Contents

All open enrollment agency resources are available on the [Open Enrollment for Administrators Website](#).

Agency Resources

See the [Open Enrollment Administrator Website](#) for agency resources including:

- Links to ETF materials
- OE PowerPoint Template

See the [OE Communications & Queries page](#) for the following:

- Emails sent via Employee Messaging
- Agency email templates and queries
- Vendor communications

Pre-OE/Start of OE Agency Checklist

Reminders

- All SSO tickets relative to Open Enrollment issues should start "OE2024, Employee Name, Empl ID"

Tasks Leading Up to the Start of OE/right at the beginning of OE

- ☐ Send [Pre-OE Announcement Email](#) to employees by 9-20-23.
- ☐ As of 9-18-23, **do not move an employee's primary benefits flag to a different empl record – submit a ticket if this is needed.**
- ☐ Run WRS Lookback on Mondays following payroll confirmation
- ☐ Run WI_BN_OPEN_EVENTS with a Schedule ID of EM2017 to manage events daily

    - Benefits Administration will also run at noon on 9/20 – 9/22 to help events move more quickly through the system.

- ☐ Complete the following by 9-21-23.
    - Complete entry on all open SHR events
        - For LTEs enrolling in health or OOS at 6 months – manually create/enter SHR events through 12-31-23.
    - Process all AGE events with an event date of 12-31-23 or earlier (preferably by 9/21)
    - Enter all life event applications as received
    - Finalize all open termination events (TER, RET, TRA, TWB)
    - Finalize all events that need no entry
    - Encourage new hires to complete elections ASAP (OE event won't open until HIR and SHR (if applicable) entry is done)
- ☐ Create a ticket if you have an employee in the DEF benefit program who wants to enroll in Pre-Tax Savings Plan during OE

BAS Group ID and OE for Employees with Multiple Jobs

BAS Group ID

Only employees who have an IYC BAS Group ID on their job will have an OE event. All active employees who are NOT in the DEF benefit program will get an IYC code (exception: if in DEF but currently enrolled in a Pre-Tax Savings plan, will get an IYC code).

The process to add the BAS Group ID to job was run on 9-18-23 (Monday). A process will run nightly during OE to populate this field and create an OE event for any newly eligible employees (new hires, newly WRS eligible).

Employees with Multiple Jobs

If an employee has more than 1 active job, the BAS Group ID is added to the benefits primary job.

- **Once the IYC code is on a job, agencies must not move the benefit primary flag to a different job**
- If there is no IYC code on the benefits primary job, the OE event will disconnect in the system and the employee won't be able to make their OE elections
    - Create a ticket if the benefits flag needs to be moved
- If the primary job is terminated but another job is active, create a ticket so the IYC code and benefits flag can be moved to the active job
- **From 9-18-23 until early 2024 (date TBD), agency must submit a ticket if the benefits flag needs to be moved**

Note: You may see NON, or DUP listed in the BAS Group ID Field. These people either have multiple benefit records or several active employment instances. These codes are added to make sure that only 1 OE event prepares for the person.

DEF Benefit Program

Employees in the DEF benefit program will NOT automatically have an OE event created for them (exception: if they are currently enrolled in a Pre-Tax Savings plan, they will get an IYC code). Most are only eligible for Parking/Transit Accounts. If in a non-LTE appointment, they are also eligible for Healthcare and Dependent Day Care FSA. If someone in the DEF benefit program wants to enroll in a Pre-Tax Savings plan during Open Enrollment, submit a ticket and Central Benefits will create an OE event for the employee and they will be able to use eBenefits to enroll.

Deduction begin dates

Benefit event rules in the system set the Deduction Begin Date of an enrollment to the pay period prior to the coverage effective date. If this happens to be a C pay period (when no benefit deductions are taken), deductions begin on the next A pay period.

PAY PERIOD NUMBER	EARNINGS PERIOD	CHECK DATE	LIFE	HEALTH, DENTAL, VISION, ACCIDENT PLAN, ICI, PRE-TAX SAVINGS ACCOUNTS
1A	12/17/23-12/30/23	01/11/24	FEB	JANUARY
2B	12/31/23-01/13/24	01/25/24		

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

The deduction begin date of the enrollment (or waive) will be 12-17-23 (12-1-23 for LEG).

The enrollment in eBenefits will look like this:

Healthcare FSA/LPFSA, Dependent Day Care FSA, Health Savings Account, Parking/Transit Accounts

The deduction begin date of the enrollment (or waive/term) will be 12-17-23 (first day of 2024 PP1).

The enrollment in eBenefits will look like this:

GHC of South-Central Wisconsin (GHC-SCW) splitting into two networks in 2024

GHC-SCW will be splitting into two different networks effective 01/01/2024. Employees currently enrolled in GHC-SCW must select either GHC-SCW Dane Choice or GHC-SCW Neighbors. Both networks will include UW and Meriter specialists and hospitals. If no plan is selected, the system will terminate coverage. There is a monitoring query available (see below)

SMP – will continue to be available in Florence County in 2024

SMP (under Dean in 2023) will continue to be available in 2024 for Florence County.

Monitoring Queries for plans leaving or changing

- **GHC-SCW**
    - OE_2024_GHCSC_ENROLL – top of stack health election is GHC-SCW
    - OE_2024_EM_GHCSCW
    - EM_OE2024_GHCSW
- Additional monitoring queries will be created that will be used for follow-up employee messages
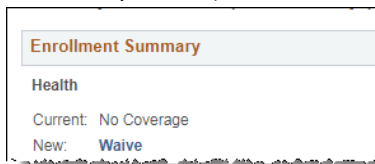
Opt-Out Stipend

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

- During OE, employees will apply for OOS through eBN

    - Reminder- new hires must apply for stipend via paper health application. Agencies will enter OOS enrollment on either SHR or OOS event

- **NEVER enter Opt-Out Stipend directly to Additional Pay**

- Employees will be enrolled in the Opt-Out Stipend simple benefit plan

- Enrollment in the OOS plan will automagically create the OOS entry in Additional Pay

- When an employee terminates, the OOS plan enrollment and the OOS Additional Pay election will end when the TER/RET/TRA/TWB event is finalized.

The employee must take the following actions in eBenefits to enroll in the Opt-Out Stipend benefit plan.

1. Waive health insurance on the OE event (if not already waived)

Enrollment Summary

Health

Current: No Coverage
New: Waive

2. Click on the Edit button next to Opt Out Stipend

Opt Out Stipend   Before Tax   After Tax   Edit

Current: No Coverage
New: Waive   Click Edit

Opt Out Stipend   Before Tax   After Tax   Edit

Current: Health Opt Out Stipend   Example of someone who
New: Waive   currently has the OOS

3. Answer the Opt Out Stipend validation questions correctly and click **Agree**
    a. Once the employee answers the questions correctly, the validation will never appear to the employee again this year.

Benefits Certificate ✕

2024 Health Opt Out Stipend

Answer the questions below to confirm your eligibility for the Health Insurance Opt-Out Stipend for 2024. Prior to enrolling in the Opt-Out-Stipend, you must waive your health insurance in STAR.

Will you be covered by State or UW Health Insurance in 2024 either as an employee, spouse or child?

Answer

○ No

○ Yes

Have you waived your health insurance in STAR for 2024?

Answer

○ Yes

○ No

In 2015, if you were a state employee, were you covered by State Group Health Insurance?

Selection

☐ No

☐ Yes

☐ Not employee in 2015

I agree that I am eligible for the opt-out stipend and have waived my health insurance for 2024.

[Agree]   [Decline]

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b. If they answer incorrectly or click on Decline, the employee will get the following message. They will be able to try again if they click the Edit button again.

> Election criteria not completed successfully. (3001,1033)
>
> The information you have entered does not meet the minimum requirements to allow for an election of this plan type.
>
> Complete the questionnaire again or contact the Benefits Department.
>
> [OK]

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

> ⓘ **Important! Your current coverage is: No Coverage. You must re-apply for the Health Insurance Opt-Out Stipend every year.**
>
> **Select an Option**
>
> ○ No, I do not want to enroll
> ● Health Opt Out Stipend
>
> [Update and Continue]   [Discard Changes]

5. Since there is no deduction associated with the plan, nothing will be listed in deductions on the eBN summary page; however total costs will be reduced by the amount of the stipend.

This table summarizes estimated costs for your new benefit choices.

Election Summary

Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax
Costs	0.00	0.00	0.00
Your Costs	-83.34	-83.34	0.00

These costs do not include certain choices that are based on variable earnings.

6. The Opt-Out Stipend will appear on the employee's Confirmation Statement

	Benefit Plan	Coverage/Annual Election	Pay Period Pre-Tax Deduction
Health	Waive		
State Group Life	Life - Basic+Suppl (2x salary)	$166,000	$15.7?
State Group Life Additional	Life - 3 Additional Units	$249,000	$34.8?
State Group Life Spouse & Dep	Life - 2 Units Spouse & Dep	2 Units	
ICI Standard	ICI Standard Coverage 6	Up to 75% of Salary	
ICI Supplemental	ICI Supplemental 6	Up to 75% of Salary	
Healthcare FSA	Terminated		
Opt Out Stipend	Health Opt Out Stipend	$2,000 Stipend	
WI Deferred Comp Pretax	WI Def Comp		$300.0?

Once the OE event is finalized, the employee will be enrolled in the Opt-Out Stipend Benefit Plan and the OOS Additional Pay will automatically be created.

- **If employee is re-enrolling in the OOS (received stipend in prior year)**
  - Employee will **NOT** get a new enrollment in Simple Benefits or Additional Pay (because coverage is continuous). The coverage begin date will be the first time the employee began receiving the OOS (this could be January 1st of a year or any other time if the employee last enrolled as a new hire).

Note: If employee initially submits OE election and does NOT re-enroll in OOS, a termination row is added to the Simple Benefits page and a term date is added to OOS Additional Pay. When the employee goes back into their OE event and enrolls in the OOS, they WILL get a new row on the Simple Benefits page (with a 1-1-24 effective date), but they will NOT get a new row in Additional Pay (the process just removes the term date from the top of stack OOS Additional Pay row).

- **How OOS looks if enrolling for the 1st time**
    - Employees will have OOS enrollment effective 01-01-2024 and an Additional Pay effective date of 12-17-23 – the first payment will be on the first check payable in 2024).

    - For the Legislature, the Additional Pay effective date is 12-1-23

- o No End Date populates in Additional Pay when the employee enrolls. This date will populate either when the employee terminates or doesn't re-enroll in the OOS plan during Open Enrollment.

How to Access OOS Certification

Only employees who enroll in the OOS **through eBenefits** will have a certification stored in STAR. For 2024, the certification is called **24 OPT OUT**. If a paper application is received, you should keep the original application in the employee's file. You do NOT have to send a copy of the application to ETF.

Navigation: Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – Maintain Certifications

Note: If an employee enrolls in both the OOS and the Delta Dental – Preventive Plan via eBenefits, the employee will have two certificates – one for OOS and one for Preventive Dental. You will need to click View All to see all certificates (including certificates from other years).

Paper Application Entry of OOS

If an employee gives you a paper application, encourage the employee to use eBenefits to enroll. If you need to do entry, make sure you Waive health insurance and scroll to the bottom of the Perform Election Entry page and enroll the employee in the OOS Benefits Plan.

OOS Termination if No Election Made on OE Event

If someone is currently receiving the OOS and makes NO open enrollment election, enrollment in the OOS plan will terminate when the OE event is finalized. This will also terminate the Additional Pay enrollment.

OOS Validations

The following OOS eligibility validation will be done by Central Benefits:

- Confirm employee is not enrolled in both health insurance and OOS

- Look for employees who were enrolled in 2023 but not in 2024 (and didn't enroll in health for 2024)

- Will monitor OOS elections effective in the last quarter of 2023 to ensure they are notified of requirement to re-apply for 2024

- The list of open enrollment enrollees will be sent to ETF twice (in November and January). ETF will validate that the employee is not a covered dependent under the state health plan and confirm the employee is not on the list of people who are ineligible because they didn't carry health insurance in 2015 as an active state employee.

- A monthly file is also sent year-round to ETF to validate new enrollments.

Ongoing OOS Process

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

Delta Dental PPO – Preventive Plan

The Delta Dental PPO – Preventive Plan is only available to employees who are **not** covered by State Group Health Insurance as either an employee or dependent, regardless of whether they are enrolled in Uniform Dental. This plan has the same benefits as Uniform Dental, but the employee must pay the full cost (no employer contribution).

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

1. Waive health insurance on the OE event (if not already waived) if enrolling in Preventive Dental for the year.

2. Click on the Edit button next to Dental – Preventive (no health)

3. Answer the eligibility questions correctly and click **Agree.**

   a. Once the employee answers the questions correctly, the validation will not appear to the employee again this year. The employee will be taken to the enrollment page if they either answer "No" to the first question and/or "Yes" to the second question.

   b. If they answer incorrectly or click on Decline, the employee will get the following message. They will be able to try again if they click the **Edit** button again.

4. The employee then enrolls or waives coverage.

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

5. Once the OE event is finalized, a record of the dental certificate is available (like the OOS)

   a. **Navigation:** Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder – Maintain Certifications

   b. Certificate ID for 2024 = 24 DENPREV

If currently enrolled in the plan:

- There is no annual certificate that must be completed (like the OOS) because coverage can remain continuous without any annual certification. Central Benefits monitors all Preventive Dental enrollments to ensure the employee is not also enrolled in State Group Health Insurance.
- If an employee is currently enrolled in the plan and clicks the "Edit" button in eBenefits for the plan, they will have to answer the questions to access the enrollment page.

Post Enrollment Validations

- Both during and after Open Enrollment, Central Benefits will monitor for employees enrolled in both health insurance as an employee and the Delta Dental Preventive Plan and take the following actions (below actions have been approved by ETF):
  - o If enrolled in health with dental, CB will waive enrollment in the preventive plan and contact the agency to reach out to the employee
  - o If enrolled in health without dental, CB will waive enrollment in the preventive plan, add uniform dental to the health election and contact the agency to reach out to the employee
- Once the OE enrollment file is sent, ETF will compare the enrollments to everyone covered by state health insurance and adjustments will be made accordingly.

New for 2024 within ess.wi.gov

- Employees will be required to make an election on the following plans when reviewing their OE enrollments:
  - o Supplemental Dental
  - o Vision
  - o Healthcare FSA
  - o Dependent Care FSA
  - o Parking
  - o Transit
- The employee must elect "waive" or enroll in the plan. We made this change within PeopleSoft this year because employees will be required to do this in the new Insurance Administration System (IAS) with ETF during the 2025 OE period.
- If the employee does not make an election on those plans, they will see the following error message:

Open Enrollment

Errors and Warnings

Your enrollment contains some errors. The following list displays your errors for each benefit choice. You will need to correct your errors before you can submit your final benefit choices.

Benefit Errors and Warnings

❌ Healthcare FSA   Error

You are required to make a selection for this benefit plan. The system will not default a benefit choice for you. Go back to the benefit page and make a selection.

❌ Dependent Day Care FSA   Error

You are required to make a selection for this benefit plan. The system will not default a benefit choice for you. Go back to the benefit page and make a selection.

❌ Parking (Before Tax)   Error

You are required to make a selection for this benefit plan. The system will not default a benefit choice for you. Go back to the benefit page and make a selection.

❌ Transit (Before Tax)   Error

You are required to make a selection for this benefit plan. The system will not default a benefit choice for you. Go back to the benefit page and make a selection.

[Return]   Select the **Return** button to go back to the Enrollment Summary and correct your benefit choices.

Open Enrollment

Errors and Warnings

Your enrollment contains some errors. The following list displays your errors for each benefit choice. You will need to correct your errors before you can submit your final benefit choices.

Benefit Errors and Warnings

❌ Dental - Supplemental   Error

You are required to make a selection for this benefit plan. The system will not default a benefit choice for you. Go back to the benefit page and make a selection.

❌ Vision   Error

You are required to make a selection for this benefit plan. The system will not default a benefit choice for you. Go back to the benefit page and make a selection.

[Return]   Select the **Return** button to go back to the Enrollment Summary and correct your benefit choices.

New for 2024 OE and Retirees

- If you have an employee who knows they will be retiring on or before 1/1/24, they should complete paper applications to make benefit changes.
- The employee should not make changes within ESS because these changes will never go over to ETF.
- ETF is requesting retirees complete paper applications and the agency send them to ETF for processing.
  - If faxing, be sure to include the EE name, ETF member ID and reason for fax (i.e., EE is retiring prior to 1/1/24).
- *Per ETF: The instructions changed this year and are now documented in the [State Agency Health Insurance Standards, Guidelines and Administration Employer Manual (ET-1118)](#), Chapter 6, Section 601 F. Please review that section for information about how to complete the Continuation – Conversion Notice (ET-2311) for terminations after OE but before January 1.*

Confirmation Statements and Online Benefits File

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

Confirmation Statement Creation Process

| Employee Submits OE Election | OE Event is Finalized around 9:30pm | Employee Receives Email that Confirmation Statement Available | Confirmation Statement Loads to B-File |
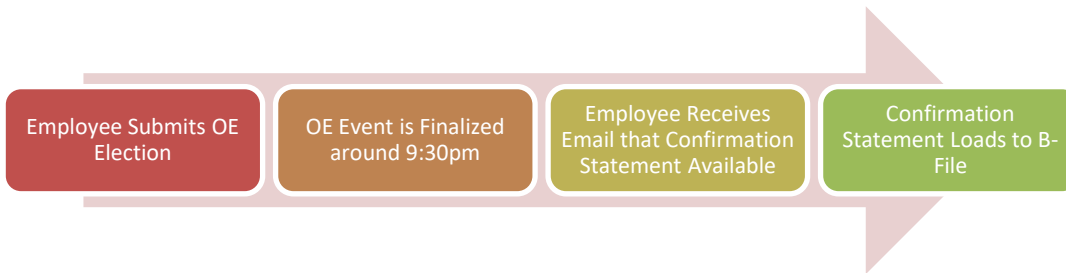
Below is the text that will be in the confirmation statement email.

Sample of the Confirmation Email text

January 1, 2024 Benefit Confirmation Statement Available

O   OpenEnrollmentDoNotReply@wisconsin.gov

Our records indicate that your 2024 Open Enrollment benefit elections have been processed. You can access your Open Enrollment Confirmation Statement from the STAR Human Resources Employee Self Service Landing Page. Click on the My Benefits Tile and then on My Benefit Documents to review your statement.

If you log in to eBenefits to review or change your elections, you will receive an updated confirmation statement.

You can access STAR self-service at https://ess.wi.gov.

Reminder: All elections must be submitted by Friday, October 20, 2023 (eBenefits will close 11:59 pm on October 20).

Thank you.

How an Employee Views Confirmation Statement

1. Employee Self Service Landing Page – My Benefits Tile – My Benefit Documents. Click on the Icon to view the document.
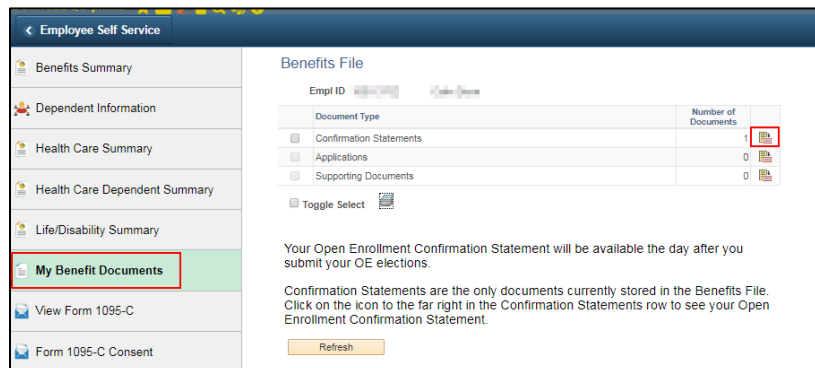
2. Click on viewer next to most recent statement
   a. Prior year confirmation statements will also be visible on this page.

Click on the View icon on the far right to see your Open Enrollment Confirmation Statement.

How Agency Can View Individual Confirmation Statement

1. Go to Benefits Administration Dashboard – Benefit Enrollments Tile – Review Employee Benefits Folder - Employee Benefit Documents
2. Enter name or Empl ID
3. Click Search

4. Click on View Documents

5. This brings you to the employee's benefits file. Follow step 2 in **How an Employee Views Confirmation Statement** to access the statement.

How to View/Print Confirmation Statements for Entire Agency or Department

When this process is run, only the employee's most recent confirmation statement will be included.

1. This process is running a report to generate a PDF of all confirmation statements. Go to the Nav Bar: Navigator and go to – State of Wisconsin (STAR) – Benefits Administration – Process – Print Confirmation Statements

2. Enter Schedule ID (OE2024) and 5-digit Business Unit. Department is optional. A wildcard value will not work for Dept ID. Click Run.
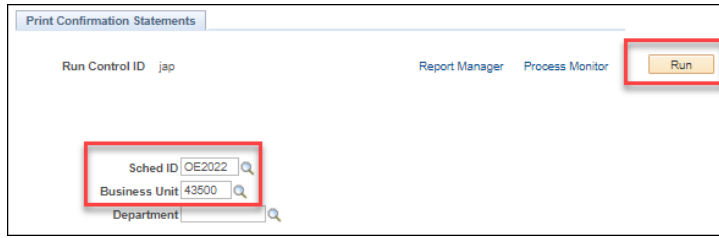
3. Don't change any data values on Process Scheduler Request and click OK.
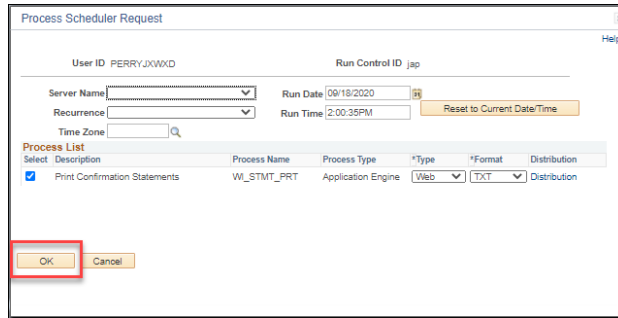
4. Once the process runs to success, click on Details.
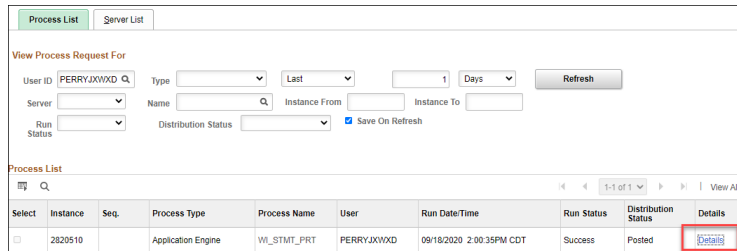
5. Click on View Log/Trace
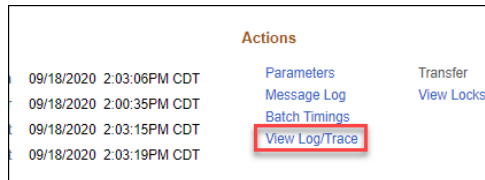
6. Click on the PDF that is created
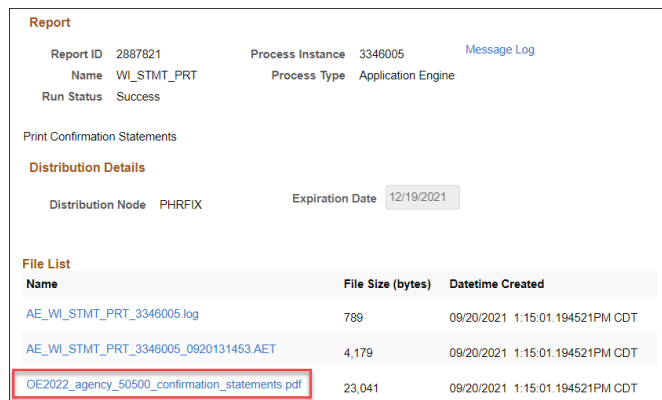
Sample Confirmation Statement

The confirmation statement includes ALL benefit elections as of 1-1-24.

CONFIRMATION OF 2024 ELECTIONS - Open Enrollment

Employee ID:
Department ID: 505P1A0000

Statement Date: 9/8/2023
Effective Date: 01/01/2024
Event Class: OE

This notice is confirmation of the changes you made during the open enrollment period, as well as ongoing benefit elections. Please review this Benefit Confirmation carefully. It is your responsibility to report any errors to your benefits office by Friday, October 20, 2023. If all information is accurate, no action is required. Coverage listed below is effective January 1, 2024.

YOUR BENEFIT ELECTIONS AS OF JANUARY 1, 2024

|	Benefit Plan	Coverage/Annual Election	Pay Period Pre-Tax Deduction	Pay Period After-Tax Deduction
Health	HDHP GHCSCW Dane Choice w/Dent	Family	$53.50	
Dental - Supplemental	Delta Dental PPO Select Plus	Family	$33.10	
Vision	DeltaVision	Family	$10.29	
State Group Life	Waive			
State Group Life Additional	Waive			
State Group Life Spouse & Dep	Waive			
Health Savings Account	HSA GHCSCW Dane Choice w/Dent	$6,500	$270.83	
ICI Standard	ICI Standard Coverage 6	Up to 75% of Salary		
ICI Supplemental	ICI Supplemental 6	Up to 75% of Salary		$2.79

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Confirmation Statements – What You Need to Know

- If previous coverage was Waive for the FSA/ERA/HSA plans and the OOS, if no enrollment was made on the OE event (either a Waive or an enrollment), coverage will display as **Terminated** on the confirmation statement.

- If there is no premium for a plan (ex. ICI Category 6), the per pay period amount will be blank.

Paper Application Entry

Agencies should encourage their employees to use eBenefits. If you do receive a paper application, you will enter it like any other paper application through Perform Election Entry (Benefits Administration Dashboard – Benefit Enrollments Tile – Event Processing Folder – Perform Election Entry).

Important Reminders:

- The Schedule ID = OE2024

- If OE event is not available for entry, submit an SSO ticket- Central Benefits will open the event for you
- Only plans with open enrollment are available for entry
- Current (2023) enrollments will be prepopulated on the OE event for the following plans:
  - Health (except for plans going away), Delta Dental Supplemental, Delta Dental Preventive, Accident Plan and Vision
- For all other plans (Pre-Tax Savings Account, HSA, OOS), the 2023 elections do not pull into the OE event because employees must re-enroll in these plans every year
- Never enter an override on HSA, Healthcare FSA, Limited Purpose FSA, Dependent Day Care FSA, Parking or Transit
  - Enter a POTT if you need to override the amount for any reason
- There is an issue with the Contribution Worksheet for the HSA/FSA/ERA Plans in Perform Election Entry. The number of pay periods is correctly displaying this year but the total annual contribution does not calculate correctly. If the annual election is correct, the paycheck amount will be correct.

- **Never delete a dependent**
- Once you enter OE elections, if you need to do additional entry, you must submit a ticket for Central Benefits to re-open the OE event.
  - The employee can still make eBN elections after paper entry is done.
- If the agency is entering paper applications and did not receive an application to enroll coverage in Healthcare FSA/LPFSA, Dependent care, Parking/Transit, Dental Supplemental or Vision you will need to waive coverage or you will see the following error messages for each plan:

New Hires and OE

All events must be processed in date order. Encourage new hires to make their HIR eBenefits elections as soon as possible. Elections must be made in the following order: HIR ➔ SHR (if applicable) ➔ OE.

September/October Hires Who Have Access to an OE Event during OE

For employees who start in PP20 – PP22 (9/10/23 – 10/21/23), encourage them to make their new hire elections ASAP. Once the HIR event is finalized, the SHR event will open (if applicable). Watch for SHR events daily. Once entry is done on the SHR event, the OE event will open. This group will be handled like all other employees provided the OE event can be opened to the employee prior to the end of the OE period.

NOTE: If an employee is still within their initial 30-day enrollment period at the end of the OE period and the employee didn't submit their OE elections, you can still collect paper OE applications and have them manually entered on the OE event.

SHR Event Schedule for Remainder of Year

Date SHR Available	SHR Event Date Range
9-20-23	11/5 – 11/12
10-05-23	11/13 – 11/26
10-13-23	11/27 – 12/10
10-19-23	12/11 – 12/23
11-03-23	12/24 – 1/1

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

The following will apply to late pay period hires in PP20 (9/10 – 9/23), all hires in PP21 (9/24 – 10/07), PP22 (10/08 – 10/21), PP23 (10/22 – 11/4), PP24 (11/5 – 11/18) and some hires in PP25 (11/19 – 12/2).

- Healthcare FSA, Dependent Care FSA
    - Remind employees that coverage they enter on HIR event is effective in 2023
    - If they want coverage for 2024, must complete a paper application within 30 days of hire (if no election made on OE event)
        - Create a ticket, attach application and Central Benefits will do entry on either OE or ADM (depends on timing of receipt of application)
- Parking/Transit
    - Remind employees that coverage they enter on HIR event is effective in 2023
    - If they want coverage for 2024, collect a paper application and create a 1-1-24 COM event and enter election
- HSA
    - If coverage is effective in 2023, remind employee that coverage they enter on HIR is effective in 2023
        - They must complete a paper application for 2024 (if not entered on OE event)
            - If they have an OE event, enter on OE event
            - If no OE event, collect a paper application and create a 1-1-24 HSA event and enter election
    - If coverage is effective in 2023, no additional action needed – HSA election will be entered on SHR event (or OE event if created for October hires)
- GHC-SCW
    - If a new hire enrolled in GHC-SCW (hired prior to 12/1), the employee should enroll in GHC-SCW on the HIR event.
        - They must complete a paper application for 2024 (if not entered on OE event)

- If they have an OE event, enter on OE event

- If no OE event, collect a [paper application](#) , create and enter the enrollment on a 01/01/2024 ADM and submit a SSO ticket to let Central Benefits know the reason for the ADM event and attach all applications.

- Opt-Out Stipend – if eligible for the employer contribution in 2023, make sure the employee completes 2 [health insurance applications](#) opting out for both years – one for 2023 and one for 2024.

  o Use the SHR event (or OOS event if employee has prior service) to enter 20232 election and a 1-1-24 OOS for the 2024 election.

December 2 – December 31 Hires

- For employees hired 12/2 – 12/31, the 2023 FSA and HSA limits connect to their HIR event even though coverage is effective 1-1-24
  - o Solution:
    - HSA – can change at any time so if employee wants to maximize, can create an HSA event to increase annual election (event date = 1-1-24 or later)
    - Parking/transit – create a 1-1-24 COM event to enter updated annual election
    - Dependent Day Care - no limit change so no issue

WRS-Covered LTEs in First 6 Months

- If WRS-covered LTE in first 6 months as of 1-1-24, the OE event opens Plan Types 1U and 1V in the OE event and the employee will not be given an opportunity to make an election in health.

Life Events and OE

During Open Enrollment

If the employee has a life event where a dependent is added or removed **AFTER** the OE event is created, you should:

- Enter the life event on the BAS Activity Table and process the event the next day
- No tickets are necessary **during** OE

    o The OE event will automatically re-open once the life event is finalized – even if the event has not been reprocessed to pick up the new enrollments

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

After Open Enrollment

- **After** OE, agency should submit a ticket on the day the life event is added to the BAS Activity Table (preferably early in the day).
- Central Benefits will open the event, agency can do entry on life event and then Central Benefits will finalize life event and immediately reprocess OE event – all in the same day (all benefits must be entered on the event)
- Reduces risk of employee doing entry on event that doesn't have most current elections
- <mark>Ticket Name = OE2024 –Reprocess OE due to Life Event – Empl Name & ID</mark>
- What happens if employee submitted OE elections BEFORE life event entry is done?

    o Central Benefits will capture enrollment made on the OE event, reprocess the OE event (this will delete all elections made on the OE event) and will re-enter the elections that were made on the OE event (considering new dependents).

    o A new confirmation statement will be generated, and the employee will receive a confirmation statement notification email

    o **Agency should direct employee to validate elections and print new confirmation statement**

When to Create a Ticket Specifically During Open Enrollment

You should create a ticket in the following situations:

- The employee has a dependent listed more than once – create a ticket so Central Benefits can delete the dependent – **do not delete the dependent yourself**
- You need to make a paper OE election and the event is not open to you (attach application to ticket and redact SSN)
- You need to have an OE event created for someone in the DEF benefit program
- You need the benefits flag moved

Central Benefits Monitoring

Central Benefits will be doing the following monitoring/auditing during and after OE:

- OE events that are out of sequence due to life events or eligibility changes

    o Central Benefits will review, and re-process events as needed

- Central Benefits will monitor, and an email will be sent via Employee Messaging for the following:

    o OE in Notified Status

- - HSA Follow-up (enrolled in HDHP but have not elected HSA for 2023)

  - OOS Follow-up (currently enrolled in OOS but have not made an OE election yet OR currently enrolled in OOS but didn't elect OOS or health for 2024)

  - GHC-SCW Follow-Up (currently enrolled in GHC-SCW but have not made an election to a new plan or waived coverage for 2024)

- Central Benefits will monitor and reach out to the agencies on the following:

  - Enrolled in HDHP but has other coverage (including Medicare) or is 65 years or will be turning 65 next year

  - Enrolled OOS + health insurance

  - Enrolled in health and supplemental preventive dental

  - Missing marital status and dependent information

  - Enrolled in Access Out of State for 2024

  - Very low FSA elections (under $50 minimum)

  - Enrolled in PreTax Parking and have Active Parking General Deduction

  - Enrolled in LPFSA and non-HDHP plan

  - Enrolled in HDHP and enrolled in regular healthcare FSA

  - Removing dependents under age 19 or a spouse but keep family coverage

  - Late year FSA elections

  - Late year GHC-SC enrollees

OE Timeline

- **Sept 18th:**

  - Run PP19 WRS Lookback Report + do all associated processing

  - Agencies should finalize as many open events as possible (TER, RET, TRA, LOA, RFL…)

  - (After 5pm) IYC BAS Group ID added to all active employees who are NOT in the DEF benefit program (only added to DEF if employee currently enrolled in ERA plan)

    - **Once IYC code is on job, agencies must no longer change primary job flag – create a ticket and Central Benefits will move the flag and IYC code (in effect through the end of the year)**

- **Sept 20th**:

  - Agencies can start sending pre-OE email to employees

  - 11/5-11/12 SHR events open for entry (enter as soon as HIR elections finalized)

  - Ben Admin runs at Noon and 5pm. All 2023 benefit configuration in Production (tentative)

  - All 2023 benefit configuration in Production (tentative)

- **Sept 21st:**

  - OE Training for agencies, 1:00pm- 3:00pm

  - Deadline to process all AGE events with an event date of 12-31-23 or earlier (Run WI_BN_OVERAGE_DEPEND_RPT with an as of date of 12-31-23 to see who is remaining)

  - Deadline to process all SHR events by the agencies

- o Ben Admin will run at Noon and 5pm
- o **Sept 22nd:**
    - o Central Benefits will finish outstanding AGE and SHR event entry – before noon
    - o Ben Admin runs at Noon and 5pm.
    - o **All users, except core central staff, will be locked out of HCM starting at 5pm** until notified (likely mid-day on September 23rd if no issues encountered)
    - o IYC code added to any newly active employees (since process last run)
    - o Run process to create ~ 33,000 OE events
    - o Run all baseline audits and queries
- o **Sept 23rd**
    - o Central Benefits and HCM benefits review to ensure OE events prepared correctly
    - o System back open to users sometime mid-day
- o **Sept 24th**
    - o Main OE email sent via Employee Messaging (after 7pm)
- o **Sept 25th** (Monday)
    - o Start of OE period
    - o eBenefits opens to employees at midnight
    - o Employee message will be sent to current GHC-SCW enrollees (late in day)

- o **Oct 2nd**: run PP20 WRS Lookback Report + do all associated processing
- o **Oct 5th**: 11/13 – 11/26 SHR events open for entry
    - o Do not use OE event in place of SHR event for January coverage
- o **Oct 13th**: 11/27 – 12/10 SHR events open for entry
- o **Oct 16th**: run PP21 WRS Lookback Report + do all associated processing
- o **Oct 19th**: 12/11 – 12/23 SHR events open for entry
- o **Oct 20th:** Last day of OE….thousands of employees likely making their elections
    - o Last day to cancel/waive benefits for 2024
    - o eBN closes at 11:59pm
- o **Oct 23rd– Nov 1st**: OE event still open to agencies to enter paper apps received on or before 10/20 (final date subject to change)
- o **Oct 30th**: run PP22 WRS Lookback Report + do all associated processing
- o **Nov 3rd**: 1st OE health election file sent to ETF
    - o 12/24 – 1/1/24 SHR events open for entry
- o **Nov 9th**: 2nd OE health elections file sent to ETF (updates since 11/03 file)
- o **Nov 10th**: Last day to submit OE health elections to ETF (5pm)

- **Nov 17th**: 1st OE enrollment file to Optum Financial

- **Nov 27th**: list of OOS enrollees sent to ETF for validation

- **Dec 1st**: OE file sent to DeltaVision

- **Dec 6th:** OE file sent to Delta Dental (includes Supplemental Dental, Preventive Dental)

- **Dec 8th:** 2nd OE Enrollment file sent to Optum Financial

- **Dec 17th**: 1st day of 2024 Pay Period 1

- **Dec 20th**: Send OE elections to Securian for Accident Plan

- **Jan 11th**: first check payable in 2024

- **Early January**

  - Central Benefits will begin health compare with ETF's system

  - Re-send OOS list to ETF for validation (in case of changes)