

Open Enrollment Process in new world ERP and eBenefits

new world ERP – Human Resources: Benefits Administration



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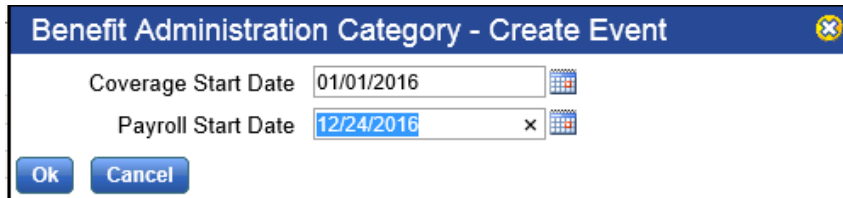


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CREATE EVENTS ON THE BENEFIT CATEGORIES IN NEW WORLD ERP BENEFITS ADMINISTRATION

1. Navigate to Maintenance > Human Resources > Benefits Administration > Benefit Plan Maintenance.
2. Drill into the applicable benefit category by clicking on the edit icon.
3. Click **Create Event**. Enter the *Coverage Start Date* and *Payroll Start Date* for the new benefit year:



Benefit Administration Category - Create Event

Coverage Start Date 01/01/2016

Payroll Start Date 12/24/2016 x

Ok Cancel

4. Click **OK**.
5. Update the *Plan Year* (this only applies to Benefit Categories that must impose annual limits, such as Deferred Comp and Pension).
6. Click **Save**.
7. If nothing has changed with the benefit plan, this step is complete. If rates, coverage options, etc., need to be updated, it may be done now.

Repeat Steps 2-6 for each benefit category that will be part of the open enrollment process.

CREATE AN OPEN ENROLLMENT BATCH IN NEW WORLD ERP

1. Navigate to Human Resources > Benefits Administration > Benefits Open Enrollment.
2. Click **New** to create the open enrollment batch:

Open Enrollment Batch Entry

Open Enrollment Batch

Batch Information

Effective Date: 01/01/2016

Description: 2016 Open Enrollment

No Enrollment Prior Year: No Selection

Benefit Categories

	Category	Coverage Start Date	Coverage End Date	Payroll Start Date	Payroll End Date
<input type="checkbox"/>	Additional CERS	02/07/2016		02/07/2016	
<input type="checkbox"/>	CERS	01/15/2016		01/15/2016	
<input type="checkbox"/>	HSA	01/01/2016	06/30/2016	01/01/2016	06/30/2016
<input type="checkbox"/>	Med Ben Admin Plan	01/01/2016		12/15/2015	
<input type="checkbox"/>	Medical	07/01/2016	06/30/2017	07/01/2016	06/30/2017
<input type="checkbox"/>	Medical Flex	01/01/2016	06/30/2016	01/01/2016	06/30/2016
<input type="checkbox"/>	Medical POS	01/01/2016		12/15/2015	

Benefit Groups

☐ Ajit F/T - Ajit Full Time
☐ Elected - Elected Officials
☐ Exception - Exception
☐ Fire A Shift - A Shift Fire Officers
☐ Fire B Shift - B Shift Fire Officers
☐ Fire C Shift - C Shift Fire Officers
☐ P/T 20 hr - Part Time 20 Hour Week
☐ P/T 25 hr - Part Time 25 Hour Week
☐ P/T 30 hr - Part Time 30 Hour Week
☐ P/T 35 hr - Part Time 35 Hour Week
☐ P/T No Accruals - Part Time - No Accruals
☐ Reg F/T E - Regular Full Time Exempt
☐ Reg F/T NE - Regular Full Time Non-Exempt
☐ Retiree - Retiree
☐ Sworn Officers - Sworn Police

Available: 21 Selected: 0

Create Batch **Cancel**

Effective Date: The date used in this field will determine the categories that will be available. This date should be the *Coverage Date* that was used on the events created on the benefit categories in Benefits Administration. All categories with a *Coverage Start Date* on or after the *Effective Date* will appear.

Description: The description entered here will display on the Benefit Open Enrollment page.

No Enrollment Prior Year: This will determine the default for any employees who did not have a coverage option selected a category used in the open enrollment page.

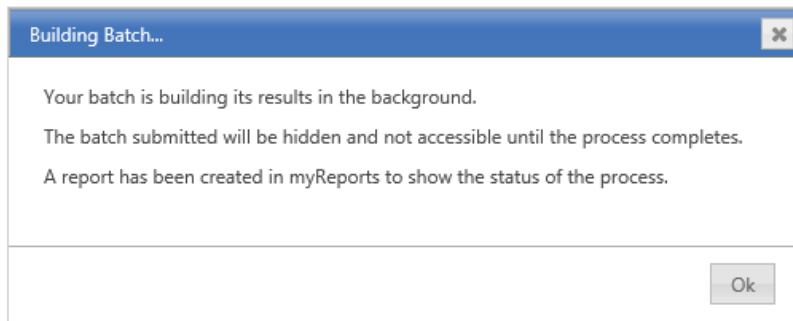
No Selection means the employee will not have a selection and will require the user to select a coverage option, remove the employee from the batch or mark the employee as declined. This selection is recommended.

Declined means the employee will be defaulted to declined for the plans within this category and may be changed when necessary.

Benefit Categories: Select the benefit categories that should be part of the benefit batch by checking the box next to the desired category or selecting the box at the top of the grid to select all.

Benefit Groups: Select the benefit groups that are eligible for this benefit batch by moving them to the right multi-select list box.

- Click **Create Batch**. You will receive a notification indicating that the batch is building in the background:



4. Click **OK**.

While the batch is building, you may continue to use LOGOS. You may create multiple open enrollment batches if employees enroll at different times or if you want to keep benefit groups separate. Additionally, you may create individual batches for benefit plans that are not going to be part of the eBenefits Open Enrollment process.

To check on the progress of the open enrollment batch creation, go to myReports. Once the report "Open Enrollment Initialization" is no longer green, the batch has been completed.

The completed Open Enrollment Initialization Report will provide a summary of the open enrollment batch:



Open Enrollment Initialization

Process finished successfully

<p>Batch 2016 Open Enrollment</p> <p>Benefit Categories Medical</p> <p>Benefit Groups Elected - Elected Officials</p>	<p>Effective Date 01/01/2016</p> <p>Coverage Dates 07/01/2016 - 06/30/2017</p>	<p>No Enrollment No Selection</p> <p>Payroll Dates 07/01/2016 - 06/30/2017</p>
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ENABLE THE BATCH IN eBENEFITS

1. Log into the eSuite Administration website.
2. Navigate to eHR > eBenefits > Manage Benefit Batch.
3. Select the benefit batch and click **Enable Batch**:

Batch Management

Enable Enrollment Batch

Batches created in Logos.NET must be enabled for online enrollment before they can be used in eBenefits

Select Batch:

2016 Open Enrollment ▼


Enable Batch


4. Enter the online enrollment period dates. The online open enrollment process will only be available to employees during this time. (**Tip:** Click the calendar icons to select the dates):

Enable Batch 2016 Open Enrollment

Online Enrollment Period

Specify the start and end dates for the online enrollment period

Start Date 

End Date 

5. Check *Enable* for each category that should be available for online enrollment.

(**Tip:** You do not have to enable every category. You may exclude certain categories from the online enrollment. Deferred compensation and pension categories are not eligible for online enrollment):

Manage Categories

Select which benefit categories from this batch should be available for online enrollment.

Enable	Disable	Source Name
<input checked="" type="radio"/>	<input type="radio"/>	Medical

Complete Batch Activation

6. Click **Complete Batch Activation**.

MANAGE THE OPEN ENROLLMENT BATCH IN eBENEFITS

1. After the Batch has been activated, use the Manage Benefit Batch page (eHR > eBenefits > Manage Benefit Batch) to view the status of the enrollees, edit the batch or disable it:

Manage Enabled Batch

Batch Name	Enrollment Period		Enrollment Status		Options
	Start Date	End Date	Submitted	Unsubmitted	
2016 Open Enrollment			0	6	Status - Edit - Disable

Under Enrollment Status, you will see the total number of employees included in the batch. They will be listed under *Submitted* or *Unsubmitted*, according to their current status.

2. Click the number under **Enrollment Status**, or click [Status](#) under **Options**, to view employee enrollment: You will see a list of the employees in the batch, sorted by benefit group. As they submit their enrollment, the *Submitted Date* column will update:

Employee Enrollment Status For Batch 2016 Open Enrollment

Elected Officials

	Name	Submitted Date	Reset Date	
✗	Antich, Iliana W			
✗	Holohan, Allyson M			
✗	Mauss, Rodney3 W			
✗	Sandone, Jayson C			
✗	Whish, Nia S			
✗	Wydler, Jacqueline D			

(**Tip:** Once an employee submits the enrollment, he or she cannot make changes. However, you can reset the enrollment to reinstate access. After the employee has submitted, return to the Employee Enrollment Status and click **Reset Enrollment** (this button will be available only after the employee has submitted):

Employee Enrollment Status For Batch 2016 Open Enrollment

Elected Officials

	Name	Submitted Date	Reset Date	
✓	Antich, Iliana W	2015-11-12 14:33:16		Reset Enrollment

Click Edit under **Options** to update the **Enrollment Period**, or **Enable/Disable Categories**.

Click Disable under **Options** to disable the entire enrollment batch.

MANAGE THE CONTENT FOR THE OPEN ENROLLMENT BATCH IN eBENEFITS

1. Navigate to eHR > eBenefits > Content Configuration
2. Select the appropriate benefit batch.
3. Select the *Content Region*. This determines which page in the open enrollment process the content will appear:

Enrollment Batch
Next, select an enrollment batch for which you want to manage content
Select a Batch 2016 Open Enrollment ▼

Content Management
Select a Content Region Open Enrollment Welcome Message ▼

B *I* U ABC \times_2 \times^2

Font ▼ Size ▼ Formatting ▼ Style ▼ Insert ▼

4. Click **Save** after adding the desired message.
5. Continue to select new content regions and add messages, as needed.

VALIDATE AND POST THE OPEN ENROLLMENT BATCH IN NEW WORLD ERP

After the online enrollment period ends, and all employees have submitted their enrollment, return to new world ERP to complete the process and post the batch.

1. Navigate to HR > Benefits Administration > Benefits Open Enrollment
2. Drill into the benefit batch by clicking on the description.

If you need to make any manual changes to your employees, because they could not complete their online open enrollment, made a mistake, forgot something, etc., this can be done here.

(Tip: If an employee has a number greater than 0 under the *No Selection* column, it means they have not made an election on one or more benefit plans. Ensure that all employees have 0 under this column):

Open Enrollment Batch List				
Open Enrollment Batch Employee List				
<input type="checkbox"/> Employee Name	Employee Number	No Selection	Benefit Group	Department
<input type="checkbox"/> Azzaro, Dariana L	3540	0	Reg Part-Time (30 - 34 hours)	Police/Administration
<input type="checkbox"/> Bafford, Precious O	2763	2	Reg Part-Time (30 - 34 hours)	Finance
<input type="checkbox"/> Bezanson, Cullen G	2753	2	Reg Part-Time (30 - 34 hours)	Facilities
<input type="checkbox"/> Carlberg, Eden T	3605	2	Reg Part-Time (30 - 34 hours)	Police/Administration
<input type="checkbox"/> Delrossi, German L	2689	2	Reg Part-Time (30 - 34 hours)	Community Services
<input type="checkbox"/> Kolata, Montana M	2708	2	Reg Part-Time (30 - 34 hours)	Police/Administration
<input type="checkbox"/> Lavista, Christopher J	3704	3	Reg Part-Time (30 - 34 hours)	Police/Administration
<input type="checkbox"/> Reinke, Vincent A	3275	2	Reg Part-Time (30 - 34 hours)	Natural Resources
<input type="checkbox"/> Shermwell, Juliette B	3601	2	Reg Part-Time (30 - 34 hours)	Police/Administration
<input type="checkbox"/> Spaw, Brisa JR	3538	2	Reg Part-Time (30 - 34 hours)	Police/Administration

Click an employee's name to view their benefit detail:

New Benefit Plans									
	Category - Plan	Option	Coverage Dates	Payroll Dates	Deduction Amount	Declined	Overridden	Comments	Required
	Health - HealthPartners Co-Pay Open	Single	01/01/2016 - Open	12/27/2015 - Open	\$352.85				
	Life Insurance-Employee Optional		01/01/2016 - Open	01/01/2016 - Open	N/A	✓			
	Life Insurance-Spouse Optional		01/01/2016 - Open	01/01/2016 - Open	N/A	✓			

Click the edit icon to expand the benefit plan detail and make the enrollment changes, if necessary:

Save

Save/New

Cancel

Benefit Plan Detail

Coverage Start Date

01/01/2016

Payroll Start Date

12/27/2015

Coverage End Date

__/__/__

Payroll End Date

__/__/__

Category

Health

Frequency

1st & 2nd Checks of the month

Plan

HealthPartners Co-Pay Open

Decline / Reason

☐

Option

Single

Comments

Enrollment Date

__/__/__

Plan Cost

Rule Set

Tier 1: Hire Date Greater Than or Equal To 01/01/1901

	Default Plan Amount
Total Annual Cost	\$8,468.40
Employer Benefit Amount	
Employee Deduction Amount	\$8,468.40


Dependents

Name	Relationship	Covered
Self	Self	<input checked="" type="checkbox"/>

Close

For the employees to be updated in Workforce Administration, the batch must be validated, reviewed and posted.

Return to the Open Enrollment Batch list (use the breadcrumb in the upper right corner, if you are in the Open Enrollment Batch Employee List.

- Click the validation icon  to navigate to the Open Enrollment Batch Validation.

This will perform a system check to verify that all employees in the batch have a selection or have declined coverage for any eligible plans.

- From the validation screen, select the open enrollment batch by selecting the box next to the batch description and clicking **Submit**.

You will receive the following message:

Validation Results

- Validation is running in the background.
- The batch submitted will be hidden and not accessible until the process completes.
- A report has been created in myReports to show the status of the process.

Once the validation is complete, the Open Enrollment Validation Report will provide a summary:




Open Enrollment Validation

Process finished successfully

Batch 2016 Open Enrollment
Benefit Categories
Health
Life Insurance-Employee Optional
Life Insurance-Spouse Optional
Benefit Groups
6 - Reg Part-Time (30 - 34 hours)





Effective Date 01/01/2016
Coverage Dates
01/01/2016 - Open
01/01/2016 - Open
01/01/2016 - Open

No Enrollment No Selection
Payroll Dates
12/27/2015 - Open
01/01/2016 - Open
01/01/2016 - Open

- Return to the Open Enrollment Batch Validation.
- Click the listings icon  to print the edit/error listings.

Using the *Show Output Preferences* option in the top-right corner, you may determine which reports you want to print and the sort order of the edit listing:

Open Enrollment Batch Print Edit & Error Listing

    Print Edit & Error Listing

Print Edit Report ☒

Print Error Report ☒

Print Change Report ☒

Sort Order

Employee - Category - Plan

- Select the box next to the batch description and click **Submit**.
- Navigate to MyReports to review the open enrollment results.

Open Enrollment Batch Error Listing

This report will list all errors and/or warnings associated with the employees' enrollment.

All errors must be corrected before moving forward. Warnings will not prevent you from posting the batch:



Open Enrollment Batch Error Listing

Sort by Employee - Category - Plan

Employee	Category	Plan	Option	Type	Error Message
Batch	2016 Open Enrollment		Effective Date: 01/01/2016		
2763	Bafford, Precious O	Life Insurance-Employee Optional		Error	Employee has not made a selection in the category.
2763	Bafford, Precious O	Life Insurance-Employee Optional		Error	Plan is required unless the category is being declined.
2763	Bafford, Precious O	Life Insurance-Spouse Optional		Error	Employee has not made a selection in the category.
2763	Bafford, Precious O	Life Insurance-Spouse Optional		Error	Plan is required unless the category is being declined.
2753	Bezanson, Cullen G	Life Insurance-Employee Optional		Error	Employee has not made a selection in the category.
2753	Bezanson, Cullen G	Life Insurance-Employee Optional		Error	Plan is required unless the category is being declined.
2753	Bezanson, Cullen G	Life Insurance-Spouse Optional		Error	Employee has not made a selection in the category.
2753	Bezanson, Cullen G	Life Insurance-Spouse Optional		Error	Plan is required unless the category is being declined.
3605	Carlberg, Eden T	Life Insurance-Employee Optional		Error	Employee has not made a selection in the category.
3605	Carlberg, Eden T	Life Insurance-Employee Optional		Error	Plan is required unless the category is being declined.

Open Enrollment Batch Change Report

This report will list all the employees who have made election changes that differ from last year:



Open Enrollment Batch Change Report

Employee	SSN	Hire Date	Benefit Group
Batch: 2016 Open Enrollment			
3540 Azzaro, Dariana L	234-18-9546	06/10/2013	Reg Part-Time (30 - 34 hours)
Prior Category - Plan - Coverage/Vendor	Coverage	Payroll	Current Category - Plan - Coverage/Vendor
Health - HealthPartners Co-Pay Primary - Single	01/01/2015 - 12/31/2015	12/14/2014 - 12/26/2015	Health - HealthPartners Co-Pay Open - Single
PAYROLL VENDOR			PAYROLL VENDOR
Dependent	Relationship	Date of Birth	SSN
Dependent	Relationship	Date of Birth	SSN
Prior Category - Plan - Coverage/Vendor	Coverage	Payroll	Current Category - Plan - Coverage/Vendor
Life Insurance-Employee Optional - Plan Not Selected	-	-	Life Insurance-Employee Optional - Declined
Beneficiary	Primary	Distribution	SSN
Beneficiary	Primary	Distribution	SSN
Prior Category - Plan - Coverage/Vendor	Coverage	Payroll	Current Category - Plan - Coverage/Vendor
Life Insurance-Spouse Optional - Plan Not Selected	-	-	Life Insurance-Spouse Optional - Declined
Beneficiary	Primary	Distribution	SSN
Beneficiary	Primary	Distribution	SSN

Open Enrollment Batch Edit Listing


This report lists all the employees in the batch and their respective elections:



Open Enrollment Batch Edit Listing





Sort by Employee - Category - Plan

Category	Plan	Benefit Group	Option	Coverage Range	Payroll Range
Batch: 2016 Open Enrollment					
Employee: 3540 Azzaro, Dariana L		Primary Department: 5500_ADM - Police/Administration		Benefit Group: 6 - Reg Part-Time (30 - 34 hours)	
Health	HealthPartners Co-Pay Open	6	Single	01/01/2016 - Open	12/27/2015 - Open
Life Insurance-Employee Optional	Declined	6		01/01/2016 - Open	01/01/2016 - Open
Life Insurance-Spouse Optional	Declined	6		01/01/2016 - Open	01/01/2016 - Open
Employee: 2763 Bafford, Precious O		Primary Department: 7700 - Finance		Benefit Group: 6 - Reg Part-Time (30 - 34 hours)	
Health	HealthPartners \$1750 Deduct Open	6	Single	01/01/2016 - Open	12/27/2015 - Open
Life Insurance-Employee Optional	No Selection	6		01/01/2016 - Open	01/01/2016 - Open
Life Insurance-Spouse Optional	No Selection	6		01/01/2016 - Open	01/01/2016 - Open

- Return to the Open Enrollment Batch List.
- To complete the final step in the open enrollment process, click the post icon  to post the open enrollment batch.

Using the *Show Output Preferences* option in the top-right corner, you may determine which reports you want to print and the sort order of the edit listing:

Open Enrollment Batch Post





Post

Print Edit Report ☒

Print Change Report ☒

Sort Order Employee - Category - Plan

- Select the box next to the batch description and click **Submit**.
- Review the generated reports in myReports.