OSC TRAINING

BN200

Benefits Display Overview

TRAINING COURSE

State of North Carolina

Office of the State Controller

July 20, 2016

For assistance with any TRAINING needs, contact:

The BEST Shared Services Team

PHONE (RALEIGH AREA): (919) 707-0707

PHONE (TOLL FREE): (866) 622-3784

EMAIL: BEST@osc.nc.gov

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Introduction

Overview

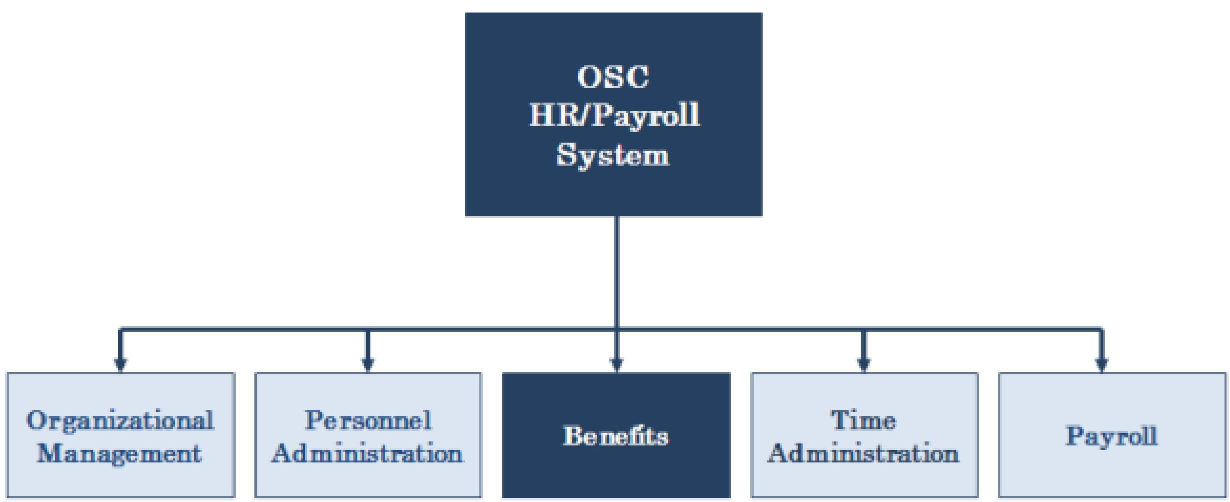
Welcome to the OSC HR/Payroll *Benefits Display Overview* training course. This course is for those individuals working at State agencies, departments, and BEST Shared Services who have been granted authorization to display benefits information for individual employees.

Post-requisites

This is the post-requisite you want to take as a follow-up to the information learned in this course. It is a reporting class using the HR/Payroll Production client as the training field.

- BOBJ410 - Business Objects Reporting

OSC HR/Payroll (BEACON) Training Curriculum



The OSC HR/Payroll training program comprises several courses and different modules. Based on your HR role, you will attend courses in the *Benefits* module.

Strategy for Training

Tell Me (Concepts)

- Instructor will discuss the process, responsibilities, and describe the transactions – LISTEN

Show Me (Demonstrations)

- Instructor will demonstrate job-related tasks performed in the OSC HR/Payroll system – HANDS OFF.

Let Me (Exercises)

- Student will complete the exercises which allows for hands-on practice in class – HANDS ON

Support Me (Availability)

- Instructor will be available to answer questions while the students complete the exercises

Course Map

You can see the Course Map of the class at the beginning of each lesson. The bolded and larger text indicates which lesson you are beginning.

The lessons covered in this class include:

- Lesson 1: Benefits Process Overview
- Lesson 2: Benefits Infotypes
- Lesson 3: Benefits Letters and Reporting
- Lesson 4: Course Review

The *Benefits Display Overview* Student Guide can be used as a reference when you return to the workplace. For example, you can use the exercises for practicing in the HR/Payroll system training environment.

You may also find it useful to take the Employee Self-Service and Manager Self-Service courses although they are not required for the PA curriculum. They are, however, mandatory for other requirements.

Course Objectives

Upon completion of this course, you should be able to:

- Describe the benefits enrollment and plan administration processes
- List the tasks performed by Agency HR and BEST Shared Services for benefits administration
- Search for an employee and view available benefit infotypes on the employee's record using transaction code PA20
- Display benefits confirmation forms and letters

Reference Materials

- Student Guide
- Job Aids
- Other Resources
  - Training HELP website
  - Online help - from the SAP portal
  - Work instructions - Business Process Procedures (BPPs)

SUMMARY

This course is intended to give HR professionals an understanding of the HR/Payroll (BEACON) system Benefits module. This course will provide you with demonstration and practice for creating and modifying positions.

Benefits Process Overview

Lesson 1 Objectives

Upon completion of this lesson, you should be able to:

- Describe the roles and responsibilities of Benefitfocus/eEnroll and BEST Shared Services.
- Identify the policies that will be enforced by the system.
- Describe the roles and responsibilities of key personnel.
- Explain the benefits business processes.
  - Annual Enrollment for NC Flex and SHP (State Health Plan)
  - New Hire enrollment
  - Qualifying Life Events
  - Leave of Absences (LOA)
  - Benefits Termination
  - Retirement Plans
  - Savings Plans Enrollment
- Explain how the OSC HR/Payroll system determines which benefits to offer an employee

Scope of the Benefitfocus/eEnroll System

The Benefitfocus/eEnroll system offers Benefit Administrators and employees a streamlined benefit enrollment and management process.

- The Benefitfocus/eEnroll system's Benefits Administration module manages activities associated with people's benefits.
- Three benefit plans are maintained in Benefitfocus/eEnroll:
  - Health Plans (Medical, Dental, Vision, Cancer, Critical Illness)
  - Insurance Plans (Term Life, Voluntary AD&D, Core AD&D)
  - Spending Accounts (FSAs)

OSC HR/Payroll System (BEACON)

The OSC HR/Payroll System houses the health plan, insurance plans, FSA plans and savings plans (Retirement and 401K, 403(b) and 457 plans) for payroll functions.

The OSC HR/Payroll system manages the benefit deduction process ensuring adherence of policy.

Polices Enforced by Benefitfocus/eEnroll System

State Health Plan

- State Health Plan Policy determines both the effective date and termination date of plan coverage.
- Daily interface file is sent to Blue Cross/Blue Shield (BCBS) with all enrollments and changes from the previous day.

NC Flex Plans

- Effective date of coverage is the 1st of the month following the qualifying event.
- Life Insurance premiums for the employee are based on the age of the employee January 1st. Premiums for the spouse (if covered under the plan) are based on the age of the employee January 1st. Premiums for children are covered under a flat rate.
- Critical Illness premiums for the employee are based on the age of the employee January 1st. Premiums for the spouse (if covered under the plan) are based on the age of the employee January 1st. All children are covered under the same rate.
- FSA contributions are calculated on a yearly limit. Employees must re-enroll in their FSA(s) each year during Annual Enrollment.
- System interfaces with vendors weekly providing enrollment data.
- NC Flex Plans will terminate at the end of the month in which an employee separates from employment, as long as there is enough money to take the deductions.

Roles and Responsibilities

Employees

Employees are responsible for:

- Enrolling themselves in the various health, insurance, savings, and Flexible Spending Account (FSA) plans.
- Keeping their information updated by notifying their Agency HBR within 30 days of a qualifying life event.
- Providing and maintaining Qualifying Life Event (QLE) documentation
- MUST use Benefitfocus/eEnroll to complete their enrollment(s) if available.

  🗁 **NOTE**: Employees with online access issues should contact Benefitfocus/eEnroll Customer Service Center to complete their enrollment.

🗁 **NOTE**: The ESS web portal provides Employee online access to review benefit information and maintain personal information in BEACON.

Agency Health Benefits Representative (HBR)

Agency HBR is responsible for:

- Printing confirmation forms and benefit reports
- Communicating benefit process, updates and changes to Employees
- Announcing NC SHP Flex Annual enrollment process to Employees
- Conducting benefit information sessions
- Maintaining and managing supplemental benefits (agency-specific)
- Monitoring Employee benefits data regarding:
  - New Hire
  - Annual Enrollment
  - Leave of Absences
  - Benefits Termination
  - Savings/Retirement Plan
- Requesting exceptions from SHP and OSHR

Benefitfocus/eEnroll System

The Benefitfocus/eEnroll representitives have full access to create, change, and maintain benefits plans and employee benefits elections.

Benefitfocus/eEnroll is responsible for:

- Administering enrollments for State Health Plan and NC Flex
- Maintain/ manage court orders
- Handle complex benefits issues
- Process approved SHP and OSHR exceptions

BEST Shared Services

BEST Shared Services monitors and migrates benefit data into the OSC HR/Payroll System from the Benefitfocus/eEnroll System.

- Manage benefit deductions and reporting for accurate payroll processing
- Manage Benefitfocus/eEnroll data discrepancies
- Manage benefits in regard to Leave of Absences (LOAs) and terminations
- Coordinate resolutions for escalated benefit issues with Employees, HBRs, Vendors and Benefitfocus/eEnroll
- Work with BEST Payroll and vendors to reconcile erroneous benefit records and deductions
- Develop and communicate new processes to Agency HBRs

Roles & Responsibilities for Events

New Hire Enrollment

Hiring Person

— The process begins in Agency HR using Workflow.

Agency HR

— Agency HR must contact the employee within 30 days of the new hire action entry regarding the employee's benefits eligibility.

— HR provides employees with NCIDs and instructions to log in to OSC HR/Payroll & ESS (BEACON).

AND / OR

— HR provides employees with instructions to log into the Benefitfocus/eEnroll system.

Newly Hired Employee

— The employee can enroll in the Benefitfocus/eEnroll system the day following the New Hire action entry into BEACON.

— Employees needing assistance completing the enrollment process must contact Benefitfocus/eEnroll via telephone.

🗁 **NOTE**: Timely entering of the New Hire action is important. There is a 30-day window of opportunity in which employees are eligible to enroll in benefits programs from the date they are hired regardless of when the action is entered in the system.

🗁 **NOTE**: The employee must also complete their Health Plan Wellness Activities within the 30-day enrollment window.

* PCP & Smoker's Attestation within Benefitfocus/eEnroll System
* Health Assessment: NC Health Smart portal (https://www.myactivehealth.com) or via phone 1-800-817-7044

A new employee or previous state employee must be hired or rehired in the BEACON system before any benefits action can be performed. Once hired or rehired, employees' benefit eligibility information is transferred to the Benefitfocus/eEnroll system nightly which allows the employees to complete their enrollment process the next day.

Examples of Reason for Action:

- Hire
- Rehire

There is a 30-day time frame for employee enrollment. For example, if an employee is hired 11/17/16, he/she has until 12/16/16 to enroll in benefits. If the hiring action is not entered until 12/1/16, the employee still only has until 12/16/16 to enroll.

SHP / NC Flex Annual Enrollment Process

The SHP and NC Flex Annual Enrollment period usually occurs in the Fall (changes effective January 1). All employees eligible for SHP/NC Flex benefits are required to enroll through Benefitfocus/eEnroll if they want coverage.

> Refer to the Benefits section of the State Health Plan website for more information about Annual Enrollment.
>
> https://shp.nctreasurer.com/Pages/default.aspx

Employee

- Enrolls in plans in the Benefitfocus/eEnroll System
- Prints confirmation form

  OR
- Employees needing assistance completing the enrollment process contact Benefitfocus/eEnroll via telephone.
- Provides and maintains documentation for QLEs.

Wellness Activities		
Health assessment	Employee completes a confidential Health Assessment	Contact: NC Health Smart portal: https://www.myactivehealth.com Telephone 1-800-817-7044
Primary care provider	Employee selects a Primary Care Provider for themselves and each covered dependent (if applicable)	Contact: Benefitfocus/eEnroll System 1-855-859-0966
Smoking cessation program	Employee attests that they and their covered spouse (if applicable) are non-smokers or commit to a smoking cessation program	

Benefitfocus/eEnroll System

The Benefitfocus/eEnroll system is the system of record for enrollments. An electronic enrollment/change data file is sent to vendors and BEACON for payroll processing.

Agency HR will need to communicate with employees that do not have ESS access to make sure they complete the phone-in enrollment changes.

🗁 *Benefitfocus/eEnroll phone number:* (855) 859-0966

BEST Shared Services

- Runs daily, weekly, and monthly reports to ensure accuracy of enrollment data for payroll processing

Qualifying Life Events (QLEs)

Benefitfocus/eEnroll is a self-service system, therefore employees are allowed to create Qualifying Life Events in the Benefitfocus/eEnroll system. QLEs allow benefit changes outside of open enrollment periods. Thus when an employee creates a QLE in the Benefitfocus/eEnroll System, they are allowed to make appropriate changes within a specified time frame. These benefit election changes must take place within 30 days of the QLE.

Examples of QLEs include:

- Marriage
- Divorce
- New birth

NOTE: Newborns are added effective the date of birth.

> **Additional Resources**
> Refer to the Benefitfocus section of the State Health Plan website and Qualifying Life Events section of the NC Flex website for more information about Qualifying Life Events.

Employees must provide supporting documentation to their Agency HBR. Agency HR should verify and maintain documentation at the Agency. Dependent or QLE supporting documentation does not need to be provided to BEST Shared Services.

Examples of supporting documentation:

- Dependent verification (birth certificates, tax forms, adoption papers, etc.)
- Status Change or Life Event documentation (certificate of coverage for other insurance plans, marriage or divorce decrees, etc.)

QLE Process

Agency HBR

- Educates employee regarding the QLE requirements and process
  - This includes notifying the employee that supporting documentation must be submitted for verification.
- Reviews and/or requests supporting documentation for validity (dependent verification and/or QLE documentation)
- Maintains any QLE supporting documentation provided by the employee
- Assists the employee with the QLE enrollment if necessary

Employee

- Creates QLE event in BenefitFocus/eEnroll
- Enters the QLE enrollment change online in the Benefitfocus system within the applicable time frame
- Provides Agency HBR supporting documentation (dependent verification and/or QLE documentation) within the applicable time frame

BEST Shared Services / BEACON

- Provides the Agency HBR with a list of approved QLEs on a weekly basis to ensure supporting documentation is obtained
  - If documentation cannot be obtained or if documentation is invalid, the Agency HBR should notify BEST via a ticket.
  - BEST will work with Benefitfocus/eEnroll to reverse any QLE enrollments based on Agency notification of unsubstantiated documentation.
- Runs comparision reports to authenticate enrollment data and ensure accurate payroll processing
- Assists employee or Agency HBR as needed

Benefitfocus/eEnroll

- Runs weekly mass approval of Task List QLEs
- Provides QLE change data back to BEACON for payroll processing and to the applicable Insurance vendor
- Provides customer service support regarding QLE for enrollment assistance or questions

State Health Plan/NC Flex/BEST Shared Services

- Conducts random dependent/QLE eligibility audits

ADDITIONAL QLE INFORMATION/REMINDERS

- QLEs will be automatically approved weekly.
- BEST will provide the Agency with a list of QLEs so documentation can be request. See the sample report below.

	A	B	C	D	E	F
1	EMPLOYER_ID	FIRST_NM	MIDDLE_NM	LAST_NM	SPONSOR_BENEFIT_OFFER_NM	EVENT_TYPE
2	123456	John	Wayne	Doe	2016 SHP Medical	LOSS_OF_COVERAGE
3	123456	John	Wayne	Doe	NCFlex Voluntary Accidental Death and Dismemberment	LOSS_OF_COVERAGE
4	123456	John	Wayne	Doe	2016 NCFlex Vision	LOSS_OF_COVERAGE
5	123456	John	Wayne	Doe	NCFlex Core Accidental Death and Dismemberment	LOSS_OF_COVERAGE
6	123456	John	Wayne	Doe	2016 NCFlex Group Term Life	LOSS_OF_COVERAGE
7	78910	David	Stuart	Beckham	2016 SHP Medical	BIRTH
8	345678	Chris	Everett	Norman	2016 SHP Medical	ELIGIBLE_FOR_OTHER_COVERAGE
9	9876543	Alicia	Ann	Keys	2016 SHP Medical	LEGAL_SEPARATION

- If documentation cannot be obtained or the documentation does not validate the QLE, the Agency HBR should submit a ticket to BEST.
- BEST will reverse the QLE processing based on the HBR ticket notification.
- In the event that a QLE enrollment is revoked, coverage could be reversed retroactively, but with NO reversal of funds. Additionally, employees would be responsible for any charges incurred due to a claims reversal.
- BEST will provide a similar report monthly, identifying plans with dependents so dependent eligibility documentation can also be obtained.

Leave of Absences

<u>HR Data Maintainer</u>

— Agency HR enters Action into BEACON system.

<u>Agency HBR</u>

— Generates Continuation of Benefits during LOA Notice (ZBNS008)

<u>BEST Shared Services</u>

— Terminates employee's NC Flex Plans in the HR/Payroll system when employee reaches Leave without pay status.
— Monitors and maintains the eligibility of the State Health Plan coverage.
— Sends list of terminated plans to the Agency and vendors.

STATE HEALTH PLAN	NC FLEX
• For continued coverage, monthly premium payments need to be sent to BEST. • If payment not received on a monthly basis, State Health Plan coverage will be terminated. • EEs receiving STD benefit payments will have their premium payments deducted from this STD benefit.	• BEST notifies the NC Flex vendors of employee's LOA by delimiting the EE's benefits in the HR/Payroll system. • Employees can choose to continue their NC Flex benefits by making payments directly to the vendor(s).

Full Cost Rule (SHP only)

The same rules as a termination are applied for LOAs. If the employee's last working day or last day in paid status is between 1st – 15th, then the employee is responsible for that month's full premiums. If the employee's last workday (paid day) is between the 16th and the end of the month, the employee is responsible for full premiums starting next month.

Example #1

The employee's LOA/Extended Illness unpaid LOA action is effective October 10, 2015 (last day in pay status is 10/09/2015), the employee is responsible for the full premium cost in October. Coverage will end on October 31, 2015 if the employee does not send premium payments.

🗁 **NOTE**: NC Flex payments must be sent directly to the vendors.

LOA Without Pay (LOA/LWOP)

LOA without Pay is when an employee is not exhausting leave. The LOAs listed below are considered LOA without Pay in regards to processing of benefits.

- Short Term Disability w/ Less than 5 years
- Worker's Compensation w/ Supplement
- STD - 60 day waiting period (If period is not covered by FML)
- Extended Illness
- Military Leave (Non-State Assignments)
- LOA (Other) - *Example: Personal Reasons*
- Family Illness Leave

Return from LOA

Employee

— Contact their HR regarding their return to work effective date.

Agency HR

— Completes Reinstatement Action in the BEACON System. The next day the employee can complete benefit elections in the Benefitfocus/eEnroll System.

NOTE: The employee can only re-enroll in the same Benefits elections s/he held prior to the LOA. Must restart the Health Care Flexible Spending Account.

Return from LOA (Workers' Comp, less than 40 hrs) with Appointment Change Action

Agency HBR

— Submit ticket to BEST to ensure Employee still recieves Full-time benefits and longevity

BEST Shared Services

— Process Full-time benefits eligibility and longevity payment when applicable.

Separation from Employment - Benefits Termination (Benefitfocus)

Agency HR

— Enters the termination action into the BEACON System.

BEST Shared Services

— Runs a nightly process to automatically end Benefits.

Agency HBR

— Generates and mails a Benefits Termination letter (ZBNS013).

Terminated Employee

— Receives Benefits Termination letter sent by Agency HBR.

Health Plan Termination *(BEACON reference guide for State Employees)*

If an employee terminates (last work day) from the 1 – 15 of the month:

- The employee's coverage ends the last day of the current month.

If an employee terminates (last work day) from the 16 – end of month:

- The employee's coverage ends the last day of the following month.

For example, if an employee is separated 11/10/16 (last work day is 11/09/16), the employee's coverage ends 11/30/16.

Separation From Employment - Reduction in Force (RIF)

The termination letter for RIF employees will include additional information regarding the options to continue their health insurance.

12 MONTHS COVERAGE

Agency HR

— Agency HR enters the RIF termination action into the BEACON system.

BEST Shared Services

— BEST Shared Services runs a nightly process to automatically end benefits.
— Enters RIF SHP Coverage wage type for employer portion of SHP premium into the BEACON system. (IT0014)
— Sets Employee up under RIF Category in the Benefitfocus/eEnroll System.
— Enrolls Employee into RIF SHP coverage in the Benefitfocus/eEnroll System which will be the same as the Employee's active coverage.

Benefitfocus/eEnroll System

— Submits RIF information to appropriate vendors

Agency HBR

— Agency HBR generates and mails a Benefits Termination letter.
— Should contact BEST Shared Services if Employee desires a different level of coverage that was assigned to them

Terminated RIF Employee

— Should receive the Benefit Termination Letter
— Should contact BEST Shared Services if they desire a different level of coverage that was assigned to them

NOTE: If RIF ee's last work day is on the 1st of the month:
— The employee's coverage ends the last day of the prior month.

For Example:

- RIF Employee's last work day is 11/01/2015; coverage ends 10/31/2015.
  — The 12 month of RIF SHP coverage will run 11/01/2015 - 10/31/2016.

- If RIF Employee's last work day is 2 - 31 of month:
  — The Employee's coverage ends at the end of current month.

For Example:

- RIF Employee's last work day is 11/15/2015; coverage ends 11/30/2015.
  — The 12 month of RIF SHP coverage will run 12/01/2015 - 11/30/2016.

FOREVER RIF COVERAGE

Benefitfocus/eEnroll System

— Sends letter to Employees notifying them of Forever RIF insurance options
— Submits RIF information to Cobraguard in Benefitfocus
— Places Employee into a Forever RIF category in Benefitfocus

BEST Shared Services

— Delimits RIF SHP coverage wage type for employer portion of SHP premium in the BEACON System. (IT0014)

Terminated RIF Employee

— Can continue SHP on a fully contributory status (forever RIF)
— Must complete election of coverage within 90 days after the termination of RIF coverage

Retroactive Terminations in the State Health Plan

Under the Affordable Care Act (ACA), retrictions have been put in place that limit retroactive terminations of coverage. Specifically, SHP will not terminate coverage due to untimely actions processed by Agency HBRs. This includes LOA and Separation Actions.

Employees must be given at least 30 days notice before coverage can be canceled. The SHP can only terminate the member's coverage on a current basis. That means the Agency will be responsible for any health plan premiums charged due to untimely processing of actions that prevent a retro termination of coverage.

Be sure to complete the following tasks in a Termination situation:

- Process Actions in a timely manner.
- Provide Employees with the following letters:
  - — LOA Continuation Notice Letter
  - — Benefits Termination Letter

Mandatory State Retirement Plans

Retirement Plans

- Enrollment in Mandatory State Retirement Plans is created automatically. (TSERS, LEORS, CJRS)
- BEST Shared Services monitors the system to ensure the correct employee is enrolled in the right plan.
- The agency runs reports to determine missing beneficiary information and notifies employees accordingly.
- Optional Retirement Program (ORP) Retirement (where agencies coordinate enrollment with BEST Shared Services)
  - — Employees have 60 days from their hire date to complete retirement plan selection.

🗁 **NOTE**: NC School of Science & Math will notify BEST Shared Services when a faculty member enrolls in the Optional Retirement Program (ORP). BEST Shared Services completes the retirement enrollment in the system. Eligible agencies have reporting capabilities to monitor employee enrollment.

Supplemental Savings Plan Enrollment

Supplemental saving plans include:

- 401(k)
- 401(k) Roth Savings plans
- 457 Deferred Compensation plans
- 457 Roth Savings plan
- 403(b) plans (Salary Reduction Agreement form)
  - — Agencies who have 403(b) plans are required to have the employee complete the form.
  - — The employee then returns the form to BEST Shared Services.
  - — Standardized form for all 403(b) plans

The vendor of the savings plan will know if the employee is eligible for the plan.

- 401(k) New hires can enroll:
  - By telephone directly with the vendor
  - Online (online enrollment requires User ID & Password created by the employee)
  - Sending a paper form to the vendor
- 457 Deferred compensation plans automatically send a PIN number to all newly eligible employees:
  - By telephone directly with the vendor
  - Online (online enrollment requires User ID & Password created by the employee)
  - Sending a paper form to the vendor

Additional Resources
Refer to the State Treasuer's website for more information regarding Retirement plans.

https://www.nctreasurer.com/Pages/ContactUs.aspx

How the HR/Payroll System Determines Participation Eligibility

It is important to understand that the HR/Payroll system uses a combination of organizational assignment data, such as Personnel area (agency), and Program Groupings to determine in which benefits plans an employee is eligible to participate. Program Groupings is technical jargon for a set of rules used by the system to sort employees into different groups, depending on which plans you offer to different groups of employees. The Program Groupings used by the HR/Payroll system are explained in the following pages.

Employee group – The purpose of the Employee group is to define the position's appointment type such as SPA, EPA or supplemental staff as a few examples. It is used to establish rules for calculating leave and managing pay.

Employee subgroup – This field defines whether the employee is subject or not subject to the Fair Labor Standards Act (FLSA) overtime and full-time/part-time status.

Personnel area – The Personnel Area is tied directly to the company code and is used by Payroll to identify the specific agency for whom the employee works. A company code can include one or more Personnel Areas.

Planned work time – This infotype determines the weekly planned working time for a position.

OSC HR/Payroll System Program Groupings

The HR/Payroll system uses these three program groupings to determine which benefits plans are offered to an employee:

- Benefit Area
- 1st Program Group
- 2nd Program Group

Benefit Area

The Benefit Area is the first sub-division of benefit information. The State of North Carolina has defined one benefit pool that contains all state employees. The HR/Payroll system field code is:

NC for State of North Carolina

1st Program Group

The first program grouping allows you to sort the "Benefit Area" into different groups, depending on which plans you offer to different groups of employees. OSC HR/Payroll has defined three first program groups based on the planned worked hours and employee groups such as SPA, Permanent, Probationary, Time-Limited, etc. The following descriptions summarize the eligibility rules for the State Health plan, NC Flex plans, and the State Retirement system based on the planned worked hours.

State Health Plan (SHP)

If employees work at least 30 hours per week, they and their dependents are eligible to enroll in a health insurance plan. The state pays for employee coverage in the State Health Insurance program. Employees must pay for family or dependent coverage. If an employee works at least 20 hours but less than 30 hours per week, the employee is still eligible for the SHP but on a full contributory basis.

NCFlex

Employees are eligible to participate in NCFlex if they are a state agency, university or select community college employee working 20 or more hours per week in a permanent, probationary or time-limited position. They may check with their Agency HR concerning their benefit eligibility.

Retirement

An employee with a permanent, probationary, or time-limited appointment, who works at least 30 hours per week for nine months of the year, is automatically a member of the State Retirement System. Participation in the Retirement System of North Carolina is mandatory for every permanent, probationary, or time-limited appointment employee who works at least 30 hours each week.

FIELD VALUE	DESCRIPTION	DEFINITION
FULL	Full Benefits eligible	EE works greater than or equal to 30 hours/week
BNR	Benefits - No retirement	EE works greater than or equal to 20 hour/week but less than 30 hours/week
NOB	No benefits	EE works less than 20 hours/week ***- OR -*** EE is a temporary/contractor – Hours do not matter for these employees because they are not benefits eligible

Exception to the First Programming Rule

- Employees returning to work with Short-Term Disability/Workers' Compensation hour restrictions will automatically be defaulted to the BNR program group, which will charge the employee full cost premium.

🗁 **NOTE**: Agency HBRs are responsible for notifying BEST Shared Services of these types of reinstatements to ensure the employee is placed in the *FULL* group category and not charged full cost premium.

2nd Program Group

The 2nd Program Group is used to further sort employees into a more distinct sub-group based on the employee's agency and retirement plan eligibility. The most common group is B014, which denotes the benefits plans available to a regular state employee and includes the Teachers and State Employees Retirement System (TSERS).

Examples:

PERSONNEL AREA (Agency)	RETIREMENT PLAN	2ND PROGRAM GROUP
AOC	CJRS	B001
DPS (Highway Patrol)	LEORS	B012
DHHS	TSERS	B014

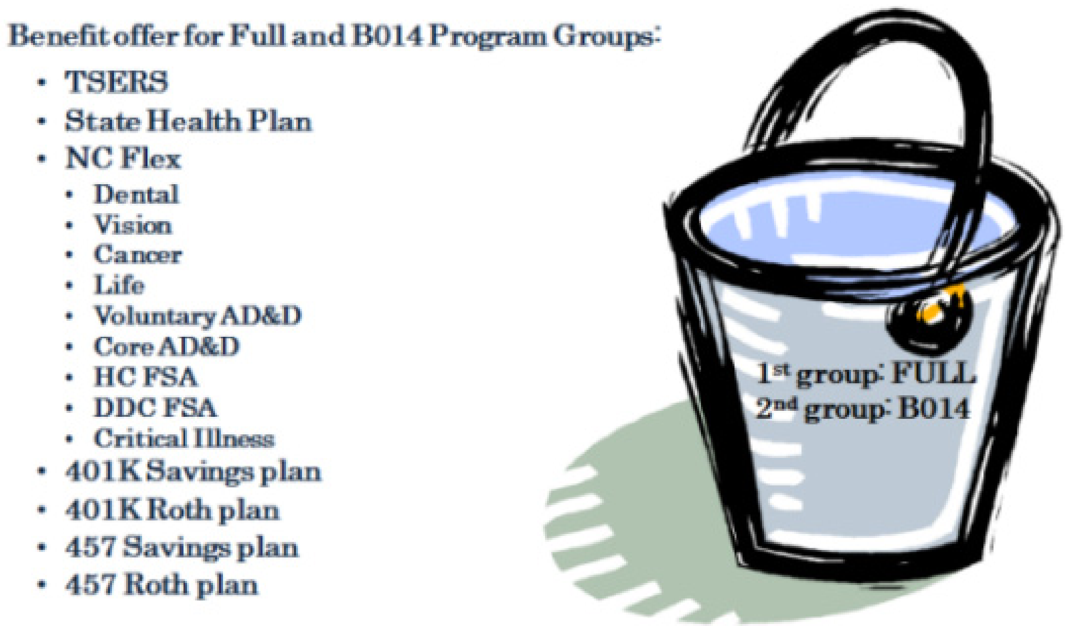
<u>Additional Resources</u>

Refer to the following website for more information about creating Adjustment Reasons:

- Access the **OSC Training HELP page**
  <u>http://www.osc.nc.gov/training/osctd/help/index.html</u>
- Follow the path below:

Benefits folder > **Job Aids** folder > **Benefits Program Groupings Reference**

Program Groupings - Example 1



The example above lists the benefit offer to an employee that falls in the following program groups:

- 1st Programming Group = FULL
- 2nd Program Group = B014

NOTE: 403(b) Saving plans are an agency-specific benefit. Four agencies offer 403(b) savings plans.

Program Groupings - Example 2

Benefit offer for the BNR and B014 Program Groups:

- State Health Plan
  (can obtain, but must pay full cost of plan)
- NC Flex
  - Dental
  - Vision
  - Cancer
  - Life
  - Voluntary AD&D
  - Core AD&D
  - HC FSA
  - DDC FSA
  - Critical Illness
- 457 Savings plan
- 457 Roth Savings plan

The example above lists the benefit offer to an employee that falls in the following program groups:

- 1st Programming Group = BNR
- 2nd Program Group = B014

NOTE: Retirement plans are not part of BNR. Employees are responsible for the full cost of premiums.

Program Groupings - Example 3

Benefit offer for the NOB and B014 Program Group:

- Only the plans listed below are offered
  - 457 Savings Plan
  - 457 Roth Savings plan

SUMMARY

In this lesson you learned to:

- Identify the policies that will be enforced by the system
- Describe the roles and responsibilities of key personnel
- Explain the benefits business processes
  - Annual Enrollment for NC Flex and SHP (State Health Plan)
  - New Hire enrollment
  - Qualifying Life Events
  - Leave of Absences (LOA)
  - Benefits Termination
  - Retirement Plans
  - Savings Plans Enrollment
- Explain how the OSC HR/Payroll system determines which benefits to offer an employee

Benefits Infotypes

Lesson 2 Objectives

Upon completion of this lesson, you should be able to:

- Identify benefits infotypes and subtypes
- Display individual benefit infotypes for an employee using the PA20, Displaying HR Master Data for Benefits, transaction

The **PA20** transaction, Displaying HR Master Data for Benefits, is another method that you can use to display a specific benefit infotype. In this lesson we will use the PA20 transaction to familiarize you with the information contained in some key infotypes for benefits.

Benefits Infotypes

- Infotype used for enrollment
  - — 0171 General Benefits Data
- Infotypes created by enrollment
  - — 0167 Health Plans
  - — 0168 Insurance Plans
  - — 0169 Savings Plans
  - — 0170 FSA Plans
  - — 0377 Miscellaneous Plans
- Infotype to store dependent information
  - — 0021 Family Members

An infotype, in simple terms, is a screen that stores particular employee HR master data information. See the list above that displays the benefits infotypes. In this lesson we will discuss the following infotypes:

- 0021 Family Members
- 0167 Health Plans
- 0171 General Benefits Data
- 0378 Adjustment Reasons

The Miscellaneous Plans infotype (0377) is used for processing State Health Plan pre-paid premiums, and other premium adjustments.

Benefits Administration will also access these infotypes:

- **Recurring Payments/Deductions (IT0014)** -- This infotype is used for the collection of premiums for agency-specific benefits.
- **Additional Payments (IT0015)** – Used to define wage elements which are not paid or deducted in every payroll period in contrast to recurring payments and deductions which are paid or deducted within a defined period.
- **Monitoring of Task (IT0019)** – Used to create date-driven tasks that have follow-up activities. Depending on the selected task type, the system proposes a date on which you will be reminded of the stored tasks. This enables you to implement the follow-up activities on schedule. Examples include the expected return date of an LOA, the date vacation will run out for an LOA, the date a foster child was added as a dependent, and the date a foster child's eligibility was proven.
- **Date Specifications (IT0041)** – Stores dates that are required by the State, such as Original Hire Date, Agency Hire Date, Last Day Worked, Notification of RIF, and 457 Catch-up date
- **Time Specification/Employment Period (IT0552)** – Stores additional employment or absence periods for the calculation of the employment period. It also stores months of service from legacy system at the time of conversion to BEACON or Non-Beacon to Beacon transfers.

Subtypes

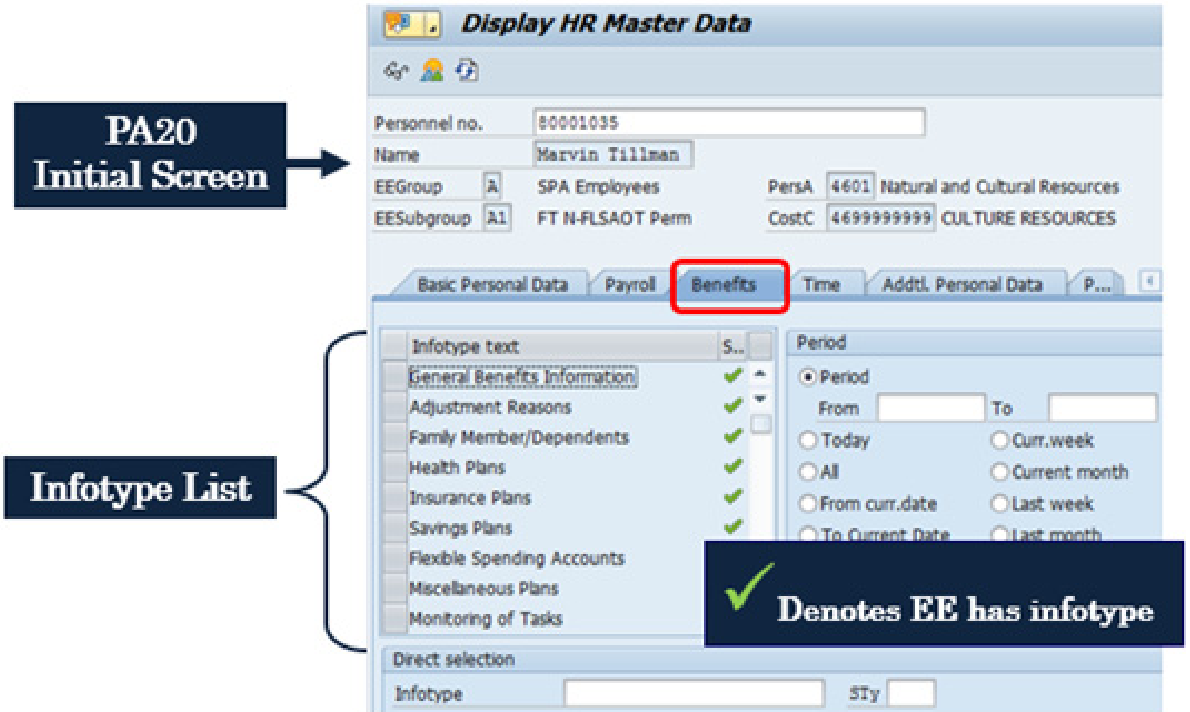
Infotypes can contain subtypes. A subtype is a subdivision or a separate category of information existing within an infotype.

Example:

The subtype for the Health Plans infotype are:

- CANC – Cancer Plan
- CRIT – Critical Illness
- DENT – Dental Plans
- MEDI – Medical Plans
- VIS – Vision Plans

Display Master Data (PA20)

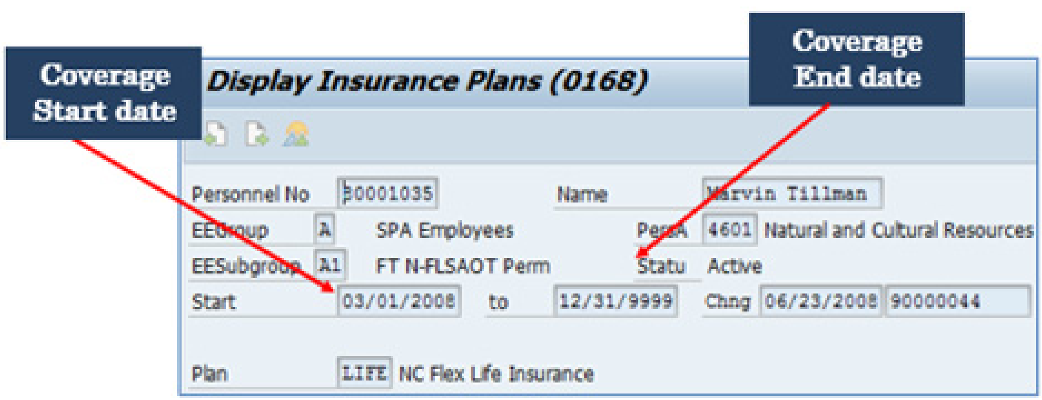


The **PA20** transaction is used to display:

- Individual infotypes within an employee's records
- An overview of the records of a specific infotype
- Specific data on a infotype

The initial screen for the **PA20** transaction lists the infotypes that have been established for an employee. To display a list of benefits infotypes, click the Benefits tab.

Validity Periods

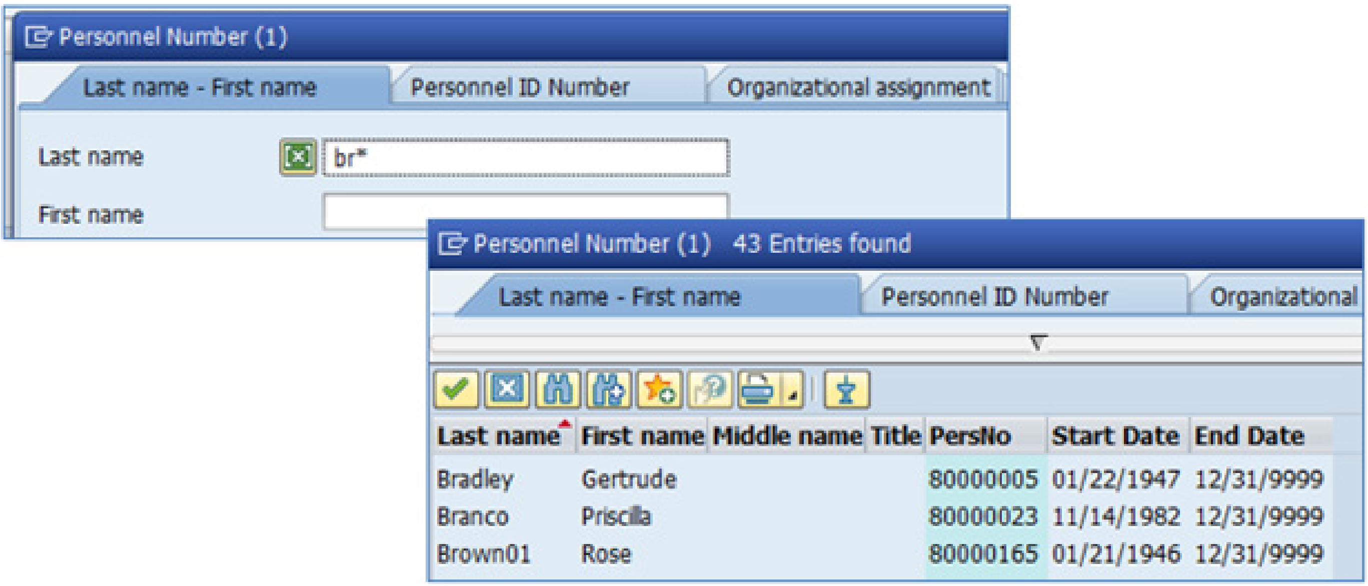


All infotypes have a validity period which consists of a start date and end date.

The validity period defines the effective dates of infotype records. It enables the HR/Payroll system to capture changes to employee information while retaining history.

When information is current, the "end of time" (12/31/9999) will be displayed in the field as the end date.

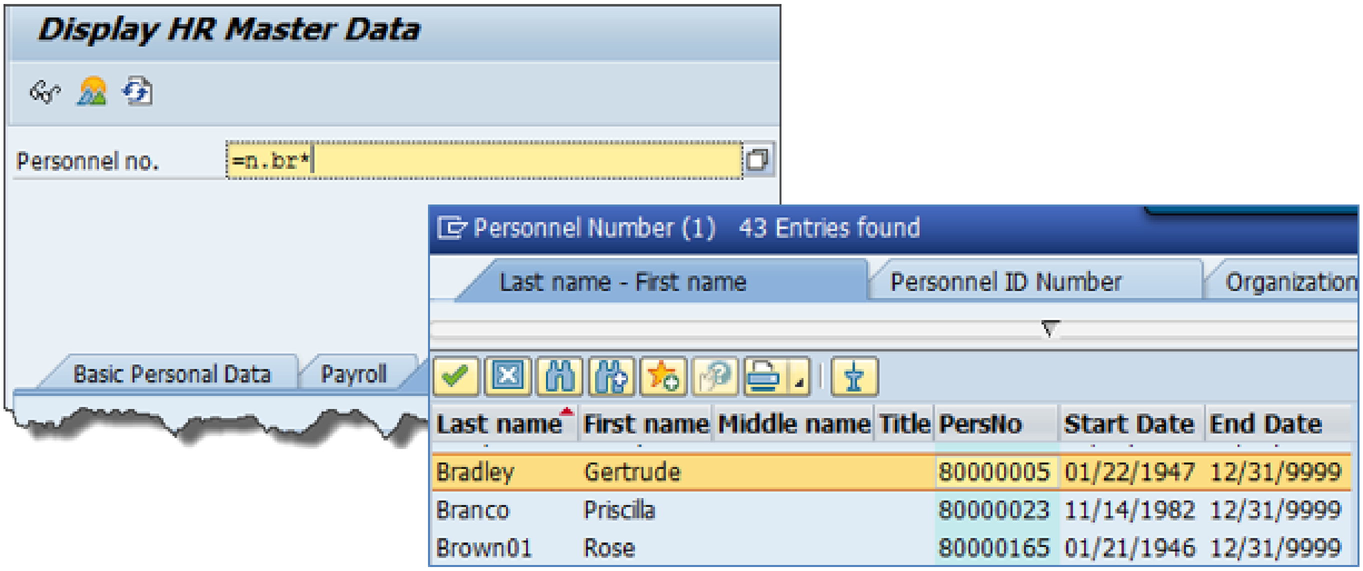
Employee Search by Name



Search by Name - Use '*' wildcard

Use the matchcode at the end of the Personnel No. field. You can then search for the employee by last and first name, personnel number, or org assignment.

> ***Example***: To search by name for records of employee Bradley, type br* and press Enter for a list of possible entries.



There are a variety of ways you can identify or search for an employee:

1. ***Personnel Number:*** Enter the Personnel Number into the *Personnel no.* field.

2. ***Shortcut:***

   A. Use a shortcut (**=n.xxxx**) in the Personnel No. field to search by last name.

      (**Example:** =n.hendrix - NO spaces.)

      A list of all employees with that last name displays. Double-click to select the appropriate employee.

      You can search for an employee by using either their full name or partial name. Here are more search examples:

      =n.last name, first name (Example: =n.Jones,Mary)

      =n.last name, first initial (Example: =n.Jones,M)

      =n.first letter of last name* (Example: =n.Jon*)

   B. Use a shortcut (**=c..#####**) in the Personnel No. field to search by SSN.

      (**Example:** =c..123456789 - NO spaces.)

3. ***Matchcode:*** Use the Matchcode at the end of the Personnel No. field to search by last and first name, or by Personnel Number, or by org assignment.

EXERCISE 2.1: Logging on to the HR/Payroll System

SCENARIO
Use the following steps to log on to the HR/Payroll system.

Instructions

1. Click on the Favorites on your Internet browser to access the Training portal link.
2. Enter the **User ID** and **password** that is assigned to you by your instructor.
3. Click on the **Log on** button.
4. Click **Yes** to confirm the security message displayed.
5. Click on the **SAP GUI tab**.
6. Click on the **training client** specified by your instructor.
7. **Stop** when you have reached the SAP Easy Access screen.

To be able to display the transaction codes on your screen, you must enable your technical settings.

8. Select **Extras > Settings** from the menu at the top of the screen to display the settings dialog box.
9. Click the **Display technical names** checkbox.
10. Click the **Continue (Enter)** button. The transaction codes will now display in the menu tree.

Now we will create Favorite links for the transactions we will use in class.

11. Right-click on **Favorites**.
12. Select **Insert transaction** from the list. A dialog box is displayed.
13. Enter **PA20** in the text box.
14. Click the green check mark to close the box and add the transaction to your Favorites list.
15. Repeat steps 11-14 to add the following transactions to your Favorites list.
    - HRBEN0006
    - HRBEN0015
    - ZBNS008
    - ZBNS013
16. Stop when you have added the four transactions.

Now add a URL to SAP Easy Favorites for the OSC Training HELP web page.

17. Copy the web address as indicated by your instructor for the OSC Training HELP page.

18. Right-click on **Favorites**.

19. Select **Add other objects** from the list. A drop-down list is displayed.

20. Click **Web address** or file from the list. A pop-up box dialog displays.

21. Enter a title for your web page in the **Text** field.

22. Paste the web address you copied in step 17 for the OSC Training HELP page in the **Web Address or File field**.

23. Click the **Continue** button at the bottom right-hand corner of the box.

24. The URL has been added to the SAP Favorites folder. Click the URL to access the website you just added.

* *

EXERCISE 2.2: Display Employee Benefit Data for Family Members/Dependants

SCENARIO

Perform this transaction to display employee master data including the Family Members / Dependents infotype.

Information:

- *Transaction*: PA20
- *Employee*: Marvin Tillman

Instructions:

In a moment your instructor will lead you to access the Family Members/ Dependents infotype using the **PA20** transaction. The **PA20** transaction allows you to display employee information. In general, all the current information we have about an employee in the system can be viewed from this transaction.

The basic steps for using the **PA20** transaction are:

1. From the Easy Access screen, click in the **Command** field and type **PA20**.

2. Click the **Enter** button. The *Display HR Master Data* screen displays.

On the left side of the *Display HR Master Data* screen, you see the Object Manager. You can leave it in place as it is or you can hide it to allow a fuller screen view.

3. On the menu at the top of the screen, click the following path: **Settings > Hide Object Manager**.

   The Object Manager is no longer visible on the screen. If you want to view the Object Manager again, click the same steps, except this time you will click Show Object Manager.

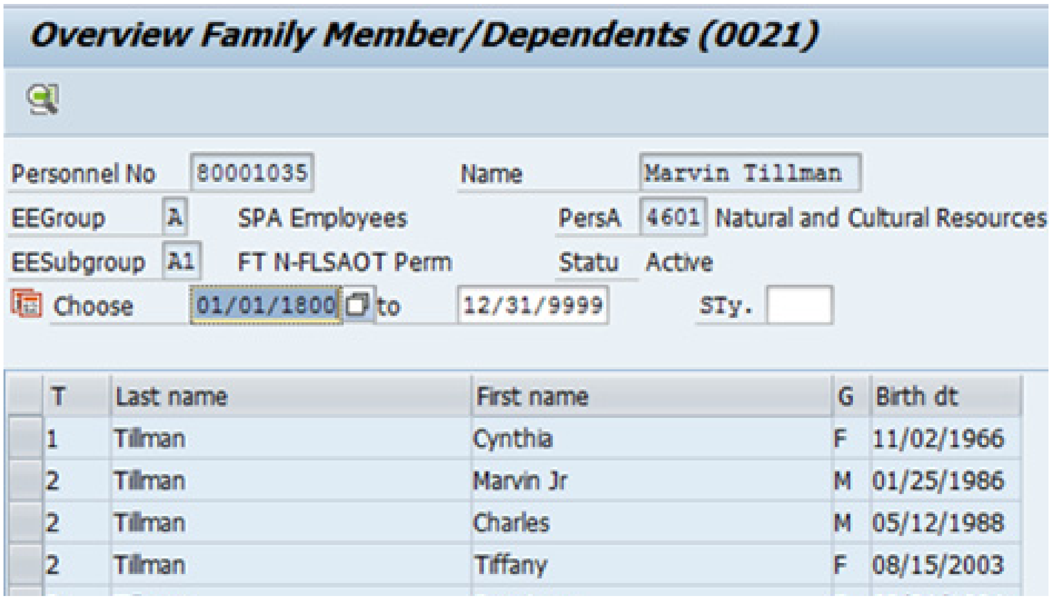
4. Type or select the employee's personnel number in the **Personnel no**. field.

5. Type **0021**, for Family Member, in the Infotype field. Keep in mind that only those infotypes that have a green check contain data.

6. Click either the **Display** button or **Overview**. The employee's master data for the specified infotype displays. Display shows each dependent record. Overview allows you to select the dependent to view.

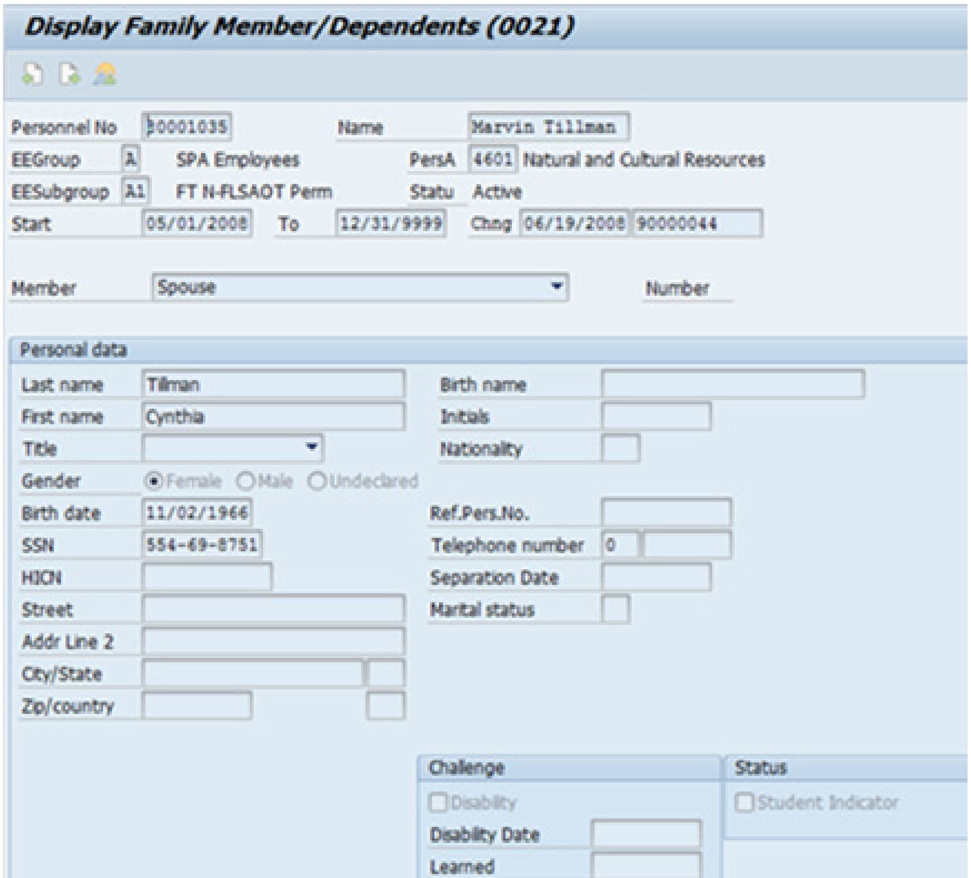
* *

Family Member/Dependants (IT0021)



Click the **Overview** button to display Dependent details.

This screen is the result of clicking the Overview button on the Display HR Master Data screen for the Family Member/Dependent infotype (IT0021).



A Family Member/Dependent record must exist before employees can include family and related persons as dependents and beneficiaries on their benefit plans.

🗁 **NOTE**: Social Security numbers and Dates of Birth are required in the Benefitfocus/eEnroll system.

The Status and Challenge indicators are relevant to dependent children over 26 years old who are medically disabled.

When these indicators are checked, the system allows the dependent to continue to be eligible for health plans.

The HR/Payroll system stores information about family members or related persons including:

SUBTYPE	NAME
1	Spouse
2	Child

These family members are available as dependents.

* *

EXERCISE 2.3: Display Employee Benefit Data for Family Members/Dependents

SCENARIO

For this exercise, Jean Leach wants you to verify that all of her dependents are in the HR/Payroll system. Access her Master Data record using the PA20 transaction and then use infotype 0021 (Family Member/Dependants) to determine the names of the dependents listed for Jean on her various plans.

Information:

- *Transaction*: PA20
- *Employee*: Jean Leach
- *Infotype* IT0021

Instructions

1. Use the data in the business scenario above to display Jean's master data structure.

Practice using the:

-  **Overview** button on the Display HR Master Data screen
-  **Next record** screen button on the Display Family Member/Dependents screen. (This button is available on the Display Family Members/Dependents screen.)

Questions/Results

A. How many dependents does Jean have? ______________________

* *

EXERCISE 2.4: Display Employee Benefit Data Health Plans

SCENARIO

Perform this transaction to display employee master data including the Health Plans infotype.

Information:

- *Transaction*: PA20
- *Employee*: Marvin Tillman
- *Infotype* IT00167

Instructions:

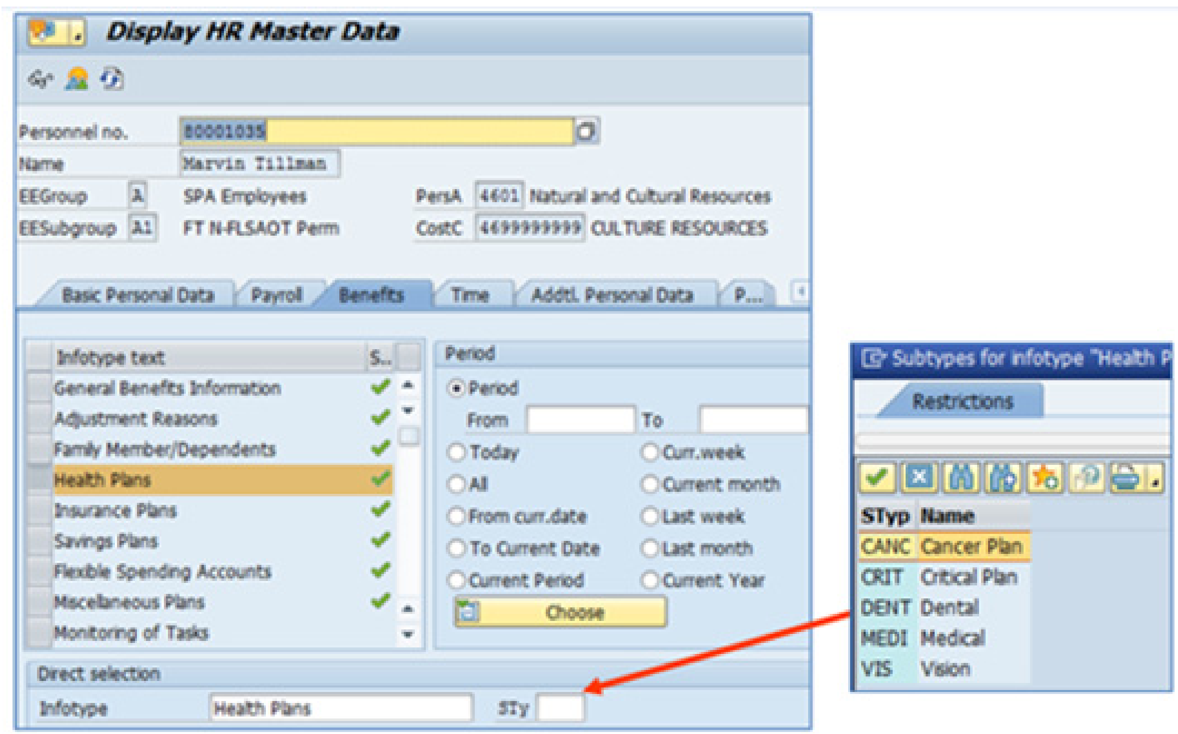
Follow along as your instructor demonstrates how to access transaction code PA20 to display master data, specifically the Health Plan infotype IT0167.

The PA20 transaction allows you to display employee information. In general, all the current information available for an employee in the system can be viewed from this transaction.

Follow along with your instructor and perform the Employee search for Marvin Tillman using his Social Security Number (402-39-3695).

* *

Health Plans Overview (IT0167)



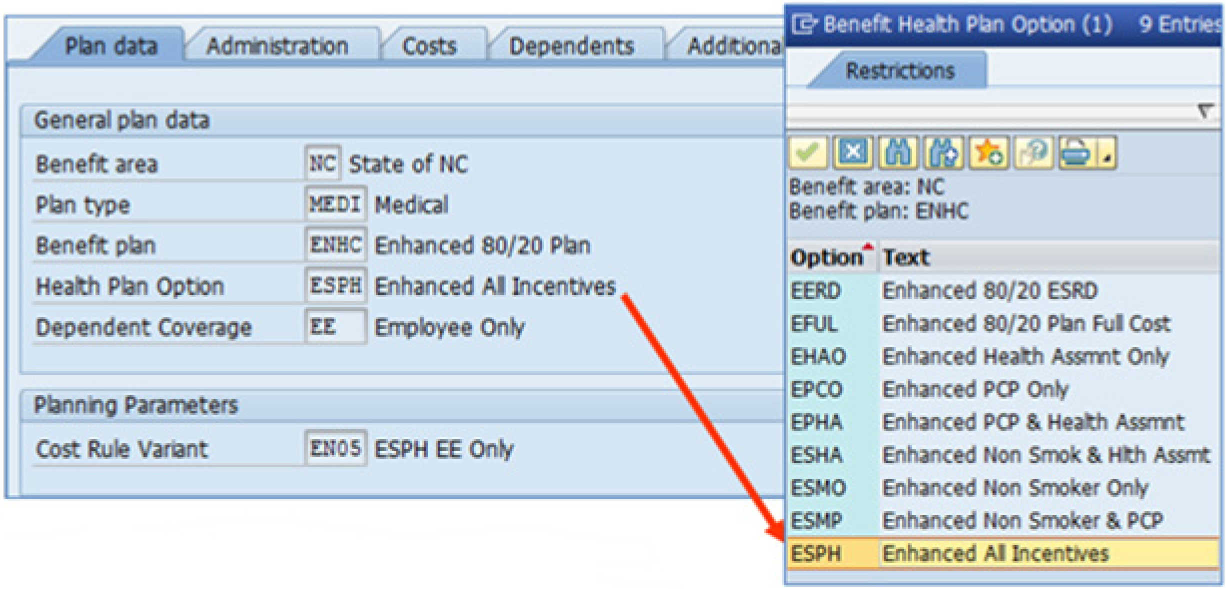
🗁 NOTE: Usually changes will not be made to this infotype. It is automatically created and updated by enrollment procedures.

This infotype stores details of the health plans in which the employee is enrolled. For each health plan in which the employee participants, a separate record exits.

The following five subtypes have been defined:

- CANC – Cancer
- CRIT – Critical Illness
- DENT – Dental
- MEDI – Medical
- VIS – Vision

Health Plans Plan Data Tab



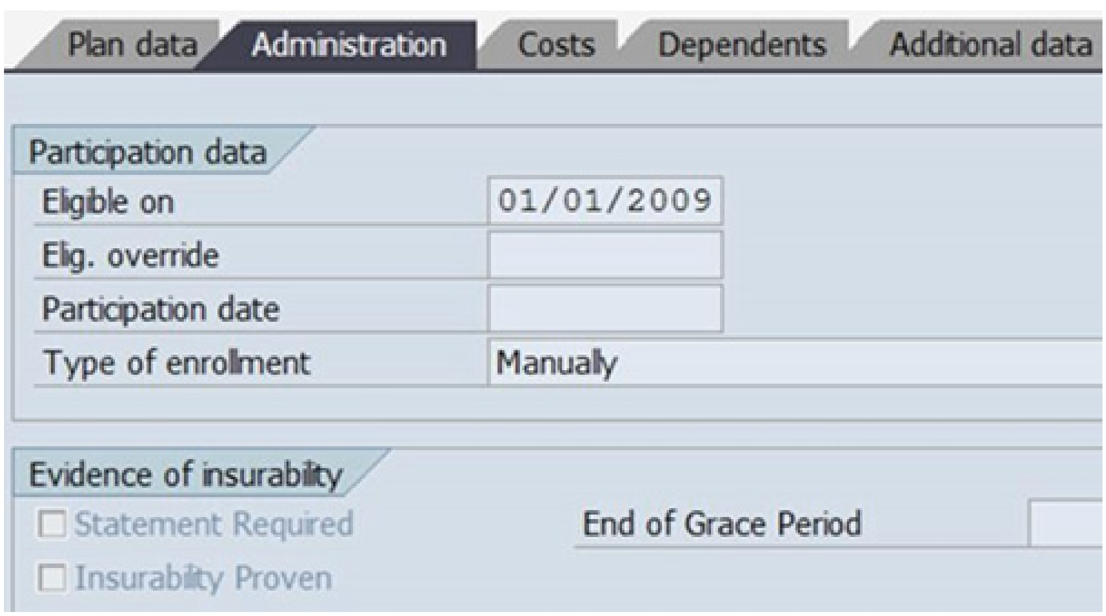
The **Plan data tab** shows how the plan fits into your benefit structure. It stores the cost rule variant for the plan.

🗁 NOTE: For the State Health Plan, the Plan Data tab shows the Employees' Wellness Credits under the Health Plan Option.

Once an infotype has been selected, a series of tab pages will become active, showing the different categories of information. The Plan data tab is the default page.

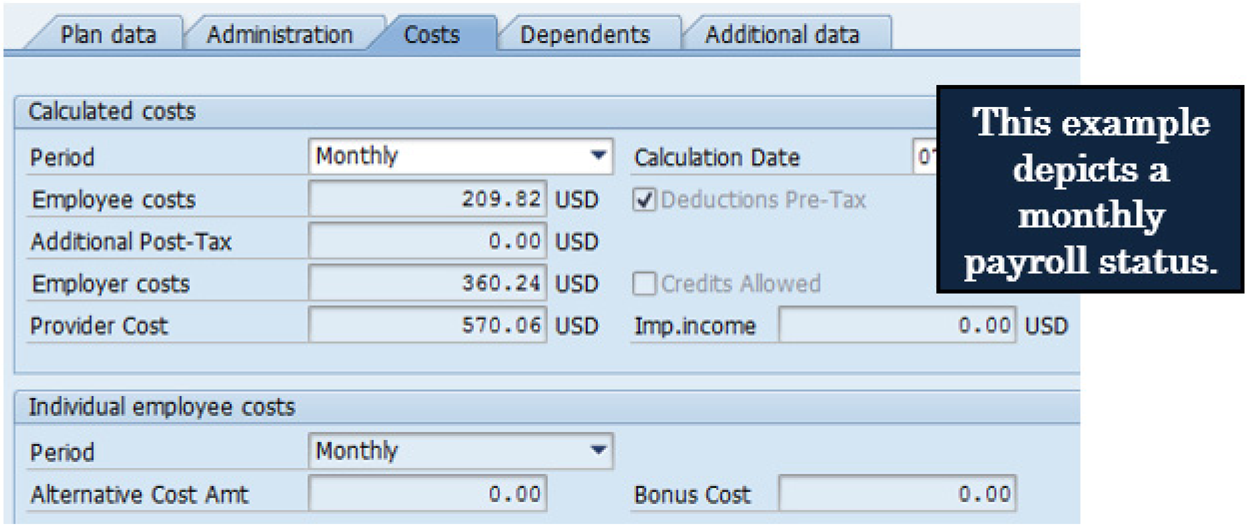
🗁 NOTE: The Additional data is not being used by OSC HR/Payroll.

Health Plans Administration Tab (IT0167)



🗁 NOTE: The *Type of Enrollment* field may show "Adjustment Reason" for plans prior to 2016.

HEALTH PLANS COST TAB (IT0167)

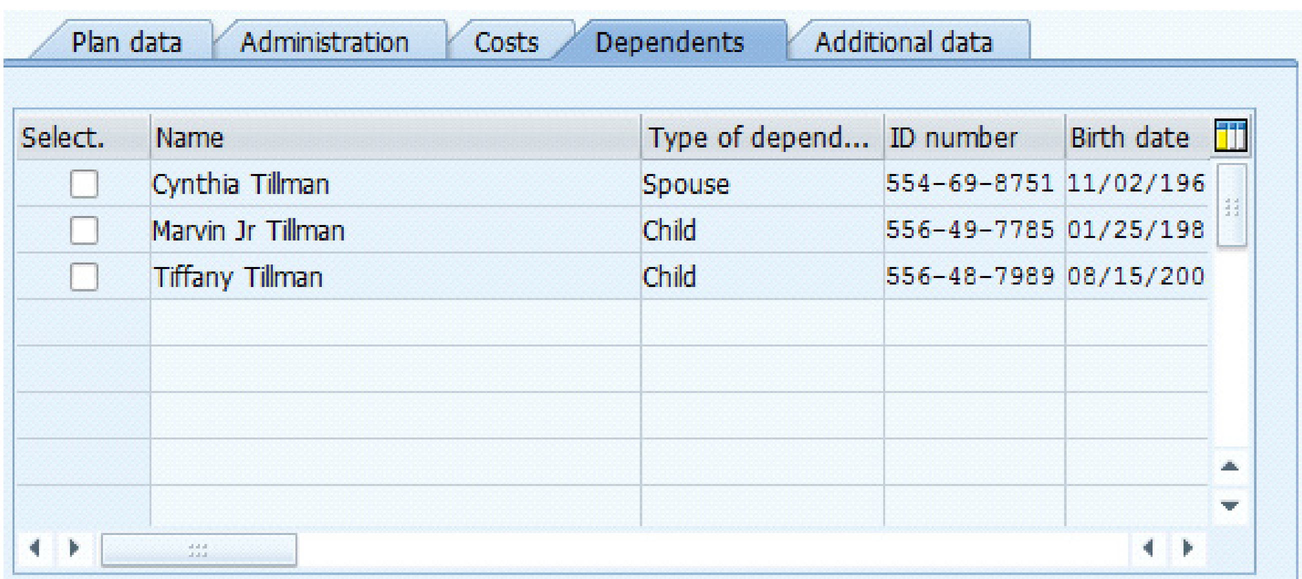


The **Costs tab** shows the automatically generated employer and employee plan costs. (The example above is from Jean Leach's medical plan.)

This slide illustrates an employee on a monthly pay cycle. The deductions shown are the monthly premium amounts.

Calculation date information and the Deductions Pre-Tax checkbox can be found on the left-hand side of the screen.

HEALTH PLANS DEPENDENTS TAB (IT0167)



The **Dependents tab** lists the possible dependents for the plan. The dependents chosen by the employee are marked here in the Select indicator.

- The Benefitfocus/eEnroll system requires SSNs and DOBs for all dependents. All Employees should ensure accuracy.

- The **Additional data tab** is not being used by OSC HR/Payroll.

* *

EXERCISE 2.5: Display Employee Benefit Data for Health Plans

SCENARIO

For this exercise, Jean Leach wants a status check on her health benefit plans. Access her Master Data record using the PA20 transaction. Use IT0167 (Health Plans) to determine which health plans Jean has.

Information:

- *Transaction*: PA20
- *Employee*: Jean Leach
- *Infotype* IT0167

Instructions

1. Use the data in the business scenario above to display Jean's master data structure.
2. Answer the questions below after locating the master data record.

Questions/Results

A. How many active health plans does Jean have? ______________________

B. How did you determine your results? ______________________

C. Does Jean have the Vision plan? ______________________

D. How many credits does Jean have for her 2016 SHP? ______________________

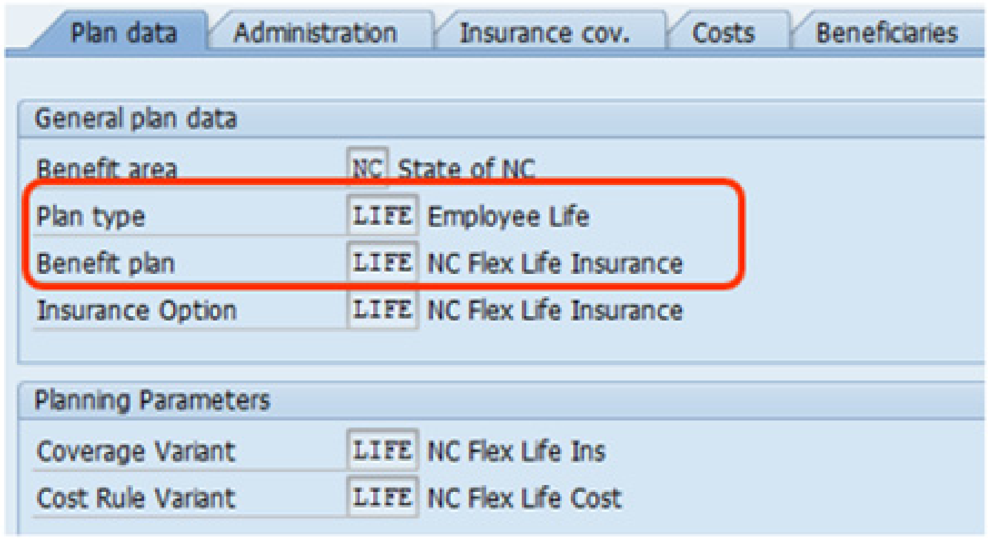
E. What is Jean's monthly premium for the SHP? ______________________

F. Which tab page did you view to determine your result? ______________________

* *

Insurance Plans (IT0168)

PLAN DATA TAB (IT0168)



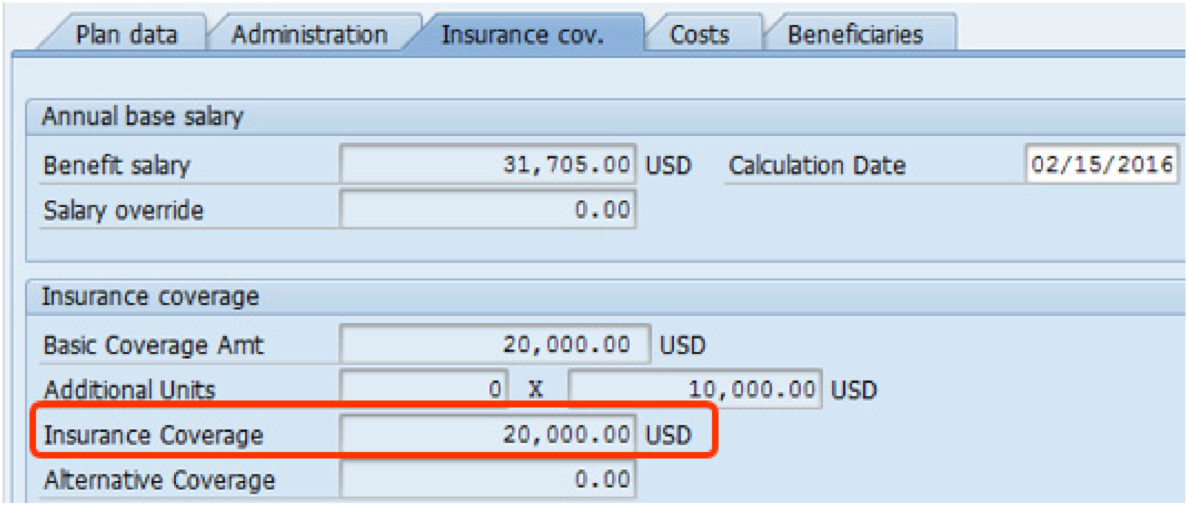
The **Plan data** tab of the Display Insurance Plans infotype displays whether the plan is:

- Core Accidental Death & Dismemberment (AD&D)
- Voluntary Accidental Death & Dismemberment
- Employee Life Insurance
- Spouse Life Insurance
- Child Life Insurance
- Life Insurance plan

In the example above a Life plan is displayed.

Evidence of Insurabiltiy (EOI) information is now housed in the Benefitocus/eEnroll System.

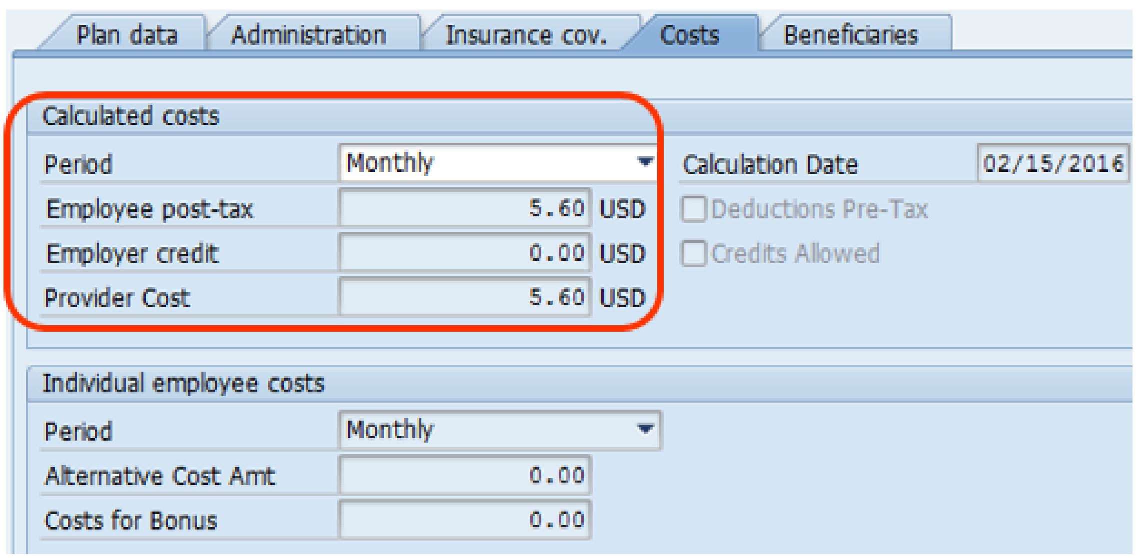
Insurance Coverage Tab (IT0168)



The **Insurance Cov. Tab** displays the coverage amount.

The *Insurance Coverage* field displays the total coverage amount.

Costs Tab (IT0168)



The Costs tab displays the costs paid by the employee and the employer.

NOTE: For a bi-weekly employee, the deduction will be half the cost displayed.

The Admin and Beneficiary tabs are not shown. The types of data displayed are the same as IT0167 (Health Plans).

The Admin tab displays:

- Eligible on date
- Participation date
- Type of enrollment
- Adjustment reason

BENEFICIARIES TAB (IT0168)

The **Beneficiaries** tab displays:

- Name of the Beneficiary
- Type of Beneficiary

Employees can perform changes in the Benefitfocus/eEnroll system.

NOTE: Beneficiaries are no longer housed in the BEACON system.

NOTE: Current beneficiary information is only listed in the Benefitfocus/eEnroll system and is entered by employees. Beneficiary updates are then replayed directly to vendors via electronic file.

* *

EXERCISE 2.6: Display Employee Benefit Data for Insurance Plans

SCENARIO

For this exercise, Jean Leach wants a status check on her insurance plans. Access her Master Data record using the PA20 transaction. Use infotype 0168 (Insurance Plans) to determine which insurance plans Jean has.

Information:

- *Transaction*: PA20
- *Employee*: Jean Leach
- *Infotype* IT0168

Instructions:

1. Use the data in the business scenario above to display Jean's master data structure.
2. Use IT0168 (Insurance Plans) with the Overview option to determine her various insurance plans.
3. Answer the questions below after locating the master data record.

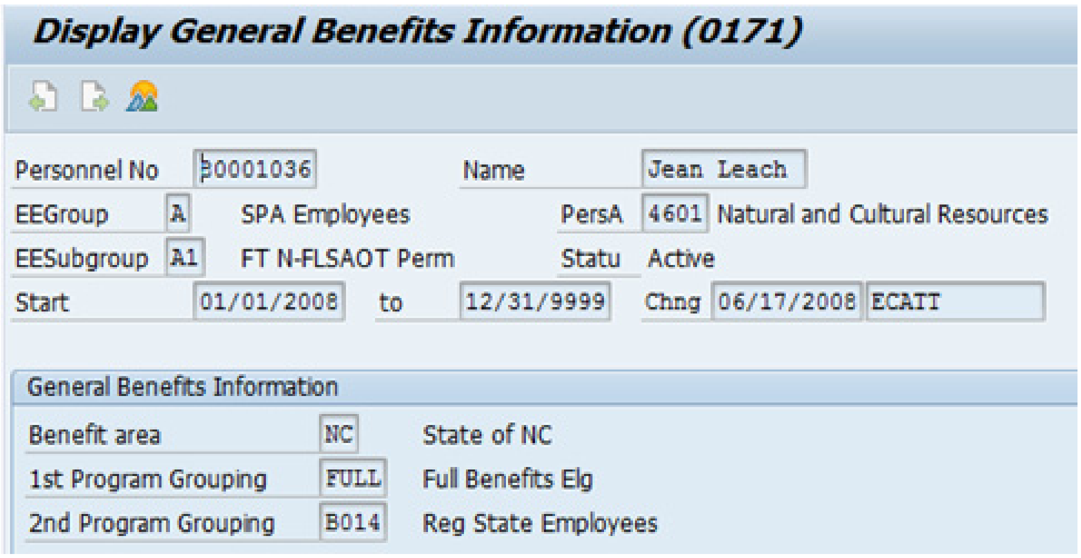
Questions/Results

A. How many insurance plans does Jean have? ________________________

B. How did you determine your results? ________________________

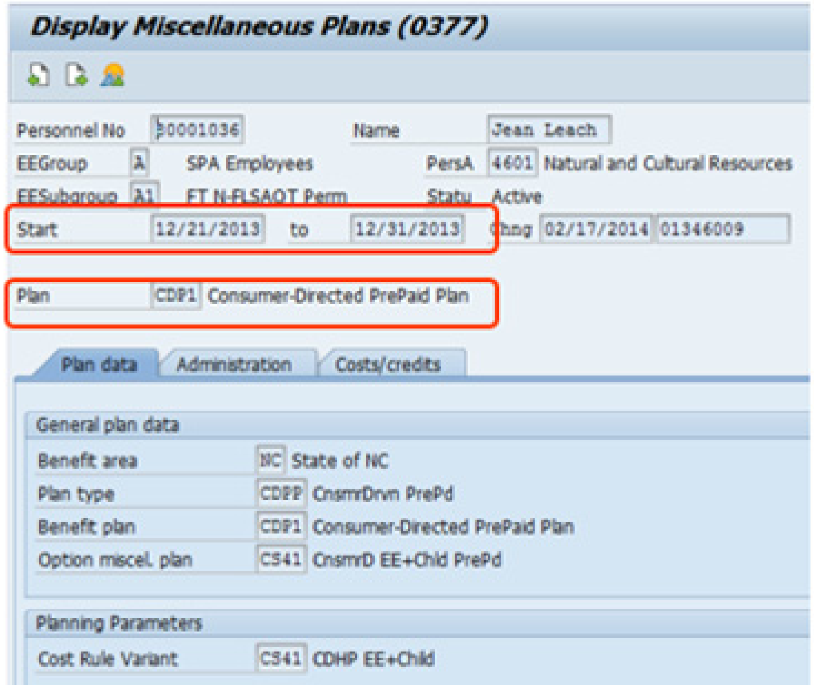
* *

General Benefits Data (IT0171)



This record is essential for benefits processing. An employee must have a General Benefits Information record before enrolling in a benefits plan.

Miscellaneous Plans (IT0377)

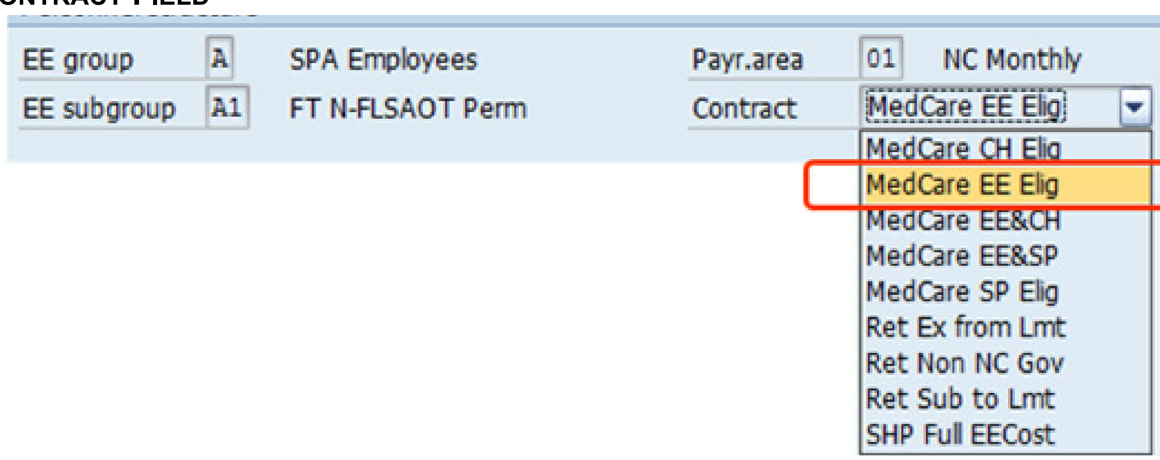


The Miscellaneous Plans Info type is created automatically when an employee enrolls, changes, or cancels the SHP (State Health Plan). It is a mechanism used to collect the prepaid and/or refund premium.

For example: As a new hire, if an employee is hired 8/19/16 and has selected to start the SHP plan on 9/01/16, the miscellaneous plan will collect the prepaid premium in the month of August for the 09/01/16 start date. Subsequent premiums will automatically occur as a payroll deduction.

Organizational Assignment (IT0001)

CONTRACT FIELD



To view the Contract field you can:

1. Select the Organizational Assignment infotype (IT0001).
2. Open the drop-down (match code) to view possible entries.
3. In this example the employee is eligible for the State Medicare Health Plan rate.

The agency STD Administrator or BEST Shared Services populates the Contract field for one of several events:

- Short-term Disability (STD) yrs of service eligibility
  - This automatically changes the deduction amount to Employee Full Pay if changed to SHP-FULL EE COST.
- The code SHP-FULL EE COST is also used for employees who are not eligible for their health insurance premiums to be paid by the state during their LOA.
- Medicare Eligibility
  - BEST Shared Services uses Medicare codes to adjust an employees deduction, so that SHP Medicare rates are applied.
- Retiree rehire earning limitations

IMPORTANT: Retiree rehire, not subject, and Ret non NC Gov earning limitations are used to report to ORBIT employees subject to earning limitations.

STD & Medicare eligibility enables the system to collect the correct premium amount for health insurance as well as controlling the cost of SHP.

* *

EXERCISE 2.7: Display the Employee Benefit Data for an Employee

SCENARIO

You need to display the employee benefit data for employee Peter Whitley. You will use the following infotypes:

- Infotype 0170 (Flexible Spending Account)
- Infotype 0169 (Savings Plan)
- Infotype 0377 (Miscellaneous Plans)
- Infotype 0001 (Organizational Assignment / *Contract* field)

Instructions:

- *Transaction*: PA20
- *Employee*: Peter Whitley
- *Infotype* (See list above)

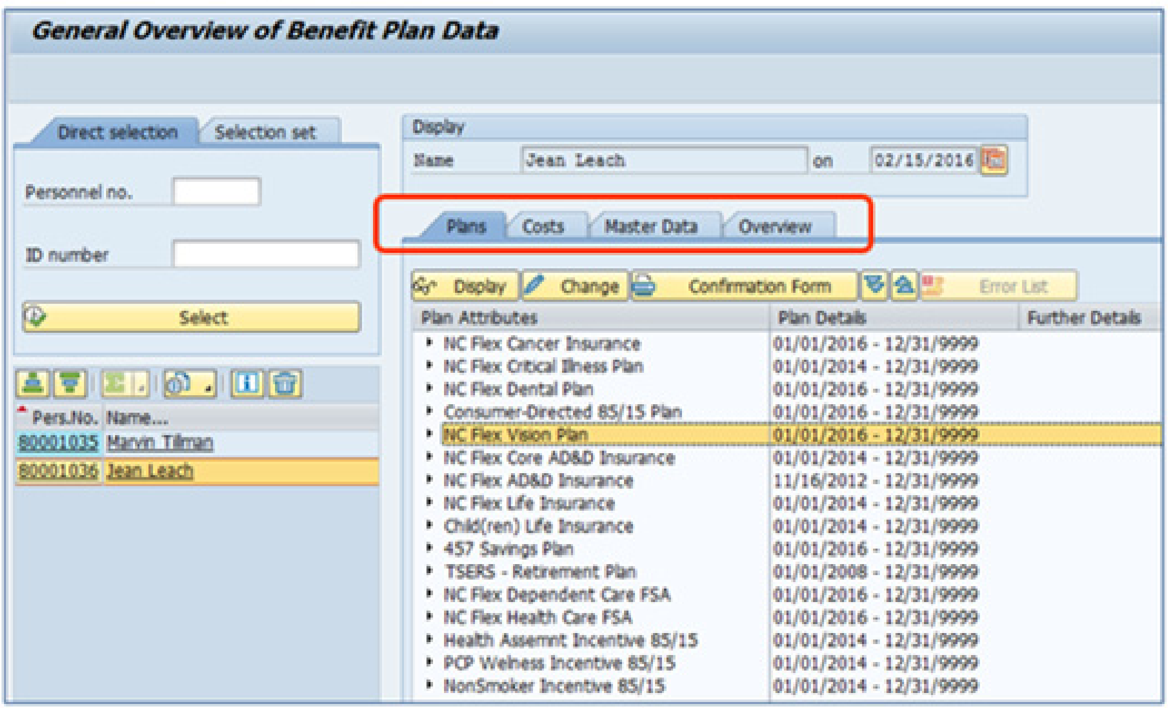
Instructions - Try this one on your own!

1. Use the data in the business scenario above to display benefit data information.
2. Answer the questions below after locating the master data record.

Questions/Results

	Question	Results	Infotype
A.	What type of Flexible Spending Account does Peter have?	______________	______
B.	What is Peter's monthly contribution towards his Savings Plan?	______________	______
C.	What did you learn about Peter's benefits status after viewing the Contract field?	______________	______

Participation Overview - HRBEN0006



Use the **Participation Overview** transaction (HRBEN0006) to display a summary list of all the benefit plans in which an individual employee is enrolled. From the General Overview of Benefit Plan Data screen, you can select (or highlight) a plan and then display the employee information for the plan.

Once an employee has been selected, a series of tab pages become active, showing the different categories of information. The Plans tab is the default page.

Helpful tip: When you double-click on the plan name, the infotype record displays.

Tabs available on the HRBEN006 are:

- **Plans** – Lists all plans for the Employee
- **Cost** – Displays the cost for both the employee and employer

- **Master** - summarizes employee data from these infotypes:
  - — Personal Data (IT0002)
  - — General Benefits Information (IT0171)
  - — Organizational Assignment (IT0001)
  - — Family Members/Dependents (IT0021)
- **Overview** - provides a block diagram that shows participation in plans over a period of time.
- **Print Confirmation Statement Button**

* *

KNOWLEDGE CHECK

SCENARIO

In this exercise, you need to check the details of Marvin Tillman's benefit record. He is an employee who has had several Qualifying Life Events and has created QLEs in the Benefitocus/eEnroll System. He has phoned you and needs you to access his benefits to determine their current status.

Information:

- *Transactions*: PA20 / HRBEN0006
- *Employee*: Marvin Tillman

Instructions:

1. Work together with those at your table as directed by your instructor.
2. Use transaction **PA20**.
3. Select the employee (Marvin Tillman).
4. View the employee's Benefits Data and answer the questions listed below.

Questions/Results

A. How many family members or dependents does Marvin have in the OSC HR/Payroll system? ______________________

B. Where did you go to find your answer? ______________________

C. Who are his family members? ______________________
____

D. How much is Marvin contributing for his pre-tax Health Care FSA? ______________________

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E. Why is his retirement enrollment date different that the rest of his benefits? ____________________

F. What special indicators are listed on Marvin Jr.'s Dependant record? ____________________

* *

SUMMARY

In this lesson you learned to:

- Identify benefits infotypes and subtypes
- Display individual benefit infotypes for an employee using the PA20, Displaying HR Master Data for Benefits, transaction
- Scope of SAP Benefits Administration Module

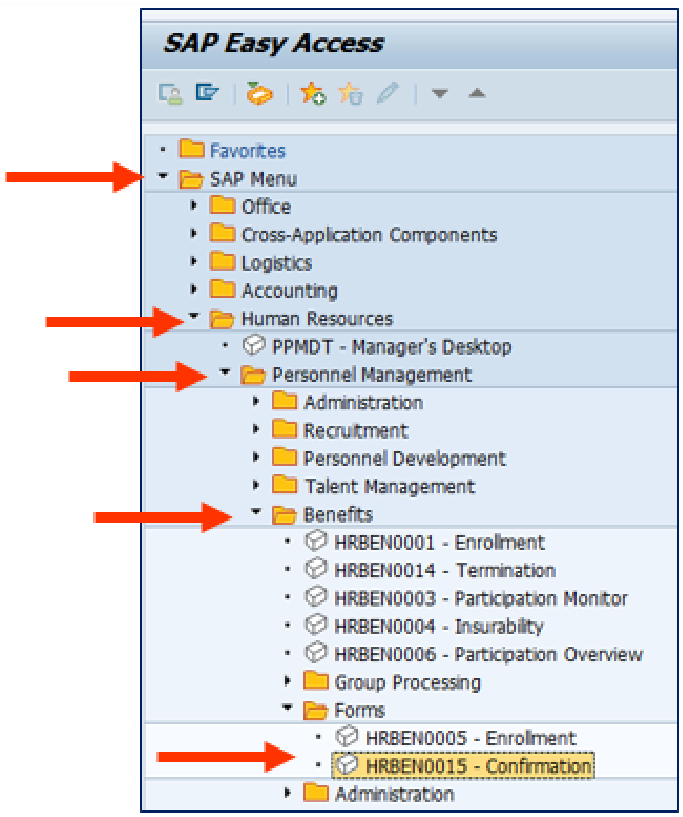
Benefits Letters and Reporting

Lesson 3 Objectives

Upon completion of this lesson, you should be able to:

- Print benefits confirmation forms
- Print benefits letters

Benefits Menu and HR



Benefits is a component of Personnel Management and is found below Personnel Management in the SAP standard menu. In this lesson you are going to learn how to use the Print Confirmation to print a confirmation form as needed.

To access the Print Confirmation transaction from the SAP Easy Access menu, choose *Human Resources > Personnel Management > Benefits > Forms* or type **HRBEN0015** in the Command field and then click the **Enter** button.

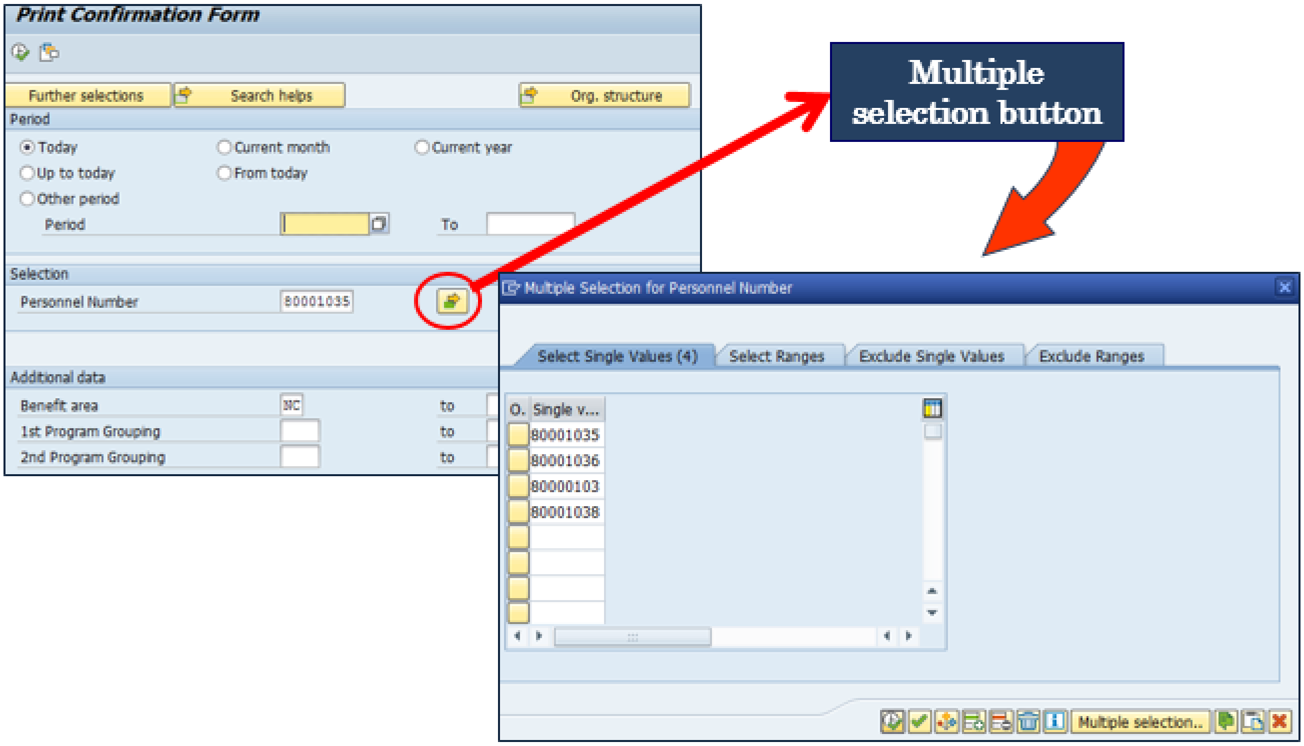
Print Confirmation Form (HRBEN0015)

- Transaction Overview
- Purpose - Use this transaction to print a confirmation form at any time.
- Features
  - You can select multiple employees by using the Multiple Selection button for Personnel Number dialog box.
  - You can preview or display the form.
  - You can specify a date range.

Date Range Selection Options

If you want to...	Then...
Print or display confirmations for current date,	Select the *Today* radio button.
Print or display confirmations from the beginning date to the end date of the current month,	Select the *Current Month* radio button.
Print or display confirmations from 01/01 to 12/31 of the current year,	Select the *Current year* radio button.
Print or display confirmations up to today,	Select the *Up to today radio* button.
Print or display confirmations from today through 12/31/9999,	select the *From today* radio button.
Enter a date range to print or display confirmations,	Select the *Other period* radio button and enter the Begin date in the period field and the End date in the *To* field.

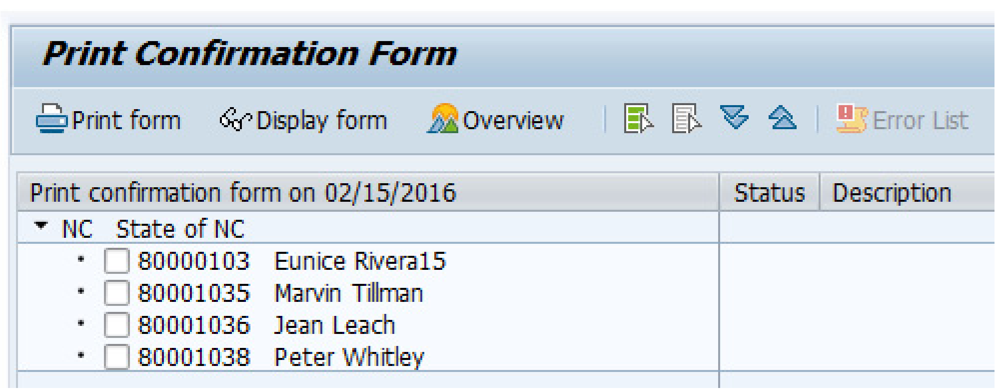
Initial Screen



You can type or search for personnel numbers in the Single Values column. Click the **Copy** button to transfer your selections to the initial screen.

NOTE: Only the first personnel number will be displayed on the screen.

Once you click the **Execute** button, the Print Confirmation Form screen displays listing the selected employees as shown in the following screen image:



The plans in which an employee is participating on the selection date are listed in the form. (See example below.)

STATE OF NORTH CAROLINA
1425 MAIL SERVICE CENTER
RALEIGH, NC 27699-1425

PRINT DATE
02/15/2016

Benefits Confirmation Statement

Jean Leach	Personnel No. 80001036	AS OF DATE: 02/12/2016
1243 Seth Street	Personnel Area Natural and Cultural Resources	
Rowena, NC, 27609	Payroll Area NC Monthly	

Listed below are your most recent elections and costs. Please review the information carefully to confirm your enrollment in these benefit plans. Changes to your plans can only be made if your eligibility changes due to a qualifying event or you make changes during open enrollment. If you have any questions about the information you see below, please contact the Benefits Support Center at 1-866-NCBEST-4U.

HEALTH PLANS

NC Flex Cancer Insurance 01/01/2013 - 12/31/2015
Option Cancer High Option
EE Pre-tax 26.06 USD

Dependents in period 01/01/2013 - 12/31/2015
Mary Leach Legal Dependent Date of Birth 08/06/2001

NC Flex Cancer Insurance 01/01/2016 - 12/31/9999
Option Cancer High Option
EE Pre-tax 25.16 USD

Dependents in period 01/01/2016 - 12/31/9999
Mary Leach Legal Dependent Date of Birth 08/06/2001

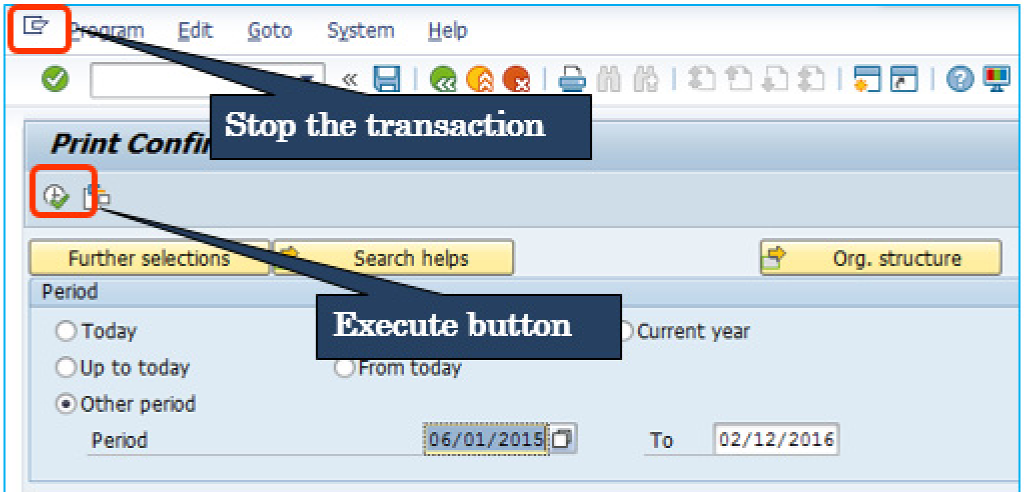
NC Flex Dental Plan 06/01/2008 - 12/31/2015
Option Dental High Option
EE Pre-tax 71.96 USD

Dependents in period 06/01/2008 - 12/31/2015
Mary Leach Legal Dependent Date of Birth 08/06/2001

NC Flex Dental Plan 01/01/2016 - 12/31/9999
Option Dental High Option
EE Pre-tax 70.96 USD

Dependents in period 01/01/2016 - 12/31/9999
Mary Leach Legal Dependent Date of Birth 08/06/2001

Executing a Report



When you have entered all of the selection criteria, click the Execute button to run the report.

Sometimes when you are running a report, or performing other transactions, the system may seem to be taking an inordinate period of time. You can stop the transaction by clicking the icon at the top left of the screen, and selecting Stop Transaction from the menu.

****

EXERCISE 3.1: Print Confirmation Form

SCENARIO

In this exercise, Jean Leach needs a printed confirmation form detailing her benefit selections for her financial planner. She does not have access to ESS so she needs you to print the benefits overview for her.

Information:

- *Transaction*: HRBEN0015
- *Employee*: Jean Leach
- *PERNR*: 80001036

Instructions:

1. Use the HRBEN0015 (Print Confirmation Form) transaction to display a copy of her plan.

2. After you have "printed" Jean's confirmation form, return back to the Print Confirmation Form screen then click the Overview button.

Questions/Results

A. What screen is now displayed? ______________________

B. Which of the previous HR/Payroll system transactions that we have covered also allows you to print a confirmation form? ______________________

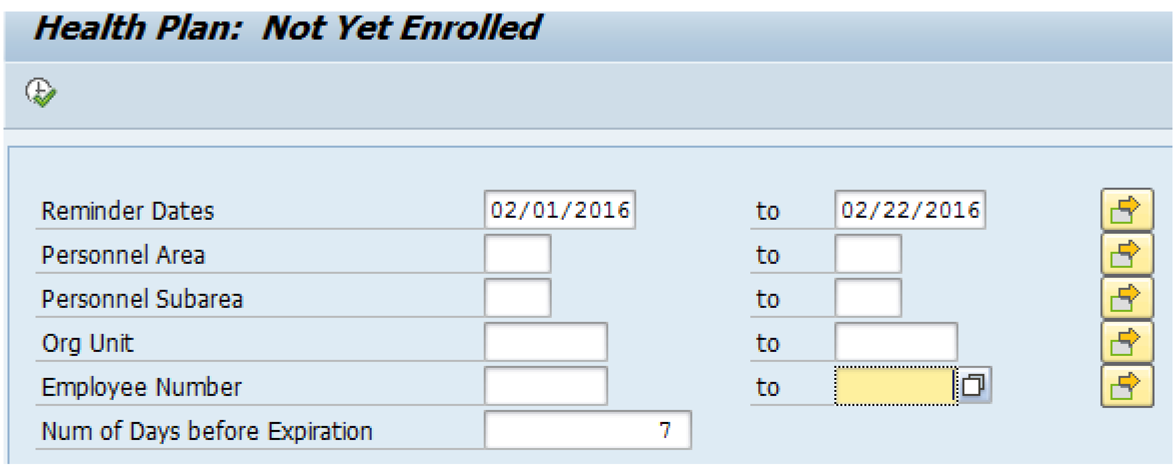
Org Structure Feature

You can also mass print forms for an entire org unit by choosing the **Org Structure** button on the upper right side of the form selection area.

- Click on the **Org Structure** button. The Choose Organizational Unit pop-up box is displayed.
- Open the tree down to the level you wish to print.
- Click the **check box** in front of the org unit.
- Click the **green check mark** to "load" the data to print.
- Continue entering the necessary data on the HRBEN0015 screen.
- Click on the **Execute** icon. The list of persons from the org unit is displayed.
- Select all or as many as you desire for whom to print forms.

Remember, you can only print forms for the those persons for whom you are authorized to view.

Print a Health Plan: Not Yet Enrolled Letter (ZBNS012)



The Health Plan: Not Yet Enrolled Letter can be used to identify employees that have not selected a health plan during the new hire event. The letter is also used to communicate to the employee that they have not selected a health plan during a new hire event. The transaction should be run weekly by Health Benefits Representitives.

Use transaction code **ZBNS012** to print a Health Plan: Not Yet Enrolled Letter.

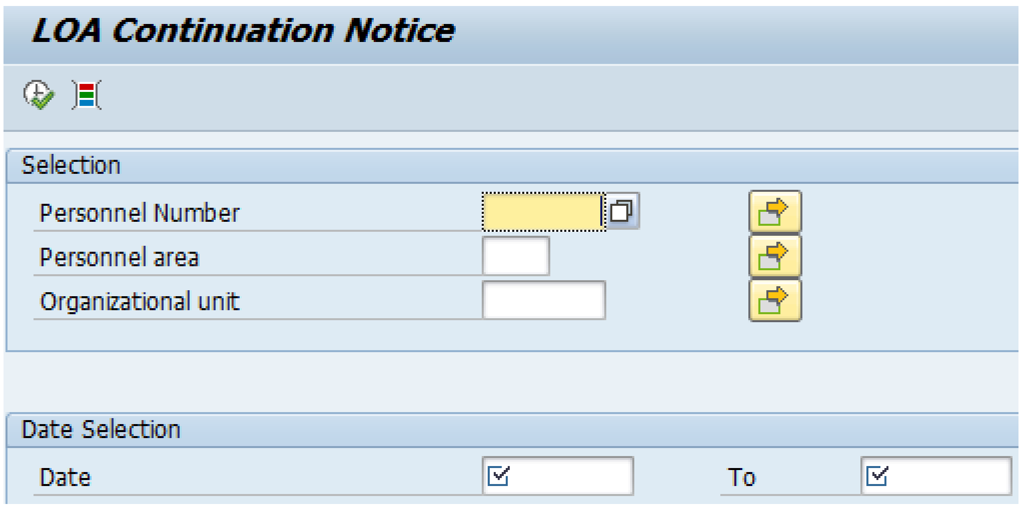
Displayed above is an example of the initial screen utilized before printing a Health Plan: Not Yet Enrolled Letter.

Many variables are available when generating a Health Plan: Not Yet Enrolled Letter:

- Reminder Dates
- Personnel Area
- Personnel Subarea
- Org unit (Organizational unit)
- Employee Number (Personnel Number)
- Number of days before Expiration

It is possible to populate all of the above fields with a list or range of numbers, but it is preferred to use the defaulted Remainder Dates and the defaulted Number of Days before Expiration fields.

Print a Leave of Absence (LOA) Notice Letter (ZBNS008)



This transaction is used to provide the LOA letter for all employees on a LOA for the selected period. The transaction should be run weekly by Health Benefits Representitives.

Use transaction code **ZBNS008** to print a Leave of Absence (LOA) notice letter.

Displayed above is an example of the initial screen utilized before printing a Leave of Absence (LOA) notice letter.

It is a simple report screen requiring the input of:

- A Personnel number, a list of Personnel numbers, or a range of Personnel numbers.
- A Start Date and an End Date.
- The dates used in the Date Selection area will identify employees whose LOA Start Date are in the range entered.

Once the transaction is executed, the letter can be displayed and printed. Pictured below is an example of the LOA letter generated.

A Word or PDF file of this letter is also available on the BEST Shared Services website:

http://www.osc.nc.gov/BEST/support/support_bn.html

STATE OF NORTH CAROLINA
1425 MAIL SERVICE CENTER
RALEIGH, NC 27699-1425

Continuation of Benefits during Leave of Absence
Employee Response Form
This letter has been sent to you by your Agency. Please contact your Health Benefits Representative (HBR) with any questions.

Lynette Rosamond	DATE 02/15/2016
4845 Florence Street	Personnel No. 80000122
Oakwood, NC 27609	Personnel Area Natural and Cultural Reso
	Payroll Area NC Monthly

This letter is to notify you of your option to continue your benefit plans during your Leave of Absence (LOA).

If during your LOA, you are using approved leave and your pay continues in full, your benefits will continue without interruption and you do not need to do anything.

If during your LOA, you are not using approved leave and are without pay; this includes but not limited to LOAs for FMLA, Family Illness Leave, Extended Illness, Short Term Disability, Military, the following applies:

AGENCY AFTER-TAX SPECIFIC BENEFITS
You must contact your local agency benefits representative to receive information on maintaining these benefits plans while on LOA without Pay.

NCFLEX PLANS
While on LOA without Pay, your benefit plans in the BEACON System will terminate. You may continue your plans by sending the premium payments directly to the vendor. NCFLEX vendors must receive your payments no later than the 15th of each month or coverage will end.

NOTE: UPON RETURNING TO WORK, YOU MUST RE-ENROLL IN YOUR NCFLEX PLANS EVEN IF YOU HAVE BEEN MAKING PREMIUM PAYMENTS DIRECTLY TO EACH VENDOR.

STATE HEALTH PLAN
While on LOA without Pay, your benefit plan will terminate (See Exceptions listed below under the HEALTH PLANS ADDITONAL INFORMATION heading). You may continue your plan, however, by sending any applicable premium payments no later than the 15th of each month to BEST Shared Services. Additionally, upon receipt of this notice, you may be required to submit two (2) monthly premium payments to prevent a lapse in coverage or prevent your plan from falling into an arrears status.

Send Premiums to:

BEST Shared Services
1425 MSC
Raleigh, NC 27699-1424

No monthly reminders, invoices or payment coupons will be sent to you by BEST, the State Health Plan or the NCFLEX vendors. It is your responsibility to make timely monthly payments. If you fail to make the premium payments by the 15th of each month, your coverage will be terminated for non-payment. If you are in receiving Short Term Disability benefits, your health insurance premiums will be deducted from the benefit payment.

NOTE: EMPLOYEES ARE RESPONSIBLE FOR ANY STATE HEALTH PLAN PREMIUM PAYMENTS FOR THEIR DEPENDENTS AND FOR ANY EMPLOYEE ONLY COST NOT COVERED BY THE EMPLOYER WHIILE ON LOA.

Continuation of Benefits during Leave of Absence
Employee Response Form
This letter has been sent to you by your Agency. Please contact your Health Benefits Representative (HBR) with any questions.

Lynette Rosamond	**DATE** 02/15/2016
4845 Florence Street	**Personnel No.** 80000122
Oakwood, NC 27609	**Personnel Area** Natural and Cultural Reso
	Payroll Area NC Monthly

HEALTH PLANS

Traditional 70/30 Plan

Option	Traditional 70/30 Plan
Employee Cost	674.60 USD Monthly
Employer cost	0.00 USD Monthly
Full Cost	674.60 USD Monthly

Dependents in period:

Lexi Rosamond	Child	Date of Birth	01/24/1992

NC Flex Dental Plan

Option	Dental High Option
Employee Cost	70.96 USD Monthly

Send premiums to:
United Concordia, Direct Pay
Attention UCCI NC Flex
PO Box 69423
Harrisburg, PA 17106
Make check payable to: UCCI

Participants can continue the plan for up to 24 months

Dependents in period:

Lexi Rosamond	Child	Date of Birth	01/24/1992

NC Flex Vision Plan

Option	Basic Vision
Employee Cost	15.46 USD Monthly

Send premiums to:
Superior Vision
Attention: NC Flex Enrollment
11101 White Rock Road
Suite 150
Rancho Cordova, CA 95670
(1-800-923-6766, ext 2204)
Make check payable to: NGLIC

Participants can continue the plan for up to 24 months.

EXERCISE 3.2: Print a Leave of Absence (LOA) Notice Letter

SCENARIO

One of your employees, Lynette Rosamond, is going on Leave of Absence (LOA) and needs the LOA Notice Letter printed so she understands the status of her benefits while on leave and her responsibilities to continue premiums if she desire to do so.

Information:

- *Transaction*: ZBNS008
- *Employee*: Lynette Rosamond
- *PERNR*: 80000122

Instructions:

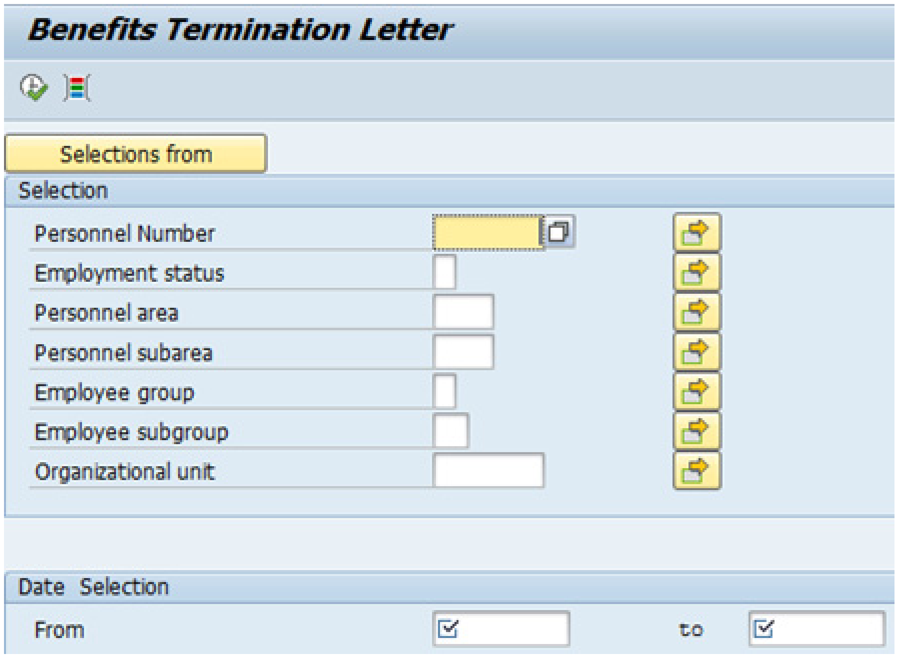
Follow along with your Instructor as he/she demonstrates how to access the Print a Leave of Absence Letter using the ZBNS008 transaction. The ZBNS008 transaction allows you to preview the letter online or print it locally.

1. Enter **ZBNS008** in the Command field and click Enter.
2. Enter **80000122** in the Personnel number field.
3. Enter the **date range** given by your instructor.
4. Click the **Execute** button.
5. Click the **checkbox** in front of the Employee's personnel number.
6. Click the **Print** button.
7. Click **Print Preview**. The LOA notice letter is displayed.

🗁 *Instructor note*: Current LOA action date range can be obtained through PA20 > IT0000.

* *

Print a Benefits Termination Letter (ZBNS013)



Purpose of Printing a Benefits Termination Letter

This transaction generates a letter that can be provided to terminated employees outlining their continued options for benefits after employment ends. The transaction should be run weekly by the Health Benefits Representitives.

Use transaction code **ZBNS013** to print a Benefits Termination letter.

Many variables are available when generating Benefits Termination letters including:

- Personnel Number
- Employment status
- Personnel area
- Personnel subarea
- Employee group
- Employee subgroup
- Organizational unit
- Start Date and End Date
  - The dates used in the Date Selection area will identify employees whose Benefits Termination date are in the range entered.

Once the report is executed, the letter can be displayed and printed.

<u>RIF Employees</u>: The termination letter for RIF employees will include additional information regarding the options to continue their health insurance.

See the example below of a letter informing employees that their benefit participation in an enrollment program has been terminated.

Benefits Termination Notice

Christa Fernandez 842 Honeysuckle Lane Chantilly, NC 27609	**Personnel No.** 80000048 **Personnel Area** Environmental Quality **Payroll Area** NC Monthly	**Date:**02/15/2016

This letter is to notify you that your state-sponsored benefit plans have ended due to Separation. It is for informational purposes only. Continuation of coverage, conversion or portability options may be available based on each plan's specifications. You will need to make satisfactory payment arrangements and complete any necessary forms based on each plan's requirements and deadlines. We will notify each vendor of the date your plan(s) will end. It is not the intent of this letter to replace or supercede any documents you receive from each plan directly. If you have any questions about the information you see below, please contact the Benefits Support Center at 1-866-NCBEST-4U.

If you are enrolled in any group life, accident, disability, dental, or cancer plans offered through your agency, please contact your Human Resources Representative directly to discuss your continuation options.

Coverage	End Date of Coverage	Continuation Options
Enhanced 80/20 Plan	12/31/9999	The State Health Plan will send you information outlining your continuation options, mailed to your last known address. You may continue coverage by paying the full cost (both the employer and employee costs) plus a 2% administrative fee by the dates the vendor indicates. You can also contact the State Health Plan with questions at 1-888-234-2416. If your coverage ended due to retirement, you may be eligible to continue your health insurance through the Retirement System. Please contact your agency representative to see if you qualify and to inquire about enrollment forms.
NC Flex Dental Plan	12/31/9999	After receiving the termination notice, the vendor will send COBRA enrollment material to your last known address if you are enrolled in an option that you pay for in monthly premiums. The cost is 100% of your monthly premium, plus 2% administratin fee. Payments are made on an after tax basis by check, payable to the vendor. Checks are due by 1st day of the month.

* *

EXERCISE 3.3: Print a Benefits Termination Letter

SCENARIO

Christa Fernandez is leaving your agency and State Government. You need to print the Benefits Termination letter for her so she knows the status of her various benefits, especially coverage termination dates.

Information:

- *Transaction*: ZBNS013
- *Employee*: Christa Fernandez
- *PERNR*: 80000048

Instructions:

Follow along with the Instructor who will lead you in printing a Benefits Termination letter using the ZBNS013 transaction. The ZBNS013 transaction allows you to preview the letter online or print it locally.

Additional Resources

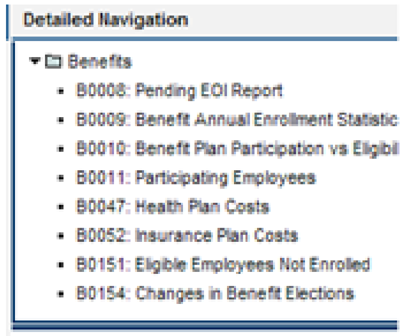
Refer to the following website for more information about printing Benefits Termination Letters:

- Access the **OSC Training HELP page** http://www.osc.nc.gov/training/osctd/help/index.html
- Go to the **Benefits** folder.
- Locate the **BPPs** folder > the document titled **ZBNS013 Benefits Termination Letter**

* *

Additional Reporting

BI Reports



Additional Resources

Refer to the following website for a complete list of BI Benefit reports available and their description:

- Access the **OSC Training HELP page** http://www.osc.nc.gov/training/osctd/help/index.html
- Go to the **BI Reporting** folder.
- Locate the **Job Aids** folder > the document titled **BN Report Descriptions in BI**

SUMMARY

In this lesson you learned to:

- Print Benefits Confirmation Forms
- Print Benefits Letters

Course Review

Lesson 4 Objectives

Upon completion of this course, you should be able to:

- Describe the benefits enrollment and plan administration processes.
- List the tasks performed by Agency HBR, BEST Shared Services, and Benefitfocus/eEnroll for benefits administration.
- Search for an employee and view available benefit infotypes on the employee's record using transaction code PA20.
- Display benefits confirmation forms and letters.

Next Steps

- Monitor the HR/Payroll System communication
  - — BEST Shared Services web site (especially the Updates tab)
    URL: http://www.osc.nc.gov/BEST/index.html
  - — BEACON Training website: **What's New** link
    URL: http://www.osc.nc.gov/beacon/training/whats_new.html
- Review conceptual materials
- Access the Training HELP site

  URL: http://www.osc.nc.gov/training/osctd/help
- Practice what you've learned

  URL: http://mybeacon.nc.gov
  - — Client 899
  - — Use your current NCID user name and password

Continue to monitor updates on the BEACON University website for information regarding any future training that you are scheduled to attend.

Keep your training materials close by as a ready reference.

Want to practice what you have learned from your desk?

Follow the link provided above to access the training client on the BEACON website. The training client is number 899. Your current NCID user name and password are used to access the practice environment.

Need transactional assistance?

Remember to access the Training HELP website when you need assistance in completing transactions. As stated above, the work instructions can be accessed on line through the web link in the steps above.

Course Assessment/Evaluation

Follow the instructions given by your instructor to complete your Competency Assessment and Evaluation of today's class in the Learning Management System (LMS).

CONGRATULATIONS!

You've completed the course!