

ADAPTING YOUR OPEN ENROLLMENT TO TODAY'S WORKFORCE



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8.18.2020

AGENDA:

- Schedule and Prep
- Configuration
- Communication and Reports
- Testing and Practicing



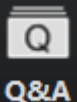
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Feel free to ask questions during the session or use the Q&A icon in the bottom of your screen to submit them

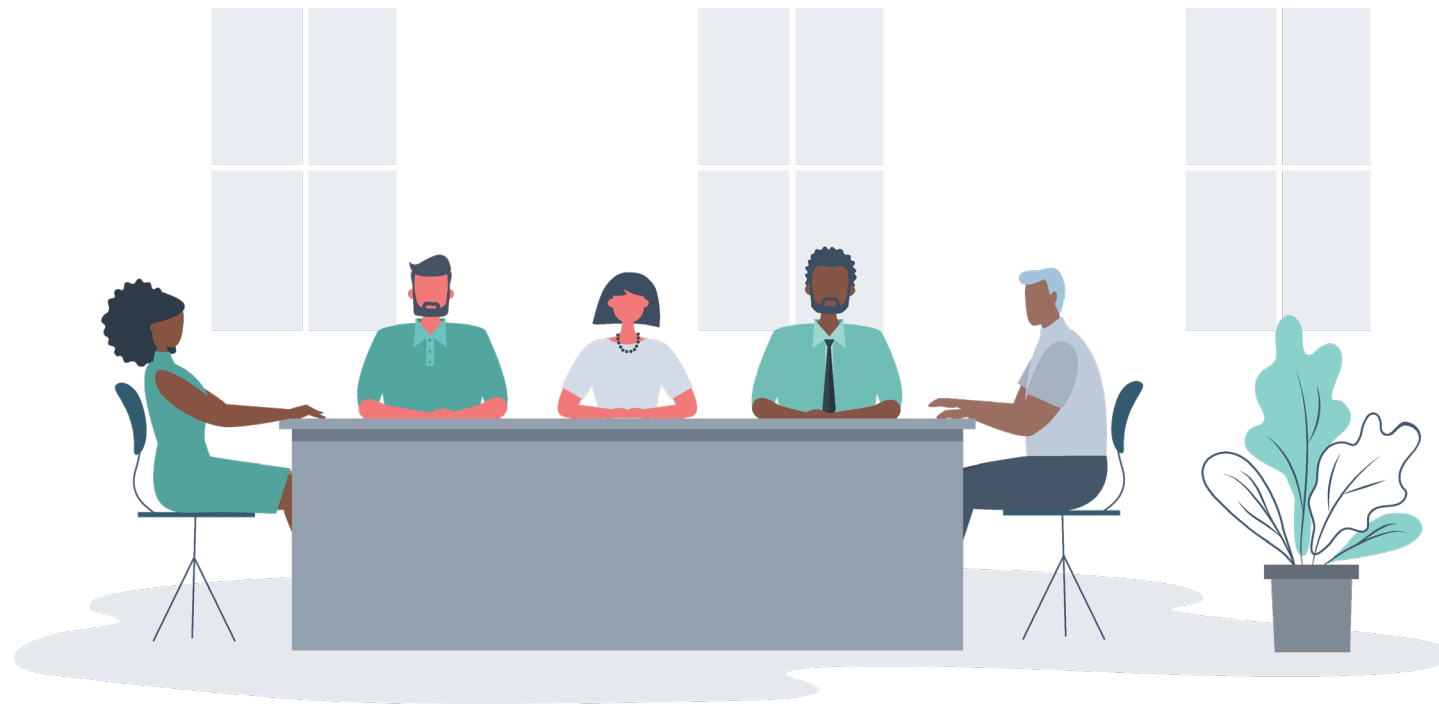
Slides and webinar recording will be shared following our session today.



PART 1: SCHEDULE & PREP

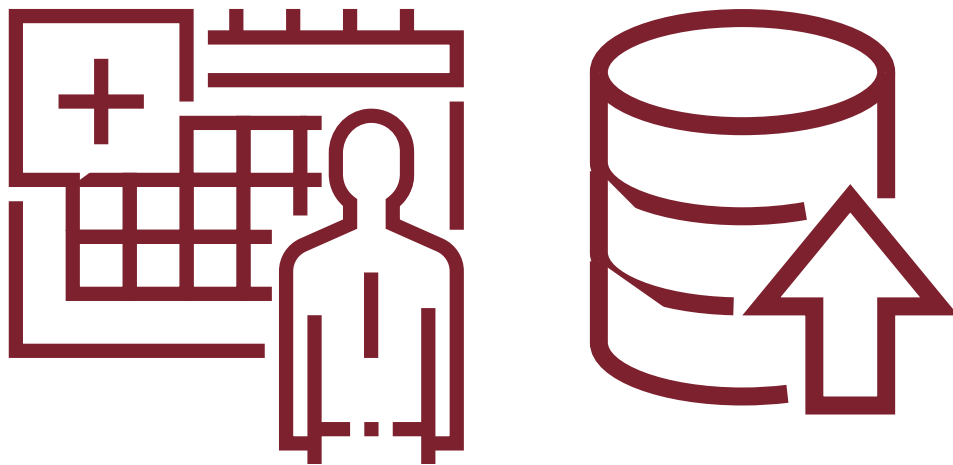
Team Should Include:

- System Admin
- Benefits Admin
- Payroll Admin
- Testers
- Presenter(s)
- Expert



Consider:

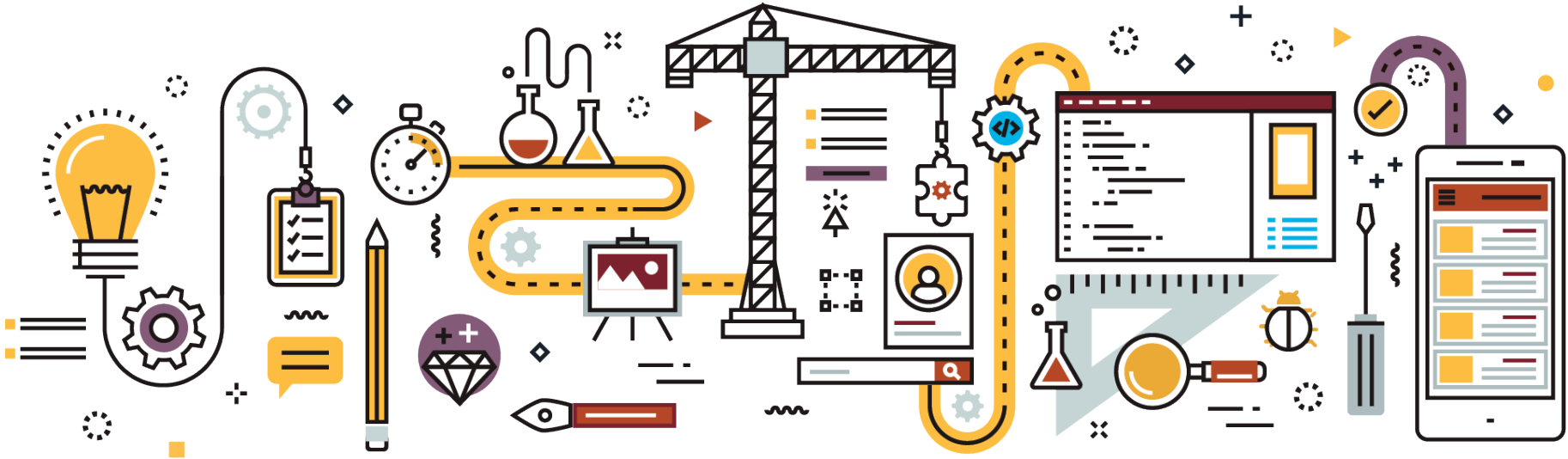
- Vendor File Feeds
- Team Schedule
- [Off Cycle Open Enrollment](#)



Also Consider:

- Multiple Presentations
- Get on Calendars Early
- Video Conferencing Tools

PART 2: CONFIGURATION



Business Rules that affect Open Enrollment:

- Deduction/Benefit Groups
- Deductions/Benefit Type
- Deduction/Benefit Plans
- Benefit Options
- Relationships
- Decline Reason
- Benefit Change Reason

Pending Effective Date Estimator:

B21		What is the start date for the deductions?		
A	B	C	D	
19	Information about when the NEW deductions begin:			
20	What is the start date for benefits?			
21	What is the start date for the deductions?			Deduction Start Date can be any date that falls between the pay period start date and pay period end date for the first payroll of the new plan year. A Best Practice recommendation is to match this up with your Pay Period Start Date. Validation: Deduction start date must be greater than or equal to the pay period start date and less than the pay period end date.
22	What is the pay period start date for this payroll?			
23	What is the pay period end date for this payroll?			
24	What is the pay date for the first payroll for new deductions?			
25				
26	Information about when the CURRENT deductions end:			
27	What is the end date for benefits?			
28	What is the end date for the deductions?			

Define Session



Session Description

Code •

Description •

Plan Year •

Status • ▾

Dates

Session Open •

Session Close •

Pending Effective Date ? •

Make sure you have completed your Pending Effective Date Worksheet available on the Learning Center

Template

You can pre-populate content from previous sessions and make changes as needed.

1. Choose a Previous Session

x ▾

Copy

2. Choose Items to Copy

- Messages
- Administrator Options
- Deduction/Benefit Groups
(includes: Types, Plans, and Qualifiers)



PART 3:

COMMUNICATION & REPORTS



Prepare:

- Invitation
- Reminders
- FAQ
- Benefits at a Glance
- Presentation and Recording
- Follow-up
- Office Hours



Open Enrollment Reporting:

- Open Enrollment Reporting:
 - Standard & Business Intelligence
- New Requirements?

Standard Reports Include:

- Enrollment Status
- Dependents Beyond Qualifying Age
- Employees with Benefit Group Changes
- COBRA Dropped Dependents
- Summary of Elections

Side by Side Comparison (Current Benefits vs Open Enrollment)												
Current	Employee Number	Employee Name	Employee Type	Pay Group Code	Deduction/Benefit Type	Deduction/Benefit Code	Deduction/Benefit (Long)	Benefit Status	Benefit Start Date	Benefit Option or Amount	Current EE Amount	
	1234	Skellington, Jack	Full Time	NBC	Medical	MED	Medical	Active	01/01/2020	Employee	\$ 50.00	
	1234	Skellington, Jack	Full Time	NBC	Dental	DENT	Dental	Active	01/01/2017	Employee	\$ 20.00	
	1234	Skellington, Jack	Full Time	NBC	Vision	VIS	Vision	Active	01/01/2020	Employee	\$ 5.00	

Side by Side Comparison (Current Benefits vs Open Enrollment)							
OE	Deduction/Benefit Code	Deduction/Benefit	Description	Election Status	Employee Declined Plan	Benefit Option or Amount	Elected EE Amount
	MED	Medical	2021 Open Enrollment	Completed	No	Employee	\$ 60.00
	DENT	Dental	2021 Open Enrollment	Completed	Yes		
	VIS	Vision	2021 Open Enrollment	Completed	No	Employee + 1	\$ 10.00



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Upcoming Events View upcoming meetings and webinars.

Meeting View registration reports and poll reports for meetings.

Webinar View registration, attendee, performance, Q&A and poll reports for webinars.

Cloud Recording View detailed information about cloud storage usage by host.

Phone System View phone system usage in a time range

Remote Support View in-meeting support sessions during a certain period.

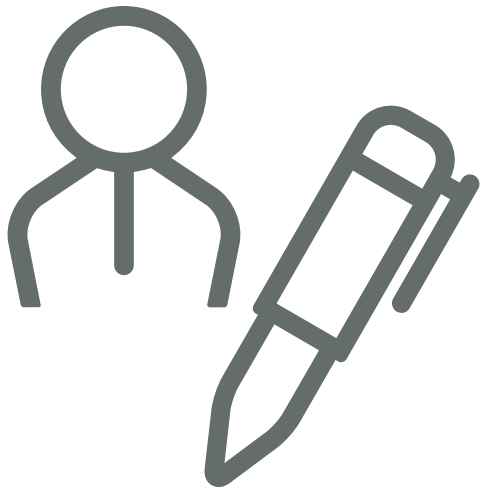
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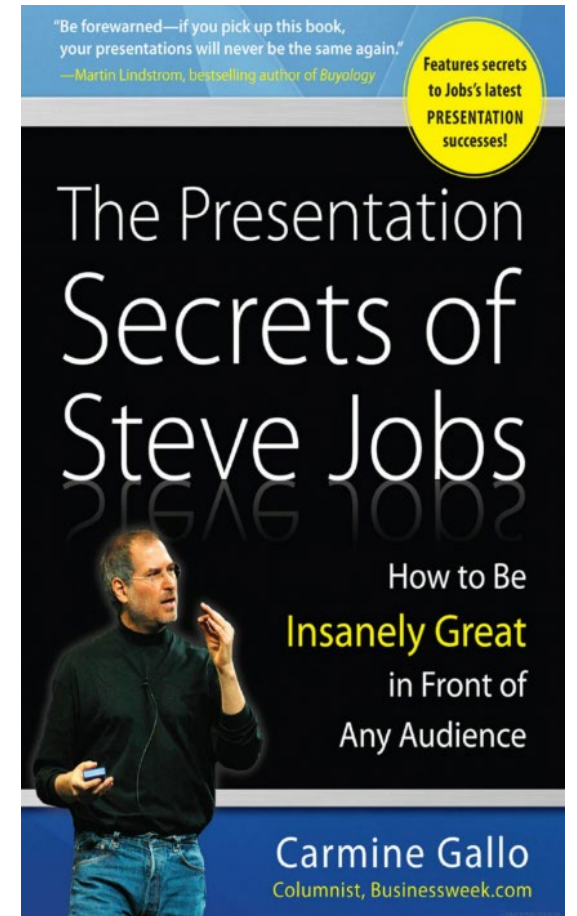
PART 4: TESTING & PRACTICE





TESTING, TESTING AND MORE TESTING

PRACTICE PRACTICE AND MORE PRACTICE



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QUESTIONS?



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