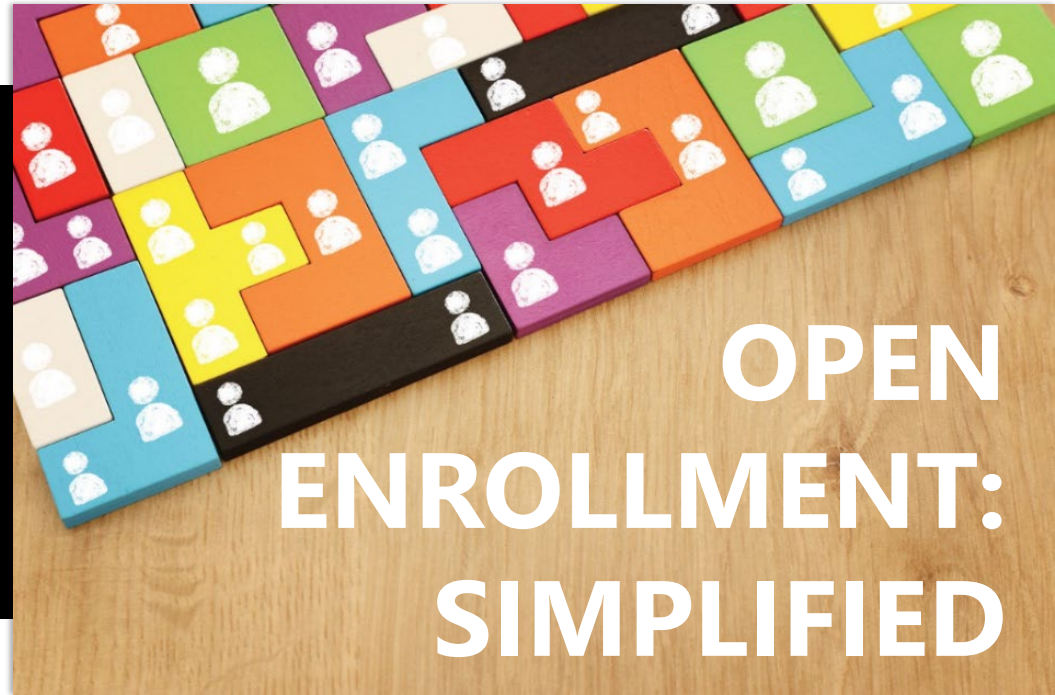


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Presented by: Amanda Edmisten
8.29.2019



**OPEN
ENROLLMENT:
SIMPLIFIED**

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INTRODUCTION

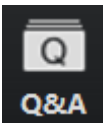
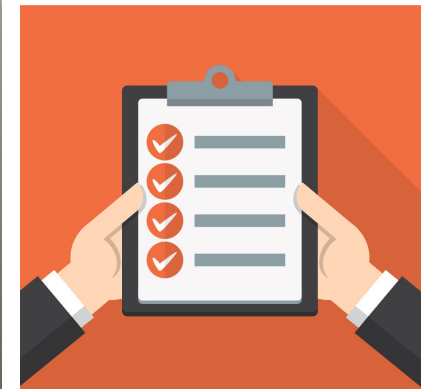
Amanda Edmisten

Senior Premier Support Consultant

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AGENDA

- Team
- Toolkit
- Reports
- Configuration
- Testing



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.

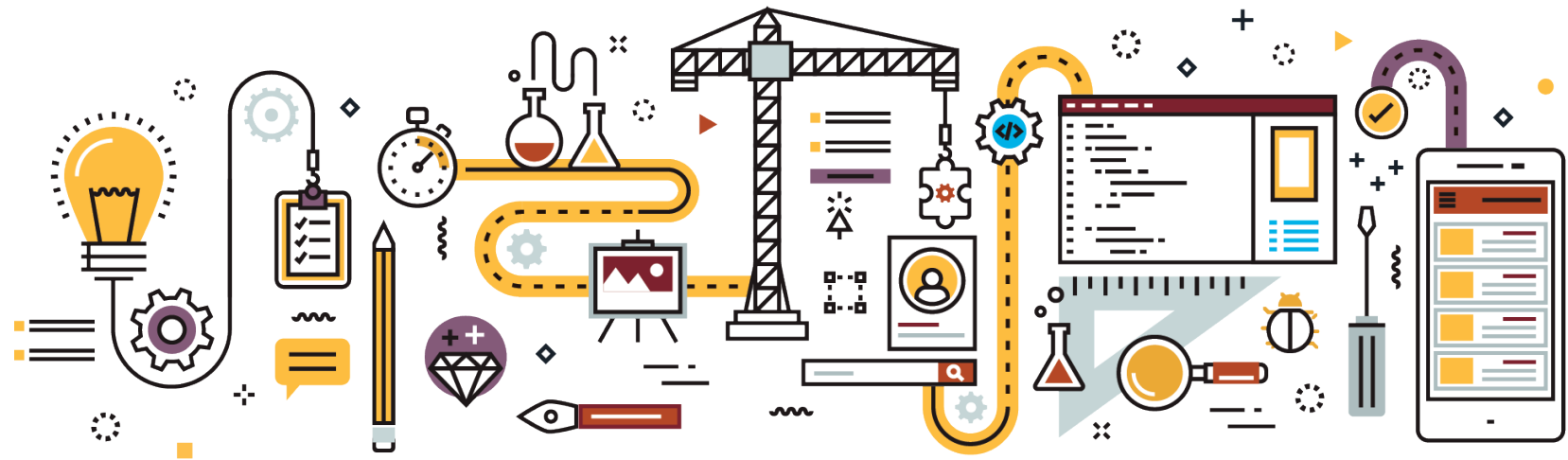
Project Team Should Include:

- System Administrator
- Benefits Administrator
- Payroll Administrator
- Testers



Ultimate Software Toolkit:

- [Rollout Materials](#)
- [Open Enrollment Checklist](#)
- [Plan Contingencies](#)



Standard Reports for Open Enrollment:

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



4 CONFIGURATION

Business Rules that affect Open Enrollment:

- Deduction/Benefit Groups
- Deductions/Benefit Type
- Deduction/Benefit Plans
- Benefit Options
- Relationships

Don't change the Allow Multiple Deductions option in an active session
Controls if employees are allowed to decline a benefit type
Menu > System Configuration > Business Rules > Deduction/Benefit Type

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?			<p>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.</p> <p>Validation: Deduction start date must be greater than or equal to the pay period start date and less than the pay period end date.</p>
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?			

4 CONFIGURATION

Define Session



Session Description

Code: 2019TEST

Description: 2019 Open Enrollment

Plan Year: 2019

Status: Incomplete

Dates

Session Open: 11/01/2019

Session Close: 11/15/2019

Pending Effective Date:

Template

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

1. Choose a Previous Session

OEADM - Open Enrollment (2015)

2. Choose Items to Copy

- Messages
- Administrator Options
- Deduction/Benefit Groups (includes: Types, P...

Copy

Session Setup

MORE10 - More than 10 Ben

Deduction/Benefit Groups

Session: MORE10 - More than 10 BenGroups | Status: Incomplete | Pending Effective Date: 01/05/2020

New Start and Stop Benefits Date Columns

Deduction/Benefit Group	Code	Stop Benefits	Start Benefits	Stop Deductions	Start Deductions
1099 EMPLOYEES	1099	12/31/2019	01/01/2020	12/31/2019	01/01/2020
BA Hourly	BAHRL	12/31/2019	01/01/2020	12/31/2019	01/01/2020
BA Salaried	BASAL	12/31/2019	01/01/2020	12/31/2019	01/01/2020
CALL plans use rate at EE	CNDG1	12/31/2019	01/01/2020	12/31/2019	01/01/2020
C.NO plans use rate at EE	CNDG2	12/31/2019	01/01/2020	12/31/2019	01/01/2020
HR Executive	HREXE	12/31/2019	01/01/2020	12/31/2019	01/02/2020
HR Hourly	HRHRL	12/31/2019	01/01/2020	12/31/2019	01/01/2020
Hourly	HRLY	12/31/2019	01/01/2020	12/31/2019	01/01/2020
HR - Salaried	HRSAL	12/31/2019	01/01/2020	12/31/2019	01/01/2020
OTHER 1	OTH1	12/31/2019	01/01/2020	12/31/2019	01/01/2020

1 / 2 | Records per page: 10



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5 TESTING



TESTING, TESTING AND MORE TESTING

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QUESTIONS?



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