PeopleSoft Benefits Administration and eBenefits for 9.1

Quest Benefits PUG

January 19, 2012

Brian J McIntyre, President
brian.mcintyre@workstrategy.com

Laurie Jacobsen, Principal Consultant
laurie.jacobsen@workstrategy.com
Agenda

• WorkStrategy Overview

• Recap – Base Benefits vs. Ben Admin

• What’s New with Benefits Administration?
  – Employee/Dependent Data
  – Benefits Enrollment
  – eBenefits Self-Service

• Configuration Updates
  – Base Benefits
  – Benefits Administration
  – eBenefits

• Q&A
WorkStrategy Profile

- HR Management firm based in Maryland
- Certified Oracle Gold Level Implementation Partner
- PeopleSoft 9.1 Implementations and Upgrades
- 9.1 Oracle Co-Development Partner
- PeopleTools-based Comp and Total Rewards Software
- PeopleSoft Production and Maintenance Services
- Fit/Gaps and Delta Training
- HR Process Improvement
- MSS & Workflow Design
- Onboarding and Offboarding (SilkRoad RedCarpet)

Talent Management Strategy

- ePerformance
- Profile Management
- TAM/CG (Recruiting)
- Succession Planning
- Learning Management (ELM)
- eComp+, eComp MD 9.1
- eBenefits
- eProfile Manager Desktop
Benefits Functionality by Release

• Release 8.9
  – Employee/Dependent Data Updates
  – Health Savings Account Functionality

• Release 9.0
  – Expanded Dependent Administration
  – **Major Changes to Base Benefits Configuration**
  – **Enhance and Extend Existing Functionality**

• Release 9.1
  – More Dependent Enhancements
  – Bundle 8: Compliance with HIPAA 5010
### Recap - Base Benefits vs. Benefits Admin

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Base Benefits</th>
<th>Benefits Administration</th>
</tr>
</thead>
</table>
| Automated Processing| No – Manual (Program Type)  
Recordkeeping/Administrator Input | Yes - Automated (Program Type)  
Automated Process |
| Eligibility Rules:  | No – Manual  
Entered in Human Resources  
Administrator Determination | Yes – Set at Program and Option Level  
Derived by Benefits Administration  
Derived by Benefits Administration |
| Event Rules:        | No - Manual  
Price Offset  
Base Benefits Tables:  
--- Flat, Age-Graded, and Service  
--- Salary Percentage (annual)  
Not available  
Not available  
Election Based – elected option  
Price = Total Premium - Employer Cost  
No Credit | Yes - Set at Plan Type Level  
Total Compensation  
Base Benefits Tables:  
--- Flat, Age-Graded, and Service  
--- Salary Percentage (annual)  
Global/Upfront – all employees  
Global/Upfront – all options in a plan  
Election Based – elected option/credit  
Price = Total Premium  
Credit = Employer Cost |
| Employer Credits:   | Price Offset  
Base Benefits Tables:  
--- Flat, Age-Graded, and Service  
--- Salary Percentage (annual)  
Not available  
Not available  
Election Based – elected option  
Price = Total Premium - Employer Cost  
No Credit | Price Offset  
Base Benefits Tables:  
--- Flat, Age-Graded, and Service  
--- Salary Percentage (annual)  
Global/Upfront – all employees  
Global/Upfront – all options in a plan  
Election Based – elected option/credit  
Price = Total Premium  
Credit = Employer Cost |
## Recap - Base Benefits vs. Benefits Admin

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Base Benefits</th>
<th>Benefits Administration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollment:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Calc Options/Prices</td>
<td>Yes</td>
<td>Yes (SQR: BAS004)</td>
</tr>
<tr>
<td>- Enrollment Form</td>
<td>No</td>
<td>Yes (‘Data Entry’ panels/scroll to plan)</td>
</tr>
<tr>
<td>- Election Entry</td>
<td>Yes (‘Use’ Menus/open by plan type)</td>
<td>Yes</td>
</tr>
<tr>
<td>- Enrollment Monitoring</td>
<td>No</td>
<td>Yes (SQR: BAS005)</td>
</tr>
<tr>
<td>- Confirmation Stmt</td>
<td>No</td>
<td>Benefits Administration (PSPBARUN)</td>
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<tr>
<td>- Deduction Processing</td>
<td>Deduction Calculation (DEDCALC)</td>
<td>Yes – Base Benefits</td>
</tr>
<tr>
<td>- Carrier Interfaces</td>
<td>Yes – Base Benefits</td>
<td>Yes – Base Benefits</td>
</tr>
<tr>
<td>- Leave Accruals</td>
<td></td>
<td>Yes – Base Benefits</td>
</tr>
<tr>
<td><strong>eBenefits Self Service</strong></td>
<td>Benefits Inquiry</td>
<td>Benefits Inquiry</td>
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<tr>
<td></td>
<td>Life Events</td>
<td>Life Events</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Benefits Enrollment</td>
</tr>
</tbody>
</table>
Benefits Upgrade Analysis

PeopleSoft Benefits Fit/Gap Analysis Release 9.1

Presented to ABC Corp
February 24, 2011

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Appendix H ................................................................. Customization Log
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Appendix J ................................................................. Meeting Agenda/Notes
Benefits Upgrade (Fit) Analysis Appendices

- **Appendix A** – *Benefits Program Definition*. This appendix outlines the criteria for benefit program eligibility and the plans that are offered within each program.

- **Appendix B** – *Benefits Plan Summary*. This appendix summarizes the benefit plan options, coverage levels and associated provisions offered within each program. In addition, the self-service configuration is evaluated to determine which functions will be used for eBenefits.

- **Appendix C** – *Action/Reason Definition*. All of the action/reason codes currently used in the system and how they will be translated to benefit status and event class for benefits processing are summarized in this appendix. This document includes all ABC CORP updates to date.

- **Appendix D** – *Event Class*. Benefit events are the drivers that determine how benefits will be processed. All delivered and recommended event classes are outlined in this appendix.

- **Appendix E** – *Event Status Change Matrix*. This appendix lists in table form the employee Job, Personal, Benefits and Open Enrollment events that occur and their impact on benefits, including self-service data collection and editing.

- **Appendix F** – *Benefits Integration*. This appendix documents all manual and electronic integration files, reports, forms and/or correspondence used for benefits plan administration.

- **Appendix G** – *Benefits Plan Matrix*. This appendix lists in table form the entire configuration for Benefits Administration detailing the plans offered within each benefit program including rates, calculation rules, eligibility and event rules.

- **Appendix H** – *Customization Log*. This appendix lists the customizations that have been identified throughout the Fit/Gap Analysis as well as any that are currently in place which are necessary for implementation.

- **Appendix I** – *Benefits Checklist*. This section identifies the benefits functionality that will be used for the ABC CORP configuration.
## Benefits Plan Matrix

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Benefit Program/Eligibility Rules</th>
<th>Deduct (Earliest) Code</th>
<th>Rate Type</th>
<th>Rate Code</th>
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<td>Benefit Plan</td>
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<td>C</td>
<td>D</td>
<td>E</td>
</tr>
</tbody>
</table>
| A         | B       | C       | D       | E�...
Employee/Dependent Information > Benefits Personal Data

- Medicare A, B & D information may be tracked for employees
- Added Fields: Effective Date, Medicare Number, Indicators and Reasons
- HIPAA Medicare Eligibility Reason: Age, Disability, End Stage Renal Disease
Employee/Dependent Information > Update Dependent/Beneficiary

• Relationships Simplified (Son, Daughter = Child)
• Effective Dating for Dependent/Beneficiary Records – Name, Address, ..... 
• HIPAA Medicare Eligibility Reason: Age, Disability, End Stage Renal Disease
Relationship Codes

- Simplified Relationships Across HRMS
- Upgrade Converts All Tables that Contain ‘Relationship’
Covered Person Type

- ‘Dependent’ Relationships More in Line with Covered Person Types
- Covered Person Types Used for Health Care (1x) Plans
Dependent Relationships Table

- Identify ‘Dependent’ Relationship; All Others Assumed ‘Beneficiary’
- Added Edits to Enforce Relationship Attributes
  - Age Limit Flag
  - Gender Validation

<table>
<thead>
<tr>
<th>Relationship to Employee</th>
<th>Covered Person Type</th>
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<tbody>
<tr>
<td>Child</td>
<td>Child</td>
</tr>
<tr>
<td>Employee</td>
<td>Employee</td>
</tr>
<tr>
<td>Foster Child</td>
<td>Child</td>
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<tr>
<td>Grandchild</td>
<td>Child</td>
</tr>
<tr>
<td>OPAult</td>
<td>Dom Partn</td>
</tr>
<tr>
<td>OP Child</td>
<td>Child</td>
</tr>
<tr>
<td>Other</td>
<td>Oth Q Dep</td>
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<tr>
<td>Oth Child</td>
<td>Child</td>
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<tr>
<td>Rec Child</td>
<td>Child</td>
</tr>
<tr>
<td>Stepchild</td>
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<tr>
<td>Spouse</td>
<td>Spouse</td>
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<tr>
<td>ExSpouse</td>
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</table>
Dependent Age Limits

- New Rule Available to Set Dependent Age Limits by Plan (DEP_RULE_TBL)
- Program Linkage at Plan Type Level, not Benefit Program
Review Employee Benefits > Current Benefits Summary

- Expanded with More Information

### Benefit Enrollment Summary

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Elect</th>
<th>Plan Type</th>
<th>Coverage or Participation</th>
<th>Coverage Begin</th>
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<tbody>
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<td>MEDOAP</td>
<td>E</td>
<td>Medical</td>
<td>Family</td>
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<td>Den Buy-Up</td>
<td>E</td>
<td>Dental</td>
<td>Family</td>
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<td>Vision</td>
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<td>Family</td>
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<td>Wellnes</td>
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<td>Vol Life 1</td>
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<td>Salary X 4</td>
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<td>$20000</td>
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<td>STD</td>
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<td>66.907% of Salary</td>
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### Benefit Deduction Summary

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<th>Coverage Base</th>
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<th>Pay Period End</th>
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<td>MEDOAP</td>
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<td>N</td>
<td>67.31 06/26/2010</td>
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<td>Den Buy-Up</td>
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<td>103.48 06/26/2010</td>
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<td>134.52 06/26/2010</td>
<td>80.77 06/26/2010</td>
<td>80.77 06/26/2010</td>
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More detail on the HIPAA Certificate

CERTIFICATE OF GROUP HEALTH PLAN COVERAGE
04/21/2007

IMPORTANT – KEEP THIS CERTIFICATE. This certificate is evidence of your coverage under this plan. Under a federal law known as HIPAA, you may need evidence of your coverage to reduce a pre-existing condition exclusion period under another plan, to help you get special enrollment in another plan, or to get certain types of individual health coverage even if you have health problems.

Participant (Employee): Richard Stankowski
Participant ID: 545-77-4854
11308 Wildflower Lane
Grass Valley, CA 95717

Covered Dependents:

Plan Administrator: 
Group Health Plan: Medical MCO Plan 2
Plan Provider: Kaiser Permanente
Group ID: M5555

Coverage Begin: 07/15/2000
Waiting Period Began: Not Applicable
Coverage Ended: 07/15/2003
Creditable Coverage: 550 Days (18 MONTHS)
Interface with Providers > Refresh Benefit Snapshot

- Added ‘Use Runtime Date’ checkbox for automatic Process Scheduler run control definitions
- Snapshot data will support both the 4010 and 5010 versions of the file
Interface with Providers > Create HIPAA EDI 834 File

- Run Control Expanded to Include Benefit Plan and Group Number Criteria
- Users Select Which Process to Run, 4010 or 5010
- File Output Supports All ‘Required’ Data Fields and Segments; ‘Situational’ and ‘Depends Upon Contract’ Information is Not Included
**eBenefits Pages**

- Updated with 9.1 Style Sheet and 8.5x Tools

### Benefits Summary

**Betty Lochery**

To view your benefits as of another date, enter the date and select Go.

<table>
<thead>
<tr>
<th>Type of Benefit</th>
<th>Plan Description</th>
<th>Coverage or Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Medical HMO Plan 2</td>
<td>Employee + Spouse</td>
</tr>
<tr>
<td>Dental</td>
<td>Dental DMO</td>
<td>Employee + Spouse</td>
</tr>
<tr>
<td>Vision</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Life</td>
<td>Basic Life Plan</td>
<td>$50,000</td>
</tr>
<tr>
<td>Supplemental Life</td>
<td>Suppl Group Life 1x</td>
<td>Salary X 1</td>
</tr>
<tr>
<td>AD and D</td>
<td>Flat 25K AD&amp;D</td>
<td>$25,000</td>
</tr>
<tr>
<td>Dependent AD and D</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Dependent Life</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Supplemental AD and D</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Short-Term Disability</td>
<td>Short Term Disability - 60%</td>
<td>80% of Salary</td>
</tr>
<tr>
<td>Long-Term Disability</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>401(k)</td>
<td>401(k) Employer Pot Match</td>
<td>$200 Before Tax</td>
</tr>
<tr>
<td>Profit Sharing</td>
<td>Profit Sharing Plan</td>
<td>Not Contributing</td>
</tr>
<tr>
<td>Employee Stock Purchase</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Sick</td>
<td>GBI Sick Leave Plan</td>
<td>- - - - - -</td>
</tr>
</tbody>
</table>

### Medical

**Betty Lochery**

To view your benefits as of another date, enter the date and select Go.

<table>
<thead>
<tr>
<th>Plan Name:</th>
<th>Medical HMO Plan 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Provider:</td>
<td>Kaiser Permanente</td>
</tr>
<tr>
<td>Coverage:</td>
<td>Employee + Spouse</td>
</tr>
<tr>
<td>Group Number:</td>
<td>M55555</td>
</tr>
<tr>
<td>Customer Service:</td>
<td>555/782-1111</td>
</tr>
</tbody>
</table>

**Covered Dependents**

- **Erik Mathers**
  - Relationship: Spouse

**Additional Information**

- [Find a Health Care Provider](#)
- [Return to Employee Benefit Summary](#)
eBenefits Dependent/Beneficiary

Dependent and Beneficiary Information

Betty Locherty

The people listed below may be eligible for Benefit Coverage. Select a name to view or modify their personal information.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship to Employee</th>
<th>Date of Birth</th>
<th>Marital Status</th>
<th>Marital Date</th>
<th>Student</th>
<th>Disabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enk Mathers</td>
<td>Spouse</td>
<td>10/12/1951</td>
<td>Married</td>
<td></td>
<td>No</td>
<td></td>
</tr>
</tbody>
</table>

In addition to the persons listed above, the following can also be allocated to as beneficiaries.

Dependent and Beneficiary Coverage Summary

Betty Locherty

To view your benefits as of another date, enter the data and select Go.

01/01/2012

Dep/Ben Details

<table>
<thead>
<tr>
<th>Dependent/Beneficiary Name</th>
<th>Relationship</th>
<th>Type of Benefit</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enk Mathers</td>
<td>Spouse</td>
<td>Medical</td>
<td>Medical HMO Plan 2</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dental</td>
<td>Dental DMO</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Life</td>
<td>Basic Life Plan</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Supplemental Life</td>
<td>Suppl Group Life 1x</td>
</tr>
<tr>
<td></td>
<td></td>
<td>AD and D</td>
<td>Flat 25K AD&amp;D</td>
</tr>
</tbody>
</table>
Base Benefits Configuration – Plan/Attributes Updates

• Health Care (1x) – Separate Domestic Partner Plans Not Necessary
  – Coverage Codes Added for Covered Dependents
  – Rate Tables Expanded for Multiple Tax Classes

• Life Insurance (2x/3x) – Life and Disability coverage calculations have been expanded by providing more formula options

• Savings (4x) – Improved limit processing as well as employer contributions enhancements

• Leave (5x) – No updates; leave included in Absence Management in version 8.9 forward

• Spending Accts (6x) – HSA (Health Savings Accounts) added in version 8.9

• Simple Rates (Ax) – Elective Plans with Deductions (LTC, Legal Plans,....)
Health Care Dependents – Coverage Code Table

- Expanded Health Care Coverage Codes
- Linkage to ‘Covered Person Type’ for Definition Flexibility
  - Identify Eligible Relationships
  - Limit Allowable Number of Dependents

<table>
<thead>
<tr>
<th>Coverage Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Single</td>
</tr>
<tr>
<td>12</td>
<td>Employee+DP</td>
</tr>
<tr>
<td>13</td>
<td>Family w/DP+DP_Child</td>
</tr>
<tr>
<td>14</td>
<td>Family w/DP</td>
</tr>
<tr>
<td>2</td>
<td>Employee+One</td>
</tr>
<tr>
<td>22</td>
<td>Employee+Civil Partner</td>
</tr>
<tr>
<td>23</td>
<td>Family w/CP+CP_Child</td>
</tr>
<tr>
<td>24</td>
<td>Family w/CP</td>
</tr>
<tr>
<td>4</td>
<td>Family</td>
</tr>
<tr>
<td>A</td>
<td>Waive Coverage</td>
</tr>
</tbody>
</table>

Effective Date: 12/01/2009
Status: Active
Description: Family
Short Description: Family
COBRA Coverage Set:
Total Covered Persons
Total Minimum Covered: 0
Total Maximum Covered: 0

<table>
<thead>
<tr>
<th>Covered Person Type</th>
<th>Minimum Covered</th>
<th>Maximum Covered</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Child</td>
<td>1</td>
<td>99</td>
</tr>
<tr>
<td>2 Employee</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>3 Spouse</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>
Health Care Dependents – Coverage Code Table

- Domestic Partner Codes 12 and 14 Delivered.....
- .....Updates Allowable
Life/Disability Coverage Calculations

- Attribute Page Expanded...Coverage Type and Insured Person
- New ‘Coverage Formula’ Table
  - Allows More Flexibility for Calculations
  - Includes Age Reduction Schedules
Savings (4x) Enhancements

- Improved Savings Management Processing
  - 402(g), 457 and 401(a) Limit Extensions (Using Check Date)
  - Contribution Suspensions
Health Savings Accounts (Plan Type 67)

- **Account Type:** Spending Account or Health Savings?
- **HSA Contribution Attributes**
  - Cross Plan Validation with Health Care Coverage Codes
  - Employee/Employer Contributions and Limits

### Table: Plan Details

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Benefit Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>67</td>
<td>HSA</td>
</tr>
</tbody>
</table>

### Table: Spending Account Setup

- **Effective Date:** 12/01/2009
- **Plan Management**
  - **Type of Account:** Health Savings Account
  - **Plan Contribution:** EE Contribution Optional
  - **Contribution Frequency:** Biweekly
  - **Balance Management:** SetID: TS01, Balance ID:

### Table: Contribution Controls

<table>
<thead>
<tr>
<th>Controlling Plan Type</th>
<th>Controlling Benefit Plan</th>
<th>Description</th>
<th>Coverage Code</th>
<th>Maximum Annual Contribution</th>
<th>Employer Contribution Amount</th>
<th>Limit to %</th>
</tr>
</thead>
</table>
Simple Plans (Ax)

- Generic plan type for benefits that have no attributes other than an election (examples: Legal Plan, LTC, EAP, Fitness Center, Car Insurance, etc.)
- Allows “deduction only” plans to be available in Self Service
Base Benefits Configuration – Rates & Rules

- Calculation Rules - Restructured to Retain Fields for Rate Calculations

- Coverage Formulas

- Benefit Rates (Red Paper – Understanding Benefit Rates)
  - Old Rate Structures Replaced; Same Calculation Process
  - PS Delivered ‘Benefit Rate Type’
    - Provides Additional Criteria
      - Salary Bands
      - Number of Covered Persons
    - New Types Define Rate Table Structure and Criteria
  - Rate Tables Expanded
    - Old: Employee and/or Employer Rates
    - New: Tax Class
      - Employee: Before or After Tax Deductions
      - Employer: Non-Taxable or Taxable (Imputed Income) Premiums
Calculation Rules

- Retained Rules related to the calculation of Rates, not Coverage
- Calculation Rules define age, service and benefits salary (multiple ABBRs)
- Coverage definitions moved to Coverage Formulas
Coverage Formulas

- All Parameters Necessary for Coverage Calculation
  - Coverage Salary and Source
  - Calculation Including Rounding and Limits
- Coverage Reduction Schedules
- May be Copied Using Clone Utility
Benefit Types

- Benefit Types = Rate Criteria
- Required for Benefit Rate Definition
Benefit Rates

- Retain existing types (Flat, Age Graded) plus new (Compensation Bands, Covered Person Type, Benefit Plan and Coverage Code)
- Retain existing Employee/Employer Rates (Composite Rates tab)
- Rates may now be defined by Tax Class (Detail Rates tab)
Benefit Rates – Tax Class

• Employee Rate = Before-Tax and/or After-Tax Rates
• Employer Rate = Non-Taxable and/or Taxable (Imputed Income) Rates
• Domestic Partners can be managed in a single plan and coverage code
Benefit Rates – Payroll Impact

- Rates by Tax Class = 1 Benefit Deduction
- No Longer Need to Separate Deductions (Plans) for Payroll Taxation
Ben Admin Configuration > Eligibility

- Added fields to track Medicare entitlements and enrollments
- Fields may be used within Benefits Administration Eligibility Rules
Ben Admin Configuration > Events

- Retain Covered Dependents (with New Plan Election)
- Ignore Overage Dependents (Keep Existing Coverage)
- Electable Options - Ensure coverage changes are consistent with qualifying event
Ben Admin Configuration > Events

- EOI Level Rules on Separate Tab/Page
- Same Functionality
eBenefits Configuration > Certification

- Enter Instruction and Agreement/Acceptance Text
- Define Question Type: Yes/No, Multiple Choice or Rating
- Enter Question Text and Available Responses

Domestic Partner Certification

Please answer the following questions regarding your Domestic Partner relationship status for the past three months:

1. We have shared the same residence.
   - Yes
   - No

2. We have been each other's sole domestic partner.
   - Yes
   - No

3. We have been financially interdependent and responsible for each other's common welfare.
   - Yes
   - No

4. We intend to stay together as Domestic Partners indefinitely.
   - Yes
   - No

I certify that the above answers are accurate for me and my Domestic Partner.

[Agree] [Decline]
eBenefits Configuration > Certification

- Identify How Certification will be Used....Link Certificate ID
  - Dependents – Partners and/or Age
  - Event Rules/Plans – Wellness

**Dep. Relationship**

**Relationship to Employee:** Domestic Partner Adult

<table>
<thead>
<tr>
<th>Dependent Types</th>
<th>Customize</th>
<th>Find</th>
<th>View All</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Effective Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/01/2009</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Covered Person Type</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Partner</td>
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<tr>
<td>Age Limit Flag</td>
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<td></td>
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<td>Certificate ID</td>
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<tr>
<td>DOMPTR</td>
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<tr>
<td>Mutually Exclusive</td>
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<tr>
<td>☐</td>
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<td></td>
<td></td>
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<tr>
<td>*Gender Validation</td>
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</tr>
<tr>
<td>No Gender Validation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Relationship to Employee:** Stepchild

<table>
<thead>
<tr>
<th>Dependent Types</th>
<th>Customize</th>
<th>Find</th>
<th>View All</th>
</tr>
</thead>
<tbody>
<tr>
<td>*Effective Date</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12/01/2009</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Covered Person Type</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Age Limit Flag</td>
<td></td>
<td></td>
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<tr>
<td>Certificate ID</td>
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</tr>
<tr>
<td>DEPVAL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mutually Exclusive</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>☐</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Gender Validation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>No Gender Validation</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Event Classification:**
- Wellness Initiative Credit
  - Ignore Plan
  - Pre-enter
  - Elect Required
  - Ignore Overage Dependent
  - Retain Covered Dependent
  - Ignore Dep/Ben Edits
  - Ignore Investment Edits
  - Allowable FSA Pledge Changes
  - N/A

**Self-Service Configuration:**
- Collect Dep/Ben
- Allow Dep/Ben Additions
- Collect Fund Allocations

**Certification:**
- Certificate ID WELLCR
Online Certification in eBenefits

- Self Service > Benefits > Benefits Enrollment
- When adding an identified dependent relationship or plan/event, the certification will appear in eBenefits Self-Service
- If dependent certification fails, use as a Beneficiary only will be allowed

**Domestic Partner Certification**

In order to cover a domestic partner under our health and life insurance plans, your relationship must meet the criteria listed below. Please answer each question.

Have you & your partner been in a mutually exclusive & supportive relationship the past 12 months?

**Answer**
- ☐ Yes
- ☐ No

Have you & your partner been legally domiciled together for at least the past 12 months?

**Answer**
- ☐ Yes
- ☐ No

Is either partner married or in a registered domestic partnership with another person?

**Answer**
- ☐ Yes
- ☐ No

I understand that any misrepresentation is grounds for termination.

[Agree]  [Decline]
Maintain Certifications

- Edit or Update Existing Certifications
- Add New Certifications
Dependent Workflow (Optional)

- Benefits Administrator will receive email notification reporting online changes to key Dependent information
- Dependent Certification Pass and/or Fail
- Dependent Data Updates for selected fields
9.1 Upgrade Considerations

- Upgrade will Move All Current Configuration Forward Except....
  - Relationship Code Consolidation
  - Add Spending Account Parameter Defaults; different from HSA
  - Rate Data Migrated to New Benefit Rate Table
  - Split Calculation Rule to Create Coverage Formula

- Review Results and Upgrade Logs

- All Other Benefits Configuration will Remain ‘As Is’

- 9.1 Upgrade Options
  - Complete 9.1 Upgrade with Current Plan Configuration
    - Review Upgrade Changes
    - Change Plan Configuration as a Separate Project; either for Event Maintenance during the year or at Annual Enrollment
  - Complete 9.1 Upgrade with Plan Configuration Updates
About WorkStrategy

WorkStrategy Services

- 9.1 Upgrade Analysis
- Remote Upgrade Lab
- Project Management
- Talent Management Analysis
- Onboarding Solutions
- FastTrack Implementations

PeopleSoft Applications

- Profile Management
- ePerformance
- Recruiting (TAM/CG)
- Career/Succession Planning
- Learning Management (ELM)
- eComp MD 9.1
- eComp+ / eRewards+
- eBenefits
- eProfile Manager Desktop
- HR / Payroll

Brian J McIntyre
President
brian.mcintyre@workstrategy.com
410.707.3760 cell

Laurie Jacobsen
Principal Consultant
laurie.jacobsen@workstrategy.com
410.715.1020 x136

Amber Drenner
Marketing Manager
amber.drenner@workstrategy.com
410.715.1020 x112

5565 Sterrett Place, Suite 401
Columbia, MD 21044
workstrategy.com
410.715.1020 main