

# BENEFITS ADMINISTRATION TRAINING

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PART THREE: HOW ELIGIBILITY IS DETERMINED IN THE SYSTEM

# HOW ELIGIBILITY IS DETERMINED IN THE SYSTEM

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BENEFITS ELIGIBILITY - JOB DATA, BENEFIT SERVICE DATES, ELG FIELDS, BENEFIT PROGRAMS

BENEFIT PLANS BY PROGRAM

ABBRS

# BENEFITS ELIGIBILITY OVERVIEW

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## Manual Process

- Entry of all Benefit Eligibility Fields and Benefits Service Date
- At hire, must enter:
  - Elg Fld 1 = WRS eligibility
  - Elg Fld 2 = If WRS eligible, must enter ICI eligibility
  - Elg Fld 3 = eligibility for ER contribution towards health (must enter for LTEs)
- Complete a prior WRS service check and determine correct Benefit Service Date

## PeopleSoft Process (Benefits Administration)

- Assigns employee to correct benefit program
- Determines eligibility for specific benefits

## Both

- Annual Benefits Base Rate (ABBR) for Life and ICI
  - Should manually enter these values at hire
  - If nothing entered, system will automatically assign a value
  - Must be entered on all active jobs
  - WRS-covered LTEs – agency must always enter ABBRs for this group of employees

# BENEFITS ELIGIBILITY – PERSONAL INFORMATION

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- Data elements required for system to determine benefits eligibility:
  - Date of birth
  - Gender (also required for pay calculations and WRS reporting)
- Data elements required for vendor interfaces:
  - Marital Status and As of date
    - If enrolling in health insurance, marital status can NOT be unknown (it will error out on health interface)
    - Make sure DOM does not equal the hire date
    - If Single, confirm there is an “as of” date listed
  - Social Security Number (also required for WRS reporting) – must be entered for spouse and all eligible dependents over the age of 1

# BENEFITS ELIGIBILITY – PERSONAL INFORMATION

- Personal information is included in almost all navigation collections. Below is an example of one of the navigations.
- **Navigation:** Workforce Administrator Homepage – Benefits Administration Dashboard - Benefits Enrollments Tile – Employee Data Folder – **Modify a Person**

The screenshot displays a web application interface for managing employee data. On the left is a navigation menu with the following items: Event Processing, Review Employee Benefits, Employee Data, Job Data, Modify a Person (highlighted with a red box), Review HR/Job/Payroll Data, Search by National ID, PeopleSearch, and Reports & Queries. The main content area is titled 'Personal Data' and contains a search form. The form includes a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for 'Empl ID', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each followed by a text input field. Below these fields are three checkboxes: 'Include History' (checked and highlighted with a red box), 'Correct History', and 'Case Sensitive'. At the bottom of the form are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'. A red arrow points from the 'Include History' checkbox to the text below.

**Note:** Check the box next to “Include History” to view all historical information for the employee



# MODIFY A PERSON

- Several fields in Modify a Person impact benefits

Biographical Details | Contact Information | Regional | Wisconsin Opt-In/Opt-Out

Person ID 100L

Name: [Search] | 1 of 1 | View All

Effective Date: 04/15/2016 [+ -]  
Format Type: English  
Display Name: [View Name]

**Biographic Information**

Date of Birth: 07/08/1989 [Calendar] | Years: 29 | Months: 10  
Date of Death: [Calendar]  
Birth Country: USA [Search] | United States  
Birth State: [Search]  
Birth Location: [Text] |  Protect Person Data

**Biographical History**

\*Effective Date: 04/15/2016 [+ -]  
\*Gender: Female [Dropdown]  
\*Highest Education Level: A-Not Indicated [Dropdown]  
\*Marital Status: Single [Dropdown] | As of: 04/15/2016 [Calendar]  
Language Code: English [Dropdown]  
Alternate ID: [Text] |  Full-Time Student

**National ID**

*Country	*National ID Type	National ID	Primary ID	
USA [Search]	Social Security Number [Dropdown]	[Text]	<input checked="" type="checkbox"/>	[+ -]

**Annotations:**

- Red box around Date of Birth: 07/08/1989. Arrow points to text: "Drives SGL Premium + eligibility for ICI".
- Red box around \*Gender: Female. Arrow points to text: "Required for Interfaces".
- Red box around \*Marital Status: Single. Arrow points to text: "Required for Interfaces".
- Red box around National ID Type: Social Security Number. Arrow points to text: "Required for Interfaces".

# BENEFITS ELIGIBILITY

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# BENEFITS ELIGIBILITY – JOB DATA

- There are several different pieces of job data that drive benefits eligibility and enrollment opportunities:
  - Action/Reason
  - Empl Class
  - Benefits Service Date (BSD)
  - Values on Benefits Program Participation Page (elg fields)



# BENEFITS ELIGIBILITY – ACTION/REASON

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Empl ID  
Employee Empl Record 0

Work Location Details ? 3 of 3

\*Effective Date 05/14/2018 Go To Row + -

Effective Sequence 0

HR Status Active

Payroll Status Active

Position Number Override Position Data

Position Entry Date 05/14/2018  Override Position Entry Date  
 Position Management Record

Regulatory Region USA United States  
Company WIS State of Wisconsin  
Business Unit 43500 Health Services

\*Action Hire  
Reason Hire No WRS  
\*Job Indicator Primary Job

History 📄

**Every action/reason is attached to a benefits event - the event determines any enrollment opportunities**

# BENEFITS ELIGIBILITY – ACTION/REASON

Hire									
↓ Every Employment Instance should only ever have ONE (1) Hire Row. Every subsequent "Hire" on the same Employment Instance should be processed as a Rehire ↓									
Action Description	Action Code	Reason Description	Reason Code	Effective Date to Use	Use Explanation	Payroll Status	HR Status	Benefit Status	BAS Action
If the employee is hired via a recruitment in TAM do not process the personnel transaction manually. Use manage hires.									
Hire	HIR	Hire No WRS	NWR	See Below	Used when an employee is hired for the first time in PeopleSoft or a new employment instance is added and employee has no prior WRS service (either have never been covered by the WRS or have taken a separation benefit and no longer have any WRS service) and they are not coming from an affiliate.  Comp rate and tax location are captured on this row.  Review and update Continuous Service Date and Benefit Service Date if needed.	Active	Active	Active	HIR
Hire	HIR	Hire Prior WRS	PWR	See Below	Used when an employee is hired in PeopleSoft for the first time or a new employment instance is added and employee has prior WRS state service (they have NOT taken a separation benefit) and they are not coming from an affiliate.  Comp rate and tax location are captured on this row.  Review and update Continuous Service Date and Benefit Service Date if needed.	Active	Active	Active	HIR
<b>Hire Event Notes</b> <ul style="list-style-type: none"> <li>Hire Effective Date:               <ul style="list-style-type: none"> <li>New hires are effective when the employee reports to work.</li> <li>Hires <b>without a break in service or break less than 30 days</b> (e.g. new employment instances) are effective the Sunday, beginning of PP.</li> </ul> </li> <li>If the employee is WRS-eligible, these job actions will open a HIR event in eBenefits. The benefits service date on the employment data page in job data must be correct when the HIR event prepares to ensure employee's eligibility for the employer contribution towards health insurance is determined correctly.</li> <li>Hire action/reasons do NOT drive the employee's eligibility for the employer contribution towards health insurance - the benefits service date on job data - employment data page does.</li> <li>If the benefit eligibility fields or benefits service date are not correct when hire entered, submit a ticket for correction. The HIR event will not prepare correctly if the information is wrong.</li> </ul>									
<b>Hire Action Continued on Next Page</b>									

- The [Action/Action Reason Job Aid](#) outlines which benefit event is tied to which action/action reason

BAS Action = Benefit Event Created

# BENEFITS ELIGIBILITY – JOB INFORMATION TAB

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The screenshot displays the 'Job Information' tab for an employee. The interface includes the following elements:

- Tabs:** Work Location, Job Information (highlighted), Job Labor, Payroll, Salary Plan, Compensation.
- Employee Info:** Empl ID, Employee, Empl Record 0.
- Job Information Section:**
  - Effective Date: 04/17/2016
  - Effective Sequence: 0
  - HR Status: Active
  - Payroll Status: Active
  - Action: Hire
  - Reason: Hire from Affiliate
  - Job Indicator: Primary Job
  - Job Code: 21105
  - Entry Date: 04/17/2016
  - Supervisor Level: Supervisor ID (input field)
  - Reports To: 312540S
  - Regular/Temporary: Regular
  - Empl Class: Permanent (dropdown menu)
  - Regular Shift: Not Applicable
  - Classified Ind: Surplus – A
- Standard Hours Section:**
  - Standard Hours: 40.00
  - FTE: 1.000000
  - Adds to FTE Actual Count? (checkbox)

Two red callout boxes provide additional context:

- Drives benefit program+ benefit plans:** Points to the 'Empl Class' dropdown menu.
- Review to determine eligibility for ER contribution towards health:** Points to the 'FTE' field.

Work Location Job Information Job Labor Payroll Salary Plan **Compensation**

Empl ID 1000  
Employee Empl Record 0

Compensation Details 1 of 9

Effective Date 04/28/2019  
Effective Sequence 1  
HR Status Active  
Payroll Status Active

Action Rehire  
Reason Rehire within 30 days  
Job Indicator Primary Job

Go To Row

Current

Compensation Rate 28.17 USD \*Frequency H Hourly

Comparative Information

Pay Rates

Annual	58,593.600000	USD
Monthly	4,882.800000	USD

Default Pay Components

Pay Components 1-1 of 1

*Rate Code	Seq	Comp Rate	Currency	Frequency	Points	Percent	Rate Code Group
1 NAHRLY	0	28.170000	USD	H			

Calculate Compensation

Review to determine ABBRs and eligibility for Supplemental ICI

# BENEFITS ELIGIBILITY – COMPENSATION TAB

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# BENEFITS ELIGIBILITY – EMPLOYMENT DATA

**Employment Information**

Employee Empl ID 1000  
Empl Record 0

**Organizational Instance** ?

Organizational Instance Rcd	0	Original Start Date	10/20/2014	<input type="checkbox"/> Override	
Last Start Date	04/28/2019	First Start Date	10/20/2014		
Termination Date		Years	Months	Days	
Org Instance Service Date	10/20/2014	<input type="checkbox"/> Override	4	7	17

**Organizational Assignment Data** ?

**Instance Record**

Last Assignment Start Date	04/28/2019	First Assignment Start	10/20/2014		
Assignment End Date		Years	Months	Days	
Home/Host Classification	Home	<input checked="" type="checkbox"/> Override	4	7	17
Company Seniority Date	10/20/2014				
Benefits Service Date	10/20/2014				
Seniority Pay Calc Date	10/20/2014				
Probation Date					
Professional Experience Date					
Business Title	Assistant District Attorne				

USA

Job Data **Employment Data** Earnings Distribution Benefits Program Participation

**Drives vacation accrual**

**Drives eligibility for ER contribution towards health insurance. If not correct when HIR event created, must create a ticket.**

# BENEFITS ELIGIBILITY – BENEFITS SERVICE DATE

- Benefits Service Date = WRS Begin Date (State WRS service only). Drives eligibility for the employer contribution towards health insurance premium.
  - For LEG and other employees not subject to 2 month waiting period for health – must adjust benefits service date to at least 2 months prior to hire date to ensure employee immediately eligible for employer contribution on HIR event (Plan Type 10)
- The action reasons of Hire/Prior WRS or Hire/No Prior WRS **DO NOT** determine eligibility for the employer contribution towards health insurance – the benefits service date is the ONLY driver
- The benefits service date must be correct when the HIR event is prepared to determine eligibility for the employer contribution towards health insurance correctly
  - If the benefit service date is not correct when the HIR event is prepared, the wrong benefit plans will appear to the employee (Plan Type 10 v. 1U and 1V)
  - If the benefit service date is not correct when HIR event is prepared must create a ticket to correct and reprocess the HIR event.



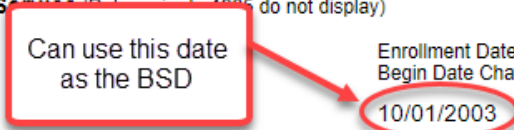
# BENEFITS ELIGIBILITY – BENEFITS SERVICE DATE

- If there are breaks in WRS service but employee has at least 2 months of WRS service, you can enter the original WRS begin date for state service – you DO NOT need to adjust for breaks in service
  - If the employee took a WRS Separation benefit and there is no longer any WRS service on record, must reset benefits service date to rehire date.
- If employee was already in STAR but was never under the WRS, you must adjust the benefits service date to the correct WRS start date when the person goes under the WRS

Previous Service (Employees hired before 10/01/2005 do not display)

State		Enrollment Date/ Begin Date Change	Termination Date
0001-131		10/01/2003	02/17/2006
0001-160	00	02/19/2006	09/07/2007
0001-131	40	03/19/2018	05/14/2019
0001-108	32	05/28/2019	

**Message: Six months state service.**



# BENEFITS ELIGIBILITY – BENEFITS SERVICE DATE

- If an employee has multiple active jobs, the benefits service date must match on all employment records
- Troubleshooting
  - If benefits service date was wrong when a HIR or other event prepared and the wrong health insurance options are created, create ticket
  - Central Benefits will re-process the event to pick up the correct eligibility

# BENEFITS ELIGIBILITY – BENEFIT PROGRAM PARTICIPATION PAGE

**Benefit Program Participation**

Employee ..... Empl ID 100  
Empl Record 0

**Benefit Status** ? 3 of 3

Benefit Record Number 0

Effective Date 09/17/2018  
Effective Sequence 0 Action Hire  
HR Status Active Reason Hire No WRS  
Payroll Status Active Job Indicator Primary Job

\*Benefits System Benefits Administration

Annual Benefits Base Rate  **Do NOT enter ABBR here**

**Benefits Administration Eligibility** ?

Group ID IYC  
Elig Fld 1  **Must enter Elig Fld 1 for all employees=WRS Eligibility**  
Elig Fld 2 ICICATGRY1 **If covered by WRS, must enter a value in Elig Fld 2 at hire = ICI Eligibility**  
Elig Fld 3   
Elig Fld 4   
Elig Fld 5   
Elig Fld 6   
Elig Fld 7   
Elig Fld 8   
Elig Fld 9

**Benefit Program Participation Details** ? 1 of 1 | View All

\*Effective Date 09/17/2018 Currency Code USD  
\*Benefit Program FTB WRS Eligible Non-LTE Employees

Job Data Employment Data Earnings Distribution **Benefits Program Participation**

# BENEFITS ELIGIBILITY – BENEFIT PROGRAM PARTICIPATION PAGE – WRS-COVERED LTE

- **Note:** If employee is not eligible for WRS (Elg Fld 1 = NOTELIG\_XX), all other Elg Flds should be BLANK

The screenshot displays the 'Benefit Program Participation' page. At the top, there is a header with 'Benefit Program Participation' and 'Empl ID' and 'Empl Record 0'. Below this, the 'Benefit Status' section shows details for a benefit record with an effective date of 02/03/2019. The 'Benefits Administration Eligibility' section contains several fields: BAS Group ID, Elig Fld 1 (30\_GENERAL), Elig Fld 2 (ICICATGRY1), Elig Fld 3 (LESSTHAN50), Elig Fld 4, Elig Fld 5, Elig Fld 6, Elig Fld 7, Elig Fld 8, and Elig Fld 9. A red box highlights the 'Elig Fld 3' field with the text: 'If WRS-covered LTE, must put a value in Elig Fld 3 - this drives the correct ER contribution towards health & puts the person in correct benefit program. If blank, no event will prepare for this group.' Below this, the 'Benefit Program Participation Details' section shows an effective date of 11/29/2015 and a benefit program of 'P50' with the description 'Less than 50% FTE PostTax LTE'. At the bottom, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'.

**Benefit Program Participation**

Julie Perry Employee      Empl ID 100102743  
Empl Record 0

**Benefit Status** 1 of 13

Benefit Record Number 0      Go To Row  
Effective Date 01/02/2022  
Effective Sequence 0      Action Pay Rate Change  
HR Status Active      Reason General Wage Adjustment  
Payroll Status Active      Job Indicator Primary Job

\*Benefits System Benefits Administration      Current  
Benefits Employee Status Active  
Annual Benefits Base Rate      USD      ACA Eligibility Details

**Benefits Administration Eligibility**

BAS Group ID  
Elig Fld 1 30\_GENERAL      Elig Fld 2 ICIBASSUP6      Elig Fld 3  
Elig Fld 4      Elig Fld 5      Elig Fld 6  
Elig Fld 7      Elig Fld 8      Elig Fld 9

**Benefit Program Participation Details** 1 of 1 | View All

\*Effective Date 08/20/2017      Current  
\*Benefit Program FTB      WRS E

Job Data      Employment Data      Benefits Program Participation

Do NOT manually update the benefit program - the system makes the update when event is processed

# BENEFITS ELIGIBILITY – BENEFIT PROGRAM PARTICIPATION PAGE

FIELDS YOU DON'T UPDATE MANUALLY



# BENEFIT ELIGIBILITY FIELDS

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Definitions



# BENEFIT ELIGIBILITY FIELDS SUMMARY

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Field	Use	Required
1.	If eligible for WRS, enter WRS category If not eligible for WRS, tracks rehired annuitant status or history of WRS participation	Yes – for all employees
2.	ICI eligibility (Category + Eligibility for Supplemental Plan)	Yes – for all WRS-covered new hires and anyone enrolled in plan
3.	Eligibility for employer contribution towards health insurance	Yes – for WRS-covered LTEs
4.	Tracks if ICI was offered through deferred enrollment	Yes – for anyone offered ICI Category 3-6 during deferred enrollment
5.	Tracks eligibility for disability premium waivers + enrollment in 50% SGL supplemental plan	Yes – if applicable

# BENEFITS ELIGIBILITY – ELG FLD 1

- **Elg Fld 1 field MUST be completed for all employees.** You must enter the employee's WRS category or the reason the employee is not eligible for the WRS.
- If this is a new hire and the employee has a WRS category listed in Elg Config Field 1, the system will also automatically enroll the employee in WRS during the overnight batch process.
  - Note: the WRS enrollment occurs on the night of the HIR event date

# BENEFITS ELIGIBILITY – ELG FLD 1 – WRS ELIGIBLE

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- If eligible for the WRS, the agency must determine and enter the correct value in Elg Fld 1 to enroll the employee in the correct WRS category.
- Protective employees – the contribution rates differ by agency so be careful when enrolling an employee in a protective WRS category

Values if Eligible for the WRS	
Elig Field 1	Values if Eligible for the WRS
30_GENERAL	30 - General
31_WCSREPT	31 - Court Reporter
32_EXECRET	32 - Executive
33_PROTECT	33 - Protective (all except DNR, DOA, Military Affairs, DOT)
33_PRTCTXO	33 - Protective Military Affairs, DOA (as of 12-11-16), and DOT (as of 12-6-21)
33_PRTCTXX	33 – Protective (DNR Only)
33_DOTGRDF	33 – Protective (DOT Grandfathered)
40_TEACHER	40 - Teacher
41_EXECTEA	41 – Executive Teacher
42_EDUCSUP	42 – Educational Support Personnel
45_WCSSUPR	45 - Supreme Court Justice
46_EXECLEG	46 – Legislative Officers, Const Officers, DAs
47_WCSAPPL	47 - Appellate Judge
48_WCSCIRC	48 - Circuit Court Judge

## BENEFITS ELIGIBILITY – ELG FLD I NOT ELIGIBLE FOR WRS

- If someone is NOT eligible for the WRS, enter the code that applies
- Do NOT use NOTELIG – enter the real reason the person is not eligible and indicate if they have prior WRS service or a rehired annuitant
  - Accurate completion of the field is critical for the WRS Lookback process to work

Values if NOT Eligible for the WRS	
Elig Field I	Definition
NOTELIG	Not Eligible Default – NEVER use for anyone with an employee relationship
NOTELIGLEG	For use by Legislature Only - Legislature-Annuitant Elected
NOTELIG_90	Not WRS eligible - No WRS service before 7/1/11
NOTELIG_91	Not WRS Eligible - Has WRS service before 7/1/11
NOTELIG_92	Rehired Annuitant termed before 7/2/13
NOTELIG_93	Rehired Annuitant termed after 7/1/13 and had WRS service prior to 7/1/11
NOTELIG_94	Rehired Annuitant termed after 7/1/13 and had NO WRS service prior to 7/1/11
BENELIG_95	In Milwaukee Retirement System – eligible for benefits but not covered by the WRS

# BENEFITS ELIGIBILITY – ELG FLD I

## TROUBLESHOOTING

- If eligible for the WRS and the wrong WRS code is entered in Elg Fld I....
  - Submit a ticket so Central Benefits can correct the job record
  - If WRS enrollment reported to ETF incorrectly, Central Benefits will correct the enrollment record
  - If deductions were taken under the wrong WRS category, Central Benefits will work with you to correct
  - Do NOT add a row to job to correct initial entry error

# BENEFITS ELIGIBILITY – ELG FLD 2 - ICI

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If eligible for WRS, a value **MUST** be in this field for all new hires

At conversion, Elg Fld 2 was populated only for employees who were enrolled in ICI at the time of conversion – the value corresponded to their ICI enrollment at the time of conversion

Elg Fld 2 is updated (as needed) during the ICI Annual Update and Deferred Enrollment period

- A new job row is added for every update



# BENEFITS ELIGIBILITY – ELG FLD 2 - ICI

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During the annual ICI Deferred Enrollment Period, if someone was NOT enrolled in ICI but was potentially eligible to enroll, Elg Fld 2 was updated based on their ICI eligibility



.....so, there are some employees who were active at conversion who have a blank Elg Fld 2

- They weren't enrolled in ICI at conversion and they weren't eligible for ICI deferred enrollment
- This is okay – Elg Fld 2 should be blank for this group of employees

# BENEFITS ELIGIBILITY – ELG FLD 2 - ICI

- For new hires, enter the ICI category and the plan for which the employee is eligible
  - If projected salary is > \$64,000, indicate the employee is eligible for supplemental coverage
- The value in Elg Fld 2 drives what ICI options are available for enrollment
- If Elg Fld 2 is blank, an option to enroll in ICI will NEVER open.
- Hire from Affiliate (HFA) – if hired from another payroll center, contact other agency to get value ASAP. If wrong at time of entry, create a ticket to correct.

Standard ICI Only	Standard + Supplemental ICI
ICICATGRY1 - ICI Category 1	ICIBASSUP1 - ICI Category 1
ICICATGRY2 - ICI Category 2	ICIBASSUP2 – ICI Category 2
ICICATGRY3 - ICI Category 3	ICIBASSUP3 – ICI Category 3
ICICATGRY4 - ICI Category 4	ICIBASSUP4 – ICI Category 4
ICICATGRY5 - ICI Category 5	ICIBASSUP5 – ICI Category 5
ICICATGRY6 - ICI Category 6	ICIBASSUP6 – ICI Category 6

# BENEFITS ELIGIBILITY – ELG FLD 3

## HEALTH INSURANCE PREMIUM

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- This field is used for a variety of reasons. This field must be completed if:
  - The employee is a WRS-covered LTE
  - The employee has a pre-tax premium waiver on file
  - The employee is required to pay the full cost of health insurance because they have lost the employer contribution towards the premium due to leave of absence or layoff
    - Do NOT enter I00EMPPAID code in field for new employees not yet eligible for ER contribution towards health
  - The employee is required to pay the less than half time rates health insurance premium

# BENEFITS ELIGIBILITY – ELG FLD 3 - VALUES

Elig Config Field 3	Definition
100EMPPAID	<p>Employee pays 100% of health insurance premium – this must be entered for employees no longer eligible for the employer contribution towards health insurance due to leave of absence or layoff.</p> <p><b>NOTE – Do NOT use this for employees who elect early health insurance before eligible for the employer contribution towards health insurance.</b></p>
ALLPOSTTAX	<p>This should ONLY be used for employees who file a pre-tax premium waiver (ET-2340).</p> <p>If an employee is an LTE, insurance premiums will automatically be taken post-tax.</p>
LESSTHAN50	<p>Use when employee must pay the less than half time rates for health insurance. You will need to enter this for all WRS-covered LTEs who have only 1 appointment or non-LTE employees who work less than 50%.</p>
LTEFULLSGH	<p>Use when WRS-covered LTE is eligible for the full employer contribution towards health insurance (employee has 2 or more concurrent LTE appointments and works at least 50%)</p>

# BENEFITS ELIGIBILITY – ELG FLD 4 ICI DEFERRED ENROLLMENT

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- Used to track when employee offered coverage through ICI deferred enrollment.

Elig Fld 4 Value	Description
ICICAT3	Eligible to Enroll through ICI Category 3
ICICAT4	Eligible to Enroll through ICI Category 4
ICICAT5	Eligible to Enroll through ICI Category 5
ICICAT6	Eligible to Enroll through ICI Category 6



# BENEFITS ELIGIBILITY – ELG FLD 5 PREMIUM WAIVERS & GRANDFATHERED SGL

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- Used to identify employees who carry the 50% Supplemental Life plan and employees who have an active Life or ICI disability premium waiver

Elig Config Field 5	Definition
B50SUP	Grandfathered employees who have SGL 50% Supplemental Plan
ICI&SGLWAV	Employee has both ICI & SGL Premium Waivers
ICIPRW	Employee has ICI premium waiver
SGLPRW	Employee has SGL premium waiver



# BENEFIT PROGRAMS

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FTB, LTE, P50, L50, EEP, DEF

# BENEFITS ELIGIBILITY – BENEFIT PROGRAMS

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Benefit programs organize all the benefit options, coverage codes, deductions, rates, eligibility rules, and event rules into one place. **PeopleSoft will automatically assign employee to a Benefit Program** based on eligibility criteria.

All the information entered in Job Data and on the Benefit Program Participation page is analyzed by the system and the system determines the correct Benefit Program for the employee.

# BENEFITS ELIGIBILITY – BENEFIT PROGRAMS (NON-LTES)

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Benefit Program	Code	Description
<b>Full-Time Employee (non-LTE)</b>	<b>FTB</b>	<ul style="list-style-type: none"> <li>• Full Time Regular Benefit Program (this applies to the majority of employees)</li> <li>• Assigned to this benefit program if:               <ul style="list-style-type: none"> <li>• There is a WRS category in Elig Config 1</li> <li>• Eligible for full employer contribution for health</li> <li>• Premiums for health insurance are pre-tax</li> <li>• Elig Config Field 3 is blank</li> </ul> </li> </ul>
<b>Pays &lt; ½ time rates for health insurance (non-LTE)</b>	<b>L50</b>	<ul style="list-style-type: none"> <li>• Like the Full-Time Benefits program except employee is required to pay the less than half time rates for health insurance</li> <li>• Premiums for health insurance are pre-tax</li> <li>• Elig Config Field 3 = LESSTHAN50</li> <li>• Employee is NOT an LTE</li> </ul>

# BENEFITS ELIGIBILITY – BENEFIT PROGRAMS (NON-LTES)

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Benefit Program	Code	Description
<b>Employee required to pay full cost of health insurance (non-LTE)</b>	<b>EEP</b>	<ul style="list-style-type: none"> <li>• Like the Full-Time Benefits program except employee required to pay full cost of health insurance (employees on extended LOA or layoff)</li> <li>• Premiums are taken pre-tax</li> <li>• Elig Config Field 3 = 100EMPPAID</li> <li>• This is NOT for employees who take early health insurance coverage – there is a health insurance code to identify this</li> </ul>
<b>All premiums taken post-tax (pre-tax premium waiver on file) (non-LTE)</b>	<b>APT</b>	<ul style="list-style-type: none"> <li>• Same benefit plans as the full-time employee (FTB) benefit program</li> <li>• All premiums taken post tax (<b>this is only for employees who file a pre-tax premium waiver</b>)</li> <li>• Elig Config Field 3 = ALLPOSTTAX</li> </ul>

# BENEFITS ELIGIBILITY – BENEFIT PROGRAMS (LTES)

Benefit Program	Code	Description
Pays < ½ time rates for health insurance (LTE)	P50	<ul style="list-style-type: none"> <li>Like the L50 except premiums are taken post-tax</li> <li>Elig Config Field 3 = LESSTHAN50</li> <li>Employee is an LTE</li> <li>FSA plans not in this benefit program</li> </ul>
LTE who is eligible for the full employer contribution towards health insurance (LTE)	LTE	<ul style="list-style-type: none"> <li>LTE eligible for the full employer contribution towards health</li> <li>Premiums taken post-tax</li> <li>Elig Config Field 3 = LTEFULLSGH</li> <li>FSA plans not in this benefit program</li> </ul>
Default	DEF	<ul style="list-style-type: none"> <li>Default Benefit Program for ineligible employees (ex. LTES not covered by WRS, Rehired Annuitants...)</li> <li>New hires assigned to this program before Benefits Administration puts the employee in the correct Benefit Program</li> <li>The only plans included in this program are Deferred Compensation, Parking/Transit, Healthcare &amp; Dependent Care FSA (if not an LTE).</li> <li>Assigned to this program if one of the “NOTELIG” values in Elig Config 1</li> </ul>



# BENEFIT PROGRAMS - TROUBLESHOOTING

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## The system didn't assign employee to correct benefit program

- Create a ticket – there is likely an error in one of the fields that drives eligibility, and the hire or other event needs to be reprocessed to pick up the correct eligibility

## A new hire is assigned to the DEF benefit program but shouldn't be....

- The employee is assigned to the correct benefit program once the HIR event is prepared. If the HIR event isn't open yet (it's still on the BAS Activity Table), you need to wait until the HIR event is open for entry to confirm the correct benefit program

# BENEFIT PLANS BY PROGRAM

Benefit Plan	Benefit Plan Code	DEF	FTB	L50	P50	LTE	EEP	APT
Health*	10		X	X	X	X	X	X
Health (early coverage – no ER contribution)*	1U		X	X	X	X		X
Health (wait until eligible for ER contribution)*	1V		X	X	X	X		X
Life (Basic & Supplemental)	20		X	X	X	X	X	X
Life (Additional)	21		X	X	X	X	X	X
Life (Spouse & Dependent)	25		X	X	X	X	X	X
ICI - Standard	30		X	X	X	X	X	X
ICI – Supplemental	31		X	X	X	X	X	X
Delta Dental PPO	13		X	X	X	X	X	X
DeltaVision	14		X	X	X	X	X	X

# BENEFIT PLANS BY PROGRAM, CON'T

Benefit Plan	Benefit Plan Code	DEF	FTB	L50	P50	LTE	EEP	APT
Securian Accident Plan	22		X	X	X	X	X	X
HSA	67		X	X	X	X	X	X
Healthcare FSA/LPFSA	60	X (if not LTE)	X	X			X	X
Dep Care FSA	61	X (if not LTE)	X	X			X	X
Parking (Pre-Tax)	6V	X	X	X	X	X	X	X
Transit (Pre-Tax)	6Y	X	X	X	X	X	X	X
WRS	7W		X	X	X	X	X	X
Sick Leave Credits	7Y		X	X	X	X	X	X
WDC (Pre-Tax)	49	X	X	X	X	X	X	X
WDC (Post-Tax)	43	X	X	X	X	X	X	X

# ANNUAL BENEFITS BASE RATE (ABBR)

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State Group Life (LIFE & Age70)

Income Continuation Insurance

WRS

# ANNUAL BENEFITS BASE RATE (ABBR)

- ABBR = coverage level (drives premium)
- LIFE ABBR = 1 unit of State Group Life Coverage
  - AGE70 – permanent coverage level for Basic Coverage once employee enrolled in Age 70 life plan
- ICI ABBR = ICI coverage level based on plan rules (never > \$120,000)
- WRS ABBR = WRS earnings for calendar year (used as basis of coverage during ICI deferred enrollment period)
  - **Do not manually enter this ABBR; this will get updated during the ICI Annual Update period**



# ANNUAL BENEFITS BASE RATE (ABBR)

- Benefits specialist should enter all applicable ABBRs for new WRS-covered hires (LIFE & ICI)
  - Effective date of ABBR at hire should be the hire date
- If ABBR not entered, automated process will create ABBR
  - Amount will NOT be correct for WRS-covered LTEs – must always enter ABBRs for this group of employees
    - If active in multiple jobs, must enter ABBRs for all active empl records
  - Amount will NOT be correct for employees who were a hire from affiliate – need to manually update the LIFE ABBR
  - Amount may not be correct for employees who have an even hourly rate
    - Example:  $\$25.00 \times 2080 = \$52,000$ , system may round it up to \$53,000. The correct value is \$52,000.
  - All ABBRs will be updated centrally on an annual basis based on the specific plan rules

# HOW TO CALCULATE ABBR

- SGL and ICI - annual projected salary rounded to the next \$1000
  - If paid hourly rate:  $(\text{Hourly Rate}) \times (2080) \times (\text{FTE} - \text{if less than full-time})$ 
    - Take result and round to next highest \$1000
  - If paid monthly rate:  $(\text{Monthly Rate}) \times (12) \times (\text{FTE} - \text{if less than full-time})$ 
    - Take result and round to the next highest \$1000
- ICI - do NOT enter an ABBR greater than \$120,000, even if the employee's salary exceeds this amount

# ABBR CHANGES

- ICI: There are certain times when you do need to update the ABBR for ICI.
  - See the [ICI ABBR Rules document](#) for full details
    - Most common = permanent FTE change
  - If an employee is going on an unpaid LOA, enter a new effective dated ICI ABBR row with the same ABBR amount and an effective date of the first day of the unpaid LOA.
    - This will allow you to easily identify employees who were on an unpaid LOA and the system will NOT update their ABBR the following year.
- LIFE: There are no changes in ABBR that the agency should be making.
  - If you think the LIFE ABBR should be changed, please submit a ticket.

# ABBR FOR TRANSFERS OR HIRES FROM OTHER PAYROLL CENTERS

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## Movement within STAR

- ABBRs should NOT change
- Only change ICI if there is also an FTE change

## Hire from other payroll centers

- LIFE = based on transfer record
- ICI = based on new projected salary

# ABBRs FOR LTES

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- When an LTE goes under WRS, agency must ALWAYS enter ABBRs manually to all active jobs
  - Auto-population of ABBR does not work correctly because LTEs don't have an FTE (they are often assigned a \$1000 ABBR)
- Central Benefits has monitoring queries that look for \$1000 ABBRs but they can also be run by agencies
  - CEN\_BN\_ABBR\_1000\_ICI – pulls LTE's who are ENROLLED in ICI with ABBR of 1000
  - CEN\_BN\_ABBR\_1000\_LIFE - pulls LTE's who are ENROLLED in SGL with ABBR of 1000



Benefits Administration Benefit Enrollments

**Event Processing**

- Review BAS Activity
- Open Events Query
- Perform Election Entry
- On Demand
- Update Dependent/Beneficiary
- Review ABBRs
- Update ABBRs**
- Maintain Flags
- Update Event Status
- Employee Event Detail
- Review Employee Benefits
- Employee Data

### Update ABBRs

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

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Include History  Correct History  Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

# ABBR - NAVIGATION

- Navigation: Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Enrollment Tile – Event Processing Folder – **Update ABBRs**

**Reminder** – if multiple active empl records appear in Search Results, add ABBRs to all active empl records

Search Results

View All 1-2 of 2

Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name
<a href="#">XXXXXXXXXX</a>	0	<a href="#">XXXXXXXXXX</a>	<a href="#">XXXXXXXXXX</a>	<a href="#">XXXXXXXXXX</a>	(blank)	(blank)	N
<a href="#">XXXXXXXXXX</a>	1	<a href="#">XXXXXXXXXX</a>	<a href="#">XXXXXXXXXX</a>	<a href="#">XXXXXXXXXX</a>	(blank)	(blank)	N

# ABBR - ENTRY

- New Hires - Add a row for each type of ABBR
- Effective date of ABBR for new hires should be the hire date

**Update ABBRs**

Employee ID                      Empl Record    0                      Name

Annual Benefit Base Rates  | << < 1 of 1 > >> | View All

\*Annual Benefits Base Rate Type    WI Income Continuation Ins

**Annual Benefit Base Rates**

	*Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update		
1	02/27/2022 <input type="text"/>	<input type="text" value="50000.000"/>		03/14/2022	<input type="button" value="+"/>	<input type="button" value="-"/>

**Update ABBRs**

Employee ID                      Empl Record    0                      Name

Annual Benefit Base Rates  | << < 1 of 1 > >> | View All

\*Annual Benefits Base Rate Type    WI State Group Life Insurance

**Annual Benefit Base Rates**

	*Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update		
1	02/27/2022 <input type="text"/>	<input type="text" value="50000.000"/>		03/14/2022	<input type="button" value="+"/>	<input type="button" value="-"/>

# ABBR – REVIEWING ABBRS

- Navigation: Workforce Administrator Homepage – Benefit Administration Dashboard – Benefit Enrollment Tile – Event Processing Folder – **Review ABBRs**
- Can use the “As of Date” to see historical ABBRs

The screenshot shows the 'Review ABBRs' search interface. On the left is a navigation menu with options: Review BAS Activity, Open Events Query, Perform Election Entry, On Demand, Update Dependent/Beneficiary, Review ABBRs (highlighted), Update ABBRs, Maintain Flags, Update Event Status, Employee Event Detail, Review Employee Benefits, Employee Data, and Reports & Queries. The main area is titled 'Review ABBRs' and contains a search form. It includes a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for Empl ID, Empl Record, Name, Last Name, Second Last Name, Alternate Character Name, and Middle Name, each followed by a text input field. There is also a 'Case Sensitive' checkbox. At the bottom of the search form are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

The screenshot shows the results page for 'Review ABBRs'. It displays the search criteria: Employee ID 100135339, Empl Record 0, and Name Lindsay Stanley. There is an 'As Of Date' field set to 03/25/2022 and a 'Refresh Search' button. Below this is a section titled 'Review Annual Benefit Base Rates' with a table of results. The table has columns for Base Rate Type, Effective Date, Annual Benefits Base Rate, Currency Code, and Date of last update. There are 3 results shown, with a '1-3 of 3' indicator.

Base Rate Type	Effective Date	Annual Benefits Base Rate	Currency Code	Date of last update
PRIM	03/14/2022		USD	03/14/2022
ICI	02/27/2022	50,000.000		03/14/2022
LIFE	02/27/2022	50,000.000		03/14/2022

# ABBR TIPS

- Employee enrolls in State Group Life or ICI outside of new hire enrollment period (EOI, employer error...)
  - Review to see if there is an ABBR for the plan (or verify that it's correct)
  - If no ABBR, enter an ABBR with an effective date = **the deduction begin date of the coverage month that coverage is effective**
    - If ICI will be effective on 3-1-22, enter an ABBR effective 2-13-22 (deduction begin date of March coverage)
    - If Life will be effective on 3-1-22, enter an ABBR effective 1-16-22 (deduction begin date of March coverage)
- Retroactive ABBR changes do NOT trigger retro benefits



The end

A rectangular sign with a black border and a white background. The sign features the text "The end" in a white serif font, centered horizontally. On either side of the text is a white decorative flourish. The sign is mounted on a light gray wall, and a wooden floor is visible at the bottom of the image.