State of Wisconsin

Department of Administration

ICI Deferred Enrollment Job Aid (2024)

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BACKGROUND

Policy Information and Documents

See the December 4, 2023 ETF Employer News Item for information about the Annual ICI Update and Deferred Enrollment Period. Chapter 404 of the ICI Administrative Manual also outlines additional information about this period.

Policy for Employees who Previously Canceled ICI Coverage

Employees who cancel or initially decline ICI coverage can re-enroll through deferred enrollment AS LONG AS it is the FIRST time, they are eligible for deferred coverage into a particular category (3, 4 or 5). It does not matter if they previously cancelled or initially declined. Below is the information from the ICI Plan language.

ICI Plan 2.03(2)(a):

> The requirement of submitting evidence of insurability shall be waived for any EMPLOYEE who does not elect to be insured during the initial enrollment period or who previously cancelled ICI coverage, but who initially becomes eligible for state contribution toward premium or an increase in the premium contribution paid by the state. The EMPLOYEE must complete the application form furnished by the DEPARTMENT and submit it to the EMPLOYER.

If an employee is in Cat 3 and now drops down to Cat 1 or 2 and cancels coverage, then they would not have a future deferred enrollment opportunity into Cat 3. They would instead have to wait until they are eligible for deferred enrollment into Cat 4 (or 5 or 6).

However, if any employee enrolled **when initially eligible** or through Evidence of Insurability, was in Cat 3, now drops down to Cat 1 or 2 and cancels coverage, then they would have a future deferred enrollment opportunity the first time they are eligible to enroll into Cat 3.

This information is also in ICI Administration Manual under Chapter 301 – Three Enrollment Opportunities.

Policy for Employees with at Least a 30-Day Break in State Employment
If an employee has at least a 30-day break in state employment and was previously offered ICI through Deferred Enrollment under Categories 3, 4 or 5, when they return to state employment, we do NOT take those offers into consideration during the Deferred Enrollment period.

What this means for you…..

When someone is rehired in STAR, you need to determine the following:
- Did the person have at least a 30-day break in state employment? Just because they had a break in STAR, doesn't mean it was a break in state employment. You should do a WRS prior service check to confirm.
- If there is no break in state employment and the person has values in Elg Fld 4 (where we capture the offer of coverage), you should leave them there.
- If there was at least a 30-day break in state employment, you should remove the value in Elg Fld 4 on the rehire row and submit a ticket to Central Benefits to remove the value in Elg Fld 4 for all historical rows. The ticket is necessary because the ICI Deferred process looks at all job rows to see if there is a value in Elg Fld 4.

All ICI Deferred Enrollment eBenefit elections and paper applications are due to the agency by end of business on March 1, 2024.

Elg Fld 2, 4 and ICI Plan Enrollment Values

Elg Config Fld 2 Values

ICI Category	Sick Leave Balance at End of Year	Earned during Prior Year	Value in Elg Fld 2
1	<184 hours (and not currently in Category 4 – 6)	N/A	ICICATGRY1
2	184 hrs to < 520 hours (and not currently in Category 4-6)	N/A	ICICATGRY2
3	N/A – based on leave usage and not currently in Category 4-6	80 hrs or greater (prorated by FTE)	ICICATGRY3
4	Initial Eligibility: 520 to < 728 hrs Permanent Plateau – once enrolled in Cat 4, can never drop to lower category (regardless of sick leave balance or usage)	N/A	ICICATGRY4
5	Initial Eligibility: 728 to < 1040 hrs Permanent Plateau – once enrolled in Cat 5, can never drop to lower category (regardless of sick leave balance or usage)	N/A	ICICATGRY5
6	Initial Eligibility: 1040 hrs and up Permanent Plateau – once enrolled in Cat 6, can never drop to lower category (regardless of sick leave balance or usage)	N/A	ICICATGRY6

Elg Fld 4 Values

Value	Description
ICICAT3	Offered ICI Deferred Enrollment through Category 3; only eligible to enroll the 1st time eligible for Category 3
ICICAT4	Offered ICI Deferred Enrollment through Category 4; only eligible to enroll the 1st time eligible for Category 4
ICICAT5	Offered ICI Deferred Enrollment through Category 5; only eligible to enroll the 1st time eligible for Category 5
ICICAT6	Offered ICI Deferred Enrollment through Category 6; can enroll in **any year** eligible for Category 6

ICI Enrollment Values

Benefit Plan	Description
ICI1	ICI Standard Category 1
ICI2	ICI Standard Category 2
ICI3	ICI Standard Category 3
ICI4	ICI Standard Category 4
ICI5	ICI Standard Category 5
ICI6	ICI Standard Category 6

TIMELINE

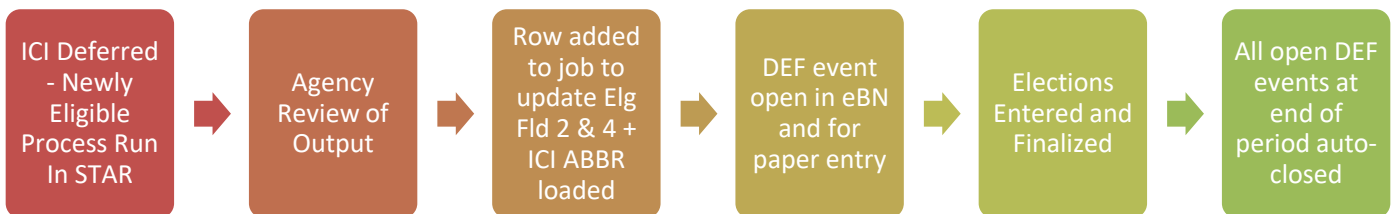The following is the timeline for the ICI Deferred Enrollment period:

- **January 31st** – agency review period of ICI Deferred Enrollment Period will begin (all updates associated with the ICI Annual Update must be complete before this process is run)

- **February 1st** - last day employees can submit an ICI application to cancel coverage effective 2-1-24 (use 2-1-24 CAN event to cancel coverage)
- **February 7th at 4pm** – end of ICI Deferred Enrollment Agency review period - All Elg Fld 2 and ABBR updates must be entered on ICI Deferred Enrollment pages **without exception**

- **February 9th (evening)**

  - o Run process to add a row to Job for all newly eligible (update Elg Fld 2 and 4)
    - ▪ Action/Reason = Data Change/ICI Deferred Enrollment
    - ▪ Effective Date = 3-2-24 for all except LEG (3-1-24 for LEG)
  - o Run process to load ICI ABBR for all newly eligible
    - ▪ Effective Date = 01-14-2024

- **February 12th**

  - o DEF event opens for entry
  - o Employees will be notified via Employee Messaging

- **March 1st at 5pm** – End of Deferred Enrollment Period
  - o eBenefits will close at 5pm
  - o All agency entry of paper applications received must be done by 5pm

- **After March 1st** – agency will have to create a ticket to enter any paper applications
  - o **Ticket Subject Line** = ICI Deferred Entry, Employee Name, Empl ID
  - o Entry must be done by Central Benefits to preserve application receipt date

- **March 28th –** PP7 Confirmation (1st premiums taken associated with deferred enrollments)
- **April 1st** – Coverage effective date of all ICI deferred enrollments
- **April 4th –** PP7 Check Date

ICI DEFERRED ENROLLMENT – NEWLY ELIGIBLE

Employees who are not currently enrolled in ICI but are eligible for ICI premium categories 3, 4 or 5 for the **FIRST** time are eligible to enroll in ICI through deferred enrollment. An employee may enroll in ICI in any year that he or she is eligible for premium category 6.

Process Overview

The ICI Deferred Enrollment – Newly Eligible process evaluates an employee's prior sick leave accrual/usage and historical ICI deferred enrollment offers (based on value in Elg Fld 4 on the Benefits Program Participation page in Job Data) and determines if the employee should be offered a deferred enrollment.

ICI Deferred - Newly Eligible Process Run In STAR	→	Agency Review of Output	→	Row added to job to update Elg Fld 2 & 4 + ICI ABBR loaded	→	DEF event open in eBN and for paper entry	→	Elections Entered and Finalized	→	All open DEF events at end of period auto-closed

Output of Process

1. All eligible employees will receive a 03-02-2024 effective dated job row (3-1-24 for LEG) that updates Elg Fld 2 with new eligibility and Elg Fld 4 to track that the offer was made.

2. The job update will create a DEF event – this event will open in eBenefits and Perform Election Entry

3. All newly eligible employees will receive a 1-14-24 ICI ABBR

Report Logic

The report looks at sick leave accruals/usage and Elg Fld 4 values for all employees currently not enrolled in ICI.

How to Derive <u>Calculated Elg Fld 2</u> Value (before you account for Value in Elg Fld 4)

ICI Category	If Ending Sick Leave Balance is…	Calculated Elg Fld 2 should be…
3	Change in Sick Leave Balance >= 80 hours (prorated if part-time)	ICICATGRY3
4	520 to < 728 hrs	ICICATGRY4
5	728 to < 1040 hrs	ICICATGRY5
6	1040 hrs and up	ICICATGRY6

How to Derive <u>Final Elg Fld 2</u> Value (after you account for Value in Elg Fld 4)

If calculated Elg Fld 2 is….	And Elg Fld 4* is…	Final Elg Fld 2 should be…
ICICATGRY3	Blank or there is no record of ICICAT3	ICICATGRY3
ICICATGRY3	ICICAT3	Blank (employee not listed on report)
ICICATGRY4	Blank or there is no record of ICICAT4, ICICAT5 or ICICAT6	ICICATGRY4
ICICATGRY4	ICICAT4, ICICAT5 or ICICAT6	Blank (employee not listed on report)
ICICATGRY5	Blank or there is no record of ICICAT5 or ICICAT6	ICICATGRY5
ICICATGRY5	ICICAT5 or ICICAT6	Blank (employee not listed on report)
ICICATGRY6	Blank or there is no record of ICICAT6	ICICATGRY6
ICICATGRY6	ICICAT6	ICICATGRY6

*Process looks at all Elg Fld 4 values when determining Final Elg Fld 2 (not just top of stack)

Description of Data Elements

This report is used to determine if an employee currently not enrolled in ICI is eligible to enroll in ICI through deferred enrollment. All enrollments made during this period are effective for April coverage. The agency is responsible for reviewing this report and making any necessary updates based on the ICI plan rules. Pertinent data elements include:

Data Element	Description
FTE	FTE determines sick leave accrual necessary to be eligible for Premium Category 3
Pr Yr Beginning Sick Leave Bal	Sick leave balance at start of review period
Sick Leave Earned Pr Yr	Sick leave accrued during review period (01/01/23-12/30/23 for all except LEG)

Data Element	Description
Sick Leave Used Pr Yr	Sick leave used during review period (01/01/23-12/30/23 for all except LEG)
Pr Yr Ending Sick Leave Bal	Sick leave balance at end of review period (12/30/23)
Change in Sick Leave Balance	Used for Category 3 eligibility only: Ending SL balance – Starting Sick Leave Balance
Pr Yr Sick Leave Adjustments	2023 sick leave adjustments; used to help identify mid-year transfers or data corrections that may affect the ICI premium category
Pr Yr Sick Leave Carryover	2023 sick leave carryover balance. Used to identify mid-year hires/transfers (balance = 0)
Current and New Elg Fld 2	New Elg Fld 2 is based on sick leave balance or usage (Category 3)
Current and New ICI Basic Enrollment	New ICI Basic Enrollment (Plan Type 30) is based on the New Elg Fld 2 value All employees on report will have a value in this column.

Source of Leave Information in Report

Leave data elements come from a variety of sources. Please see the charts below.

Leave Information for WIS (except for SWIB)

|		
Starting Sick Leave Balance	Sick Leave Balance as of 01-01-23	WI_SICK_BAL from Absence Calendar ID 2023B02
Ending Sick Leave Balance	Sick Leave Balance as of 12-30-23	WI_SICK_BAL from Absence Calendar ID 2024B01
Sick Leave Earned from 01-01-2023 through 12-30-2023	This is used to determine eligibility for Category 3 – will need to derive this amount	(WI_SICK_ENT from Absence Calendar ID 2024B01) + (WI_SICK_ACC from Absence Calendar ID of 2023B02
Sick Leave Used from 01-01-23 through 12-30-23	This is used to determine eligibility for Category 3 – will need to derive this amount	(WI_SICK_TAKE from Absence Calendar ID 2024B01) + (WI_SICK_TKPP from Absence Calendar ID of 2023B02)
Change in Sick Leave Balance	This is used to determine eligibility for Category 3	Ending Sick Leave Balance – Starting Sick Leave Balance
2023 Sick Leave Adjustments	Used to help identify employees with large adjustments, typically transfers from another payroll center. Sum of all SL adjustments for CY 2023	WI_SICK_ADJ from Calendar ID 2024B01
Sick Leave Balance as of 12-31-22	Used to help identify new employees and those that transfer from another payroll center. Sick leave balance at the end of 2022.	WI_SICK_CRROV_BAL from Calendar ID 2024B01

Leave Information for LEG and SWIB

LEG and SWIB maintain absence information outside of STAR. Leave information was provided to Central Benefits and loaded into report.

How to Access ICI Deferred – Newly Eligible Report

1. **Navigation:** Workforce Administrator Homepage – Annual Processing Tile – ICI Annual/Deferred Folder – ICI Eligibility Verification Page

2. Click on the **Report Name** down arrow and select **ICI Deferred Newly Eligible**. Enter your **Company** (required) and Business Unit (not required). If reviewing for a Region, just enter the Company and all departments within your regional security will return. Click Search.

3. The report based on your criteria will appear on the page. Click on the Download to Excel button. This will create an Excel document that you can use to do your validation.
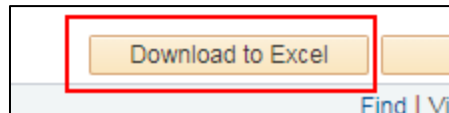
The Excel document will show the selection criteria used and give you an output of all data elements. You can use this output to get both the mailing and email addresses of eligible employees.

| WI_ICI_RPT1	6266						
Year = 20XX							
BU = 41000							
Dept ID =							
ID =							
Last =							
First Name =							
Co = WIS							
Business Unit	**Department**	**EMPLID**	**Empl Rc**	**Benefit Rcd**	**Last Name**	**First Name**	**Empl Class**

How to Navigate the Online Page

1. Summary information is displayed on the main report page. You will also be able to correct Elg Fld 2 and the ABBR directly on this page.

Final Elg Fld 2	Corrected Elg Fld 2	Projected ICI ABBR	Corrected ABBR	Historic Elg Fld 4	Current Elg Fld 4	Prior Year WRS Earnings
ICICATGRY6	🔍	52,000.000		ICICAT6	ICICAT6	51,193.04
ICICATGRY6	🔍	51,000.000		ICICAT6	ICICAT6	50,775.53
ICICATGRY6	🔍	43,000.000		ICICAT6	ICICAT6	42,009.49

2. To see additional data elements for an employee, click on the View ICI Detail icon on the far right of the page.
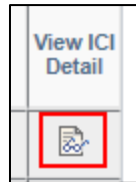
3. If you make an update to the page, you should enter a comment by clicking on the comment icon to the far right of the page. The comments do appear on the Excel output of the page.
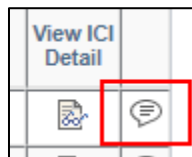
Comments

Not eligible for deferred enrollment

How to Correct Elg Fld 2 or ABBR

It is unlikely that you will need to make any corrections to this report but if needed, you can correct Elg Fld 2 or the ABBR directly on the page. If you make any updates, you must enter the reason for the update in Comments. Click Save after making any changes.

If you determine the employee is not eligible for deferred enrollment, you will select the **NOT ELIG** value from the Corrected Elg Fld 2 dropdown.

Note: If you determine someone is not eligible for deferred enrollment, enter a comment and indicate why (ex. "employee was previously eligible for Category 3").

Agency Validations

Agency must review all comments added to Report 2 by Central Benefits and update if needed.

For 2024 all employees with ICIBASSUP in the New Elg Fld 2 and Final Elg Fld 2 must update the Corrected Elg Fld 2 value to be the non-supplemental value.

Agency must review Category 3 enrollments based on the report logic listed on page 9.

If you know that someone was previously offered coverage under Categories 3, 4 or 5 but the information is NOT listed in Elg Fld 4, indicate that the person is Not Eligible and add a comment on the page.

ISSUES TO WATCH
Future Dated Job Rows

The process will put a future-dated job row on all eligible employees (3-2-24 for all but LEG, 3-1-24 for LEG). If you need to update job with an effective dated job row prior to the ICI job row, you will need to submit a ticket.
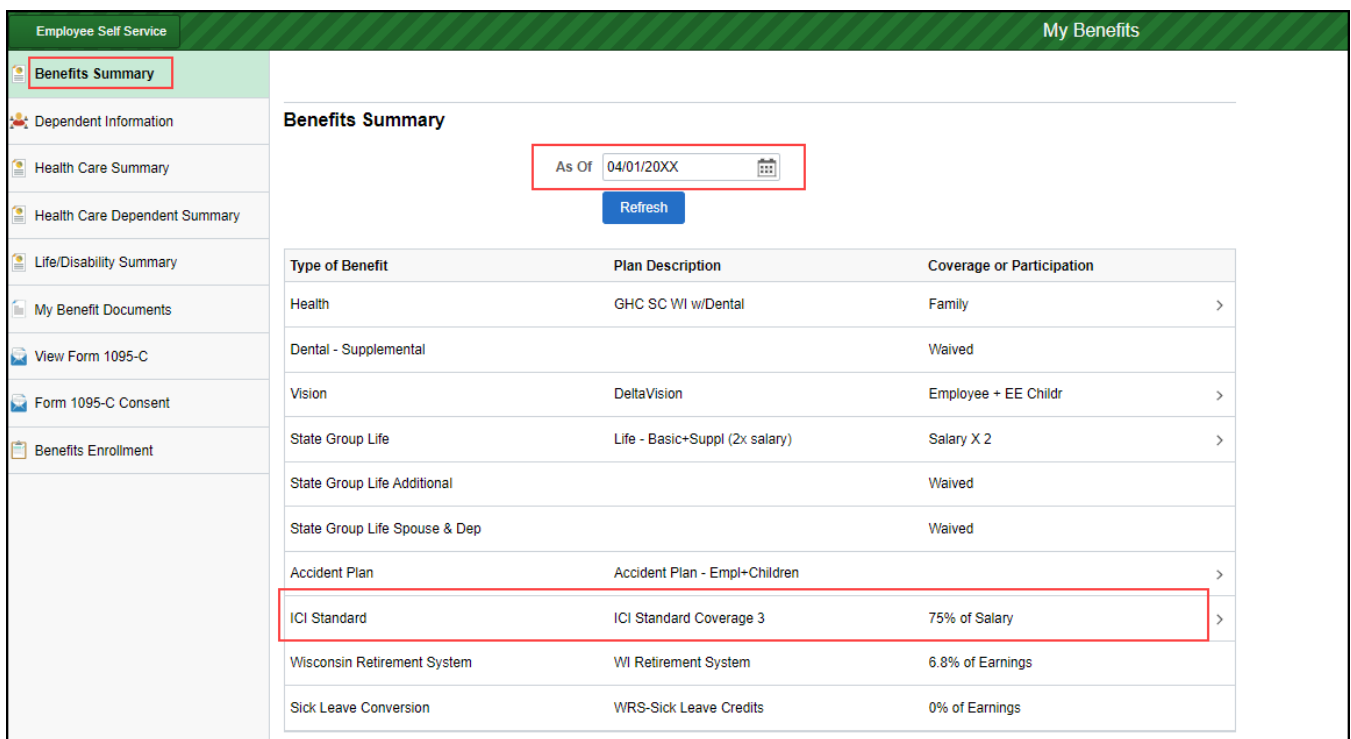
Events Closing the DEF event (temporarily)

Once the DEF event is created, if an event with an event date prior to 3-2-24 (3-1-24 for LEG) is created, it will close the DEF event until the earlier event is processed. Monitor your open events query closely and work to keep the DEF events open.

Use the Open Events Query to monitor the DEF events (WI_BN_OPEN_EVENTS).

No Confirmation Statement of Elections

Employees will NOT receive a confirmation statement of their elections. Once enrolled, they can future-date their benefit summary to see their election.

Employees Can NOT Reenter on the DEF Event Once Finalized
Unlike the OE event, once an election is made on the DEF event, the employee **CANNOT** go back in and make elections. Agency must submit a ticket to re-open the event, so the employee can make changes.

HOW TO ENROLL IN ICI THROUGH DEFERRED ENROLLMENT

DEF Event

A DEF is created for all employees who are eligible for an ICI Deferred Enrollment. The event is automatically created when the Data Change/ICI Deferred Enrollment job row is added.

DEF Event Rules

This event is only used for ICI Deferred Enrollment. The DEF **Event Date = 3-2-24** *(3-1-24 for LEG)*. This will set the coverage effective date to 4-1-24 and the deduction begin date to 3-10-24 (start of PP7). For LEG, the deduction begin date will be 3-1-24.

Standard ICI will open in all events.

If no entry is made on the DEF event, the event will automatically be closed after 5pm on March 1st.

Enrollment through eBenefits

Employees will be able to enroll in coverage through eBenefits (ICI Deferred eBN Job Aid)

1. Once the DEF event is open, employee can access eBenefits through the **Benefits Enrollment Link** in the **My Benefits Tile** on the Employee Self Service Landing Page.

2. Employee will click Select to start the process.

3. Only the plans available to the employee will appear on the enrollment page:

4. Employee clicks the Edit button to enroll and click on the Radio button next to the plan.

Select an Option

○ No, I do not want to enroll
◉ ICI Category 6

[Update and Continue]   [Discard Changes]

Select the **Update and Continue** button to store your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Select the **Discard Changes** button to ignore all entries made on this page and return to the Enrollment Summary.

5. The election is confirmed on the following screen.

Your Choice

You have chosen ICI Category 6 coverage.

Notes

Once submitted, this choice will take effect on 04/01/2024. Deductions for this choice will start with the pay period beginning 03/10/2024.

[Update Elections]   [Discard Changes]

Select the **Update Elections** button to store your choices.

Select the **Discard Changes** button to go back and change your choices.

6. The employee is then brought back to the Summary page. Must Click Save and Continue to start the submission process (or **Edit** to enroll in Supplemental in this example)

Enrollment Summary

ICI Standard		Before Tax	After Tax	Edit

Current: No Coverage
New: ICI Category 6: 75.00% of Salary   0.00

This table summarizes estimated costs for your new benefit choices.

Election Summary

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

[Save and Continue]

7. Employee must then click the final Submit button.

8. Final verification screen

9. A confirmation statement will **NOT** be generated as part of this process

10. Unlike the OE event, once an election is made, the employee **CANNOT** go back and change the election. The agency must submit a ticket to have the event re-opened.

Paper Application Entry
Agencies should encourage employees to use eBenefits. If a paper application is received, use the DEF event to complete the entry by 5pm, March 1st.

Application and Entry Deadline
- eBenefit entry must be complete by 5pm on March 1st
- All paper applications must be received and entered by 5pm on March 1st
- If a paper application isn't entered timely, create a ticket and Central Benefits will have to do the entry to capture the real application receipt date
  - **Ticket Subject Line** = ICI Deferred Entry, Employee Name, Empl ID

This is a strict deadline because the enrollments are sent to ETF via interface and all deferred enrollments must show an "application receipt date" of 3-1-24 or earlier; otherwise, the enrollment will be rejected.

AGENCY CHECKLIST

☐ Validate ICI Deferred Newly Eligible report

    ☐ If the person was previously offered coverage under the same premium category offered now but the information is NOT in Elg Fld 4, indicate the employee is Not Eligible and add a comment (applies to Categories 3, 4 and 5 only)

    ☐ Projected ABBR based on prior year WRS – no need to validate

☐ Employee Messaging will be used to notify employees of eligibility. *The below queries will not populate results until AFTER the DEF events are created. Can run on 2-13-24 or later.*

    The following queries identify all eligible employees:

        ▪ WI_BN_ICI_2024_DEFERRED_NEW

    The following queries identify the employees who will be sent the messages via Employee Messaging:

        ▪ WI_EM_ICI_2024_DEFERRED_NEW

    Below are links to text of the emails that will be sent:

        • [ICI Deferred Enrollment Email Template](#)

☐ Encourage employees to use eBenefits to enroll. All eBN elections must be entered by 5pm on March 1st.

☐ DEF events in Notified Status - leading up to March 1st, run WI_BN_DEF_EVENT_STATUS and send the [Notified Email](#) to employees to remind them to submit their elections.

☐ **All paper applications must be received and <u>ENTERED</u> by the agency by 5pm on March 1st.**

    ▪ Use the open DEF event to enter the election

☐ Monitor open DEF events on the Open Events Query (WI_BN_OPEN_EVENTS) – follow-up as needed

☐ If you have applications to enter after March 1st, create a ticket for Central Benefits to do the entry (expectation is that agency will do all entry – this is only for applications received right at the deadline).

    ▪ **Ticket Subject Line** = ICI Deferred Entry, Employee Name, Empl ID