1 st of month on or after event date (otherwise use MIL)	Event Date = 1 st of month coverage is lapsed. Can have multiple LPS events	Event Date = 1 st of month coverage is lapsed. Can have multiple MIL events	<p>JOB-created RFL Use to re-enroll if coverage effective on the 1st of the month on or following the return from leave date</p> <p>Manual RFL Event Date = 1st of month coverage should be effective</p>	Event date = date employee returns to work. Upon return from <u>military leave</u> , eligible to re-enroll in health effective 1 st day of return to work

TERMINATION EVENTS



TERMINATION EVENTS

- There are several termination related events
 - TER event – created by termination job action
 - RET event – created by retirement job action
 - TRA event – created by transfer to affiliate job action
 - TWB event – created by terminated with benefits job action
 - DEA event – created by employee death job action
- Query to identify terminated employees:
WI_BN_TERM_RETIRE
- See the [Benefits at Termination job aid](#) for full details

TER, RET AND TRA EVENTS

- All benefits end at the end of the month in which the employee terminates
- Recommend that agency finalizes event as soon as possible
 - Benefits deductions will continue to come out until event finalized
 - Retro benefits will refund any premiums taken in error once event is finalized
 - DO NOT request a POTT for termination-related refunds
 - Central Benefits generates State Group Life related refunds
 - Note – Central Benefits looks for terms that occurred in the past 3 months to generate refunds – if retroactive term (> 3 months ago) is entered, agency will need to request a refund via ticket
- Event will auto-close 5 days after event date

FINALIZING TERM RELATED EVENTS

1. Go to Workforce Administrator Homepage – Benefits Administration Dashboard – Benefits Enrollment Tile – Event Processing Folder – Update Event Status
2. Check box next to Finalize/Apply Defaults and Save
3. Benefits Administration will finalize termination overnight
4. Never change the Process or Event Status

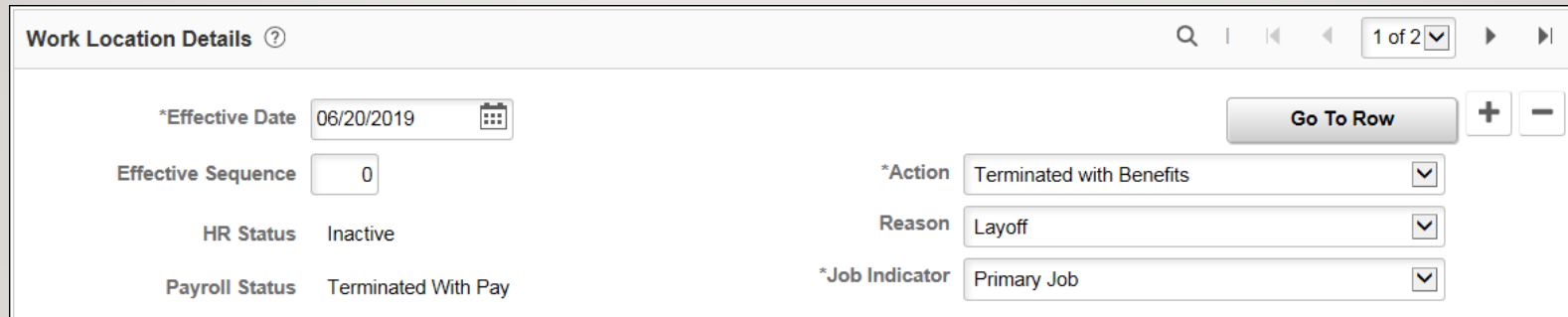
Event Status Update ? 1 of 13

Schedule ID EM2017	<input type="checkbox"/> Address Eligibility Changed
Event Date 06/24/2019 <input type="checkbox"/> Event Disconnected	<input type="checkbox"/> MultiJob Indicator Changed
Event ID 5	<input type="checkbox"/> Job Eligibility Changed
Event Class RET Retirement	<input type="checkbox"/> Event Out of Sequence
Event Priority 120	<input checked="" type="checkbox"/> Finalize/Apply Defaults
Benefit Program FTB	Print Option Print Both Forms <input type="checkbox"/>
Process Status Prepared	*Process Normal Processing <input type="checkbox"/>
Action Source Job Data Change	*Event Status Open for Processing <input type="checkbox"/>

Don't change me

TERMINATED WITH BENEFITS (TWB) EVENT

- The TWB event is created when a Terminated with Benefits action is used on the job



The screenshot shows a 'Work Location Details' form with the following fields and values:

Field	Value
*Effective Date	06/20/2019
Effective Sequence	0
HR Status	Inactive
Payroll Status	Terminated With Pay
*Action	Terminated with Benefits
Reason	Layoff
*Job Indicator	Primary Job

Additional UI elements include a search icon, navigation arrows, a '1 of 2' dropdown, and 'Go To Row' buttons with '+' and '-' symbols.

- Terms all benefits EXCEPT health at the end of the month of termination
- Used when a person is laid off or appealing a termination and health insurance should remain active
- This event should NOT be used in any other situation except the ones listed above
 - Note: If someone is retiring in lieu of layoff, use Action Reason = Retirement/Retirement in Lieu of Layoff. Will also create TWB event that can be used to keep health active for the first 3 months after layoff.

TWB EVENT

- TWB event will open and health election will pull forward.
 - If health is continuing, finalize event (remember to collect applicable premiums)
 - If health is not continuing, there was no need to use TWB event and regular TER event should be used

Event Data 06/20/2019 Terminated (SGH continues) Excess Credit Rollover To Cash

Available Plans and Options ? 1 of 2

Plan Type 10 : Health

Option Code 208 Quartz-UW Health w/ Dental (QRZ) (Employee Only)

Health Provider ID Previously Seen

Special Requirements

TERMING HEALTH AFTER TWB EVENT USED

- Once the employee is no longer maintaining health insurance, must add a row to job to term health insurance
 - Event Date = last day of month health is effective
 - Action = Termination, Reason = End Benefits
- Finalize the TER event that is created – this will terminate health insurance

Work Location Details ?

1 of 11

*Effective Date 09/30/2019

Effective Sequence 0

HR Status Inactive

Payroll Status Terminated

Go To Row + -

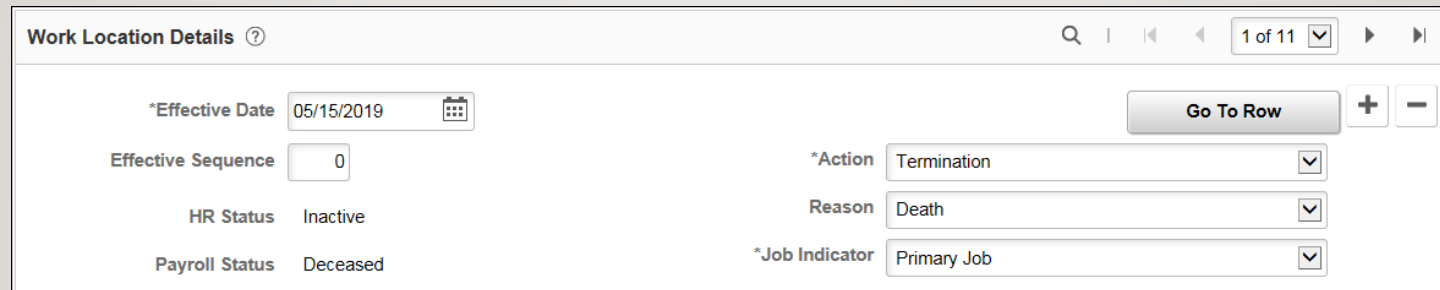
*Action Termination

Reason End Benefits

*Job Indicator Primary Job

EMPLOYEE DEATH (DEA) EVENT

- When an employee dies, a termination due to death must be entered on the job record



The screenshot shows a 'Work Location Details' form with the following fields and values:

*Effective Date	05/15/2019	Go To Row	+	-
Effective Sequence	0	*Action	Termination	▼
HR Status	Inactive	Reason	Death	▼
Payroll Status	Deceased	*Job Indicator	Primary Job	▼

- The effective date of the job change is the **DAY AFTER** the employee dies
- When the death is entered, the following message appears





Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)
Date of Death on personal data gets updated for the current transaction.

OK Cancel

EMPLOYEE DEATH (DEA) EVENT

- The update to Job automatically updates the employee's profile and a DEA event is created

Biographic Information

Date of Birth	05/06/1972		Years	47	Months	0
Date of Death	05/14/2019					
Birth Country	USA		United States			
Birth State						
Birth Location					<input type="checkbox"/>	Protect Person Data

- The DEA event auto-finalizes the night that it's created and terms all benefits at the end of the month in which the employee died

ADM EVENT



ADM EVENT

- ADM event should be used sparingly (always try to use “real” event)
- **A ticket is required when using an ADM event. Applicable applications should be attached to the ticket.**
- Common uses for the ADM event
 - FSA Changes that don't correlate to a life event
 - Late It's Your Choice enrollments
 - Enrolling in Access Plan to escrow sick leave credits month prior to retirement

ADM EVENT

- Event date is almost always the 1st of the month
 - Event date = 1st of the month that new coverage is effective or 1st of the month that coverage is waived
 - When using ADM event, coverage is effective on the event date that you enter on the BAS Activity Table

BENEFIT INTERFACES

HEALTH INSURANCE INTERFACE

Tips for making sure your health insurance enrollments make it through the interface

DATA ELEMENTS THAT PREVENT ENROLLMENT FROM GOING THROUGH INTERFACE

- If any of the following data elements are missing on the employee or covered dependents, the enrollment will **NOT** go through the interface:
 - Gender
 - Date of birth
 - SSN (required for employee, spouse, dependents over age 1)
 - Relationship of dependent to the employee
 - Marital status of “Unknown” on employee or any covered dependents
 - If married or divorced must have date in marital status as of date
 - If single, don’t put a date in the marital status as of date
 - Recommend running the Data Integrity Report to find some of the missing employee data elements
(**Navigation:** Workforce Administrator Homepage – Payroll Dashboard – Payroll Processing Tile – Reports & Queries Folder – Data Integrity Audit Report)

WHEN IS A HEALTH INSURANCE ENROLLMENT SENT FOR A NEW HIRE?

- Employee immediately eligible for ER contribution
 - Enroll in Plan Type 10 immediately – as soon as enrollment is finalized, sent to ETF
- Employee has no prior WRS service
 - If the employee enrolls immediately (Plan Type 1U) – as soon as enrollment is finalized, sent to ETF within 2 days
 - If employee enrolls when eligible for ER contribution (Plan Type 1V) – Enrollment is sent on interface 2-days after completion of SHR event.

FUTURE DATED EVENTS

- Future-dated new hire coverage is immediately sent if effective date less than 30 days in the future
- You can't enter a future dated birth (BIR), adoption (ADP), marriage (MAR),
 - Don't enter these types events prior to the event date
 - Can not be sent to ETF prior to the effective date (ETF will not process the enrollment)
 - Loss of coverage (LST OR LOC)...can be entered in advance, but won't be sent prior to effective date
- Spouse to spouse transfers
 - Can't do both on the same day
 - Need to term coverage first – verify that ETF is updated
 - Then enter the coverage under the new spouse

WHEN ARE HEALTH TERMINATIONS SENT ON INTERFACE?

- Once the termination event is finalized (you see a termination row on health insurance in base benefits), the termination is sent to ETF that evening
- Retirements – system automatically sends sick leave balance and wage rate when RET event terminates health insurance
 - Establishes initial annuitant health insurance contract
 - Agency must still submit Accumulated Sick Leave Certification to ETF
 - Be sure employee has met eligibility criteria to retire (age 55 or older - non-protective, age 50 or older – protective)

DAY IN THE LIFE OF A HEALTH INSURANCE ENROLLMENT – NEW HIRE

Day 1

Employee enrolls in health through eBenefits (election in “Entered” status)

3:45pm

Benefits administration finalizes all enrollments in “Entered” status
All finalized health enrollments sent through health interface to ETF

7:00pm

ETF starts its nightly batch process to ingest all enrollments

Day 2

1am – ETF’s batch process is complete and ETF generates and sends enrollment files to health plans, Navitus and Delta Dental

8am or later (typically) – agency can verify coverage in ETF’s system (MEBS)

Day 2 morning and beyond – health plans, Navitus, Delta Dental update their systems (health plan systems can take several days to update their systems)

IMPORTANCE OF EVENTS

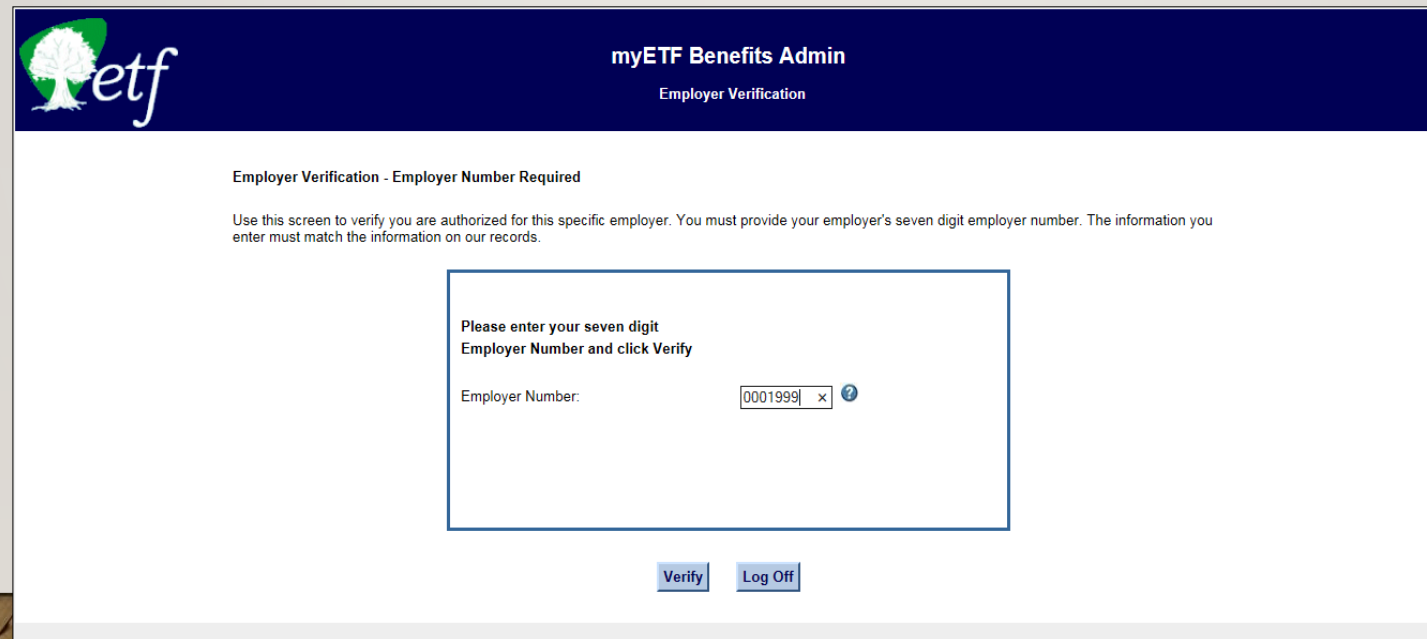
- Always use the most “appropriate” event when entering a health enrollment
- Events are mapped to enrollment codes in ETF’s system
- Use an ADM event to enroll in/change health enrollment as a last resort
 - ***If you use an ADM event, must submit a ticket to let us know the reason for the enrollment so we can adjust the reason on the interface accordingly***


OTHER ITEMS THAT CAUSE DELAY

- Enrollment rejects on interface and must be manually corrected
- Lack of supporting documentation
 - Once a week the agency should be checking the “Waiting for ETF Approval” in MEBS
 - Example: Divorce, Maternity/Paternity acknowledgement, adoption, etc.
 - Agencies should submit a ticket with the supporting health application and documentation. ETF will not approve pending request without it.
- Please refer to ETF’s Life Change Events and Documentation Requirements web page for details: <https://etf.wi.gov/its-your-choice/life-change-events-and-documentation-requirements>

HEALTH CONTRACTS WAITING FOR ETF APPROVAL

- Log into [MyETF Benefits](#)
- Enter 0001999 as the Employer Number



 **myETF Benefits Admin**
Employer Verification

Employer Verification - Employer Number Required

Use this screen to verify you are authorized for this specific employer. You must provide your employer's seven digit employer number. The information you enter must match the information on our records.

Please enter your seven digit
Employer Number and click Verify

Employer Number:

[Verify](#) [Log Off](#)

HEALTH CONTRACTS WAITING FOR ETF APPROVAL

- Hover over “MyMembers” and choose “MyMembers Requests”



- Again, enter the employer number 0001999

Employer Specific Function - Employer Number Required

Use this screen to specify the employer whose data you would like to access. You must provide the employer's seven digit employer number. You must have the authority to access the employer's data.

Please enter the seven digit Employer Number and click Verify

Employer Number:

HEALTH CONTRACTS WAITING FOR ETF APPROVAL

- You will click verify when the next screen comes up to search ALL
- Change the Request Status to “Waiting for ETF Approval” and click search
- This will bring up everyone in your agency that has a contract that is “Waiting for ETF Approval”. The Reason for Request column will be a hint as to why they are waiting for ETF approval

Employer Specific Function - Employer Number Required

Use this screen to specify the employer whose data you would like to access. You must provide the employer's seven digit employer number. You must have the authority to access the employer's data.

Please enter the seven digit Employer Number and click Verify

Employer Number:

myETF Benefits Admin
myMembers Requests

etf.wi.gov

myEmployerInfo myMembers Health Life Disability WRS Other Benefits Help Log Off

Employer Number: 0001999 Employer Name: CENTRAL PAYROLL ALL

Request Status: **WAITING FOR ETF APPROVAL** Benefit Program: Request: Request Date: (MM/YYYY)

Reason for Request: Max Rows: Employer Action Date: (MM/YYYY)

Employer Contact: Request From Date: (MM/DD/YYYY) Request To Date: (MM/DD/YYYY) Member ID:

ALL OTHER INTERFACES



SUPPLEMENTAL PLAN INTERFACES

- Delta Dental, DeltaVision, and Accident Plan
 - Full file sent to vendor weekly on Monday night
- Optum
 - Sent weekly on Friday

ICI AND STATE GROUP LIFE INTERFACES

- ICI – sent Monday of non-payroll weeks for prior or current coverage months
- State Group Life (2 files sent weekly on Monday)
 - Enrollment file - new hire enrollments entered via eBN only
 - Change file (termination, retirements, deaths, LOA coverage lapse, data corrections related to DOB, gender, name, SSN)
- ★ • **If paper app received, agency MUST fax completed application to ETF (ETF requirement) – this information not sent on an interface**

WRS PERIODIC INTERFACE

- Sent weekly on Friday
- Sends hire, terms, retirements, transfers, and demographic changes
- Hire/rehire transactions are sent immediately
 - Unless following a termination in the same business unit
 - Hires associated with a transfer to a different business unit are sent immediately
- Terms and retirements have a 20-day lag from the effective date before being sent
 - Reason: Capture the last reportable hours, earnings, and contributions
- Less than 30-day employment durations are accounted for in the WRS Periodic interface.



QUESTIONS?