



eeeeeeeeBenefits...

**Taking the Fear Out of
Automating Enrollment**

Session 25195

Carrie Medders, Eric Blessing and Twinki Mistry
San José State University



San José State
UNIVERSITY

eeeeeeeeBenefits...Taking the fear out of automating enrollment

Today's Presenters

- Carrie Medders
 - HR Project Manager and Manager, Training & Support
 - San José State University
- Eric Blessing
 - Io Consulting, Inc.
- Twinki Mistry
 - HR Analyst/Trainer
 - San José State University



eeeeeeBenefits...Taking the fear out of automating enrollment

San José State University

- 32,000 students and 5,000+ employees (full & part-time)
- Oldest institution of public education on the west coast
- 1 of 23 campuses in the California State University system
- Silicon Valley's metropolitan university



Project Timeline & Scope

- February 2007 – March 2008 (2 phases)
- Scope
 - Phase 1 (Live September 2007)
 - Open Enrollment
 - Tax Sheltered Annuity Processing
 - Phase 2 (Live March 2008)
 - New Enrollment
 - Life Events



The Basics

- HCM 8.9
- Benefits Administration
 - Processes well-defined and stable
- Why did we do it?
 - Reduce paper flow
 - Reduce data entry for Benefits staff



Phase 1

- Goals
 - Full processing of OE and TSA transactions
 - No paper flow other than required docs
 - eSignature
 - Automated determination of required permitting event codes (CA requirement)



Open Enrollment

- Functionality
 - Delivered look and feel
 - Mostly delivered processing
 - Code changes to validate no double enrollment
 - Code changes to accommodate permitting event processing



Open Enrollment

- Functionality
 - Custom record and fields to accommodate Flexible Cash payment for Medical & Dental coverage
 - Appear on Enrollment Option page
 - Custom eSignature page and processing
 - Disclosures and Privacy notices
 - Custom reports/enrollment forms



San José State
UNIVERSITY

eeeeeeeeBenefits...Taking the fear out of automating enrollment

Open Enrollment

- Challenges
 - CA required permitting events
 - Dependent processing
 - Timing to finalize



Tax Sheltered Annuity

- Functionality
 - Custom component that feeds into delivered records
 - Allows delivered process to run as if data were entered manually
 - Custom eSignature page and processing
 - Custom reports/enrollment forms



Tax Sheltered Annuity

- Challenges
 - Effective dates and submission cutoff
 - Terminations (waives)



Phase 2

- Goal
 - Full processing of New Enrollment (new hires/newly eligible) and Life Events
- Reality
 - Custom online data collection and manual processing
 - Paper flow still eliminated



Phase 2

- Why didn't we meet the goal?
 - Potential for multiple effective dates
 - Medical & Dental have one rule; FlexCash and Flexible Spending have another
 - Life Event variables too complex
 - Exceptions to rules would have caused employee to have to answer multiple questions and walk down many paths



Phase 2

- Why we're still happy
 - Paper flow eliminated
 - Employees still key online
 - Dependent data flows to delivered records
 - Benefits staff has more efficient online process
 - Benefits staff still has control



New Enrollment and Life Events

- Functionality
 - Custom page to collect enrollment data
 - Custom record/fields to store data
 - Custom review page for benefits
 - Custom email process for notification
 - Custom eSignature page and process



New Enrollment and Life Events

- Basic Process
 - Employee completes enrollment data and submits (eSignature) to Benefits
 - Benefits receives notification
 - Benefits creates BAS_ACTIVITY row; runs OnDemand Event Maintenance; generates reports
 - Benefits notifies employee via email that enrollment is complete



New Enrollment & Life Events

- Challenges
 - Multiple effective dates
 - Varying life event rules



eBenefits Demonstration

- Open Enrollment
- Tax Sheltered Annuity
- Life Events
- New Enrollment



Communication, Training, Help

- Communication
 - Postcards to all eligible employees
 - OE and TSA only; initial go-live
 - Inserts in paychecks
 - OE and TSA only; initial go-live
 - Email/Website notices



Communication, Training, Help

- Training and Help
 - High-level overview sessions w/demonstrations for OE and TSA; glimpse of new enrollment and life events
 - Open labs during OE
 - Kiosks in benefits offices
 - Business process guides



San José State
UNIVERSITY

eeeeeeeeBenefits...Taking the fear out of automating enrollment

Time for you to talk...

- Questions?
- Comments?
- Praise and adoration?