Open Enrollment Process in new world ERP and eBenefits

new world ERP – Human Resources: Benefits Administration
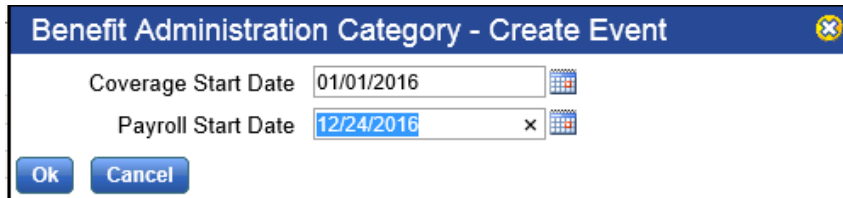
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CREATE EVENTS ON THE BENEFIT CATEGORIES IN NEW WORLD ERP BENEFITS ADMINISTRATION

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:

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:

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.

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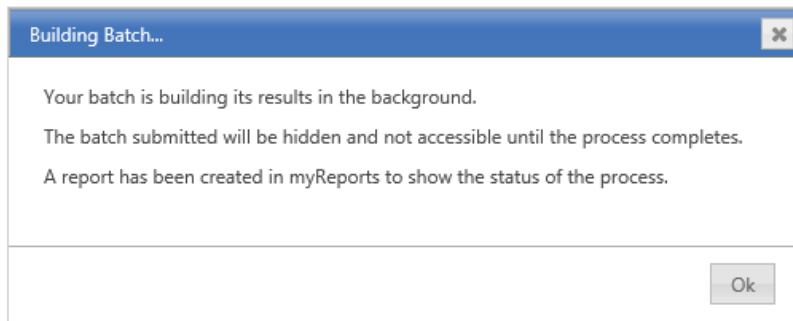
4. Click **OK**.

   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:

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**:

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 11/01/2015

End Date 11/30/2015

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
●	○	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 <u>Status</u> 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:

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

Click <u>Disable</u> 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 ▾]

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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

Employee Name	Employee Number	No Selection	Benefit Group	Department
Azzaro, Dariana L	3540	0	Reg Part-Time (30 - 34 hours)	Police/Administration
Bafford, Precious O	2763	2	Reg Part-Time (30 - 34 hours)	Finance
Bezanson, Cullen G	2753	2	Reg Part-Time (30 - 34 hours)	Facilities
Carlberg, Eden T	3605	2	Reg Part-Time (30 - 34 hours)	Police/Administration
Delrossi, German L	2689	2	Reg Part-Time (30 - 34 hours)	Community Services
Kolata, Montana M	2708	2	Reg Part-Time (30 - 34 hours)	Police/Administration
Lavista, Christopher J	3704	3	Reg Part-Time (30 - 34 hours)	Police/Administration
Reinke, Vincent A	3275	2	Reg Part-Time (30 - 34 hours)	Natural Resources
Shemwell, Juliette B	3601	2	Reg Part-Time (30 - 34 hours)	Police/Administration
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	✓			

Close

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

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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.

3. 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.

4. 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**   Effective Date **01/01/2016**   No Enrollment **No Selection**

Benefit Categories   Coverage Dates   Payroll Dates
Health   01/01/2016 - Open   12/27/2015 - Open
Life Insurance-Employee Optional   01/01/2016 - Open   01/01/2016 - Open
Life Insurance-Spouse Optional   01/01/2016 - Open   01/01/2016 - Open
Benefit Groups
6 - Reg Part-Time (30 - 34 hours)

5. Return to the Open Enrollment Batch Validation.

6. 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 ☑   Sort Order Employee - Category - Plan ▾
Print Error Report ☑
Print Change Report ☑

7. Select the box next to the batch description and click **Submit**.

8. 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.

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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 Edit Listing

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

9. Return to the Open Enrollment Batch List.

10. 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:

11. Select the box next to the batch description and click **Submit**.

12. Review the generated reports in myReports.