Oracle Fusion Cloud Human Resources

Using Benefits

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1 Overview

Overview of Using Benefits

This overview outlines the activities throughout the benefits cycle, from maintaining benefits enrollment information for your employees to running processes and reports.

The Manage Benefits business process contains the following activities:

- Manage Benefit Plans, Programs, and Events
- Maintain Benefits Enrollments
- Elect Benefits

The following table provides the main work areas to use for these activities:

Activity	Work Areas
Manage Benefit Plans, Programs, and Events	Plan Configuration
Maintain Benefits Enrollments	Enrollment Evaluation and Reporting Reports and Analytics
Elect Benefits	Me, Benefits

Manage Benefit Plans, Programs, and Events

Update configurations of benefits objects, including:

- Eligibility
- Life events
- Plans and programs
- Rates and coverages
- Flex credits

You can also configure display of information in the self service enrollment guided process, and export and import plan configurations.

Maintain Benefits Enrollments

Coordinate and manage day-to-day benefits enrollment activities for participants in a central location. Run processes to manage enrollments for multiple employees. Administer certification requirements and designation requirements that enrollments generate.

Reports

View reports based on enrollments and other transactions, including:

- Person enrollment summary
- Person enrollment kit
- Person enrollment results
- Pending action items
- Life event reports

The Creating and Editing Analytics and Reports guide explains how you can edit or create reports for your own purposes.

Elect Benefits

Participants can:

- Change benefit elections
- View pending action items
- Update contacts
- Update beneficiary organizations
- View and print a summary report

Related Topics
- Overview of Benefits Service Center
- Overview of Benefits Open Enrollment
- Overview of Benefits Reports and Analytics

2 Maintain Benefits Enrollments

Overview of Benefits Service Center

Coordinate and manage day-to-day benefits enrollment activities for participants in a central location.

Using the Benefits Service Center page, benefits professionals can:

- Enter and update benefits selections, individual eligibility exceptions, and overrides for participants
- View enrollments, update coverage and dependents, and designate beneficiaries as a participant's personal and employment data changes
- Record the history of communications and notable transactions for retrieval with a participant's records

Enrollments generate action items that help benefits professionals administer:

- Certification requirements, such as proof of student status or proof of good health
- Designation requirements, such as dependents, beneficiaries, and primary care physicians

Related Topics

Overview of the My Dashboard Page

Administrators can use the My Dashboard page to see at a glance the list of tasks they need to perform.

For example, you can quickly get to know how many people have life events that need manual intervention, and how many people have pending actions. You can get to the details from the activity counts, or even jump to a specific person's benefits summary to do person-related benefits tasks.

To get to the My Dashboard page, on the Home page, click **Benefits Administration**, and then click **Enrollment**.

How You Adjust the Timeline

By default, benefits activities that happened in the current week appear. You can change the timeline by choosing to view activities in the current month, the next 3 months into the future, or the last 3 months in the past.

How You Learn More About Benefits Activities

You can use the My Dashboard page to see at a glance the list of tasks you need to perform. For instance, you see that 10 people have pending actions. If you want to learn more about this activity count, simply click the activity link to access a page to see those persons that have the pending actions. Then, click the person's name to open their benefits summary. On that page, you can check the scorecard to know how many pending actions the person has. For example, 10 pending actions. Click the count to open a page that tells you the specific action item that's pending.

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How You View the Benefits Summary for a Specific Person

If you want to open the benefits summary of a specific person, enter the name, or person number, or any other keyword, such as an email address, in the Search for a Person box. If the person record exists, you should see the person record appear in the results below the box. Click the person's name to open their Benefits Summary page.

How You Configure the My Dashboard Page

The My Dashboard page, out of the box, displays all the counts except the People with Closed Events count. You can choose to hide or show these counts.

For example, if your company doesn't deal with court orders, you can choose to hide that count. You can even change the sequence in which the counts appear.

If you have the required access permissions, you configure the My Dashboard page from the Setup and Maintenance work area, using the **Manage Common Lookups** task. Open the ORA_BEN_RESP_SUMMARY look up type.

Each activity count that you see on the My Dashboard page appears as a lookup code. Here's what you can configure:

Configuration aspect	How to configure
Display or hide an activity and its count	Select or deselect the **Enabled** check box. For example, if your organization doesn't use the billing feature, you might want to deselect the Enabled check box for the People with unpaid bills row. If you deselect the **Enabled** check box for all the counts, the entire section won't appear on My Dashboard. Only the search box appears.
Determine the top 4 activity counts	The first 4 activity counts, starting with the display sequence number 1, are the counts that appear on the My Dashboard page. Other activity counts appear, but only when you click the **Show more** link.
Reword the activity	Enter a new name in the **Meaning** field.
Change the display sequence of activity counts	Enter a new sequence number in the **Display Sequence** field for the lookup code. Adjust the sequence numbers in the rest of the lookup codes as required.

Note: The People with closed life events count doesn't appear by default. You can, however, choose to display it. You might see a decrease in performance because of the typically large counts associated with this activity.

If you want your users to use only the Search and not the counts, you can hide the dashboard section completely by using the functionality in the HCM Experience Design Studio.

Related Topics

Row Limit on Benefits Dashboard Counts

If you see any errors due to the high volume of data used for the calculation of activity counts in Benefits dashboard, you can apply the row limit on those counts.

This limits the number of rows used for the calculation of activity counts.

The maximum value used for limiting the row counts is 50000. Here's how the row limits are calculated:

Calculation of Row Limits

Value You Set	Value Used for Calculations
50000 or less.	The value you set.
More than 50000.	50000
Any non-numeric values. For example, Fifteen Thousand.	50000
Values include special characters. For example, 25,000 or 150.5	50000

Related Topics
- Apply Row Limit on Benefits Dashboard Counts

Apply Row Limit on Benefits Dashboard Counts

Here's how you enable the lookup code to set the maximum row limit:

Steps to set the maximum row limit
1. Select the **Manage Common Lookups** task in the Setup and Maintenance work area.
2. Create a lookup type with these details:
    - Lookup Type: BEN_DASHBOARD_ROW_LIMIT
    - Meaning: Benefits Dashboard Row Limit
    - Module: Benefits Repository
3. Search for **BEN_DASHBOARD_ROW_LIMIT**.
4. Add a new row in the Lookup Codes section.
5. Enter **MAX_ROW_LIMIT** as the Lookup Code.
6. . Add a new row in the Lookup Codes section.
7. Select the **Enabled** check box.
8. Enter the row limit in the Meaning column. The maximum value used for limiting the row counts is 50000.

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9. Click **Save**. When you create and enable the MAX_ROW_LIMIT lookup code, you see a plus sign (+) next to the person count if the row count exceeds the maximum limit you set.

Related Topics
   • Row Limit on Benefits Dashboard Counts

Overview of the Benefits Summary Page

The Benefits Summary page of a benefits participant has these key areas that let you complete benefits related tasks or answer any questions that a participant might have.
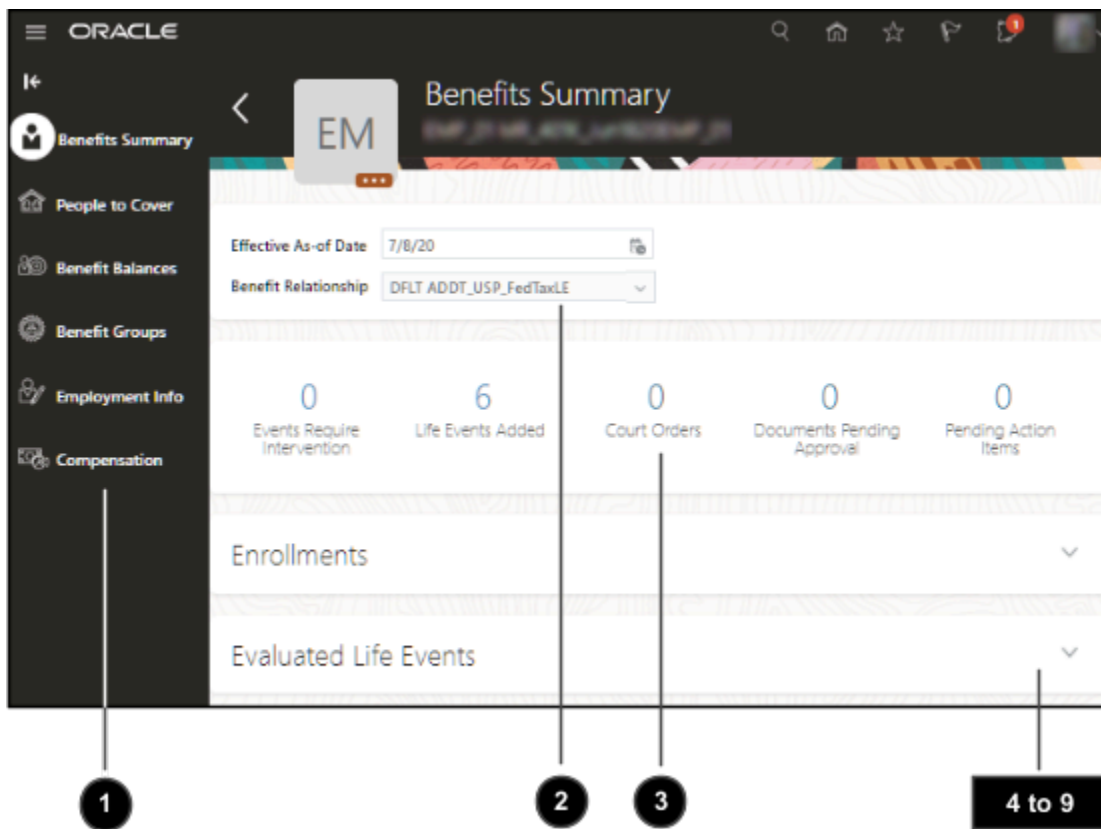
Here are the details of the areas on the Benefits Summary page:

Number	Area	Details
1	Side Panel	This panel contains supporting tasks related to the participant. For example, you use the **People to Cover** task to see and manage the person's dependents and beneficiaries that you can later use during enrollment. You use the **Benefit Groups** task to see what groups the participant is enrolled in and manage new and existing memberships.

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Number	Area	Details
2	Effective Dates and Benefits Relationship	The information in the Benefits Summary page appears on the basis of the effective date and the benefits relationship that you select.
3	Scorecard	You can see the counts of various benefits aspects or activities. For example, you can see a count of the life events that require your intervention, new life events, pending actions, court orders, and documents that you need to review.

Click the count to open a page or navigate to a section within the summary page that has more details. |
| 4 | Enrollments section | The current enrollments for the participant as of the effective date appear here. Use the filter to see only those benefits with pending actions or benefits that are suspended. The **Actions** menu lets you change benefit elections, view flex credits, and enrollment results. Depending on plan setup, you can click the **Actions** (ellipses) link to override the enrollment. |
| 5 | Evaluated Life Events section | When the application processes a life event and starts an enrollment window, the details appear in this section. If the effective date you have set is within the enrollment window, the **Enroll** button appears. You can then make elections. Depending on your configuration, you can use the **Actions** menu to add an open enrollment event.

For each evaluated life event, depending on setup, you can click **Actions** (ellipses) to back out the event, close the event, override participant eligibility for that event, or view enrollment opportunities that the life event offers.

You can also print the enrollment document so that you can share the report with the participants to record their elections. |
| 6 | Potential Life Events section | If life events were detected for the participant, they appear here. To add a life event, click **Add**. The **Actions** menu contains tasks to process the life events. If you have configured collapsing logic, click **Determine Winning Events**. To process the life events and start an enrollment window, you click **Evaluate Life Events**. |
| 7 | Court Orders section | This section lists existing court orders that were defined for the participant. You can add or edit court orders. |

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Number	Area	Details
8	Certification section	If there are documents that you need to review and approve, they will appear here. Use the filter to see documents that are pending for approval especially when there's a large list.
9	Notes section	You use the Notes section to record any comments or additional text that you want to store for your reference.

Related Topics

Life Event Statuses

Life event status indicates the degree to which the event has been processed. This topic defines the status values found on each tab of the Person Life Event page in the Benefits Service Center page.

Potential Life Event Tab

This table defines the status values found on the Potential Life Event tab.

Status	Description
Detected	The life event, such as marriage event, was triggered for the person and participation evaluation processing hasn't yet evaluated it.
Unprocessed	You created the life event manually on this tab. The next time participation evaluation processing runs, it changes the status to **Detected**.
Voided	You select this status to indicate that the potential event should not be processed further.
Manual	This status prevents participation evaluation processing from processing a detected event. Use it to indicate that manual intervention is required. Set this status either manually or configure it to be set automatically: • Manually select this status when you manually create an event for a person. • Configure the Timeliness Evaluation setting of a particular life event to set the status to Manual when a detected event falls outside the defined timeliness period.

Life Event Tab

This table defines the status values found on the Life Event tab.

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Status	Description
Processed	Participation evaluation processing evaluated this life event and one of the following conditions is true: • The life event provided electable choices and enrollment opportunities, the participant enrolled, and the life event was closed. • The life event didn't provide enrollment opportunities because the participant doesn't meet eligibility requirements.
Started	Participation evaluation processing evaluated this life event and determined that the participant currently has electable choices available for enrollment.
Backed Out	The Back Out Life Events process ran for this life event in batch or individually for this person. Backing out a life event rescinds any updates to worker records that resulted from the life event. You can back out only life events in the **Started** or **Processed** status.
Voided	When you run the Back Out Life Events process, you specify whether to delete or void the event.

How Benefits Relationships Impacts Benefits Processing

Benefits relationships control how a worker's benefits are grouped for processing. A worker might have different sets of benefits attached to different benefits relationships.

Settings That Affect Benefits Relationship Assignments

Configure two default benefits relationship settings for each combination of country or legal entity, and benefits usage:

Setting	Description
Default Benefits Relationship	The default benefits relationship assigned automatically to all new hires and workers with one assignment.
Enable Multiple Assignment Processing	If disabled, then all workers have the default benefits relationship. If enabled, you must configure whether and how to assign benefits relationships to additional assignments by default.

Use the **Configure Default Benefits Relationships** task in the Setup and Maintenance work area.

In the Benefits Service Center page, benefits professionals can change:

• The benefits relationships associated with individual workers
• The work assignments associated with the worker's benefits relationships

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How Benefits Relationship Assignments Affect Benefits Processing

Benefits relationships affect these benefits entities:

- Potential life events
- Life event
- Eligibility records
- Electable choices
- Enrollment options
- Dependent coverage
- Beneficiary designations
- Primary care physician designations
- Deductions

A worker might have assignments that are associated with different benefits relationships.

The following six examples list:

- Different ways that worker assignments might be structured within an organization
- How the benefits relationships would be associated
- The impact on life events, electable choices or enrollment options, and benefits eligibility

Example 1: Single Legal Entity, Work Relationship, Employment Terms, Assignment and Benefits Relationship

Configuration: Only one assignment and one benefits relationship exist.

Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy UK	1	Architect	Architect	A (default)

Processing: Life events, electable choices or enrollment options, and benefits eligibility are evaluated based on the assignment in this benefits relationship.

Example 2: Work Relationships in Two Different Legal Entities

Configuration: Two sets of work relationships, employment terms and assignments exist, one for each legal entity. The person has two sets of benefits, one for each legal entity. Each assignment is associated with a different benefits relationship.

Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy UK	1	Architect	Architect	A (default for the legal entity)

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Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy US	2	Consultant	Consultant	B (default for the legal entity)

Processing: This table shows the basis for benefits evaluation and processing for each data type:

Data Type	Benefits Evaluation Processing Basis
Life events	Primary assignment from each legal entity.
Electable choices or enrollment options	One set of data for each legal entity.
Eligibility	Use eligibility to provide benefits from the appropriate legal entity. Eligibility criteria are defined at the legal entity level or globally.

Example 3: Multiple Assignments in a Single Legal Entity

Configuration: One benefits relationship is associated with different employment terms and assignments.

Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy US	1	Architect	Architect	A (default)
Galaxy US	1	Consultant	Consultant	A

Processing: This table shows the basis for benefits evaluation and processing for each data type:

Data Type	Benefits Evaluation Processing Basis
Life events	Primary assignment
Electable choices or enrollment options	One set of data for each life event
Eligibility	Attributes defined at global person level are used for both life events. Assignment-level attributes are used in the respective life events.

Example 4: Multiple Assignments in a Single Legal Entity - One Benefits Relationship for Each Assignment

Configuration: Separate benefits relationships are associated with each assignment.

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Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy US	1	Architect	Architect	A (default)
Galaxy US	1	Consultant	Consultant	B

Processing: This table shows the basis for benefits evaluation and processing for each data type:

Data Type	Benefits Evaluation Processing Basis
Life events	Separate life events created for Architect and Consultant assignments
Electable choices or enrollment options	One set of data for each life event
Eligibility	Attributes defined at global person level are used for both life events. Assignment-level attributes are used in the respective life events.

Example 5: Multiple Assignments in a Single Legal Entity - One Benefits Relationship Has Two Assignments, Another Has Remaining Assignments

Configuration: Two assignments are associated with one benefits relationship, and another assignment with a second benefits relationship.

Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy US	1	Architect	Architect	A (default)
Galaxy US	1	Product Manager	Product Manager	A
Galaxy US	1	Consultant	Consultant	B

Processing: This table shows the basis for benefits evaluation and processing for each data type:

Data Type	Benefits Evaluation Processing Basis
Life events	Separate life events are created for the assignments in benefits relationships A and B
Electable choices or enrollment options	One set of data for each life event
Eligibility	Attributes defined at the global person level and assignment level are used for life events

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Example 6: Complex Multiple Benefits Relationships

Configuration: Many assignments are associated with one or more benefits relationships.

Legal Entity	Work Relationship	Employment Terms	Assignment	Benefits Relationship
Galaxy US	1	Product Manager	Orlando	A
Galaxy US	1	Product Manager	Dallas	A
Galaxy US	1	Product Manager	Atlanta	B
Galaxy US	1	Consultant	San Francisco	C
Galaxy US	1	Consultant	Los Angeles	D

Processing: This table shows the basis for benefits evaluation and processing for each data type:

Data Type	Benefits Evaluation Processing Basis
Life events	Separate life events created for the assignments in each benefits relationship
Electable choices or enrollment options	One set of data for each life event
Eligibility	Attributes defined at global person level are used for all life events. Assignment-level attributes are used in the respective life events.

Related Topics
- Guidelines to Configure Default Benefits Relationships

How can I ensure that a worker's benefits relationship is accurate?

You can verify the accuracy of the benefits relationship of either a specific worker or multiple workers.

The following table lists scenarios and actions to ensure accuracy:

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Scenario	Action
For a specific worker	Click **Refresh** on the Benefits Relationship tab of the Manage Benefits Relationship page in the Benefits Service Center page. Ensure that the default benefits relationship configuration for the worker's legal entity or country exists.
For multiple workers	Use the Assign and Update Benefits Relationship process in the Evaluation and Reporting work area.

Related Topics

- How You Get the Latest Benefits Relationship Information for a Worker
- The Assign and Update Benefits Relationships Process

The Assign and Update Benefits Relationships Process

Use this process to ensure that the benefits relationship information for multiple workers is accurate. You run the process from the Evaluation and Reporting work area, Processes tab, Maintenance Processes subtab.

The process assigns and updates worker benefits relationships on the basis of the configuration that exists in the Configure Default Benefits Relationships page.

Settings That Affect Processing

The following table describes the options that affect processing.

Parameter	Effect of Selecting
Create default benefits relationship assignment configuration	Select to create the default configuration for the worker's legal entity in the Configure Default Benefits Relationships page, if no setup exists. You might want to do this when you rehire a worker or transfer a worker to a different legal entity. The process creates default configurations for both usages: normal and unrestricted life event processing.
Assign benefits relationship for life event processing	Select to assign the worker a benefits relationship for life event processing based on worker information and the default benefits relationship configuration.
Assign benefits relationship for unrestricted processing	Select to assign the worker a benefits relationship for unrestricted benefits processing based on worker information and the default benefits relationship configuration.
Benefits Relationship to Delete	Select whether you want to delete the life event type of benefits relationship or the unrestricted type of benefits relationship.
Mode of Deletion	Select whether you want to delete the relationship or end date it.

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Parameter	Effect of Selecting
End Date	If you have selected **End Date** as the mode of deletion, you can set the date on which you want to end the benefits relationship.

How Benefits Relationship Assignments and Updates Are Processed

If you decide to assign a benefits relationship to workers, the process, if required, updates worker assignments associated with the benefits relationship. For example, if a worker's primary assignment changed, the process updates the benefits relationship with the new assignment.

You manage the worker's benefits relationship details using the Manage Benefits Relationship task in the Benefits Service Center page.

Related Topics
- Benefits Process Parameters

When do I run the Assign and Update Benefits Relationships process?

Typically, you run the Assign and Update Benefits Relationships process in these scenarios.

Scenario	Processing
You have existing worker records in your organization before you start using Oracle Fusion Benefits. These workers don't have benefits relationships assigned. Also, you haven't included default benefits relationship assignment configurations that apply to those worker's countries and legal entities.	The process: • Creates the default benefits relationship configuration • Assigns the benefits relationships based on the configuration • Updates the worker assignments associated with the benefits relationship
When you rehire a worker or transfer a worker to another country or legal entity	The process: • Ends the previous benefits relationship and starts a new benefits relationship for the worker as of the date of the rehire or transfer. • Updates benefits relationship worker assignment information, if required.
When the primary assignment for a worker changes	The process updates the benefits relationship worker assignment information.
When a worker is terminated	The process ends the current benefits relationship

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All scenarios in this topic assume that you select the following parameters before you submit the process:

- Create default benefits relationship assignment configuration
- Assign benefits relationship for life event processing
- Assign benefits relationship for unrestricted processing

Related Topics
- The Assign and Update Benefits Relationships Process

How You Get the Latest Benefits Relationship Information for a Worker

To update a worker's benefits relationship information, click Refresh on the Benefits Relationship tab of the Manage Benefits Relationship page in the Benefits Service Center page.

Conditions That Affect Refresh Processing

Refresh processing varies based on these conditions:

- Whether benefits relationships already exist for the worker
- Whether the worker's assignments are already associated with benefits relationships

How the Refresh Processing Works

The following table describes the results of the refresh processing for each condition.

Condition	Processing
Benefits relationships don't exist for the worker	Creates worker benefits relationships for life event processing or unrestricted life event processing. The refresh processing creates benefits relationships only if the corresponding values exist for the worker's legal entity or country on the Configure Default Benefits Relationship page.
Worker is terminated or transferred to another legal entity	End dates the assignment record associated with the benefits relationship as of the termination date
Worker's primary assignment has changed or is incorrect	Associates the new assignment with the benefits relationship

Related Topics
- Guidelines to Configure Default Benefits Relationships

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How Action Items Are Processed

The configuration of action items determines what happens during enrollment processing. For example, failure to provide required action items can result in suspended enrollment or simply cause delinquent items to appear in benefits administration reports.

Settings That Affect Action Item Processing

The following action item settings affect processing:

Setting	Description
Suspend Enrollment	When enabled, notifies participant of pending action item during enrollment and causes suspension of enrollment until the item is completed.
Determination Rule	Determines when the item is required, such as always or only for initial enrollment.
Due Date	Determines when the item starts appearing on audit and error reports generated by enrollment processing.

Interim coverage setup also affects enrollment processing, as described in the next section. You define interim coverage for a plan or option on the Plan Enrollment page using the Benefit Plan Details task in the Plan Configuration work area.

How Action Items Are Processed

If enrollment processing suspends enrollment due to incomplete action items, it then applies interim coverage, if configured. No further life event processing takes place until the participant completes the action items.

> **Note:** Incomplete or past-due action items for one benefits relationship don't stop processing of events for another benefits relationship for the same worker.

Reporting of pending action items and certificates occurs as part of enrollment processing. Benefits administrators can use these reports to follow up as required.

Process	Reporting
Close enrollment action items	The audit log includes any: • Past-due required action items • Incomplete action items that you configured to suspend enrollment
Close enrollment	The audit log includes any: • Past-due required action items

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Process	Reporting
	• Incomplete action items that you configured to suspend enrollment
Participation evaluation	The error report contains any incomplete action items that you configured to suspend enrollment for a participant.

The following scenarios illustrate subsequent life events processing for a participant with an open action item.

Suspension Results in No Further Life Event Processing

Scenario:

1. On January 1, 2015, you process the Add a Child life event with an occurred date of January 1, 2015, and make corresponding elections.
2. An action item, configured for suspension, is generated with a due date of January 30, 2015. The participation evaluation process suspends the enrollment and applies the configured interim coverage.
3. You process the Relocation event on January 15, 2015.

Result:

- The Relocation event can't process until you resolve the suspension for the Add a Child event.

- The action item associated with the Add a Child event appears on the audit report after action item processing.

- The participant's name appears on the error report after participation evaluation processing.

- Contact the participant and attempt to resolve the action item. After you mark the action item as complete, enrollment for the Add a Child event completes and you can process the Relocation event.

Suspension of Beneficiary Designee Only

Scenario:

1. On January 1, 2015, you process the Add a Child event with an occurred date of January 1, 2015, and make corresponding elections.
2. An outstanding action item for beneficiary designation, configured for suspension, is generated with a due date of January 30, 2015. The participation evaluation process suspends the enrollment for the beneficiary designee.
3. You process the Relocation event on January 15, 2015.

Result:

- The participation process evaluates the Relocation event for enrollment opportunities even though an outstanding action item exists. This is because the action item exists only for the beneficiary designation, not for the entire offering.

- You can process future life events for the participant.

Suspension with No Interim Coverage

Scenario:

1. On January 1, 2015, you process the Add a Child event with an occurred date of January 1, 2015, and make corresponding elections.
2. An action item, configured for suspension, is generated with a due date of January 30, 2015. The participation evaluation process suspends the enrollment, but no interim coverage exists.

3. You process the Relocation event on January 15, 2015.

Result: The Relocation event can't process until you resolve the suspension for the Add a Child event.

Subsequent Life Event Processing Causes Previous Life Event to be Backed Out

Scenario:

1. On January 10, 2015, you process the Add a Child event with an occurred date of January 10, 2015 and make corresponding elections.
2. An action item, configured for suspension, is generated with a due date of January 30, 2015. The participation evaluation process suspends the enrollment and applies the configured interim coverage.
3. On January 15, 2015, you process the Relocation event with an occurred date of January 1, 2015.

Result: Life event processing backs out the Add a Child event, along with any pending action items. It processes the Relocation event, unless the timeliness setup for the life event prevents life events from backing out in this situation.

Termination Processing After Suspension

Scenario:

1. On March 1, 2015, you process the Marriage life event and make corresponding elections.
2. An action item, configured for suspension, is generated with a due date of March 30, 2015. The participation evaluation process suspends the enrollment and applies the configured interim coverage.
3. You process the Termination event on March 20, 2015.

Result: The participation process evaluates the Termination event even though there is a pending action item from the Marriage life event.

Related Topics

- Options to Configure Certifications and Other Action Items
- Overview of Benefits Certifications and Other Action Items
- Guidelines to Configure Enrollment Suspensions

Manage Action Items Process

You can use this process to close participant action items that have no suspensions set up.

To run this process, in the Evaluation and Reporting work area, click the Processes tab. Then, expand the Election Processes section, and click Manage Action Items.

When a person record with a past due action item is detected, the process lists that person record in the log file. If suspensions are in place, they will remain, and that person record appears on the audit log. A benefits administrator can then follow up with the employee to resolve the action item. If there is a suspended action item, no future life event processing can occur for that person, until that action item is resolved.

The Manage Action Items process also tracks, in a log file, any past-due action items that have suspensions set up. It also records information on any enrollment that was suspended as a result of past-due action items.

Impact of Action Items and Suspensions on Manage Action Items Process

This topic lists how different setup conditions of action items and suspensions impact the working of the Manage Action Items process.

Condition	Processing
No suspensions are set up for the enrolled benefits objects.	The process closes the action items.
Suspensions are set up. Participant has completed action items, so no suspended benefits objects exist.	No action.
Suspensions are set up. Action item doesn't have a due date set up. Participant hasn't completed the action item yet.	The process records the person information in the audit log.
Suspensions are set up. Action item due date is set up. Participant hasn't completed the action item yet.	The process records the person information in the audit log.
Suspensions are set up. The action item's due date is set up. Participant hasn't completed the action item yet. The action item's due date is past.	The process records the person information in the audit log.
Incomplete action items have caused only the beneficiary records to be suspended.	The beneficiary records continue to remain in a suspended state. The process records the beneficiary information in the audit log.

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Review and Resolve Participant Action Items

As a benefits administrator, here's how you resolve action items for a participant.

1. Click **Navigator** > **Benefits Administration** > **Enrollment**.
2. Search for the participant.
3. Ensure that the current effective date is before the action item's due date.
4. In the Benefits Summary page of the participant, click **Pending Action Items** on the scorecard.
5. Click an action item's link. In the page that appears, provide the required details to resolve the item.

Benefits Relationships and Action Items

Unresolved action items for one benefits relationship will not stop processing of events for another benefits relationship for the same person.

Each benefits relationship is handled separately and doesn't impact each other. The past-due action items are restricted only to the applicable benefits relationship.

Impact of Action Items and Suspensions on Close Enrollment Process

This topic lists how different setup conditions of action items and suspensions impact the working of the Close Enrollment process.

Condition	Processing
No suspensions are set up for any of the enrolled benefits objects.	The process closes the life event.
Suspensions are set up. Participant has completed action items, so no suspended benefits objects exist.	The process closes the life event.
Suspensions are set up. Action item doesn't have a due date set up. Participant hasn't completed the action item yet.	The process: • Closes the life event • Indicates successful processing • Creates an audit log entry for that person record

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Condition	Processing
Suspensions are set up. Action item due date is set up. Participant hasn't completed the action item yet.	The process: • Closes the life event • Indicates successful processing • Creates an audit log entry for that person record
Suspensions are set up. Action item due date is set up. Participant hasn't completed the action item yet. The action item's due date is past.	The process: • Closes the life event • Indicates successful processing • Creates an audit log entry for that person record

Impact of Action Items and Suspensions on Participation Evaluation Processes

This topic lists how different setup conditions of action items and suspensions impact the working of the participation evaluation processes.

Condition	Processing
No suspensions are set up for any of the enrolled benefits objects.	No action. The process indicates successful processing.
Suspensions are set up. Participant has completed action items, so no suspended benefits objects exist.	No action. The process indicates successful processing.
Suspensions are set up. Action item doesn't have a due date set up. Participant hasn't completed the action item yet.	The process: • Indicates unsuccessful processing • Creates a log entry
Suspensions are set up. Action item due date is set up. Participant hasn't completed the action item yet.	The process: • Indicates unsuccessful processing • Creates a log entry

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Condition	Processing
Suspensions are set up. Action item due date is set up. Participant hasn't completed the action item yet. Action item due date is past.	The process: • Indicates unsuccessful processing • Creates a log entry

Examples of Original Coverage Start Date in Benefits

The original coverage start date indicates when the participant and dependents began continuous coverage under a benefit plan or option. The following example shows how the original start date changes in different situations.

Use the View Enrollment Results task on the Actions menu of the Enrollment section in the Benefits Service Center landing page to see the original coverage start date for a participant and dependents.

Impact of Enrollment Changes on the Original Coverage Start Date

One of the benefits that your enterprise offers to newly hired workers is a health insurance plan that has the following options:

- Employee Only
- Employee plus One
- Employee plus Family

A worker joins your enterprise on January 1, 2015 and enrolls in the Employee Only option.

The following table lists subsequent changes to the worker's enrollment and their impact on the dependent's coverage start date and the original coverage start date.

Enrollment Event	Coverage Start Date
March 1, 2015 The worker gets married and enrolls in the Employee plus One option.	The coverage start date and the original coverage start date for the worker and spouse is March 1, 2015.
March 1, 2016 The worker gives birth to a child and changes enrollment to the Employee plus Family option.	The coverage start date and the original coverage start date for the worker, spouse, and child is March 1, 2016. The worker and designees have the same dates because the worker enrolled in a new option.

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Enrollment Event	Coverage Start Date
October 1, 2016 The worker changes from working full-time to part-time and is no longer eligible for coverage.	Enrollment for worker, spouse, and child ends.
April 1, 2017 The worker changes from working part-time to full-time. The worker enrolls in the Employee plus Family option and designates spouse and child as dependents.	The coverage start date and the original coverage start date for the worker, spouse, and child is April 1, 2017. The original coverage start date is April 1, 2017 because of the break in coverage from October 2016 through March 2017.
July 1, 2017 The worker gives birth to a second child and makes designations accordingly to the Employee plus Family option.	Worker, spouse, and first child: • Coverage start date: July 1, 2017 • Original coverage start date: April 1, 2017 Second child: • Coverage start date: July 1, 2017 • Original coverage start date: July 1, 2017 The original coverage start date for the worker, spouse, and the first child is April 1, 2017, which is when they were first covered.

Why can't I see or edit a benefit participant's contacts?

First, check whether the contact is future dated as contacts are not visible until the contact's effective start date is reached.

If that is not the issue, then your data role might not include access to related contact information for participants.

- Your application administrator must provide you with the proper data role and person security profile so that you can access related contact information for participants.

- The application administrator grants you access by following the steps provided in the Configuring Security for Manage Contacts Page for Benefits: Worked Example topic.

Related Topics
- Configure Contacts Page Security for Participants and Administrators

Configure Contacts Page Security for Participants and Administrators

Standard data role and person security profile configurations typically restrict access to the Manage Contacts page to only the participant, in the self-service guided process.

This topic covers how to grant benefits administrators and specialists access to participant contacts in the Benefits Service Center page.

The administrator or specialist must have a person security profile with **Include Related Contacts** selected. Users inherit the profile through a chain of associated roles, from the parent job role through the descendant duty and data roles.

You can create or edit a data role and:

- Edit the person security profile already associated with the data role
- Edit an existing person security profile and associate it with the created or existing data role
- Create the person security profile and associate it with the created or existing data role

Note: Only application administrators with IT Security Manager privileges can complete these tasks, which they perform in the Setup and Maintenance work area.

Creating or Editing a Data Role

1. Go to the Manage Data Role and Security Profiles task.
2. Either edit an existing data role or create one.
   To edit a data role:
   a. Search for and select the data role that you want to edit.
   b. On the Search Results toolbar, click **Assign**.
3. In the Person section of the new or existing data role, select the person security profile that you want for this data role.
4. When you are ready, click **Submit**.

Creating or Editing a Person Security Profile

1. Go to the Manage Person Security Profile task.
2. Either edit the existing profile or create one.
3. In the Basic Details section of the new or existing profile, select **Include Related Contacts**.
4. When you are ready, click **Save and Close**.

FSA and HSA Calculators in Benefits

Overview of the health savings and flexible spending account calculators.

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The health savings and flexible spending account calculators estimate your savings and spending. These calculators are designed mainly for savings plans in the United States, such as the standard Health Savings Account (HSA) and Flexible Savings Account (FSA).

You need to enter your contributions to get a projection of how much can be saved and how the contributions grow over a period of time. Here's a list of calculators that you can find in the Self-Service Benefits page:

Calculator	Purpose
HSA	Get an estimate of your earnings, tax savings for your health savings accounts. You can do the estimations either for yourself or for your family.
Dependent Care FSA	Understand how much more you can save by enrolling in a flexible spending account.
Health Care FSA	Estimate your annual health care costs and potential tax savings.

Estimate Savings and Spending Using FSA and HSA Calculators

Here's how you access the FSA and HSA calculators from Self-Service Benefits.

1. Click **Me Benefits** on the Home page.
2. Depending on your benefits setup, you can see different calculators to help you with estimates. Select the appropriate calculator.
3. Enter the values to estimate your savings and spending.

FAQs for Enrollments

How can a participant make elections offline

If a participant doesn't have access to the self-service pages, you can print and share the Enrollment Document with them. Once they return the completed document to you, you can enter the enrollment information for them by using the document.

This document is available when the participant has a life event in the Started status.

Here's how you view and use the Enrollment Document:

1. On the Home page, click **Benefits Administration** > **Enrollment**, to open the Benefits Service Center work area.
2. Open the Benefits Summary page of the participant in the Benefits Service Center.
3. In the Evaluated Life Event section, click **Actions** > **Print Enrollment Document**.
4. Share the document with the participant.
5. The participant manually selects or changes enrollment options and returns the document.

6. You edit enrollment information for the participant using the returned document.

How can I unprocess a life event that was processed in error?

You need to back out and void the life event in the Benefits Service Center page.

Here's how you do it:

1. Select the event on the Life Events tab of the Manage Person Life Events page.
2. Select **Back Out Event** on the Actions menu.
3. Specify **Voided** as the life event status.

To delete the voided life event:

1. Select **Show Voided Potential Life Events** on the Potential Life Events tab.
2. Select the voided potential life event and delete it.

Note: Backing out an HR data change doesn't back out automatically any potential life event that the HR data change automatically triggered, such as marital status change. If the triggering HR data change is invalid, you must manually back out the life event, as described in this topic.

What are the different dates that I see when I enter a life event?

Here are the details of the dates that you see.

Date	Details
Occurred Date	Actual date when the life event happened. For example, when you enter a marriage as a life event, you specify the date of marriage as the occurred date. This date is important for Benefits to evaluate person-related eligibility, enrollment opportunities, and rate value determination.
Reported Date	Date when you enter the life event in the application. For example, the date when you enter the marriage as a life event. This date is used to evaluate timeliness rules.
Status Date	Date when the life event moves to the current status. For example, the Open Enrollment life event's occurred date is January 1, 2021. The administrator processes the open event, that's a potential life event, on September 27, 2020. This is the same date that the application sets as the status date for the potential life event. Similarly, when a potential life event is added from the Benefits Service Center page, status date is the unprocessed date. When a life event is added by the Report a Life Event task in the Self-Service Benefits page, status date can be the detected date or manual date.

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Related Topics

How can I diagnose any issues with a person's benefits enrollments?

When you need details of a person's event, eligibility, and enrollment data, you can run the Person Benefits Diagnostic Test if you have access to the Diagnostic Dashboard. Select Run Diagnostics Tests from the Setting and Actions menu in the global header.

Related Topics

What happens to existing benefits if workers transfer to another legal entity?

Eligible workers continue to receive benefits that they elected in the previous legal entity.

Before a global transfer, administrators must ensure that default benefits relationship assignment rules for the destination legal entity or country exist on the Configure Default Benefits Relationships page.

How can I diagnose any issues with a participant's benefits information?

Run the Benefits Health Check diagnostics report.

To run the report:

1. Click the logged in user's icon, and click **Run Diagnostics Tests** in the Troubleshooting section.
2. In the Diagnostic Dashboard page, search for the Benefits Health Check Diagnostics report, select it, and click **Add to Run**.
3. In the Choose Tests to Run and Supply Inputs table, click **Run**.

How can I diagnose participant eligibility issues?

Run the Person Benefits Eligibility diagnostics report from the Diagnostic Dashboard page.

The report helps you find out if there are any setup issues in the plan configuration that's preventing temporal events from being detected. The report also tells you whether you have configured the offering to track ineligibility. Specifically, the Track Ineligible section in the report shows you all the levels in the program hierarchy where you have, and haven't, set up the **Track Ineligible Persons** check box.

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You can also see information that indicates the eligibility status of the person at all levels in the hierarchy. The Eligibility column in the report indicates the eligibility status.

To run the report:

1. Click the logged in user's icon, and click **Run Diagnostic Tests** in the Troubleshooting section.
2. In the Diagnostic Dashboard page, search for the Person Benefits Eligibility diagnostics report, select it, and click **Add to Run**.
3. In the Choose Tests to Run section, click the **Input Status** icon to enter the effective date, person number, and program that you want to generate the report for.
4. Click **Run**.
5. In the Diagnostic Test Run Status table, click the **Refresh** button to see the latest status.
6. When the execution status reads **Complete**, click the **Report** icon to view the report.

How can I diagnose any issues with the US Affordable Care Act (ACA) setup?

Run the Affordable Care Act diagnostics report.

To run the report:

1. Click the logged in user's icon, and click **Run Diagnostic Tests** in the Troubleshooting section.
2. In the Diagnostic Dashboard page, search for the Affordable Care Act diagnostics report, select it, and click **Add to Run**.
3. In the Choose Tests to Run and Supply Inputs table, click **Run**.

How can I upload certifications received and close related action items for multiple participants?

Use the Upload Enrollment Certifications integrated workbook in the Evaluation and Reporting work area to create and upload a batch of certification details. Then, select that batch in the Close Enrollment Action Items to close action items.

Note: The Close Enrollment Action Items process closes only those action items that have no suspensions set up. If suspension setup does exist for an enrollment, then the suspension will remain enforced and the processed person appears in an audit log. Administrators must manually resolve such action items.

Why can't I see the absence plan balance for the time-off sale enrollments in Benefits?

Ensure that you associated the absence plan when you created or edited the benefit plan. In the Basic Details step, check whether you selected the required absence plan from the Absence Plan list.

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Also, in the enrollment page, the **Absence Balance** field might be hidden. On the **View** menu, click **Columns** and select the **Absence Balance** column.

How can I display future-dated contacts on the people to cover page?

If you're an administrator, you need to select the Display future-dated contacts check box on the Self-Service Configuration page for participants to see such contacts.

How can I configure future-dated contacts to appear on the People to Cover page?

Future-dated contacts appear in the People to Cover page. You need to enable it from the Self-Service Configuration page.

For example, on July 26, 2020, an employee adds a domestic partner with a relationship start date of 14th November 2020. The People to Cover page displays this newly-added domestic partner along with other contacts of the employee.

Here's how you can display future-dated contacts in the People to Cover page:

1. On the Home Page, click **Benefits Administration** >**Plan Configuration**.
2. In the Tasks panel drawer, click **Self-Service Configuration**.
3. Select the **Display future-dated contacts** check box.
4. Click **Save**.

Can I make changes to a future-dated contact?

Yes, on the People to Cover page. For example, you might need to add more detail, change the detail, or even delete the contact. A message identifies that the contact's start date is in the future.

Can I enroll a future-dated contact in an offering?

When you add future-dated contacts, you can see a message that states that although you have created the contact, they might not be eligible for enrollment.

The message makes it clear that the contact won't appear on the enrollment pages, under the Dependents and Beneficiaries section.

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How can I display additional values on Benefits Service Centre and Self-Service Benefits pages?

You can display additional values on the Benefits Service Center and Self-Service Benefits user interfaces using the standard Page Composer functionality.

These are the additional values that you can display:

- Life event name
- Program or plan name
- Person name, person number
- Legal entity ID
- Legislation code
- Country code

You can configure the Overview and Confirmation pages in self-service to display the life event name and the program and plan names. For example, you might want to display the life event in the Enrollment flow to help participants know which life event is providing the enrollment opportunity.

Related Topics

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3 Manage Benefits Processing and Uploads

Overview of Benefits Reports and Analytics

This table lists benefits reports and analytics.

Name or Type of Report or Analytic	Description	Navigation
Life Event Summary	Analytic that provides details of life events in different statuses in your enterprise. You can also view details by legal employer, benefit group, location, and payroll.	**Benefits** > **Evaluation and Reporting** The Summary section on the Overview page contains the life event summary. The Life Events tab in this section enables you to view details by legal employer, benefit group, location, and payroll.
Manage Action Items	A process that generates details of participant enrollments that contain pending action items.	**Benefits** > **Evaluation and Reporting** On the Overview page Summary section, select the Processes tab. Expand Election Processes, and click Submit for the Manage Action Items row.
Person Enrollment Summary Report	Displays the benefit enrollments for participants.	**Reports and Analytics** > **Shared Folders** > **Human Capital Management** > **Benefits** > **Enrollment**
Enrollment Kit Report	Displays, by participant, a choice list of programs, plans, and options in which the participant may elect to enroll, as well as areas for the participant to designate dependents and beneficiaries.	**Reports and Analytics** > **Shared Folders** > **Human Capital Management** > **Benefits** > **Enrollment**
Real-Time Analysis: Participant Enrollment Results - Weekly	Displays, for each participant, the benefit enrollments that they elected or where given by default.	**Reports and Analytics** > **Shared Folders** > **Benefits** > **Transactional Analysis Samples**
Real-Time Analysis: Totals by Life Event - Weekly	Displays the status of the life events and their corresponding counts in table and graph formats.	**Reports and Analytics** > **Shared Folders** > **Benefits** > **Transactional Analysis Samples**
Real-Time Analysis: Totals by Life Event Name for Potential Life Events - Weekly	Displays, by potential life event, the total for each status of the life event as well as the cumulative total for all statuses of the life event.	**Reports and Analytics** > **Shared Folders** > **Benefits** > **Transactional Analysis Samples**
Real-Time Analysis: Totals by Life Event Status for Potential Life Events - Weekly	Displays the status of the life events and their corresponding totals in table and graph formats; the table includes a grand, cumulative total of all life event statuses.	**Reports and Analytics** > **Shared Folders** > **Benefits** > **Transactional Analysis Samples**

Name or Type of Report or Analytic	Description	Navigation
Real-Time Analysis: Totals by Location - Potential Life Events- Weekly	Displays, by location, the total for each status of the life event as well as the cumulative total for all statuses of the life event.	**Reports and Analytics** > **Shared Folders** > **Benefits** > **Transactional Analysis Samples**

Benefits Process Parameters

Benefits process parameters control aspects of Oracle Fusion Benefits evaluation and reporting processes. You select parameters to limit the persons and benefits objects for processing of eligibility evaluation, electable choices, and enrollment information.

- The list of parameters that appears for each process depends on the process that you select.
- Required parameters have an asterisk before the description.
- Some parameters contain default values that you can override, as required.

Note: A person or benefits object must meet all criteria, based on the parameters you select, to be included in the result of the evaluation process.

The following table describes the benefits process parameters:

Benefits Process Parameters	Description
Common Processing Parameters	These parameters are common to most benefits evaluation and reporting processes. **Effective Date** Used to determine eligibility, electability, and as a reference for deriving start and stop dates for enrollment, coverage, and rates. - For life event processes, the effective date is the date on which the life event occurred. - For scheduled processes, the effective date is equal to the life event occurred date. **Validate** Specify whether to update the database with the process results. Options are: - Roll back - database will not be updated This option enables you to view the results of the process without making changes to the database. - Save - database will be updated A best practice is to run the process without updating the database and view the results in the audit log. After you are satisfied with the results, rerun the process and select the parameter option that saves the results to the database. **Organization Name**

Benefits Process Parameters	Description
	Restrict processing to employees, and their related persons, whose primary assignment is associated with the organization name that you select. **Benefits Group** Restrict processing to persons in the benefits group that you select. **Location** Restrict processing to employees, and their related persons, whose primary assignment is in the location that you select. **Legal Entity** Restrict processing to active employees, and their related persons, in the legal entity that you select. **Person Name** Restrict processing to the identified person. **Person Type** Restrict processing to the person type that you select. **Person Selection Formula** Restrict processing to persons identified by the selected formula. **Person Number** Restrict processing to the person numbers that you provide. **Postal Code Range** Restrict processing to employees, and their related persons, whose primary assignment location is included in the specified postal code range.
Life Event Parameters	These parameters relate to life events, dates, and statuses. **Life Event** Restrict processing to persons who have the life event that you select. > **Note:** > This parameter applies only to life event processes and temporal processes. **Life Event Occurred Date** Restrict processing to persons with a life event that occurs on the date that you select. **From Occurred Date** Start of the date range for the following processes: • Reopen Life Events • Back Out Life Events • Purge Backed-Out or Voided Life Event Data

Benefits Process Parameters	Description
	To Occurred Date End of the date range for the following processes: • Reopen Life Events • Back Out Life Events • Purge Backed-Out or Voided Life Event Data **Apply Defaults** Specify whether to assign the default benefit object to participants during the evaluation process. **Resulting Status** Life event status after the Back Out Life Events process completes. Options are: • Unprocessed • Voided • Manual **Loss of Eligibility Tracking Life Event** Status of the tracking life event after the process determines that the designee is ineligible. Options are: • Set to Processed status • Remain in Started status **Detect Temporal Events** Specify whether and which types of temporal events to include in the process.
Adjust Open Enrollment Window Parameters	These parameters appear only for the Adjust Open Enrollment Window process. **New Enrollment End Date** Last date on which a person can enroll in the program or plan. **New Processing End Date** Last date on which the benefits administrator can apply elections. **New Default Enrollment Date** When processing enrolls persons in the program or plan if they fail to make an election. **Number of Days to Extend** Number of days to extend the current open enrollment end date so that employees can make elections.
Benefits Object Parameters	These parameters relate to benefits programs, plans, and options, and include payroll. **Program Name** Restrict processing to participants and persons eligible for the specified program.

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Benefits Process Parameters	Description
	Note: Processing includes the program, plans in that program, and options in plan in the program. **Plan Name** Restrict processing to participants and persons eligible for the specified plan. **Plan Type** Restrict processing to participants and persons eligible for the specified plan type. **Note:** Processing includes all active plans and options in plan of the selected plan type. **Plans Not in Programs** Restrict evaluation processing of participants and persons eligible for plans not in program. **Only Programs** Restrict evaluation processing to participants and persons eligible for all programs only. **Option Name** Restrict processing to participants and persons eligible for the specified option. **Payroll** Restrict processing to employees, and their related persons, whose primary assignment is associated with the payroll name that you select. **Compensation Object Selection Rule** Restrict processing by compensation object using the specified formula.
Purge Life Event Data Parameters	These parameters apply to the Purge Backed-Out or Voided Life Event Data process only. **Life Event Type** Remove life events of the specified type. **Backed Out Status** Life event status for purging. Options are: • Voided • Backed out **Note:** Selecting **Backed out** purges data related to both Backed out and Voided life events during processing.

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Benefits Process Parameters	Description
	Delete Life Events Remove life events with a Voided or Backed out status. **Delete Voided Potential Life Events** Remove potential life events with a Voided status. **Void Potential Life Events with Status** Voids potential life events that belong to any of these statuses: • Detected • Manual • Unprocessed The audit report and log file contain statistics on the total number of life events deleted. It also contains information about person numbers, life events deleted, life event name, life event occurred date, and life event status.
Administrative Parameters	Various processes use these parameters, except as noted. **Assigned Life Event Date** When the scheduled life event is assigned to participants. Example: As an open life event or administrative life event **Audit Log** Create an audit log for the process. **Concurrent Request** Process run record request identification number that contains the data to be purged. > **Note:** > This description only applies to the Purge Participation Evaluation Audit Data process.
Close Enrollment Action Items	These parameters apply to the Close Enrollment Action Items process. **Batch Name** Select a batch that you created using the Upload Enrollment Certifications workbook to close all action items in that workbook. **Action Item** Select a specific action item to close. **Close Previous Optional Action Items** Select **Yes** to close optional action items that do not cause suspension. For example, you might want to close **For Your Information** types of action items where it might not be necessary to see a certificate before closing.

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Benefits Process Parameters	Description
	Note: To run the process correctly, you use either the **Batch Name** parameter, or the **Action Item** and **Close Previous Optional Action Items** parameters.

Person Number Entry in Benefits Batch Processes

You can use a set of comma-separated person numbers in the Process tab of the Benefits batch processes.

For example, you can use this parameter if you want to quickly test your plan design changes against a sample set of employees. This parameter is available for these processes:

- Evaluate Life Event Participation
- Evaluate Scheduled Event Participation
- Evaluate Temporal Event Participation
- Evaluate Unrestricted Event Participation
- Enroll in Default Benefits
- Close Enrollment
- Prepare Benefit Coverage Charge Data
- Re-evaluate Designee Eligibility

Here's the list of points that you should consider when you enter person numbers:

- You can enter up to 2000 characters.
- The comma-separated person numbers should be in a single continuous text format.
- Don't enter person numbers with embedded commas. The process ignores such constructions. For example, the person numbers 127,356 and 89,34 have embedded commas and these numbers are ignored.
- The list can have whitespaces, tab, line feed, and carriage feed characters embedded in the string, if you have copied it from a spreadsheet. Such irrelevant characters are ignored or truncated during the processing if they are surrounding the real person number within the comma delimitation.
- You can't use the person number parameter along with any of these person-determining parameters:
    - Person Name
    - Person Selection rule
    - Person Type
    - Organization Name
    - Benefits Group
    - Location
    - Postal Code Range

    ◦ Legal Entity

Any auto-submitted process, such as Default Enrollment, will consider the values in the person number list. The log file provides details on which person numbers were processed, and which ones weren't.

How You Purge Benefits Staging Data

Use the Purge Stage Data process to free up space and improve performance. The process deletes staging data that was created as a result of benefit extracts and spreadsheet loaders.

You can find this process in the Evaluation and Reporting work area, Processes tab, Maintenance Processes section.

CAUTION: The process permanently removes data. You can't recover it.

Select the Source

You can remove staging data that belongs to either benefits extracts or spreadsheet loaders. In the Process Details page, use the **Source Type** list. If you want to delete the data by batch, select the request ID or batch name from the **Source Key** field, and submit the process.

Remove Data during a Specific Period

You can also enter a specific time period between which you want to delete the data. Use the **From Date** and **To Date** fields. You can only delete data that's older than 6 months from today's date. This check is in place to prevent you from accidentally deleting data that you might still require.

For example, assume that today's date is 1st January 2019. When you set the period from January 1, 2018 to December 31, 2018, the process deletes the data only up to June 30, 2018.

Advanced Logs for Purge Processes

Here's the list of purge process that you can find in the Processes tab in the Evaluation and Reporting work area:

- Purge Participation Evaluation Audit Data
- Purge Backed-Out or Voided Life Event Data
- Purge Stage Data

You can use the process logs to understand how often you need to run these processes, and how much data is held before and after each run. You can use these numbers along with the frequency of the current purge run to identify the future frequency of running the respective purge processes. The count gives you an estimate of how much data gets purged over a period.

The Audit Log parameter should be set to **Yes** to see the enhanced logs. If the parameter is set as **No**, the log files show only the basic details. You need to submit the processes from the Maintenance Processes section of the Processes tab in the Evaluation and Reporting work area to set the Audit Log parameter.

Related Topics
- How You Purge Benefits Staging Data

Spreadsheet Loaders

Manage Person Benefit Groups in the Integrated Workbook

You can download person benefit group information to the integrated Microsoft Excel workbook. Use the integrated workbook to view and edit person benefit group assignments for multiple persons and groups. Then, upload your changes back into the application database.

The basic process for managing person benefit groups using the workbook is:

1. Generate and populate the workbook.
2. Edit, add, and delete person benefit groups in the workbook.
3. Upload edits.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

In the Evaluation and Reporting work area:

1. In the Upload Person Benefit Groups row of the Person Data Loaders tab, click the **Go to Task** button.
2. In the Upload Person Benefit Groups dialog box, enter a session effective date.
3. Click **Prepare in Workbook**.

Editing, Adding, and Deleting Person Benefit Groups in the Workbook

After the download is complete, view, edit, add, and delete existing person benefit group assignments.

- Edit the **Benefits Group** value.

  The upload process ignores edits in any other columns.

- Insert a row to add a person benefit group assignment.

- Delete data from the application database using these steps:

  a. Double-click the **Mark for Deletion** field in each workbook row that you want to delete.
  b. Click **Delete Selected Rows**.

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Tip:

- You can't edit or enter the effective date in the workbook. To change the effective date, use one of these methods:

    ○ Generate a new workbook with the new session effective date.

    ○ Edit the date directly in the application using the Manage Benefit Groups task in Plan Configuration work area.

- You can't retrieve data deleted as part of the upload process.

Uploading Edits

After you complete your edits, click **Upload**.

The process:

1. Uploads into the application database the workbook rows marked as **Changed**
2. Uses the session effective date that you set when generating the workbook as the start date for any edits or new group assignments that you entered in the workbook
3. End dates the prior group assignments as of the previous day for each edited row
4. Retains the history
5. Deletes permanently all of the related effective-dated records from the application database for each workbook row that is marked for deletion

For each row marked for deletion in the workbook, the application permanently deletes all of the related effective-dated records from the application database.

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics

- What's the difference between Export to Excel and desktop integration for Excel?

- Guidelines for Using Desktop Integrated Excel Workbooks

- Set Up Desktop Integration for Excel

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Manage Person Benefit Balances in the Integrated Workbook

You can download person benefit balance information to the integrated Microsoft Excel workbook where you can add, edit, and delete balances. Then, upload your changes back into the application database tables.

The basic process for managing person benefit balances using the workbook is:

1. Generate and populate the workbook.
2. Edit, add, and delete person benefit balances in the workbook.
3. Upload edits.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

In the Evaluation and Reporting work area:

1. In the Upload Person Benefit Balances row of the Person Data Loaders tab, click the **Go to Task** button.
2. In the Upload Person Benefit Balances dialog box, enter a session effective date.
3. Click **Prepare in Workbook**.

Editing, Adding, and Deleting Person Benefit Balances in the Workbook

After the download completes, view, edit, add, and delete person benefit balances.

- Edit the Value, Primary Assignment, and Benefits Relationship values.

  The upload process ignores edits in any other columns.

- Insert a row to add a person balance.

  For each new balance, you must enter a value in either the **Primary Assignment** or **Benefits Relationship** field, but not both.

- Delete data from the application database using these steps:

  a. Double-click the **Mark for Deletion** field in each workbook row that you want to delete from the application database.
  b. Click **Delete Selected Rows**.

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Tip:

- You can't edit or enter the effective date in the workbook. To change the effective date, use one of these methods:

    ○ Generate a new workbook with the new session effective date.

    ○ Edit the date directly in the application using these steps:

        i. Search for the person in the Benefits Service Center page.
        ii. Click the **Person Benefit Balances** task.

- You can't retrieve data deleted as part of the upload process.

You can't edit or enter the effective date in the workbook. To change the effective date, you must generate a new workbook with the new session effective date. You can also edit the date directly in the application. Search for the person in the Benefits Service Center page, then use the Person Benefit Balances task.

Uploading Edits

After you complete your edits, click **Upload**.

The process:

1. Uploads to the application tables only those rows marked as **Changed**
2. Uses the session effective date that you set when you generated the workbook as the start date for any edits or new person benefit balances that you entered in the workbook
3. End dates prior balances as of the previous day for each edited row
4. Retains the history
5. Deletes permanently all of the related effective-dated records from the application database for each workbook row that's marked for deletion

Generate a new workbook after the successful upload to verify your edits.

Related Topics

- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks
- Set Up Desktop Integration for Excel

Manage Person Habits in the Integrated Workbook

You can download person habit information, such as disability tobacco usage, to the integrated Microsoft Excel workbook. Use the integrated workbook to view and edit the data and upload the changes to the database.

The basic process for managing person habits data using the workbook is:

1. Generate and populate the workbook.
2. Edit, add, and delete person habits in the workbook.
3. Upload edits.
4. Resolve errors

Repeat these steps as many times as required to accommodate revisions.

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Generating and Populating the Workbook

1. On the Person Data Loaders tab in the Evaluation and Reporting work area, click **Prepare Person Habits in Workbook**.
2. In the generated workbook, enter the session effective date.
3. Click **Download** to retrieve the records that are effective as of the date that you entered in step 1.

Editing, Adding, and Deleting Person Habits in the Workbook

After the download completes, you can view, edit, add, and delete existing person habits data.

- Edit the Student Status, Disability Status, Disability Type, Tobacco Use, Covered in Another Plan, and Plan values only.

  The upload process ignores edits in any other columns.

- Insert a row to add habit data for a new person.

  To identify the person, you must enter either the person number or these three values, in their respective fields:

  - First name
  - Last name
  - Date of birth

  As denoted in the column header, person type is required for each new row.

Tip:
- You can't edit or enter the effective date in the workbook. To change the effective date, use one of these methods:

  - Generate a new workbook with the new session effective date.
  - Edit the date by searching for the person in the Benefits Service Center page and then opening the Manage Contacts page.

- You can't retrieve data deleted as part of the upload process.

- You can verify disability status and tobacco usage for only participants in the application user interface. To verify disability status and tobacco usage for dependents, you must:

  a. Generate the integrated workbook.
  b. Download the person habit information for the relevant dependents.

Uploading Edits

After you complete your edits, click **Upload** to load into the application database the rows that are marked as **Changed**.

The process:

1. Uses the session effective date that you set when you generated the workbook as the start date for any edits or new rows that you entered in the workbook
2. End dates the prior data row as of the previous day

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3. Retains the history
4. Deletes permanently all of the related effective-dated records from the application database

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics
- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks
- Set Up Desktop Integration for Excel

Upload Bill Payments Using the Integrated Workbook

Use the Upload Billing Payments integrated Microsoft Excel workbook to record and adjust benefit billing payments for multiple participants. Then, upload your changes back into the application database.

Perform these basic steps to manage bill payments using the workbook:

1. Generate and populate the workbook.
2. Record payment information.
3. Upload the data.
4. Resolve errors if required.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

Perform these steps:

1. In the Evaluation and Reporting work area, Person Data Loaders tab, click the **Go to Task** button in the Upload Billing Payments row.
2. Click **Prepare in Workbook**.

Enter each payment record or adjustment record in a new row in the spreadsheet.

Uploading Edits

After you complete entering data, in the Billing tab that is available on the Excel toolbar, click **Upload**.

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Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Overview of Managing Benefit Enrollments in the Integrated Workbook

You can enroll participants in various programs, plans, and options using the integrated Microsoft Excel workbook. You can also designate dependents and beneficiaries in participant-enrolled plans.

The high-level process for managing benefit enrollments using the integrated workbook is:

1. Prepare and upload data to interim table, resolving any identified workbook errors.
2. Upload enrollments batch to database tables, resolving any identified processing errors.

Preparing and Uploading Enrollment Workbook Data to Interim Tables

You can process multiple life events by entering different effective dates in different workbook rows to handle successive historical changes for an individual. This preserves and uploads legacy historical data.

The Upload Benefit Enrollments batch process uses the effective date when:

- Fetching person details
- Validating dependents
- Processing participant life events

The basic process for preparing and uploading workbook data to interim tables is:

1. Generate the workbook.
2. Create a batch of enrollment data.
3. Upload edits into the interim database table.
4. Resolve workbook data errors.

The details of this process are covered in the Uploading Enrollment Workbook Data to Interim Tables: Procedure topic.

Uploading Enrollments Batch to Database Tables

After you upload your changes to an interim database, you run the Upload Benefit Enrollments batch process.

The participant enrollment portion of this batch process:

1. Creates a potential life event

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2. Processes this life event
3. Creates enrollments
4. Populates rates and coverage amounts
5. Closes life events

The basic process for uploading workbook data to the application tables with the batch process is:

1. Run the Upload Benefit Enrollments batch process.
2. Download the enrollment processing results and fix any errors.
3. Review the results and reprocess.

The details of this process are covered in the Uploading Benefit Enrollments Batch to Database Tables: Procedure topic.

Related Topics
- Upload Enrollment Workbook Data to Interim Tables
- Upload Benefit Enrollments Batch to Database Tables
- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks

Benefit Enrollment Integrated Workbook Columns

This topic details the information required when you enter batch records in the integrated Microsoft Excel workbook for benefit enrollments.

1. After completing the integrated workbook, you upload the rows to an interim batch table.
2. After all workbook rows upload without errors, you run the Upload Benefit Enrollments batch process in the Evaluation and Reporting work area.

Workbook Column Explanations

Required fields are marked with an asterisk, *, and you must enter a value for them.

> **Note:** Values that you enter in name fields must exactly match the values already in the application. This applies to names of participants, programs, plans, options, dependents, beneficiaries, and life events.

Column	Description
Changed	Marked automatically when you edit or add a row in the workbook The upload process loads only these rows to the interim batch table.
Mark for Deletion	Double-click this cell to mark the row for deletion. When you click **Delete Selected Rows**, the upload deletes the data from the interim batch tables so that it's not available for the batch process.
Status	Provided automatically by the upload process for each row after it loads the data into the interim batch table

Column	Description
	For rows with errors, click **Upload Error** to see the details.
*Enrollment Type	Enter this value based on the person for whom you're entering the data. Valid values are: • Participant Enrollment • Dependent Designation • Beneficiary Designation
*Effective Date	Used when: • Fetching person details • Validating dependents • Processing participant life events Enter the date in your standard local format.
*Person Number	PARTICIPANT_PERSON_NUMBER, a unique numeric identifier for the participant for whom to process the enrollment changes
Additional Person Identifier	Reserved for the application, don't use.
Program Name	Must be valid as of the effective date.
Plan Name	Must be valid as of the effective date.
Plan Disenrolled From	Reserved for the application, don't use.
Option	Must be valid as of the effective date.
Option Disenrolled From	Reserved for the application, don't use.
*Life Event	Must be valid as of the effective date.
*Life Event Occurred Date	Benefits processing derives the existence of a started life event based on the combination of this date and the specified life event. Enter the date in your standard local format.
Original Participant Enrollment Date	Doesn't affect processing, the upload updates the field for the participant enrollment record. Enter the date in your standard local format.
Create Potential Life Event	**Yes**: The process determines whether the participant has a potential life event for the combination of the life event name, life event occurred date, and benefit relationship. If there is no valid potential life event, it creates and processes one.

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Column	Description
	No: The process doesn't create the potential event or process life events automatically. You must manually add the life event using the Potential Life Event tab.
*Benefit Relationship	Must be valid for the participant as of the effective date Benefits processing derives a valid started life event for the participant based on this value.
Rate Amount	If you enter a rate amount, ensure that there is no value in coverage amount.
Coverage Amount	If you enter a coverage amount, ensure that there is no value in rate amount.
Disenrolled Coverage Amount	Reserved for the application, don't use.
Date of Birth	Dependent's or beneficiary's date of birth Enter the date in your standard local format.
Beneficiary Organizations and Trusts	Enter the name of the existing beneficiary organization or trust. If the beneficiary organization or trust doesn't exist as of the effective date, the beneficiary designation process fails. To create the organization or trust, which you can then use in the workbook, use the Beneficiary Organizations task in the Benefits Service Center page.
Primary Beneficiary Percentage	If you enter a percentage amount, ensure that there is no value in beneficiary amount.
Contingent Beneficiary Percentage	If you enter a percentage amount, ensure that there is no value in beneficiary amount.
Beneficiary Amount	If you enter a beneficiary amount, ensure that there is no value in beneficiary percentage.
Close Life Event Date	Date on which you want to close the life event Enter the date in your standard local format.
*Close Life Event	**Yes**: The process attempts to close the life event that it's processing, which is useful if it's processing multiple life events for the same participant, dependent, or beneficiary. **No**: The process doesn't close the life event, leaving it in the started state. Suspended results or pending action items don't allow the life event to close. In such cases, it remains unchanged and you must close this event before attempting to process the next event.
Batch Line ID	Don't modify. Uniquely identifies the batch line, which is referenced in error messages.
Message	Don't modify. Describes any errors that occurred during the Upload Benefits Enrollments batch process. Reprocess the batch after correcting the errors.

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Column	Description
Row Batch Status	Don't modify. Indicates the Upload Benefits Enrollments batch processing status for the row, such as COMPLETE or ERROR.
Key	Don't modify. Internal value used for Upload Benefits Enrollments batch processing.

Related Topics
- Overview of Managing Benefit Enrollments in the Integrated Workbook

Options to Reevaluate Eligibility of Designees for Enrollment

When a dependent is found ineligible by the Reevaluate Designee Eligibility process, it creates a Loss of Eligibility tracking life event for the participant. You can determine how you want to evaluate the Loss of Eligibility life event; select one of these life event statuses on the Process Details page:

- Set to Processed status
- Remain in Started status

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Here's a diagram that illustrates, at a high level, how you can configure the Reevaluate Designee Eligibility process to handle Loss of Eligibility tracking life event:

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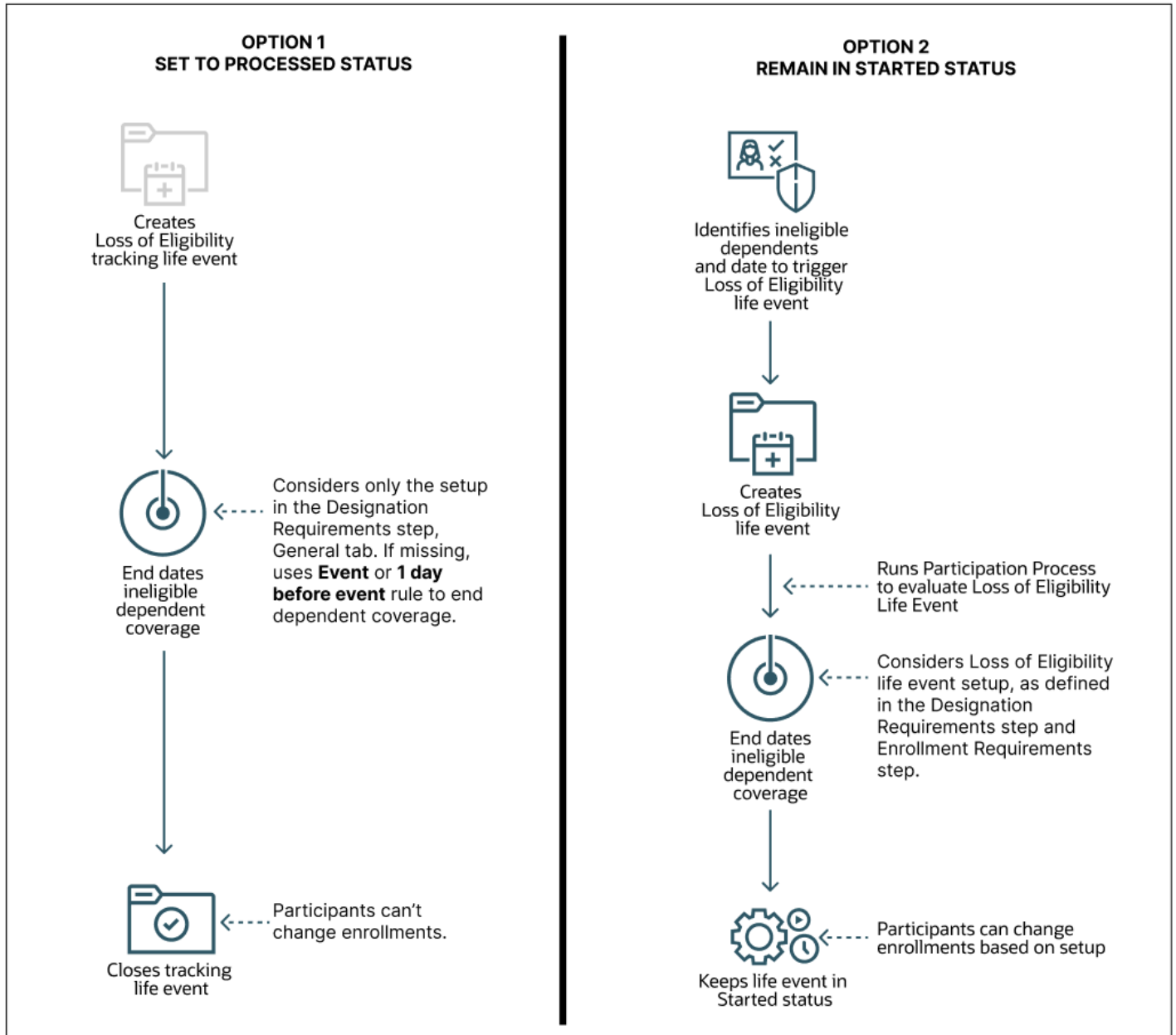
Option 1: Set to Processed Status

You select this option if you don't want to provide participants the ability to change their benefits due to loss of eligibility, and you want them to continue with the same rate-level deductions. You select this option from the Loss of Eligibility Tracking life Event list on the Process Details page.

No processing happens on the Loss of Eligibility tracking event. The process end dates only the dependent coverage record that was found ineligible. Other than the ineligible dependent coverage record, nothing else is changed. For example, the participant doesn't get unenrolled from any offerings.

When the Reevaluate Designee Eligibility process end dates the ineligible dependent coverage record, it considers only the effective end date, and not the end-date rule specific to the Loss of Eligibility life event. The process considers the setup in the Designation Requirements train stop, General tab for the plan, or plan type in program. If the end date rule isn't specified in the General tab, the process considers the Event date or One day before the event date, as the end date.

When the Reevaluate Designee Eligibility process end dates the ineligible dependent coverage, it closes the tracking life event and sets its status to Processed. The life event only indicates the occurrence of the loss of eligibility, but it doesn't evaluate for any enrollment opportunities. The participant's coverage in the same plan or option continues.

Option 2: Remain in Started Status

If you want to evaluate the Loss of Eligibility tracking event for enrollment opportunities, select **Remain in Started Status** from the Loss of Eligibility Tracking Life Event list on the Process Details page.

The Loss of Eligibility tracking life event is created as a regular life event. The process doesn't end date the dependent coverage record that was found ineligible. It only identifies the ineligible dependent and the date to create the Loss of Eligibility tracking life event.

As the dependent has already lost further eligibility, the coverage needs to be end dated. Note that the participant's eligibility into the various plans gets reevaluated and there will be impact if family member code rules exist. So, along with the dependent coverage, the participant coverage needs to be end dated. The end dates are calculated based on the Loss of Eligibility Life Event setup defined in the Designation Requirements and Enrollment train stops in the plan configuration work area.

Based on how frequently you run the Reevaluate Designee Eligibility process, you need to decide whether you want to change the derived factor setup, or the coverage end date setup. If you run the process daily, you can set up the event to be triggered based on the date of birth. The coverage dates are processed accordingly. If you run the process monthly, you can set up the event to be triggered at the end of the month or on the first day of the next month so that all the ineligible dependents lose their coverage in the current month.

Impact of Derived Factors on Option 2 (Remain in Started Status)

Suppose you're using a derived factor for a person's age. If the derived factor is set to the **As of Event** rule, then the Loss of Eligibility life event will use the date of birth as the end date for the coverage. But if you want the coverage to end on the last day of the month, then you have 2 options. You can change the Previous Dependent Coverage End Date rule to **End of Month**, and the Start date rule, to **First of Next Month**.

The other option is to continue with the Participant enrollment coverage end date rule, but make sure you define the date rules for enrollment specific to the Loss Of Eligibility event in the Life event tab. Note that the change might impact the employee's coverage start and dates.

If the derived factor is set to **End of month** or **First of next month**, you can use that setup for ending the dependent coverage, but the life event will trigger not on the date of birth, but will be based on the derived factor's determination rule.

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The way you set up the derived factors or the coverage end date should be on the basis of how frequently you run the Reevaluate Designee Eligibility process. If it's daily, then we recommend you get the event triggered on the date of birth and get the coverage dates processed accordingly.

If the frequency is monthly, then we recommend you use the **End of Month** rule or **First of next month** rule in the derived factor. This way, all the dependents losing eligibility in the current month can be detected and processed in a single run per month.

Guidelines to Test Benefits Formulas

Use the Evaluate Formulas and Eligibility Profiles task in the Plan Configuration work area to test whether a benefits formula works as expected for a sample participant.

This topic covers the following aspects:

- Authoring formulas
- Restrictions
- Available contexts
- Formula results

Note: The formula evaluation tool does not change any data when you test a formula.

Authoring Formulas

You create formulas using the Define Formula task in the Plan Configurationwork area.

Restrictions

You cannot test formulas designed to act on data that is not saved to the database yet. For example, you cannot test these formula types:

- Person Change Causes Life Event
- Post Election Edit

You cannot test formulas designed to act on input values received from a process that the formula calls at runtime. For example, you can't test the Rate Periodization formula type. You can still use this tool to test such formulas by creating a version that contains fixed input values available in the code.

Available Contexts

You must provide values to the following contexts to test any benefits formula:

- Effective date
- Person name
- Benefits relationship

You can also provide values to these contexts depending on the formula type:

- Life event name

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- Program name

- Plan name

- Option name

Formula Results

The Formula tab displays the results of the last five formula submissions. The Results window displays the name of the return variable defined in the formula and its value. To view more details, you can download and view the generated log file.

FAQs for Evaluation and Reporting

Can I upload benefit group assignments for multiple persons at one time?

Yes.

1. Use the integrated Microsoft Excel workbook to view and edit person benefit group assignments for multiple persons and groups.
2. Upload your changes back into the application database.

To generate the integrated workbook, in the Evaluation and Reporting work area:

1. Select the Person Data Loaders tab.
2. In the Upload Person Benefit Groups task row, click the **Go to Task** button.

Related Topics
- Manage Person Benefit Groups in the Integrated Workbook

Can I upload benefit balances for multiple persons at one time?

Yes.

1. Use the integrated Microsoft Excel workbook to:

   o View and edit the benefit balance value, primary assignment, and benefits relationship entries for multiple persons.
   o Add and delete person benefit balances.

2. Upload your changes back into the application database.

To generate the workbook, in the Evaluation and Reporting work area:

1. Select the Person Data Loaders tab.
2. In the Upload Person Benefit Balances task row, click the **Go to Task** button.

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Related Topics
- Manage Person Benefit Balances in the Integrated Workbook

Can I upload student and disability status for multiple persons at one time?

Yes.

1. Use the integrated Microsoft Excel workbook to view and edit student and disability status, disability type, tobacco usage, and other plan coverage details for multiple persons.
2. Upload your changes into the application database.

To generate the integrated workbook, in the Evaluation and Reporting work area:

1. Select the Person Data Uploads tab.
2. In the Upload Person Habits task row, click the **Go to Task** button.

Related Topics
- Manage Person Habits in the Integrated Workbook

Can I upload enrollment data in a batch?

Yes.

1. Use the integrated Microsoft Excel workbook to:

   - Enroll participants in various programs, plans, and options.
   - Designate dependents and beneficiaries in participant-enrolled plans.

2. Upload your changes into an interim database.
3. Run the Upload Benefit Enrollments batch process.

To generate the integrated workbook, in the Evaluation and Reporting work area:

1. Select the Enrollment Uploads tab.
2. Click **Prepare Enrollment Batch in Workbook**.

What benefits processes can I schedule on the Schedule Processes page?

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records.

You can schedule the following processes:

- Evaluate Life Event Participation

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- Evaluate Temporal Event Participation

- Evaluate Unrestricted Event Participation

- Back Out Life Events

- Back Out Unrestricted Life Events

- Close Enrollment

- Reevaluate Designee Eligibility

- Purge Backed-Out or Voided Life Event Data

> **Note:** You can schedule these processes from the Processes tab of the Evaluation and Reporting work area too.

How can I view more details on the results of a benefits process?

In the Evaluation and Reporting work area, Monitor Process Request section, click the Report icon of the life event or enrollment process.

The Results section indicates the number of person records that:

- Processed successfully

- Didn't process

- Processed with errors

If the person records processed with errors and you want to find out more, click the number indicating the number of records with errors. The following key fields appear depending on the process that was run:

- Person details, such as number, name, processing status

- Job details, such as name and process date

- Life event name

- Life event occurred date

- Error message code

- Error message

Experienced users can also look at the log file in the Monitor Process Request section. The log file provides in-depth details of each person record that was processed. To access the log file, you click the **Log File** icon of the process. In the window that appears, click the log file link to download it.

Related Topics

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4 Manage Document Uploads

Upload Supporting Documents

Depending on how document uploads were configured for your enterprise, participants and administrators can upload documents from several areas to address pending actions.

If you're a participant, you can upload documents directly from the pending actions self-service page. Or you can upload using the Documents link on the landing page.

If you're an administrator, you can upload documents on behalf of a participant from the Benefits Service Center page.

1. On the dashboard, search for and select the person you want to upload the documents for.
2. On the person's benefit summary page, click the number for **Documents Pending Approval**, or scroll directly to the **Certification** section.
3. Set the filter to **All**.
4. Click the document link to open its details.
5. Click **Add Attachment** to complete uploading the required documents.
6. Save and close the page.

Note: These steps work only if there's relevant configuration in place to enable participants to upload documents from the pending actions page. If there is no configuration in place, you can always use Document Records page from the Person Management work area.

Review and Approve Documents

You review and approve documents from the Benefits Service Center page.

1. On the dashboard, click **People with documents waiting to be approved**. You can even search for a specific person.
2. Click the person link to open the person's benefits summary.
3. Click the number that you see for **Documents Pending Approval**.
4. In the Certification section, click the document link to open its details, and then click the attachment to download or open the document.
5. When you're done reviewing the document, click **Save and Close** to get back to the previous page.
6. In the **Actions** menu, select **Approved** or **Rejected**.
7. If you're approving the document, set the received date. Otherwise, set the denied date and select a reason. Enter any comments if required.
8. Click **Submit**.

Note: After you approve or reject a document, you can't change its status. If you're using a third party application to manage document approvals, you still need to set the received or denied date in the document details page.

How You Resolve Participant Queries on Document Approvals

The Benefits Service Center should help you resolve most queries you receive regarding document uploads.

For instance, if a participant wants to know why their document was rejected, you navigate to the Certification section on the Benefits Summary page. Set the filter to Rejected to see the documents that were rejected. To see more details, click the document link.

You can even use the Person Benefits diagnostic report from the diagnostic dashboard. This report, apart from other details, displays the entire list of documents that were uploaded for a person across life events. You can access these details outside an enrollment window too. You don't need to use an effective date to search for the documents.

How can I change the validity period for documents?

If you're setting up document uploads, you can set the documents validity period in the Document Uploads step when you create or edit a plan.

The validity period impacts all documents of that type and you need to reprocess the relevant life event to see this change.

You can also change the validity period of a specific document during an enrollment window. On the Benefits Summary page, in the Certifications section, click the document link and change the validity period.

Typically, you might want to extend the validity period if you know that there's an upcoming enrollment opportunity that requires the same supporting document. Set a new date in the **Valid Until** field. When you do this, you can reuse the same document authorization without requiring participants to upload the document again.

In another example, if the plan policy changes and you need to approve documents afresh, you can end the document's validity by shortening the validity period. Participants can then upload a new document so that you can review it again.

How You Manage Missing Certifications

You can resolve the pending actions in the self-service page when you can't provide the certificates for various reasons.

Pending certification can lead to suspension of coverage. You can use the Declare Missing Certification button in the Pending Actions page to resolve pending actions.

The Declare Missing Certification button appears only when:

- The life event is in started state.
- The effective date is within the enrollment window.
- The pending certification is just for the participant. The button doesn't appear for the designation action items for dependent or beneficiary. It also doesn't appear for the missing date of birth or social security number action items.

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- Document of records is configured for certification and the document is not uploaded. When the document is loaded, the button doesn't appear.

Enable Participants to Declare Missing Certifications

Here's how you allow participants to declare that they can't provide a certificate:

1. On the Home Page, click **Benefits Administration** > **Plan Configuration**.
2. In the Tasks panel drawer, click **Self-Service Configuration**.
3. Select the **Allow employees to declare that they can't provide a certificate** check box in the Pending Actions section.
4. Click **Save**.

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5 Enroll in Benefits

Overview of the Benefits Work Area

Participants enroll in benefits during open enrollment or when they have a qualifying life event. They can elect or change unrestricted enrollments at any time.

Participants can:

- Compare current and potential benefits

- Make selections

- View and accept configured terms and conditions

- Elect coverage for themselves and their dependents

- Select primary care physicians for applicable plans

- View and print a confirmation statement

- Complete additional certification or designation action items specified on the confirmation statement

Participants elect benefits by clicking **Me - Benefits**.

Related Topics

How You Enroll in Benefits

The benefits enrollment process consists of three major steps.

Participants should complete the steps in the following order:

Open the self-service Benefits Service Center page by selecting Benefits under Me on the Navigator menu.

Add Contacts and Beneficiary Organizations

Before you start electing benefits, add or update all persons or organizations that you plan to designate as dependents or beneficiaries.

- Add persons in the Contacts section.

- Add beneficiary organizations or trusts in the Beneficiary Organizations section.

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Provide all information required to determine the eligibility of each contact or organization. This ensures that the contacts and organizations are available for designation when you elect benefits.

Elect Benefits

Click **Change Benefit Elections**. This button is available only if an opportunity exists for you to make elections, such as:
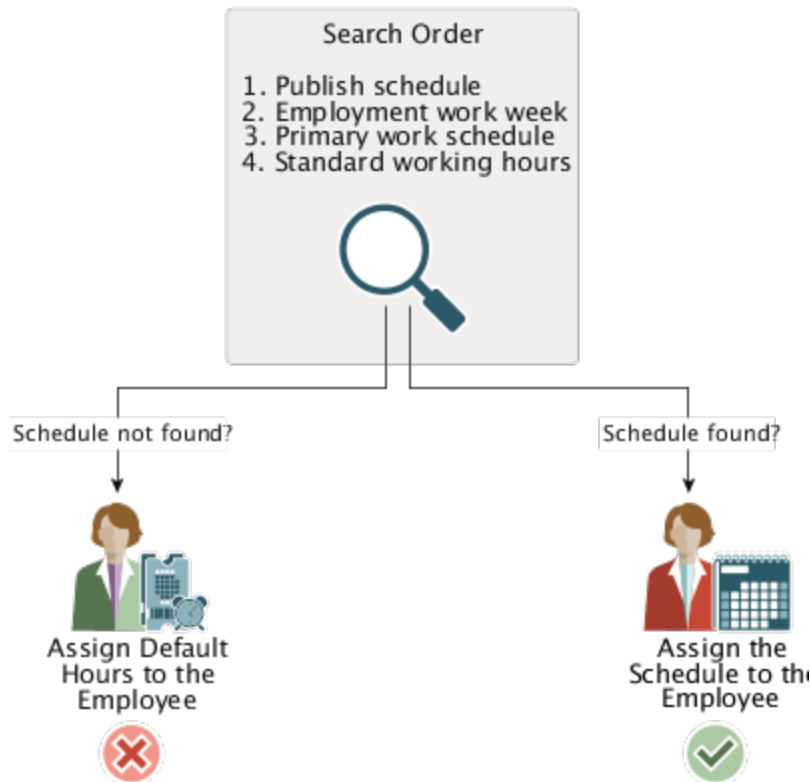
Sample

- During an open enrollment period
- If you have a qualifying life event

Electing benefits involves:

- Selecting benefits offerings
- Designating beneficiaries and dependents as appropriate for each offering

Additional information, such as a contribution or investment amount, might be required, depending on the offering type.

When you finish making elections, you can review the information and make changes before submitting.

Review and Resolve Action Items

After submitting your elections, carefully review the Pending Action Items section to determine if you must:

- Provide any additional information, such as proof of good health or other documents or certifications
- Select a primary care physician

Note: Enrollment processing might suspend a benefits offering if you don't complete required action items. Contact your benefits department if you have any questions about resolving specific action items.

Related Topics

Examples of Entering Contact Start Date for Benefits Designation Purposes

▶ **Watch video**

This topic provides examples to help you decide the best effective start date to use so that you and your dependents qualify for benefits.

- The first two examples relate to dependents:

    - Adding your newborn
    - Updating a contact relationship

- The final example relates to updating the effective start date because of an event.

Adding Your Newborn

The following table contains two scenarios related to newborns and provides the best effective start date for each.

Scenario	Effective Start Date to Enter
• Your hire date is January 1, 2014. • Your child was born on January 15, 2014.	Your newborn's birth date
• Your child was born on December 15, 2013. • Your hire date is January 1, 2014.	Your hire date

Updating a Contact Relationship

The following table contains one scenario related to changing a contact relationship and the best effective start date.

Scenario	Effective Start Date to Enter
• Your hire date is January 1, 2014.	Marriage date

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Scenario	Effective Start Date to Enter
• On February 1, 2014, you married Jane Smith, an existing contact with a current relationship of friend.	

Updating the Effective Start Date Because of an Event

The following table contains two scenarios related to a relocation event and provides the best effective start date for each.

Scenario	Effective Start Date to Enter
• Your hire date is January 1, 2014. • You relocated to a new address on February 28, 2014.	When you update your address details, enter the date that you relocated to the new address.
• Your hire date is January 1, 2014. • You relocated to a new address on November 21, 2013.	When you update your address details, enter your hire date.

Considerations for Using the Change Beneficiaries Page

You need to remember these key points when you enable participants to use the Change Beneficiaries page.

- If participants have enrolled in benefits that allow beneficiary designations, they can change beneficiary details even if there isn't an enrollment window open. In other words, they can update beneficiary designations for the latest processed life event.

- Participants can change the percentage of allocation for existing beneficiaries, remove a primary or contingent beneficiary, and adjust the allocation percentage.

- Participants can designate new contacts. But they can do this only if they added the contacts before the latest processed life event date. For example, participant A added a dependent contact on Apr 1, 2022. You process a life event on Apr 5, 2022. The participant makes some elections, but forgets to designate the dependent contact. The enrollment window closes on Apr 7, 2022. The participant can still use the Change Beneficiaries page to designate the dependent. However, if the participant adds a contact after Apr 7, 2022, they won't see the contact in the Change Beneficiaries page.

- All new designations start from the coverage start date of the plan.

- As these beneficiary changes happen outside of the enrollment window, the application doesn't generate any beneficiary-related pending actions. If an enrollment had generated a pending action to designate beneficiaries, the action will automatically close when participants complete their designations.

How You Can Update Beneficiary Designations

Depending on the status of the enrollment window and how your benefits application is set up, you can change your beneficiaries from either the Benefits page or the Change Beneficiaries Page.

▶ **Watch video**

On the Benefits page, you can make updates to your beneficiaries only if a relevant enrollment window is open. Depending on setup, you can use the Change Beneficiaries page to change beneficiaries even after an enrollment window has closed. To get to this page, click **Search**, enter **Change Beneficiaries**, and select the action.

You can change beneficiaries on the Change Beneficiaries page only if you are already enrolled in benefits that allow beneficiary designations. You can't use this page when there's already an enrollment window that has started. In that case, you can go to the Benefits page.

If you need to add a beneficiary based on a previous life event, you need to contact your administrator. They need to back out the started event and then you can use the Change Beneficiaries page to update your designations.

Enable Participants to Update Beneficiary Designations Anytime

Participants can update their beneficiaries, outside of an enrollment window, using the standalone Change Beneficiaries page. However, you need to enable a quick action for participants to access that page.

1. Log in as a user who has administrative privileges.
2. On the Home Page, click **Configuration** > **Structure**.
3. Create a sandbox with Structure and Page Composer as the tools, and then open the sandbox.
4. Open the sandbox.
5. From the Tools menu, click **Structure**. Then, click **Me**.
6. Select the **Quick Actions** tab, **Benefits**.
7. Select **Change Beneficiaries** and select **Yes** from the Visible list to enable the Change Beneficiaries tile.
8. Ensure that you select the **Add as a quick action link on home page** check box.
9. Select **Yes** for Mobile Enabled.
10. Click **Save and Close**.

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FAQs for Self Service Elections

How can I quickly get to the benefits enrollment pages?

You can open the self-service Benefits Service Center page by selecting Benefits under Me on the Navigator menu to start the enrollment.

Also, you can directly navigate to the enrollment pages by using the People to Cover quick action and by integrating the People to Cover quick action as a task in a checklist.

Here's how you directly navigate to the enrollment pages using the People to Cover quick action:

1. Click **Me** on the Home page.
2. Click the **Show More** link.
3. Select **People to Cover** under Benefits.
4. Click **Continue** to navigate to the enrollment flow.

How can I view my past and future benefits enrollments?

Use the Effective Date field in the Enrollment Summary page. You can select a date between three years in the past from the current date up to one year in the future to see your enrollments.

What happens if I don't resolve action items by their due date?

It depends on the specific benefits offering. Failure to provide required information might result in enrollment suspension.

Provide all action items as quickly as possible after submitting benefits updates. Contact your benefits department if you require more information about specific action items.

How can I designate beneficiaries?

Designating beneficiaries is a two-step process in the Benefits work area, which you open by clicking Me - Benefits on the Home page.

1. Add all contacts, beneficiary organizations, and trusts on the People to Cover page.

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2. When you have an opportunity to change your benefits, select specific benefits offerings and designate beneficiaries for those offerings.

   If you designate more than one beneficiary for an offering, enter the percentage of the total benefit to assign to each one.

   If your beneficiaries don't appear in the list of beneficiaries during benefit selection, return to the Overview page and add them as contacts.

Employees can designate or change beneficiaries using the anytime beneficiary flow for life events that are not visible in Self-Service Benefits. For example, you may not want employees to change enrollments from Self-Service Benefits but allow changes to beneficiary designations for events like salary change. You need to enable a quick action for employees to access the Change Beneficiaries page.

Related Topics
- How can I designate dependents?
- Enable Participants to Update Beneficiary Designations Anytime

How can I designate dependents?

Designating persons as dependents is a two-step process in the Benefits work area, which you open by selecting Benefits under Me on the Navigator menu.

1. Add all persons as contacts on the Overview page.
2. When you have an opportunity to change your benefits, select specific benefits offerings and designate eligible contacts as dependents for those offerings.

If your dependents don't appear in the list of eligible dependents during benefit selection, return to the Overview page and add them as contacts or provide any missing eligibility information.

Related Topics
- How can I designate beneficiaries?

Why is my flex credit usage unchanged for some benefit offerings?

You might have selected benefit offerings that the flex credits program does not cover. Check your flex credit program details or ask your benefits administrator for more information.

How can I delete a benefits document that I added?

Use the Edit action in the Document Records task to open the document record. Then, open the Attachments dialog box and use the Delete Attachment icon to delete the document.

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What's the purpose of the relationship start date on the self service benefits contacts page?

The relationship start date determines the contact's effective start date for benefits when participants designate them in a benefit offering. For example, if you want to enter your newborn as a contact, you enter the child's birth date as the relationship start date.

How can I integrate the People to Cover quick action as a task in a checklist?

The People to Cover quick action can be integrated as a task within a master checklist, which enables users to complete enrollment as part of the assigned checklist tasks.

For example, you can embed the quick action as a task within newhire checklist, so that the employee can navigate directly to the benefits enrollment area from the checklist tasks. You can use the Checklist Templates task in the Setup and Maintenance work area to embed the quick action as a task.

After you embed the quick action task in the checklist template, participants can use these steps to navigate to the enrollment flow using the checklist tasks:

1. Click **Me**, *Checklist Tasks* on the Home page.
2. Click **Current Tasks**.
3. Select the name of the task that you embedded in the checklist.
4. Click **Go to Task** in the page that appears.
5. Click **Continue** to navigate to the enrollment flow.

Related Topics

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6 Prepare for Open Enrollment

Overview of Benefits Open Enrollment

The benefits open enrollment process comprises three phases: preparation, the enrollment period, and post enrollment activities. This chapter provides a sample timeline, checklists, and instructions to guide you through the phases of open enrollment.

Open Enrollment Period Opportunities

The open enrollment period is an opportunity for eligible participants to:

- Enroll in a plan if not currently enrolled
- Change coverage from one plan to another
- Change enrollment status of eligible family members
- Decline coverages

Open enrollment is also an opportunity for your organization to:

- Modify plan configuration
- Update rates
- End benefits offerings
- Start new benefits offerings

Sample Open Enrollment Timeline

This sample timeline and the instructions in this chapter assume the following dates and rules:

- Open enrollment elections are effective on the event date, January 1.
- Coverages and rates start on the event date, January 1.
- Previous year coverages and rates end one day before the event date.

You must thoroughly test the open enrollment procedures using your configuration if either of the following conditions is true:

- Your organization's open enrollment is effective on any other date within the year.
- You apply different coverage and rate start and end date rules to meet your business requirements.

The following timeline outlines suggested activities before, during, and after an open enrollment period that lasts throughout the month of November.

Month	Details
September and October	Update plan configuration

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Month	Details
	Run a trial open enrollment: • Test performance • Test self-service enrollment
November 1	Run the open event processing: • Evaluate Scheduled Event Participation • Enroll in Default Benefits
Throughout November	Elect benefits: • Participants enter elections using the self-service guided process. • Benefits administrators enter elections in the Benefits Service Center page.
December 2 -- 15	• Benefits administrators can still enter elections as necessary by setting a session effective date within the enrollment period of November.
December 15	Run the Close Enrollment process to close all elections.

Phase One Checklist: Before the Open Enrollment Period Starts

Follow these steps to prepare for the open enrollment period:

Task	Work Area
Check payroll calendars.	Contact payroll administrator
Check plan year periods.	Plan Configuration
Assess and update eligibility profiles and derived factors.	Plan Configuration
Prepare program and plan configurations: • End existing plans no longer offered. • Add new plans. • Add new options to existing plans.	Plan Configuration
Add the open scheduled life event to the program or plan not in program.	Plan Configuration
Manage standard and variable rates: • Add rates to new benefits objects. • Modify rates on existing benefits objects.	Plan Configuration

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Task	Work Area
• Modify elements on existing rates. • Modify flex credit offerings.	
Start new coverage for flexible spending accounts (FSA)	Plan Configuration
Configure enrollment and rate display.	Plan Configuration
Identify and resolve in-progress life events: • Identify conflicting and incomplete life events • Identify and finalize open action items and suspensions • Evaluate and resolve temporal event participation	Evaluation and Reporting Enrollment
Process trial open enrollment.	Evaluation and Reporting
• Test trial open enrollment.	Enrollment Me - Benefits (Self-Service)
• Analyze and tune performance.	Evaluation and Reporting

Phase Two Checklist: During the Open Enrollment Period

Follow these steps to administer the open enrollment period:

Task	Work Area
Generate the Participant Enrollment Results report.	Reports and Analytics
Manage the open enrollment period. • Run the Evaluate Scheduled Event Participation and Enroll in Default Benefits processes.	Evaluation and Reporting
• Monitor processes and resolve errors.	Evaluation and Reporting
• Enter enrollments.	Me - Benefits (Self-Service) Enrollment

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Task	Work Area
• Process life events that occur during the open enrollment period.	Enrollment
Manage and close the open enrollment window.	Evaluation and Reporting
Generate the Participant Enrollment Results report.	Reports and Analytics

Phase Three Checklist: After the Open Enrollment Period Ends

Follow these steps to complete the open enrollment activities:

Task	Work Area
Verify enrollment.	Enrollment
Investigate incorrect enrollments.	Enrollment
Close action items and certifications.	Enrollment
Enter overrides.	Enrollment
Inactivate plans that are no longer offered.	Plan Configuration
Process life events that occur after open enrollment.	Enrollment

Related Topics
- Set Up and Process an Open Enrollment Period

Prepare Program and Plan Configuration for Open Enrollment

Ensure that you have completed the tasks mentioned in this topic when you prepare program and plan configurations for open enrollment.

1. Verify periods for payroll calendars and year periods for programs and plans.
2. Check derived factors and eligibility profiles.
3. Inactivate existing plans and options that are ending.

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4. Create options and plans and add to existing plans and programs.
5. Check default enrollment rules.
6. Check unrestricted processing enablement.

Verify Periods for Payroll Calendars and Year Periods for Programs and Plans

Check with the payroll administrator:

- That the payroll periods for your benefits plans extend through the entire new plan year

- Whether the upcoming plan year has standard 52 or 26 pay periods or nonstandard 53 or 27 pay periods, respectively, if using biweekly or weekly period types

In the Setup and Maintenance work area, Verify that a year period exists for the new plan year. Create year periods as required using the Manage Year Periods task. In the Plan Configuration work area:

- Verify that all active programs and plans include the correct year periods using the Basic Details pages.

- If your business calculates communicated rates using pay periods, check that the correct communicated rate frequency is selected based on the pay periods in the upcoming plan year.

Communicated Rate Frequency	Description
Per pay period	Uses the number of pay end dates derived from the payroll definition. Example: A weekly payroll might result in 53 end dates in the calendar year.
Estimated per pay period	Uses the standard number of periods corresponding to the period type value selected in the payroll definition, regardless of the number of pay end dates in the calendar year. Example: Communicated rate calculations use the fixed number of 52 weekly periods, even for years with the nonstandard 53 weekly periods.
Per pay period with element frequency rules	Uses the frequency rules of the payroll element associated with the standard rate to determine the number of deductions in the calendar year. Example: One of your benefit deductions occurs only on the first biweekly payroll in each month. If you use this communicated rate frequency, select Per-pay-period amount as the value passed to payroll.

Check Derived Factors and Eligibility Profiles

Check and edit existing eligibility configuration and add missing eligibility configuration as required. Use the tasks under Manage Eligibility in the Tasks panel drawer of the Plan Configuration work area.

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Examples:

- You created benefit offerings for spousal and child life that require new age derived factors.

- You have new requirements that require you to edit length of service derived factors.

- You evaluate eligibility profiles associated with benefits objects requiring many manual participation overrides to determine how to better include and exclude participants.
  Adjusting the eligibility profiles based on your analysis reduces or ends the manual overrides.

- Your service areas are changing, so you must modify the existing postal codes and service areas accordingly.

Inactivate Existing Plans and Options That Are Ending

Inactivate plans or options that you no longer offer in the new plan year to stop existing participant enrollments and prevent new enrollments. Before you inactivate a plan, ensure that you disenroll all participants from the plan.

To inactivate a plan, do these steps in the Plan Configuration work area:

1. Search for the programs or plans that contain the plans or options that are ending.

   Tip: Use the effective start date of the upcoming plan year as your effective as-of date.

   - The effective as-of date becomes the session effective date at the top of the edit pages.

   - The session effective date becomes the new effective start date for plans and options that you update, after you save your changes.

2. On the edit Basic Details page, select the plan or option that you want to end.
3. Update the plan or option, setting the status to Inactive and saving your change.

   Check that the effective start date for when the plan or option becomes inactive changed to the session effective date at the top of the page, for example, January 1, 2016.

4. On the Enrollment page, select the plan or option that you want to end.
5. Update the Enrollment section on the General tab, setting the enrollment rule to **Current - lose only; new - nothing** and saving your change.

   Check that the updated plan or option:
   - **Enrollment** field contains a check mark

   - Effective start date changed to the session effective date for the page, such as January 1, 2016

Processing the open event with these settings disenrolls all existing plan or option participants on the new effective start date and no new participants can enroll in it.

Create Options and Plans and Add To Existing Plans and Programs

Create the option or plan for the upcoming plan year in the Plan Configuration work area.

Object	Settings
Options and plans	• Set the session effective date at the top of the create page to the first day of a plan year at least a few years earlier, for example, January 1, 2000.

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Object	Settings
	• Set the option or plan status to **Pending**.
Plans	• Add year periods that include the current plan year and the upcoming plan year. Example: If the upcoming plan year starts January 1, 2016, then, at minimum, add year periods from January 1, 2015 to December 31, 2015 and January 1, 2016 to December 31, 2016.

Add the new objects to the relevant plans and programs.

Parent Object	Steps for Adding the New Option or Plan
• Plan to which you want to add the new option • Program to which you want to add the new plan	1. Set the session effective date at the top of the Basic Details page to the first day of the current plan year, for example, January 1, 2015. 2. Add the new option or plan, setting the status to **Pending** and click **Save**. The effective start date should be the first day of the current plan year. 3. Set the session effective date at the top of the edit program page to the first day of the upcoming plan year, for example, January 1, 2016. 4. Update the option or plan status to **Active** for the newly added option or plan and click **Save**. ○ The newly added option or plan status should have changed from Pending to Active. ○ The effective start date should now be the first day of the upcoming plan year.
Plan not in program to which you want to add the new option	1. Set the session effective date using the current plan year, set the status, and add year periods, just as you do when creating plans. 2. Follow steps 3 and 4 in the preceding row to set a new session effective date using the upcoming plan year and update the plan status to **Active**.

Check Default Enrollment Setup

For all active programs, plans, and options, check that the selected enrollment methods and default enrollment rules are still valid for your latest program and plan designs.

- Check on the General and Life Event tabs of the edit program or plan Enrollment pages.

Where the default enrollment rule is New - default; current - same enrollment and rates, the processing is as follows:

- Participants who are new to an electable benefits object receive the default plan or option.

- Currently enrolled participants who make no explicit election changes retain their same enrollment.

  Enrollment processing recomputes rates based on the plan configuration. If you entered the coverage or rate at the time of enrollment, then participants retain the current benefit and rate amount by default.

Tip: Use the Automatic enrollment method when you don't want workers to change the default elections that you set.

Check Unrestricted Processing Enablement

To allow enrollment in unrestricted plans during open enrollment, you must disable the regular unrestricted processing. Otherwise, the regular unrestricted processing backs out the unrestricted open enrollments.

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Use the Manage Self-Service Configuration task in the Plan Configuration work area to set unrestricted processing enablement to **Not during open enrollment**.

> **Note:** Unrestricted programs and plans run on entirely different business relationships than the regular, life event driven programs and plans. This means that you can process an unrestricted life event on the same day that you process a regular life event.

Related Topics

- Eligibility Profiles
- How Default Enrollment Rules Are Calculated
- How Enrollment Rules Are Calculated

Options to Configure Open Enrollment Period

When you add an open scheduled event to a program or to plans not in program, you must specify the dates and enrollment rules for processing.

This topic discusses:

- Adding the open scheduled event
- Creating the enrollment period

    o Recommendations for enrollment period date and rule selections

    o Additional information about the assigned life event date selection

    o Additional information about the close enrollment period date rule selection

- Selecting the reinstatement rule

Adding the Open Scheduled Event

To add the open event, in the Plan Configuration work area:

1. Open the Enrollment page for the program or plan not in program.
2. In the hierarchy, select the program or plan not in program, then select the **Scheduled** tab.
3. Select **Open** from the list, which by default is set to create an Administrative event.
4. In the Periods section, click **Create**.
5. Create the enrollment period.

Creating the Enrollment Period

This table lists the configurable fields with a description and sample recommended value.

The sample dates assume an open enrollment period throughout the month of November, with the elections taking effect on January 1 of the following year.

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Field	Description	Sample Recommended Values
Enrollment Period Start Date	First day of the open enrollment period.	November 1, 2015
Enrollment Period End Date	Last day of the open enrollment period.	November 30, 2015
Assign Defaults Date	Date on which default benefits assignments are made. Typically, this is the same date as the open enrollment period start date so that participants can minimally see their waive or prior elections when enrolling.	November 1, 2015
Assigned Life Event Date	Effective date of the Open event. The date as of which eligibility is evaluated and rates are determined. For the open event, this date is typically the first day of the new benefit year.	January 1, 2016
Processing Cutoff Date	The last day on which the benefits professional can make election changes on behalf of the participant.	December 15, 2015
Close Enrollment Period Date Rule	Occurrence that causes the Open event to advance from the started to processed phase.	When processing ends
Year Period	Year in which benefit elections are effective.	January 1, 2016 to December 31, 2016
Period Determination Rule	How enrollment periods are determined when: • Backing out and reprocessing an event • The event occurs within the enrollment window of another life event.	Later of enrollment period start or future start
Coverage Start Date	Select the rule that meets your business requirements. Example: Select **Event** if you want the coverage for the benefit plan to start on the assigned life event date, which is January 1, 2016 in this scenario.	Event
Previous Coverage End Date	Select the rule that meets your business requirements. Example: If you select **Event** as the coverage start date rule, then also select the corresponding 1 day before event rule to end the previous coverage the day before the assigned life event date. In this scenario, the event date is January 1, 2016, so the previous coverage end date is December 31, 2015.	1 day before event

Field	Description	Sample Recommended Values
Rate Start Date	Select the rule that meets your business requirements. Example: Select **Event** if you want the rates for the benefit plan to start on the assigned life event date, which is January 1, 2016 in this scenario.	Event
Previous Rate End Date	Select the rule that meets your business requirements. Example: If you select **Event** as the rate start date rule, then select the corresponding 1 day before event rule to end the previous rate the day before the assigned life event date. In this scenario, the event date is January 1, 2016, so the previous rate end date is December 31, 2015.	1 day before event

Selecting the Assigned Life Event Date

The event date is important for the evaluation of derived factors based on age, such as imputed income.

Example: Imputed income calculation in the US uses the participant's age as of the end of the current year. So for the plan year 2016, the calculation uses the participant's age as of December 31, 2016.

If the assigned life event date is in late December of 2015 for the 2016 plan year, the person's age would be calculated as of December 31, 2015. This age would be incorrect for imputed income purposes.

Selecting the Close Enrollment Period Date Rule

Specify the date that fits your business requirement for the open event. The following table provides example rule selections and when you might select them:

Rule	When to Select
When processing ends	When there is a time between the end of the participant's enrollment period and the date of the open event. This enables you to make adjustments before the event is closed.
When enrollment period ends	If there are no additional processing days after the enrollment period ends.

Selecting the Reinstatement Rule

During an open enrollment period, a reinstatement rule enables you to restore elections if:

- The open event was accidentally backed out
- An intervening life event backs out the open event

The default reinstatement rule that applies for any life event that you create is **Reinstate all if no electability change in event**.

The default rule restores elections only if there are no changes to the open enrollment electable choices between the dates that you:

- Backed out the open event
- Reprocessed the open event

You can reinstate elections only if you backed out the life event using the Unprocessed status.

Related Topics
- Reinstatement Rules
- How Default Enrollment Rules Are Calculated
- How Enrollment Rules Are Calculated

Reinstatement Rules

Use reinstatement rules to control how life event processing restores participant elections when you back out and reprocess a life event.

You select reinstatement rules on the Life Event tab of the Enrollment page when you create or edit a program or plan in the Plan Configuration work area.

Example: You back out an open enrollment event for a participant to make changes to some benefit offerings and then you reprocess the open event. Reprocessing restores the original participant elections, depending on the reinstatement rule that you configured for the open event.

> **Note:** Reprocessing a backed out life event restores participant elections only if you backed out the life event using the Unprocessed status.

Reinstatement Rules

The following table identifies and describes each reinstatement rule as well as when to use it.

Rule	Description	When to Use
Reinstate All If No Electability Change In Life Event	Restore elections if there is no change in the electable choice data between the dates when you backed out and reprocessed the life event. Example: If a rate value or definition changes, reprocessing doesn't restore the elections.	When changes in electable choices might influence the participant's election decisions and you want the participant to review and make new elections. Reprocessing uses this rule if you don't make a selection.
Reinstate If No Change for the Backed Out Enrollment	Restore elections if the participant's original elections remain the same after you reprocess the life event.	When participants don't have to reconsider their original election decisions because of new electable choices or changes to electable choices that they didn't choose originally.

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Rule	Description	When to Use
Reinstate If Electability Exists for the Backed Out Result	Restore elections as long as the participant is eligible for the electable choices. Example: You changed the value of an activity rate that the participant originally elected. Reprocessing the life event restores those elections with the new rate, as long as the participant is eligible for that electable choice. **CAUTION:** If an activity rate increases, the participants' election automatically increases in cost and the participant might not have an opportunity to reevaluate the election.	When you: • Want to apply any changes to the participant's original elections without providing an opportunity for participants to review the changes • Don't want participants to review any new electable choices
Reinstate If Electability Exists for the Backed Out Result, Else Apply Defaults	This rule is similar to the **Reinstate If Electability Exists for the Backed Out Result**. The rule reinstates the elections if electable choices exist. If they don't exist, the participant is enrolled using the configured defaults.	When you want to apply any changes to the participants original elections without requiring the participant to review these changes. If the participant no longer has electability for some elections, you want to make the elections anyway by using the defaults instead.
Never Reinstate	Doesn't restore elections.	When you: • Don't want to restore participant elections after reprocessing the life event • Want to use a specific life event to make adjustments or corrections to a benefit offering and you want participants to reevaluate their original elections

Related Topics
- Examples of Reinstatement Rules
- Examples of How Intervening Life Events Impact Reinstatement Rules
- Reinstatement Rules to Restore Participant Elections with Overridden Rates

Options to Configure Open Enrollment Rates

When preparing benefits offerings for open enrollment, create rates for new benefits offerings and update rates for existing offerings as required.

Consider these aspects of creating and updating rates in the Plan Configuration work area:

- Creating rates for new benefits offerings

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- Updating existing standard rates

- Updating existing variable rates

- Updating elements for existing rates

- Updating flex credit offerings

- Editing rates in the integrated workbooks

- Configuring rate display for self-service enrollment

Creating Rates for New Benefits Offerings

Ensure that the rates that you create have the same effective start date as your new benefit offerings. On the Create Standard Rates page, edit the session effective date to match the effective start date of the corresponding new plan or option.

Updating Existing Standard Rates

Update existing standard rates if there are any changes to rate calculations or other details.

1. Use the Manage Rates task to search for the standard rate as of the first day of your new plan year.

   Searching by this date sets the session effective date for the rate updates.
2. Select the standard rate and make changes to the calculations using the Update action.

Updating Existing Variable Rates

There are two possible scenarios to consider when you update existing variable rates:

- You want to edit the calculation details for an existing variable rate profile. In this case, follow these steps:

   a. On the Manage Variable Rate Profiles page, search for the variable rate profile effective as of the start date of the new plan year, typically January 1.

      Searching by this date sets the session effective date for the rate updates.
   b. Make changes to the variable rate calculations using the Update action.

      No updates are necessary on the corresponding standard rates page, because the revised calculation goes into effect on the effective start date of the revised variable rate profile.

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- You want to attach a different variable rate profile to the standard rate.

  Example: You now want to use two age band variable rate profiles for the same age range where you formerly used just one profile.

  In this case, follow these steps:

  a. Search for the standard rate using the effective as of date that is one day before the effective start date of the new variable rate.

  Example: If the new variable rate is effective on 01 January 2016, search for the corresponding standard rate as of 31 December 2015.

  b. Edit the rate using the Update action.

  The session effective date reflects 31 December 2015.

  On the Edit Standard Rate page, end-date the unwanted variable rate profile in the Variable Rates section and click **Save and Close**.

  c. Search again for the standard rate, this time setting the **Effective As-Of Date** to the effective start date of the new variable rate, which sets the session effective date.

  In this example, the date is January 1, 2016.

  d. Edit the rate using the Update action, adding the new variable rate profiles to the rate.

Updating Elements for Existing Rates

Consider whether any of your rates require a different payroll element.

Example: You formerly used a single payroll element for all medical plans, but for the next plan year you require a distinct element for each medical plan.

- If you must attach a different element to an existing standard rate, search for the rate as of the first day of the new plan year. Then, use the Update action to attach the new element.

- The association of the current payroll element with the rate is end-dated effective the day before the first day of the new plan year.

Updating Flex Credit Offerings

Update existing flex credit shell plans if there are any changes to:

- Flex credit calculation methods

- Spending options

- Excess credit calculations

Use the Manage Flex Credits Configuration task to search for the flex credit shell plan as of the first day of your new plan year.

- Searching by this date sets the session effective date for the flex shell plan updates.

- Select the flex shell plan and make changes using the Update action.

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Editing Rates in Integrated Workbooks

You can use the Microsoft Excel integrated workbook available on the:

- Standard rates search page to edit and upload multiple standard rates at once
- Variable rate profiles search page to:
    a. Create, edit, and upload multiple variable rate profiles.
    b. Associate them with existing standard rates.

Configuring Rate Display for Self-Service Enrollment

You can configure the name and visibility of rate columns on each step in the self-service enrollment guided process. Use the Configure Plan Type Grouping Display task.

Related Topics
- Configure Enrollment Display
- Manage Standard Benefit Rates in the Integrated Workbook
- Manage Variable Benefit Rates in the Integrated Workbook
- Variable Rates Options

Restart Coverage for Flexible Spending Accounts

This topic covers how to configure flexible spending accounts (FSA), which might have requirements to start new on a certain date. For example, FSA plans in the US, such as health care and dependent care reimbursement, typically must start new every calendar year.

FSA plans also typically require explicit entry of the enrollment amount, even if the participant:

- Enrolled in the previous year
- Plans to continue the same coverage level for the following year

The coverage of a currently enrolled participant should end on December 31 and restart on January 1.

Configure the FSA Plan

In the Plan Configuration work area:

1. On the Edit Program Enrollment page, select the FSA plan from the program hierarchy.
2. On the Scheduled tab, select the **Open** event.
3. In the **Session Effective Date** field, select the first day of the new benefit year, typically January 1.
4. In the **Enrollment Method** field, select **Explicit**.
5. In the **Enrollment Rule** field, select **Current - keep or choose, starts new; new - can choose**. This rule ensures that current participants must explicitly reelect coverage amounts, even though their coverage amounts might stay the same. The coverage ends at the configured end date for the processed life event and restarts the next day.

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6. Select one of the following default enrollment rules, depending on your plan configuration.

Default Enrollment Rule	Usage Conditions
New - nothing; current - nothing	Typical default enrollment rule to force participants with current year coverage to reelect coverage for the new plan year.
New - default; current - default	If your FSA plan configuration includes a waive plan or option, select this default enrollment rule on the waive plan or option.
New - default; current - same enrollment but default rate	If the standard rate for the FSA object has a default of zero.

7. In the Reports and Analytics work area, check the setup using the Participant Enrollment Results Report.

    a. View the report results as of one day before processing the open event. The results provide a list of current enrollees in each FSA plan, and their current elected amount.
    b. Run the same report after the open enrollment period ends to verify that coverage was reelected, or ended, according to participant elections.

Test Procedure in a Test Instance

Follow these steps after you set up the enrollment rules in a test instance:

1. Process the open event in the Evaluation and Reporting work area as of the first day of your new plan year.
2. Search for the enrollment information of a current FSA plan participant. Select **Enrollment** under Benefits on the Navigator menu to search for and select the participant and open the Benefits Service Center page.
3. For this date, verify that the Enrollment Results page:

    o Doesn't display the existing enrollment in the FSA plan

    o Does display existing enrollment in other benefit plans, which is expected

4. On the Enrollment page, explicitly select the FSA plan and specify the coverage amount, to enroll again for the new plan year.
5. Verify that the coverage start date is the first day of your plan year and the original coverage start date is as expected.
6. Select the first day of your new plan year as the session effective date.
7. Verify that the Enrollment Results page shows that coverage:

    o Ended on the last day of the previous plan year

    o Restarted on the first day of the new plan year

You can follow the same procedure to test the self-service enrollment for a worker by using this method to open the worker's self-service enrollment pages:

1. On the Manage Self-Service Enrollment Configuration page, verify that **Parameter Display** is selected.
2. Select **Benefits** under Me on the Navigator menu.
3. Search for and select the person.
4. Click **Continue**.

Configure Enrollment Display

You can configure how to group and display plans on each step in the self-service guided enrollment process and each administrator enrollment tab.

This topic covers how to:

1. Group plans for enrollment.
2. Configure the enrollment display.
3. Configure the rate display.

Group Plans for Enrollment

Group plan types into display categories in the Manage Plan Types task. You can group plan types together for display by assigning the same display category to multiple plan types. For each plan type, specify a category in which to display plans:

- Self-service enrollment steps

- Administrative enrollment tabs

When you create plans, you assign each to a plan type. Each plan inherits the enrollment display category of its assigned plan type.

Example Enrollment Groupings

You could group several different life insurance plan types together into a single Life Insurance display category. For a single plan type, you can select a different category for self-service display compared to the administrative display.

Configure Enrollment Display

Use the Manage Plan Grouping page to configure the visibility and display names of plan type enrollment categories.

Category	Possible Configurations
Self-service enrollment guided process steps	- Change the names of the plan type category groupings, which correspond to self-service enrollment step names - Control whether each step is visible - Enter a description of the plan grouping to associate with the selected enrollment display name Participants see this description during self-service enrollment.

You can modify only the name and visibility of plan groupings, you can't create groupings here.

Configure Rate Display

Use the Rate Column Display button to configure the name and visibility of rate columns on each step in the self-service enrollment guided process.

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Related Topics
- Rate Display Configuration Options
- Display Only Eligible Offerings for Enrollment

Identify and Resolve In-Progress Life Events Before Open Enrollment

On a given day, you can process only one life event in a single benefits relationship for a participant. The Evaluate Scheduled Event Participation process doesn't start an open event for a participant who has an existing life event that isn't fully processed.

Therefore, process and resolve in advance all existing life events that would conflict with the open life event.

To resolve yet-to-close, in-progress life events:

1. Identify incomplete life events.
2. Resolve incomplete life events.
3. Identify and finalize open action items.
4. Evaluate and resolve detected temporal events.

Identify Conflicting and Incomplete Life Events

Incomplete and conflicting life events include events that are:

- Detected for participants, but not yet processed
- Started or processed, but not closed
- Suspended, awaiting fulfillment of action items
- Detected by temporal processing

To identify participants with incomplete events that require resolution, use one of these reports:

- On the Evaluation and Reporting work area Life Events tab, search by specifying the event status and other report parameters.
  Example: You can search for all life events in the Detected status and view by legal employer.
  Click the **Details** button to see the list of participant names for each employer.
- View the Totals by Life Event summary report for life events that aren't processed.
  in the Reports and Analytics work area, search for the Participant Enrollment Results report and click **More**.

Resolve Life Events

To resolve the in-progress life events for each participant, use the Person Life Events task in the Benefits Service Center page. Follow these steps:

1. On the Potential Life Events tab, resolve all life events in the **Detected** or **Unprocessed** status by taking one of these actions:

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      o   Delete the life event.

      o   Process the life event.

      o   Void the life event, if it doesn't require processing, by changing the status to **Voided**.

2. On the Life Events tab, resolve the life events that are in the **Started** status, as shown in the following table.:

Enrollment Period Passed?	Available Resolution Actions

Yes	Close the life event.
	
	   a. Select the started event.
	   b. Select the Close action.
	   c. Specify a date.

No	**a.** Process the life event for the participant.
	   b. Allow enrollment if applicable.
	   c. Process the Open event separately for these participants.

Note: You can also use the Close Enrollment process in the Election Processes section of the Evaluation and Reporting Work area to close enrollment for a large group of participants. However, even though you closed enrollment for the prior event, any suspensions caused by unfulfilled action items conflict with open event creation.

Identify and Finalize Open Action Items and Suspensions

While a participant has a life event with enrollment suspended because of an unfulfilled action item, the next life event can't process for that participant. Therefore, you must resolve and close the open and suspended action items for each participant before you process the open event.

To finalize open action items and suspensions:

1. In the Evaluation and Reporting work area, run the Manage Action Items process.

   View the process report to see a list of participants with pending action items.
2. Follow up with those participants to complete their action items.
3. On the Enrollments page in the Benefits Service Center page, click **Manage Enrollment Activities**.
4. Depending on what item the participant is fulfilling, select the election and in the Enrollment Activities section:

         o   Enter and save the dependent or beneficiary information.

         o   Enter and save the received date for the certification.

5. On the Action Items tab, confirm that your action or certification shows as completed and the date of completion.
6. Close the life event.

Evaluate and Resolve Temporal Events

The Evaluate Scheduled Event Participation process can detect life events triggered by temporal events, such as age or salary change, based on selected process parameters.

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If the event date of a detected temporal event is prior to the open event date, the open event fails to process for that participant. If your organization uses temporal processing to create detected events, you can minimize such conflicts:

1. Run the Evaluate Temporal Event Participation process a few days before open event processing.
2. Resolve as many of the detected temporal events as possible before processing the Open event.

FAQs for Open Enrollment Preparations

How can I disenroll all participants from a plan?

Use the Manage Eligibility Profiles task to create an eligibility profile. You can configure it to exclude participants who satisfy the eligibility profile. Then, attach the eligibility profile to the plan.

In the benefits service center, when you process the relevant life event and eligibility is evaluated, all participants will be disenrolled from the plan.

Another way is to configure any life event that is linked with the plan and set the enrollment code to **Current - lose only; new - nothing**. When you process that life event, all participants will be disenrolled from the plan.

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7 Manage Open Enrollment

Overview of Benefits Open Enrollment

The benefits open enrollment process comprises three phases: preparation, the enrollment period, and post enrollment activities. This chapter provides a sample timeline, checklists, and instructions to guide you through the phases of open enrollment.

Open Enrollment Period Opportunities

The open enrollment period is an opportunity for eligible participants to:

- Enroll in a plan if not currently enrolled
- Change coverage from one plan to another
- Change enrollment status of eligible family members
- Decline coverages

Open enrollment is also an opportunity for your organization to:

- Modify plan configuration
- Update rates
- End benefits offerings
- Start new benefits offerings

Sample Open Enrollment Timeline

This sample timeline and the instructions in this chapter assume the following dates and rules:

- Open enrollment elections are effective on the event date, January 1.
- Coverages and rates start on the event date, January 1.
- Previous year coverages and rates end one day before the event date.

You must thoroughly test the open enrollment procedures using your configuration if either of the following conditions is true:

- Your organization's open enrollment is effective on any other date within the year.
- You apply different coverage and rate start and end date rules to meet your business requirements.

The following timeline outlines suggested activities before, during, and after an open enrollment period that lasts throughout the month of November.

Month	Details
September and October	Update plan configuration

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Month	Details
	Run a trial open enrollment: • Test performance • Test self-service enrollment
November 1	Run the open event processing: • Evaluate Scheduled Event Participation • Enroll in Default Benefits
Throughout November	Elect benefits: • Participants enter elections using the self-service guided process. • Benefits administrators enter elections in the Benefits Service Center page.
December 2 -- 15	• Benefits administrators can still enter elections as necessary by setting a session effective date within the enrollment period of November.
December 15	Run the Close Enrollment process to close all elections.

Phase One Checklist: Before the Open Enrollment Period Starts

Follow these steps to prepare for the open enrollment period:

Task	Work Area
Check payroll calendars.	Contact payroll administrator
Check plan year periods.	Plan Configuration
Assess and update eligibility profiles and derived factors.	Plan Configuration
Prepare program and plan configurations: • End existing plans no longer offered. • Add new plans. • Add new options to existing plans.	Plan Configuration
Add the open scheduled life event to the program or plan not in program.	Plan Configuration
Manage standard and variable rates: • Add rates to new benefits objects. • Modify rates on existing benefits objects.	Plan Configuration

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Task	Work Area
• Modify elements on existing rates. • Modify flex credit offerings.	
Start new coverage for flexible spending accounts (FSA)	Plan Configuration
Configure enrollment and rate display.	Plan Configuration
Identify and resolve in-progress life events: • Identify conflicting and incomplete life events • Identify and finalize open action items and suspensions • Evaluate and resolve temporal event participation	Evaluation and Reporting Enrollment
Process trial open enrollment.	Evaluation and Reporting
• Test trial open enrollment.	Enrollment Me - Benefits (Self-Service)
• Analyze and tune performance.	Evaluation and Reporting

Phase Two Checklist: During the Open Enrollment Period

Follow these steps to administer the open enrollment period:

Task	Work Area
Generate the Participant Enrollment Results report.	Reports and Analytics
Manage the open enrollment period. • Run the Evaluate Scheduled Event Participation and Enroll in Default Benefits processes.	Evaluation and Reporting
• Monitor processes and resolve errors.	Evaluation and Reporting
• Enter enrollments.	Me - Benefits (Self-Service) Enrollment

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Task	Work Area
• Process life events that occur during the open enrollment period.	Enrollment
Manage and close the open enrollment window.	Evaluation and Reporting
Generate the Participant Enrollment Results report.	Reports and Analytics

Phase Three Checklist: After the Open Enrollment Period Ends

Follow these steps to complete the open enrollment activities:

Task	Work Area
Verify enrollment.	Enrollment
Investigate incorrect enrollments.	Enrollment
Close action items and certifications.	Enrollment
Enter overrides.	Enrollment
Inactivate plans that are no longer offered.	Plan Configuration
Process life events that occur after open enrollment.	Enrollment

Related Topics
- Set Up and Process an Open Enrollment Period

Process Trial Open Enrollment

One month before your actual open enrollment, run a trial open enrollment in a test instance to tune performance and validate plan configuration for the upcoming plan year.

At this point, in your production instance, you have:
- Prepared your programs and plans
- Updated your standard and variable rates
- Configured enrollment and rate display

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- Configured flexible spending account plans to start new coverage
- Closed in-progress life events
- Finalized and closed action items
- Processed and resolved temporal event participation

Now, you create a separate test instance from this production instance with all or a representative sample of your participants and manage your trial open enrollment.

The trial open enrollment mimics many aspects of the actual open enrollment process, as shown with the following basic high-level tasks:

Task	Work Area	Phase I Trial Open Enrollment	Phase II Actual Open Enrollment
Generate the Participant Enrollment Results report.	Reports and Analytics	Identify test participants.	Compare enrollments before and after open enrollment. Identify any in-progress life events and resolve them before processing open enrollment.
Run the Evaluate Scheduled Event Participation and Enroll in Default Benefits processes.	Evaluation and Reporting	Yes	Yes
Monitor processes and resolve any errors.	Evaluation and Reporting Enrollment	Yes	Yes
Identify and fix performance issues.	Evaluation and Reporting	Yes	Refine as required.
Iteratively, check plan configuration and rates using sample employees and fix errors as required. 1. Back out the open life event. 2. Correct setup. 3. Rerun the open event.	Evaluation and Reporting Enrollment Self-Service Plan Configuration	Yes	Validate on an exception basis.
Enter enrollments.	Self-Service Enrollment	On a test basis	Yes

Identify and Fix Performance Issues

It's difficult to determine the amount of time it takes to process a single person due to the variables that can impact performance. These variables include:

- Complexity in plan configuration
- Hardware
- Network usage

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- Optimized table usage

- General database tuning

Poor performance times often result from not running table statistics on a regular basis. In the Evaluation and Reporting work area:

- Check that the threads parameter is set to the number of processors for the computer, at a minimum.

- Check that the chunk size is appropriate to the quantity of rows that processes are writing to the database.

  Use a smaller value when writing many rows, such as when processing participants and converting annual enrollments.

- Analyze and adjust your maximum error threshold as required using the Manage Batch Parameters task.

  Example: If you process your trial open enrollment using your entire participant population, processes might fail because they reached the maximum errors threshold.

- Analyze all index column statistics and gather column, schema, and table statistics before the following processes.

  - Evaluate Scheduled Event Participation
  - Enroll in Default Benefits
  - Close Enrollment

Related Topics
- How Participants and Administrators Enter Enrollments
- Scheduled Event Participation Process Options
- Monitor Processes and Resolve Errors

Manage Open Enrollment Period

Process your open scheduled event so that participants can make their benefits elections.

At this point, you have:

- Completed your trial open enrollment where you validated your:

  - Programs and plans
  - Standard and variable rates
  - Enrollment and rate display configuration

- Configured flexible spending plans to start new coverage

- Closed unprocessed life events

- Finalized and closed action items

- Processed and resolved temporal event participation

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During your trial open enrollment, you focused on performance and validation. Now during your actual open enrollment period, you focus on monitoring and managing the:

- Open enrollment period
- Participant enrollments
- Intervening life events

Task	Work Area	Phase I Trial Open Enrollment	Phase II Actual Open Enrollment
Generate the Participant Enrollment Results report.	Reports and Analytics	Identify test participants.	Compare enrollments before and after open enrollment. Identify any in-progress life events and resolve them before processing open enrollment.
Run the Evaluate Scheduled Event Participation and Enroll in Default Benefits processes.	Evaluation and Reporting	Yes	Yes
Monitor processes and resolve any errors.	Evaluation and Reporting Enrollment	Yes	Yes
Identify and fix performance issues.		Yes	Refine as required.
Iteratively, check plan configuration and rates using sample employees and fix errors as required. 1. Back out the open life event. 2. Correct setup. 3. Rerun the open event.	Evaluation and Reporting Plan Configuration	Yes	Validate on an exception basis.
Enter enrollments.	Self-Service Enrollment	On a test basis	Yes
Process life events that occur during the open enrollment period.	Enrollment	Not applicable	Yes
Manage the open enrollment window.	Evaluation and Reporting	Not applicable	Yes
Close open enrollment.	Evaluation and Reporting	Not applicable	Yes

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Related Topics

- How You Manage an Open Enrollment Window
- How Participants and Administrators Enter Enrollments
- Scheduled Event Participation Process Options
- Monitor Processes and Resolve Errors
- Examples of Processing Life Events That Occur During Open Enrollment

Scheduled Event Participation Process Options

When preparing to submit the Evaluate Scheduled Event Participation process in the Evaluation and Reporting work area, pay particular attention to setting the following key parameters.

Parameter	Comments
Effective Date	Select the first day of your open enrollment period, for example, November 1, 2015.
Detect Temporal Events	Regardless of whether you decide to detect all, some, or no temporal life events, during processing the open event evaluates each participant's: • Age • Length of service • Salary • Other temporal factors
Person Type	To exclude terminated participants, select **Employee** or **Participant**.
Life Event Occurred Date	Select the date as of which to evaluate eligibility and determine rates. For the open event, this date is typically the first day of the new benefit year, for example, January 1, 2016.
Life Event	Select **Open**.
Apply Defaults	Select **Yes** to run the Enroll in Default Benefits process automatically after the Evaluate Scheduled Event Participation process completes so that participants can view their default enrollments when they enroll. Select **No** to apply default enrollments later using the Enroll in Default Benefits process. Example: You might run the process after participants finish electing their enrollments and before you close the enrollment period.
Audit Log	Select **Yes** only for troubleshooting. It causes the application to generate detailed audit logs. Processing stops for any process generating an audit log, after that log becomes full.

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Parameter	Comments
	Select **No** to generate only summary information if you are processing your entire participant population.

> **Tip:** To limit the population processed, you can set additional parameters, such as Benefits Group, Location, Legal Entity, and others, or write a person selection formula.

Process Default Enrollments

Depending on how you configured your programs and plans, the Enroll in Default Benefits process does the following:

- Enrolls participants using their current enrollments if they make no explicit election choices
- Assigns participants new default enrollments
- Changes current elections to a new default election

  Example: You have a dependent care spending plan configuration that sets current participants to nothing or a waive plan or option.

Monitor Processes and Resolve Errors

When processing open enrollment, always check the process-generated log files to identify and fix any errors in your trial and production instances.

- You identify and fix many issues during the trial open enrollment, which reduces, but does not eliminate, issues raised during the actual open enrollment.
- Run the Restart Participation Evaluation and Back Out Life Events processes, as required.

Use the Evaluation and Reporting work area.

This topic covers:

- Monitoring processing
- Restarting participation evaluation
- Backing out life events

Monitor Processing

Use the Monitor Process Request section of the Overview page to view the percentage of completion for processes and the process-generated logs and reports.

Example: The Evaluate Scheduled Event Participation process:

- Log files identify who failed and how to fix the issue
- Summary report provides an overall summary of the following:
  - Participants that processed successfully, in error, or were unprocessed

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    ○   Open life events with a Started status

If you can't run a process that generates an audit log, then in the Maintenance Processes section:

1. Run the Purge Participation Evaluation Audit Data process.

   The purge process protects ongoing activities by purging data only from completed batch processes. Purging the audit logs does not affect life event or election information.
2. Restart the interrupted process.

> **CAUTION:** You want to generate audit logs only during trial open enrollment. Check that production processes do not generate audit logs, especially for batch processes that use the entire participant population.

Restart Participation Evaluation

Run the Restart Participation Evaluation process after fixing errors, such as errors resulting from reaching the maximum allowable errors or full audit logs.

Back Out Life Events

If the open event must be backed out for the entire participant population or a select group of participants, run the Back Out Life Events process for the Open life event. You do this most typically during the trial open enrollment to retest edited plan configurations.

When backing out open life events, set the resulting life event status to:

- **Unprocessed** to include it for future processing

- **Voided** to exclude it from any further processing

Life Events That Occur During Open Enrollment Period

You must act on any intervening life events that occur during an open enrollment period. This topic explains what causes intervening life events, provides an example, and lists reports to detect them.

Causes of Intervening Life Events

Any of the following actions can generate intervening life events based on their setup:

- The Evaluate Temporal Event Participation process detects temporal life events for workers, such as grade or age changes.

- The administrator or participant adds a contact, for example, a spouse or child, using the Contacts page.

- The administrator adds a life event manually using the Person Life Events page in the Benefits Service Center page.

Example of Intervening Life Event

Scenario: During the open enrollment period, a participant experiences a gain dependent life event that affects eligibility for electable choices.

The administrator or specialist must:

1. Allow the life event to back out the open event.
2. Take steps to process the intervening life event.
3. Reprocess the open event.

Reports to Detect Intervening Events

Use the sources in the following table to review evaluation processing results and identify intervening life events:

Population Processed	Life Event Report Location
All participants or selected population	Life Event tab on the Summary page of the Evaluation and Reporting work area 1. Search for events in the Detected status with other report parameters. 2. Click **Details** to view the participant list.
Specific participant	Use the Person Life Events task in the Benefits Service Center page 1. Select the **Potential Life Events** tab. 2. View any detected or unprocessed life events for that worker.

Related Topics
- Examples of Processing Life Events That Occur During Open Enrollment

Examples of Processing Life Events That Occur During Open Enrollment

This topic provides three intervening life event scenarios along with the steps to process and resolve each event.

The following intervening life event scenarios share common open enrollment dates:

- Life event changes electability
- Life event doesn't change electability
- Life event added manually

You can remove the processing of a life event performed by participation evaluation processing, and you can prevent further processing of a life event.

- Close a life event to prevent further processing.
- Back out a life event to roll back any updates generated by the participation evaluation processing, such as updates to eligibility, rates, and automatic de-enrollments

- Void a life event to roll back any updates and prevent further processing by participation evaluation processing.

Common Open Enrollment Dates

All examples in this topic assume the following main dates:

- The open enrollment period is from November 1 to 28, 2015.

- The new plan year starts January 1, 2016.

- Coverage and rates for elections made during the open enrollment period start on January 1, 2016.

Life Event Changes Electability

Scenario:

- A participant gains a spouse on November 20, 2015 and reports the event to the benefits administrator who updates the contact information.

    - Evaluation processing detects the gain dependent life event.

    - The life event provides new electable choices, with rates and coverage effective November 20, 2015.

- New electable choices are also currently available for open enrollment.

To resolve this event:

1. Evaluate the gain dependent life event for the participant in the Benefits Service Center using the Process Life Event task.

   Allow the life event to back out the open enrollment event for that participant. The status of the life event changes to Started.
2. Ask the participant to make elections based on the gain dependent life event.

    - Participants open self-service enrollment by selecting **Benefits** under Me on the Navigator menu.

    - Benefits professionals can make elections on the participant's behalf in the Benefits Service Center using the Enrollments task.
3. Close the gain dependent life event for the participant in the Benefits Service Center using the Life Events tab of the Person Life Events task.

   The status of the life event changes to Processed.
4. Reprocess the open enrollment for that participant using the Process Open Enrollment task.

   Ask the participant to make elections.

Life Event Doesn't Change Electability

Scenario: A participant changes address on November 13, 2015, but remains in the same postal code.

- The process detects an address change life event for the participant and backs out the open event.

- You know that this address change doesn't affect rates, coverages, or electable choices, so you want to void it.

To resolve this event, in the Benefits Service Center:

1. Void the address change event using the Person Life Events task.

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    a. On the Life Events tab, select the event.

    b. On the Actions menu, select **Back out event**.

    c. In the **Potential Life Event Status** field, select **Voided**.

2. Reprocess open enrollment for that participant using the Process Open Enrollment task.

   The reinstatement rule restores any open enrollment elections already made.

Life Event Added Manually

Scenario: A participant gains a child on November 20, 2015.

- The participant reports the event to the benefits specialist.
- The specialist:
  a. Adds a gain dependent life event manually in the Benefits Service Center using the Person Life Events task.
  b. Sets the life event status to Manual.

To resolve this event, in the Benefits Service Center:

1. Change the status of the gain dependent life event to **Unprocessed**.

   Use the Potential Life Events tab of the Person Life Events task.

2. Evaluate the gain dependent life event using the Process Life Event task.

   o Allow the gain dependent life event to back out the open enrollment event for that participant.

   o The status of the gain dependent life event changes to Started.

   o The event provides new electable choices, with rates and coverage effective on the date of childbirth.

3. Continue as in steps 2 -- 5 of the first scenario, Life Event Changes Electability.

How Participants and Administrators Enter Enrollments

Multiple methods exist for entering enrollments and the open enrollment process typically uses all of them.

- Participants make their elections using the self-service enrollment guided process.

  If participants have election opportunities, they can click **Me - Benefits** on the Home page.

  > **Tip:** In your trial environment, you must first select **Parameter Display** on the Manage Self-Service Enrollment Configuration page before you can make elections as a participant.

- Benefits administrators enter enrollments for specific participants in the Enrollments work area.
  a. Benefits professionals can generate a Benefit Enrollment document on the Manage Person Life Events page and send it to participants.
  b. Participants can use the document to make their election choices and return the completed document.
  c. Benefits professionals use the completed document to enter the participant elections into the Enrollments page in the Benefits Service Center page.

- Benefits administrators can make default enrollments for participants who didn't elect any benefits. They use the Enroll in Default Benefits process in the Evaluation and Reporting work area.

  The Enroll in Default Benefits process might have already run automatically depending on whether you elected to apply defaults as part of the Evaluate Scheduled Event Participation process.

Set Up and Process an Open Enrollment Period

This example contains a basic scenario with setup steps to define an open enrollment period and run the process to evaluate scheduled event participation.

The following table summarizes key decisions in this scenario.

Decisions to Consider	In This Example
Are there any new offerings that you want to add for the open enrollment period?	Yes, add the InFusion Vision plan to the InFusion Wellness program.
What are the start and end dates for the open enrollment period?	Starts November 1, 2015. Ends November 15, 2015.
When do you want eligibility to be evaluated and new rates determined based on elections?	Start date of the new plan year, which is January 1, 2016 in this example.
When do you want the new coverage to start?	Start date of the event
When do you want the previous coverage to end?	One day before the event
When do you want the new rates to become effective?	Start date of the event
When do you want previous rates to end?	One day before the event

Task Summary

1. Add the new plan to the program.
2. Define the open enrollment period for the program.
3. Process the open event as of the first day of the open enrollment period.
4. Check the enrollment page of a sample worker to verify that all electable choices appear as expected.

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Prerequisites

In the Plan Configuration work area, ensure that you created a:

1. Plan type called InFusion Wellness

    Use the Manage Plan Types task to create the plan type.
2. Program called InFusion Wellness with the following configuration:

Field	Value
Program Type	Core

Year Periods	Year periods for the current plan year and the new plan year:
	
	  ○ January 1, 2015 to December 31, 2015
	
	  ○ January 1, 2016 to December 31, 2016

3. Plan called InFusion Vision with the following configuration:

Field	Value
Plan Type	InFusion Wellness
Usage	In program

Year Periods	Year periods for the current plan year and the new plan year:
	
	  ○ January 1, 2015 to December 31, 2015
	
	  ○ January 1, 2016 to December 31, 2016

Adding the Plan to the Program

Use the Plan Configuration work area to complete this task with the default values for fields unless the steps specify other values.

1. In the Tasks panel drawer, click **Benefit Program Details** to open the Manage Benefit Program Details.
2. In the Search Results table, click **InFusion Wellness**.
3. In the **Session Effective Date** field, select the first day of the current plan year, for example, January 1, 2015.
4. In the Plans and Plan Types section, click **Select and Add Plan**.

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5. Complete the fields, as shown in this table.

> **Note:** The Basic Details page of programs shows only the active plans and plan types in a program by default. You can display both active and inactive plans by selecting **View All Plans** from the View menu.

Field	Value
Sequence	Enter a unique sequence based on the sequence of existing plans in your program.
Plan	InFusion Vision
Status	Pending

6. Click **OK** to return to the Edit Program Basic Details page.
7. Click **Save**.
8. Review the effective start date of the plan that you added.

   The date should be the first day of the current plan year, for example, January 1, 2015.
9. In the **Session Effective Date** field, select the first day of the new plan year, for example, January 1, 2016.
10. In the Plans and Plan Types section, select the InFusion Vision plan.
11. On the Edit menu, select **Update**.
12. Set the plan status to **Active**.
13. Click **OK** to return to the Edit Program Basic Details page.
14. Click **Save**.
15. Review the status and effective date of the InFusion Vision plan.

   The status should be Active and the effective date should be the first day of the new plan year, for example, January 1, 2016.

Defining the Open Enrollment Period

1. Click the **Enrollment** step.
2. Select the InFusion Wellness program in the hierarchy.
3. On the Scheduled tab, select **Open**, the default event is Administrative.
4. In the Periods section, click **Create**.
5. Complete the fields, as shown in this table.

Field	Value
Enrollment Period Start Date	November 1, 2015
Enrollment Period End Date	November 15, 2015
Close Enrollment Period Date Rule	When enrollment period ends

Field	Value
Assigned Life Event Date	January 1, 2016
Year Period	January 1, 2016 to December 31, 2016
Coverage Start Date	Event
Previous Coverage End Date	One day before the event
Rate Start Date	Event
Previous Rate End Date	One day before the event

6. Click **OK** to return to the Edit Program Enrollment page.
7. Click **Save and Close** to return to the Programs tab.

Processing the Open Event

Use the Evaluation and Reporting work area to complete these steps with the default values for fields unless the steps specify other values.

1. Select the **Processes** tab.
2. In the Evaluate Scheduled Event Participation row of the Evaluation Summary Process Life Events table, click the **Submit** icon button.
3. In the Parameters section, complete the fields as shown in this table.

Field	Value
Effective Date	The first day of the open enrollment period, for example, November 1, 2015
Life Event Occurred Date	The first day of the new plan year, for example, January 1, 2016
Life Event	Open

4. Select additional parameters to limit processing to a test population.
5. Click **Submit**.
6. In the Monitor Process Request section, search for the process that you submitted and verify that it completed successfully.
7. Click the **View Report** icon button of the process that you submitted.
8. On the process details page, check the Results section to see how many worker records processed successfully and how many processed with errors.
   Click the number to view details about the specific worker records that processed.

9. In the Benefits Service Center page of any worker in the processed test population:

    a. Click the **Enrollments** task.
    b. Verify that the new InFusion Vision plan appears as an electable choice.

Related Topics
- How Participants and Administrators Enter Enrollments
- Scheduled Event Participation Process Options
- Prepare Program and Plan Configuration for Open Enrollment
- Monitor Processes and Resolve Errors

How You Manage an Open Enrollment Window

The day after your open enrollment period ends, run the Close Enrollment process in the Evaluation and Reporting work area. If necessary, you can extend or adjust the open enrollment window.

Tip: If you haven't already done so, run the Enroll in Default Benefits process before closing enrollment.

Close Enrollment

To close enrollment:

1. Optionally, run the Close Enrollment process with the:

    ○ **Validate** parameter set to **Roll back - database will not be updated**
    ○ **Audit Log** parameter optionally set to **Yes**.

    Analyze the generated logs and reports. Investigate and fix any errors.
2. Run the Close Enrollment process with the

    ○ **Validate** parameter set to **Save - database will be updated**
    ○ **Audit Log** parameter set to **No**

Extend Open Enrollment

You can extend an open enrollment period when unexpected delays require additional days for certain participant population segments, or the entire population, to complete their annual enrollment selections.

In the Evaluation and Reporting work area use the Adjust Open Enrollment Window process to:

- Update the enrollment period end date, processing end date, and default enrollment date
- Provide an appropriate number of extension days

The generated log file displays the details of the new enrollment period for all participants.

If you ran the Close Enrollment process and you now want to reopen the event, you can run the Reopen Life Event process, selecting the event and the population parameters.

> **Tip:** Use the Reopen Life Event process, selecting the **Open** event, with the Adjust Open Enrollment Window process to extend the annual enrollment window after reopening a closed Open scheduled event.

Extend Open Enrollment Window

You can extend the open enrollment window without closing any open life events to give more time to employees to make their choices.

You can use the **View Enrollment Opportunities** option in Benefits Service Center to extend the open enrollment window. Here's how you do it:

1. On the Home page, click **Benefits Administration** > **Enrollment**, to open the Benefits Service Center work area.
2. Open the Benefits Summary page of the participant in the Benefits Service Center.
3. In the Evaluated Life Event section, click **Actions** (ellipses), **View Enrollment Opportunities**.
4. Click **Edit** in the Enrollment Opportunities section, follow the prompts to extend the dates, and save the changes.

How You Manage Tasks After the Open Enrollment Closes

Now that your open enrollment period is closed, you're ready to perform the following tasks in the production instance.

- Verify enrollment.
- Investigate incorrect enrollments.
- Close action items and certifications.
- Enter overrides.
- Inactivate plans that are no longer offered.
- Process intervening life events that occur after the open enrollment period.

Verify Enrollment

Generate the Participant Enrollment Results report in the Reports and Analytics work area and compare it with the same report that you generated before you opened enrollment.

Use the preenrollment and postenrollment reports as well as the reports on the Life Events tab of the Evaluation and Reporting work area to verify that:

- Participants are no longer enrolled in plans that aren't offered in the new plan year

- Eligibility evaluated correctly

- Rates and premiums changes are reflected for the new plan year

- Default plan and option enrollments processed correctly

- Coverage restarted for flexible spending plans

- Enrollment included any other plan configuration changes

- Element entry values are correct for benefit elements

Also verify interim assignments and suspensions, action items and certifications, payroll results, and third-party interfaces.

Investigate Incorrect Elections

For any elections that failed during open enrollment:

- Analyze the issue to determine if the failure occurred for one participant, many, or all.

- Review the setup of the benefit objects involved to determine if there:
  - Was an oversight in making plan configuration changes
  - Were incorrect data on an employee

Close Action Items and Certifications

To indicate that participants have fulfilled outstanding action items and certifications:

1. On the Enrollments page in the Benefits Service Center page, click **Manage Enrollment Activities** to open the Manage Enrollment Activities page.
2. Depending on what item the participant is fulfilling, select the election and in the Enrollment Activities section enter and save the:
   - Dependent or beneficiary information
   - Received date for the certification
3. On the Action Items tab, confirm that your action or certification shows as completed and the date of completion.
4. To close unresolved action items and certifications, in the Evaluation and Reporting work area run the Manage Action Items process.

Note: The application doesn't process the next life event until all unresolved action items for the prior life event are resolved, even if the prior life event has a Closed status.

Enter Overrides

In the Benefits Service Center page, use the following tasks:

Task	Description	Examples
Eligibility Override	Maintain override information for a potential participant who's otherwise ineligible for a particular program or plan.	- A few employees live outside of a service area, but work inside the service area and

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Task	Description	Examples
		your provider allows for this eligibility override. • Special approval has been given to continue coverage for dependents who exceed the plan age limits.
Enrollment Override	Override election information. You might have to override eligibility first, to specify that a participant can enroll in a plan or option for which the participant was originally ineligible.	• An employee received a special rate for a certain length of time. • Certain retirees have grandfathered rates that you don't want to change during the annual open enrollment.

> **CAUTION:** Exercise caution when you override eligibility or enrollment so that the enrollment record doesn't extend indefinitely, for example, when you terminate an employee. Ensure that you enter the through date when you override eligibility, and the coverage end date, when you override an enrollment record.

Inactivate Plans That Are No Longer Offered

To inactivate plans:

1. Disenroll all participants from the plans and options that are no longer offered.
2. Verify in the Plan Configuration work area that these plans and options inactivate at the start of the new plan year.

For any plans and options that you haven't already scheduled to inactivate:

1. Set the session effective date to the first day of the new plan year.
2. Change the status to **Inactive**.

Process Intervening Life Events That Occur After the Open Enrollment Period

You must act on any intervening life events that might occur after an open enrollment period, and before the start date of the new plan year.

Example: A participant experiences an address change life event after the open enrollment period. As a result, the participant:

- Might no longer be eligible for the elections made during the open enrollment period

- Might be eligible for other offerings

The benefits administrator must:

1. Process the intervening life event and allow it to back out the open event.
2. Ask the participant to make necessary elections if required.
3. Reprocess the open event as of any date within the open enrollment period if the intervening life event affects the eligibility of the open enrollment elections.
4. Work with the participant to make or update elections using the Benefits Service Center page.

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Related Topics
- Examples of Processing Life Events That Occur During Open Enrollment

Remove Incorrect Person Data in Non-Production Environments

You use the Delete Person Benefits diagnostic report to remove incorrect data for a person in a nonproduction environment.

You need to first run the report in the Validation mode. Then, you run it in the Commit mode. In the Validation mode, you get to review the person's life event data. It also generates an authorization key. Then, you run the report in the Commit mode by using the authorization key to remove the data permanently.

1. Click the signed in user's icon, and click **Run Diagnostics Tests** in the Troubleshooting section.
2. Search for and run the **Delete Person Benefits Diagnostic Test** report using these parameters:

Field	Details
Person Number	Enter the person number whose data you want to view.
Commit Mode	N, to indicate that you don't want to commit the data.
Authorization Key	Leave this field empty.
Delete Benefit Relations	N, to indicate that you don't want to delete benefits relationships at this time.

3. When the report is available, click the **Report** icon, and make a note of the authorization key. You need this key when you run the report again, in the commit mode to delete the data.

   Note: The authorization key is valid only for 1 hour.

4. Search for and run the **Delete Person Benefits Diagnostic Test** report using these parameters:

Field	Details
Person Number	Enter the person number whose data you want to delete.
Commit Mode	Y, to indicate that you want to commit the data.
Authorization Key	Enter the authorization key that you received when you ran the report in the validation mode.
Delete Benefit Relations	Enter Y only if you want to delete the data from the benefits relationship tables too. Otherwise, enter N.

5. When the report is available, click the **Report** icon to see the summary of data that you deleted.

8 Billing

Overview of Billing in Benefits

An enterprise providing a benefit to a participant might want to bill the participant directly instead of deducting the cost from the payroll. Such participants might include retirees or those who are on absence without pay.

The enterprise might require that the participant make payments to keep the benefit. Use the billing tasks to generate bills and record payments as shown in the following figure.
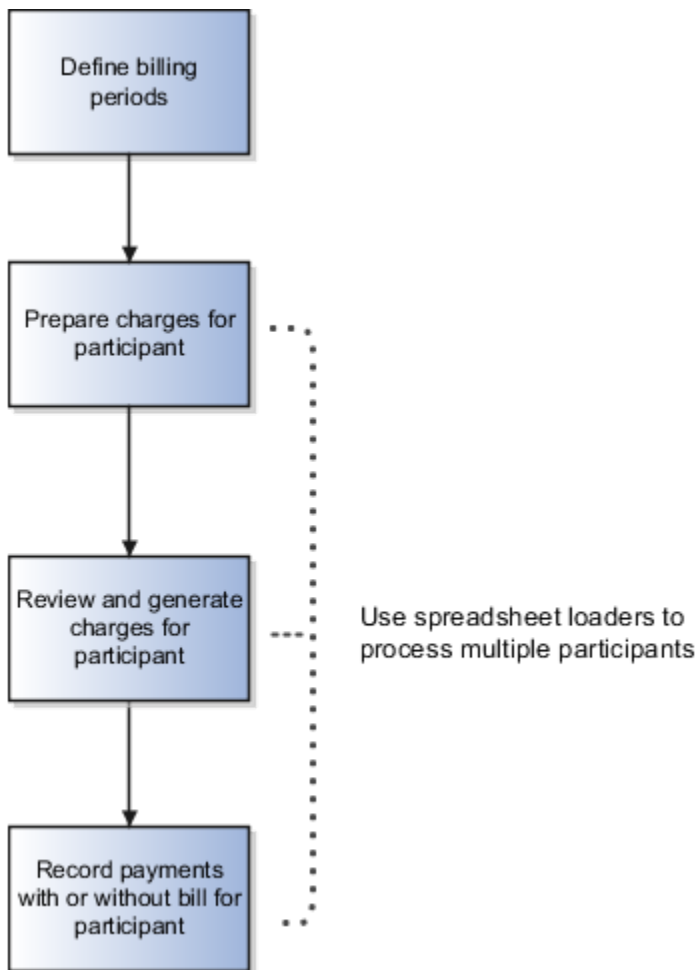
Defining Billing Periods

Use the Year Periods and Billing Calendars task available in the Plan Configuration work area. You must create a billing calendar before you generate bills for participants. Billing calendars contain monthly billing periods, payment due dates, and overdue dates, for the number of years that you specify. Typically a single billing calendar is sufficient for your billing requirements. However, depending on your enterprise policy, you might want to maintain separate calendars for different types of participants, such as retirees, and employees on unpaid leave.

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Recording Payments for Individual Participants

When you receive payment from the participant for a bill, you use the Benefit Coverage Payments task to record the payment. You can record partial payments, complete payments, and overpayments for a generated bill. The application automatically allocates the amount you record to any open charges. The allocation is done sequentially, on the basis of cost. You can also record payments without a bill, especially when participants make payments before you generate the bill. Once you record a complete payment, the bill status changes to Fully Paid.

Using Processes to Prepare and Generate Bills for Multiple Participants

You can prepare and generate charges for multiple participants simultaneously using the following processes that exist in the Evaluation and Reporting work area, Billing Processes section:

- Prepare Benefit Coverage Charge Data
- Generate Benefit Coverage Charges

Recording Payments for Multiple Participants

At a high level, follow these steps to record payments for multiple participants:

1. Use the Upload Billing Payments workbook available in the Person Data Loaders tab of the Evaluation and Reporting work area. You enter your payments for multiple participants in this worksheet and upload.
2. Use the Allocate and Reconcile Payments process in the Evaluation and Reporting work area to process the payments you entered in the worksheet. If required, use the Benefit Coverage Payments task to review the payments for a specific participant.

Related Topics
- Guidelines to Use Benefits Billing Processes

Guidelines to Use Benefits Billing Processes

The benefits billing processes are available in the Evaluation and Reporting work area, Processes tab, Billing Processes section.

Consider the following points before you run the processes:

- Prerequisites to prepare and generate charges for multiple participants
- Process sequence to prepare and generate charges
- Process for allocating and reconciling payments

Prerequisites to Prepare and Generate Charges for Multiple Participants

You must create a benefits group and assign it to participants whom you want to generate charges for a billing period:

1. Create benefit groups using the Benefit Groups task in the Plan Configuration work area.
2. Use the Upload Person Benefit Groups task in the Evaluation and Reporting work area to assign that benefits group to multiple participants. When you run the processes, you select the benefits group to process all the participants in that group.

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Process Sequence to Prepare and Generate Charges

You must run the processes in the following order:

1. Prepare Benefit Coverage Charge Data process
2. Generate Benefit Coverage Charges process

Before you run the Generate Benefit Coverage Charges process for a participant, you can still review the charges and make changes using the Benefit Coverage Charges task.

Process for Allocating and Reconciling Payments

After you record and upload payments or adjustments using the Upload Billing Payments workbook, you must run the Allocate and Reconcile Payments process. This process allocates and adjusts the payments appropriately for all the records that were uploaded using the workbook. You can verify the updated payment records using the Benefit Coverage Payments task.

Apply Credits to Participants

You can apply credits to participants against any outstanding bill when you review their existing credit balances in Benefits Service Center.

For example, the benefits administrator generates health coverage charges of $500 for June. The participant overpays $1000 and expects the excess credit of $500 to be used for the July bill. You can use the new Pay with Credits option on the Billing page of Benefits Service Center to apply the credits.

For multiple credit adjustments, you can use the Upload Billing Payments workbook available in the Person Data Loaders tab of the Evaluation and Reporting work area.

Here's how you apply credits to participants through Benefits Service Center:

1. On the Home Page, click **Benefits Administration** > **Enrollment**.
2. Search for the participant.
3. Select the **Billing** task from the side panel.
4. In the Payments section, select **Add**, and click **Pay with Credits**.
5. Follow the prompts to apply credits. You can apply only the amount that is less than or equal to the previous credits. The balance amount after applying the credit appears as the current credit.
6. Click **Save and Close**.

Related Topics
- Upload Bill Payments Using the Integrated Workbook

Refund Excess Credits to Participants

You can refund the excess credit amount against bills.

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The refund amount should be less than or equal to the available credit. Refunds are processed only if the outstanding bills are all fully paid.

For example, a participant was planning to take an approved long-term unpaid leave of absence and overpays some amount for the upcoming bills. The participant later decides not to take their unpaid leave and requests a refund of the extra amount that they had paid. You can use the new Refund option on the Billing page of Benefits Service Center to refund excess credits.

To refund multiple participants, you can use the Upload Billing Payments workbook available in the Person Data Loaders tab of the Evaluation and Reporting work area.

Here's how you refund the excess credit amount:

1. On the Home Page, click **Benefits Administration** > **Enrollment**.
2. Search for the participant.
3. Select the **Billing** task from the side panel.
4. In the Payments section, select **Add**, and click **Refund**.
5. Follow the prompts to refund the excess credits. The refund amount should be less than or equal to the previous credits. The balance amount after the refund appears as current credit.
6. Click **Save and Close**.

Related Topics
- Upload Bill Payments Using the Integrated Workbook

FAQs for Billing

How do benefit coverage payments settle open charges in the record payment page?

When you enter an amount and press TAB, the application settles the highest outstanding bill amount first, and then the rest in descending order of value.

If there are outstanding charges from other billing periods, then the application settles the earliest charges first before settling the latest billing period's charges.

For example, the following charges appear in the Record Payment page:

- InFusion Dental (20 USD) for the billing period of August 2016
- InFusion Eye Care (50 USD) for the billing period of September 2016
- InFusion Medical (200 USD) for the billing period of September 2016

The participant pays 250 USD on October 1, 2016. The application settles the charges as listed in the following table:

Sequence	Offering	Settlement Amount	Reason
1	Dental	20 USD	The application settles this charge first as it is an outstanding charge from an earlier billing period.
2	Medical	200 USD	The application settles this charge next as it is the costliest charge in the latest billing period.
3	Eye Care	30 USD	The application does not settle this charge as the payment is insufficient to settle the charge completely. The amount due is 20 USD.

What happens if the benefits participant overpays or makes a partial payment?

Overpayments appear in the Current Credit field on the Record Payment page. For example, if the bill amount is 95 USD and the participant pays 100 USD, the excess amount of 5 USD appears in the Current Credit field.

The credit is automatically subtracted from subsequent charges and prorated for the rest of the year.

Underpayments appear in the Current Arrears field. For example, if the bill amount is 100 USD and the participant pays 75 USD, the outstanding amount of 25 USD appears in the Current Arrears field. The arrears are automatically added to subsequent bills and prorated for the rest of the year. Any outstanding amount at the end of the year is automatically carried over to the next year and appears in that year's bills.

How can I make adjustments to a benefit participant's due amount?

In the Benefits Service Center page of the participant, open the Benefit Coverage Payments task, Record Payment without Bill or Make Adjustments page. Select the Arrears option and enter the due amount.

If you want to make adjustments to multiple participants simultaneously, use the Upload Billing Payments integrated workbook. This workbook is available in the Person Data Loaders tab of the Evaluation and Reporting work area. This is the same workbook you use to record payments for multiple participants. Then, use the Allocate and Reconcile Payments process to update the payments you recorded. This process is available in the Processes tab, Billing Processes section.

The Review Benefit Coverages Payments page displays the payments or adjustments that you entered in the spreadsheet for a specific participant.

How can I change the billing address of a benefits participant?

The primary address of a participant is the default billing address. You can change the billing address from the Benefits Service Center page of the participant.

Here's how you change the billing address:

1. Open the Benefit Coverage Charges task, Billed Enrollments tab.
2. Check the session effective date.
3. From the Actions menu, click **Update**.
4. Deselect the **Use primary address** check box.
5. Enter the address in the fields that appear, and save your changes.

What's the difference between the hold billing option and the stop billing option?

You select the Hold billing calculation check box to keep charges for a particular offering on hold for that billing period. The check box is available in the Review Benefit Coverage Charges page.

Typically, you might want to hold a plan or bill for a short period of time while you are in discussion with an individual employee or retiree. The charges on hold apply only to a specific billing period. They continue to appear as normal charges in subsequent bills you generate.

The **Stop billing** check box, available in the Billed Enrollments tab, cancels current and subsequent billing for selected plan types. The corresponding charges cease to appear in bills.

Why are some charges missing in benefit coverage bills?

On the Benefit Coverage Charges page, select the billing period and check if the Hold Billing Calculation check box is selected for the charges that aren't appearing. Also, in the Billing Periods tab, check if the Stop Billing check box is selected.

Related Topics
- What's the difference between the hold billing option and the stop billing option?

How can I bill participants if they were enrolled late in a benefits billing cycle?

You must manually calculate the amount for the past billing periods. You then enter the amount due using the Arrears option in the Record Payment without Bill page.

Alternatively, you prepare the bill using the Benefit Coverage Charges page and edit the charges before you generate the bill.

How can I determine a benefits participant's due amount?

In the Benefits Service Center page of the participant, open the Manage Benefit Coverage Payments page. Subtract the Payments value from the Amount Due value to determine the total amount due.

Alternatively, from the **Create** menu, click **Record Payment**. In the billing table, the total amount due value appears in the Amount Due column of the most recent billing entry.

Why can't I edit any of the benefit charges for a billing period?

You can't edit bills that are already generated. A bill with an Unpaid status indicates a generated bill. You can edit bills that have the Open status.

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9 Integrated Workbooks for Loading Data

Overview of Managing Benefits Objects in Integrated Workbooks

Use integrated Microsoft Excel workbooks to manage multiple records at one time for various Benefits objects.

Here's the list of Benefits objects that you can manage in Integrated Workbooks:

- Enrollments
- Plans and programs
- Rates and variable rates
- Derived factors
- Reporting groups
- Benefit balances
- Benefit groups
- Person habits
- Postal code ranges and service areas
- Regulations
- ACA Override Upload
- Upload Billing Payments

Examples

In the application, when managing person habits, you must enter the Benefits Service Center page for each person individually. With the integrated workbook, you can manage the person habits for multiple persons at one time and upload the data.

Rather than searching for each rate individually when preparing for your next open enrollment period, you can download them to the integrated workbook. Make your edits in the workbook and upload them back to the application.

Manage Person Benefit Groups in the Integrated Workbook

You can download person benefit group information to the integrated Microsoft Excel workbook. Use the integrated workbook to view and edit person benefit group assignments for multiple persons and groups. Then, upload your changes back into the application database.

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The basic process for managing person benefit groups using the workbook is:

1. Generate and populate the workbook.
2. Edit, add, and delete person benefit groups in the workbook.
3. Upload edits.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

In the Evaluation and Reporting work area:

1. In the Upload Person Benefit Groups row of the Person Data Loaders tab, click the **Go to Task** button.
2. In the Upload Person Benefit Groups dialog box, enter a session effective date.
3. Click **Prepare in Workbook**.

Editing, Adding, and Deleting Person Benefit Groups in the Workbook

After the download is complete, view, edit, add, and delete existing person benefit group assignments.

- Edit the **Benefits Group** value.

  The upload process ignores edits in any other columns.

- Insert a row to add a person benefit group assignment.

- Delete data from the application database using these steps:

  a. Double-click the **Mark for Deletion** field in each workbook row that you want to delete.
  b. Click **Delete Selected Rows**.

Tip:
- You can't edit or enter the effective date in the workbook. To change the effective date, use one of these methods:

  ○ Generate a new workbook with the new session effective date.

  ○ Edit the date directly in the application using the Manage Benefit Groups task in Plan Configuration work area.

- You can't retrieve data deleted as part of the upload process.

Uploading Edits

After you complete your edits, click **Upload**.

The process:

1. Uploads into the application database the workbook rows marked as **Changed**
2. Uses the session effective date that you set when generating the workbook as the start date for any edits or new group assignments that you entered in the workbook
3. End dates the prior group assignments as of the previous day for each edited row
4. Retains the history

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5. Deletes permanently all of the related effective-dated records from the application database for each workbook row that is marked for deletion

For each row marked for deletion in the workbook, the application permanently deletes all of the related effective-dated records from the application database.

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics
- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks
- Set Up Desktop Integration for Excel

Manage Person Benefit Balances in the Integrated Workbook

You can download person benefit balance information to the integrated Microsoft Excel workbook where you can add, edit, and delete balances. Then, upload your changes back into the application database tables.

The basic process for managing person benefit balances using the workbook is:

1. Generate and populate the workbook.
2. Edit, add, and delete person benefit balances in the workbook.
3. Upload edits.
4. Resolve errors.

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

In the Evaluation and Reporting work area:

1. In the Upload Person Benefit Balances row of the Person Data Loaders tab, click the **Go to Task** button.
2. In the Upload Person Benefit Balances dialog box, enter a session effective date.
3. Click **Prepare in Workbook**.

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Editing, Adding, and Deleting Person Benefit Balances in the Workbook

After the download completes, view, edit, add, and delete person benefit balances.

- Edit the Value, Primary Assignment, and Benefits Relationship values.

  The upload process ignores edits in any other columns.

- Insert a row to add a person balance.

  For each new balance, you must enter a value in either the **Primary Assignment** or **Benefits Relationship** field, but not both.

- Delete data from the application database using these steps:

  a. Double-click the **Mark for Deletion** field in each workbook row that you want to delete from the application database.
  b. Click **Delete Selected Rows**.

Tip:
- You can't edit or enter the effective date in the workbook. To change the effective date, use one of these methods:

  o Generate a new workbook with the new session effective date.

  o Edit the date directly in the application using these steps:

    i. Search for the person in the Benefits Service Center page.
    ii. Click the **Person Benefit Balances** task.

- You can't retrieve data deleted as part of the upload process.

You can't edit or enter the effective date in the workbook. To change the effective date, you must generate a new workbook with the new session effective date. You can also edit the date directly in the application. Search for the person in the Benefits Service Center page, then use the Person Benefit Balances task.

Uploading Edits

After you complete your edits, click **Upload**.

The process:

1. Uploads to the application tables only those rows marked as **Changed**
2. Uses the session effective date that you set when you generated the workbook as the start date for any edits or new person benefit balances that you entered in the workbook
3. End dates prior balances as of the previous day for each edited row
4. Retains the history
5. Deletes permanently all of the related effective-dated records from the application database for each workbook row that's marked for deletion

Generate a new workbook after the successful upload to verify your edits.

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Related Topics
- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks
- Set Up Desktop Integration for Excel

Manage Person Habits in the Integrated Workbook

You can download person habit information, such as disability tobacco usage, to the integrated Microsoft Excel workbook. Use the integrated workbook to view and edit the data and upload the changes to the database.

The basic process for managing person habits data using the workbook is:

1. Generate and populate the workbook.
2. Edit, add, and delete person habits in the workbook.
3. Upload edits.
4. Resolve errors

Repeat these steps as many times as required to accommodate revisions.

Generating and Populating the Workbook

1. On the Person Data Loaders tab in the Evaluation and Reporting work area, click **Prepare Person Habits in Workbook**.
2. In the generated workbook, enter the session effective date.
3. Click **Download** to retrieve the records that are effective as of the date that you entered in step 1.

Editing, Adding, and Deleting Person Habits in the Workbook

After the download completes, you can view, edit, add, and delete existing person habits data.

- Edit the Student Status, Disability Status, Disability Type, Tobacco Use, Covered in Another Plan, and Plan values only.

  The upload process ignores edits in any other columns.

- Insert a row to add habit data for a new person.

  To identify the person, you must enter either the person number or these three values, in their respective fields:

    o First name
    o Last name
    o Date of birth

  As denoted in the column header, person type is required for each new row.

Tip:

- You can't edit or enter the effective date in the workbook. To change the effective date, use one of these methods:

  - Generate a new workbook with the new session effective date.

  - Edit the date by searching for the person in the Benefits Service Center page and then opening the Manage Contacts page.

- You can't retrieve data deleted as part of the upload process.

- You can verify disability status and tobacco usage for only participants in the application user interface. To verify disability status and tobacco usage for dependents, you must:

  a. Generate the integrated workbook.
  b. Download the person habit information for the relevant dependents.

Uploading Edits

After you complete your edits, click **Upload** to load into the application database the rows that are marked as **Changed**.

The process:

1. Uses the session effective date that you set when you generated the workbook as the start date for any edits or new rows that you entered in the workbook
2. End dates the prior data row as of the previous day
3. Retains the history
4. Deletes permanently all of the related effective-dated records from the application database

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

Related Topics

- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks
- Set Up Desktop Integration for Excel

Overview of Managing Benefit Enrollments in the Integrated Workbook

You can enroll participants in various programs, plans, and options using the integrated Microsoft Excel workbook. You can also designate dependents and beneficiaries in participant-enrolled plans.

The high-level process for managing benefit enrollments using the integrated workbook is:

1. Prepare and upload data to interim table, resolving any identified workbook errors.
2. Upload enrollments batch to database tables, resolving any identified processing errors.

Preparing and Uploading Enrollment Workbook Data to Interim Tables

You can process multiple life events by entering different effective dates in different workbook rows to handle successive historical changes for an individual. This preserves and uploads legacy historical data.

The Upload Benefit Enrollments batch process uses the effective date when:

- Fetching person details

- Validating dependents

- Processing participant life events

The basic process for preparing and uploading workbook data to interim tables is:

1. Generate the workbook.
2. Create a batch of enrollment data.
3. Upload edits into the interim database table.
4. Resolve workbook data errors.

The details of this process are covered in the Uploading Enrollment Workbook Data to Interim Tables: Procedure topic.

Uploading Enrollments Batch to Database Tables

After you upload your changes to an interim database, you run the Upload Benefit Enrollments batch process.

The participant enrollment portion of this batch process:

1. Creates a potential life event
2. Processes this life event
3. Creates enrollments
4. Populates rates and coverage amounts
5. Closes life events

The basic process for uploading workbook data to the application tables with the batch process is:

1. Run the Upload Benefit Enrollments batch process.
2. Download the enrollment processing results and fix any errors.
3. Review the results and reprocess.

The details of this process are covered in the Uploading Benefit Enrollments Batch to Database Tables: Procedure topic.

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Related Topics

- Upload Enrollment Workbook Data to Interim Tables
- Upload Benefit Enrollments Batch to Database Tables
- What's the difference between Export to Excel and desktop integration for Excel?
- Guidelines for Using Desktop Integrated Excel Workbooks

Benefit Enrollment Integrated Workbook Columns

This topic details the information required when you enter batch records in the integrated Microsoft Excel workbook for benefit enrollments.

1. After completing the integrated workbook, you upload the rows to an interim batch table.
2. After all workbook rows upload without errors, you run the Upload Benefit Enrollments batch process in the Evaluation and Reporting work area.

Workbook Column Explanations

Required fields are marked with an asterisk, *, and you must enter a value for them.

> **Note:** Values that you enter in name fields must exactly match the values already in the application. This applies to names of participants, programs, plans, options, dependents, beneficiaries, and life events.

Column	Description
Changed	Marked automatically when you edit or add a row in the workbook The upload process loads only these rows to the interim batch table.
Mark for Deletion	Double-click this cell to mark the row for deletion. When you click **Delete Selected Rows**, the upload deletes the data from the interim batch tables so that it's not available for the batch process.
Status	Provided automatically by the upload process for each row after it loads the data into the interim batch table For rows with errors, click **Upload Error** to see the details.
*Enrollment Type	Enter this value based on the person for whom you're entering the data. Valid values are: • Participant Enrollment • Dependent Designation • Beneficiary Designation

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Column	Description
*Effective Date	Used when: • Fetching person details • Validating dependents • Processing participant life events Enter the date in your standard local format.
*Person Number	PARTICIPANT_PERSON_NUMBER, a unique numeric identifier for the participant for whom to process the enrollment changes
Additional Person Identifier	Reserved for the application, don't use.
Program Name	Must be valid as of the effective date.
Plan Name	Must be valid as of the effective date.
Plan Disenrolled From	Reserved for the application, don't use.
Option	Must be valid as of the effective date.
Option Disenrolled From	Reserved for the application, don't use.
*Life Event	Must be valid as of the effective date.
*Life Event Occurred Date	Benefits processing derives the existence of a started life event based on the combination of this date and the specified life event. Enter the date in your standard local format.
Original Participant Enrollment Date	Doesn't affect processing, the upload updates the field for the participant enrollment record. Enter the date in your standard local format.
Create Potential Life Event	**Yes**: The process determines whether the participant has a potential life event for the combination of the life event name, life event occurred date, and benefit relationship. If there is no valid potential life event, it creates and processes one. **No**: The process doesn't create the potential event or process life events automatically. You must manually add the life event using the Potential Life Event tab.
*Benefit Relationship	Must be valid for the participant as of the effective date Benefits processing derives a valid started life event for the participant based on this value.
Rate Amount	If you enter a rate amount, ensure that there is no value in coverage amount.

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Column	Description
Coverage Amount	If you enter a coverage amount, ensure that there is no value in rate amount.
Disenrolled Coverage Amount	Reserved for the application, don't use.
Date of Birth	Dependent's or beneficiary's date of birth Enter the date in your standard local format.
Beneficiary Organizations and Trusts	Enter the name of the existing beneficiary organization or trust. If the beneficiary organization or trust doesn't exist as of the effective date, the beneficiary designation process fails. To create the organization or trust, which you can then use in the workbook, use the Beneficiary Organizations task in the Benefits Service Center page.
Primary Beneficiary Percentage	If you enter a percentage amount, ensure that there is no value in beneficiary amount.
Contingent Beneficiary Percentage	If you enter a percentage amount, ensure that there is no value in beneficiary amount.
Beneficiary Amount	If you enter a beneficiary amount, ensure that there is no value in beneficiary percentage.
Close Life Event Date	Date on which you want to close the life event Enter the date in your standard local format.
*Close Life Event	**Yes**: The process attempts to close the life event that it's processing, which is useful if it's processing multiple life events for the same participant, dependent, or beneficiary. **No**: The process doesn't close the life event, leaving it in the started state. Suspended results or pending action items don't allow the life event to close. In such cases, it remains unchanged and you must close this event before attempting to process the next event.
Batch Line ID	Don't modify. Uniquely identifies the batch line, which is referenced in error messages.
Message	Don't modify. Describes any errors that occurred during the Upload Benefits Enrollments batch process. Reprocess the batch after correcting the errors.
Row Batch Status	Don't modify. Indicates the Upload Benefits Enrollments batch processing status for the row, such as COMPLETE or ERROR.
Key	Don't modify. Internal value used for Upload Benefits Enrollments batch processing.

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Column	Description

Upload Enrollment Workbook Data to Interim Tables

You can enroll participants in various programs, plans, and options using the integrated Microsoft Excel workbook. You can also designate dependents and beneficiaries in participant-enrolled plans.

The basic process for preparing and uploading workbook data to interim tables is:

1. Generate the workbook.
2. Create a batch of enrollment data.
3. Upload edits into the interim database table.
4. Resolve workbook data errors.

Prerequisites

You must verify that the relevant plan and program configuration is set up and working correctly before uploading enrollment data using the workbook.

Generating the Workbook

To generate the workbook:

1. On the Enrollment Uploads tab of the Evaluation and Reporting work area Overview page, click **Prepare Enrollment Batch in Workbook**.
2. In the **Batch Name** cell, enter a name for the enrollment batch.
3. Enter the batch lines.

Creating a Batch of Enrollment Data

Enter data in the workbook following these guidelines:

- Create and upload batches of fewer than 500 rows.

   More than 500 rows negatively affects performance, and you can only download 500 rows at a time to fix errors.

- Enter plan, program, participant last, participant first, and option names exactly as they are in the application database.

   The names that you enter also must be valid as of the effective date and for the specified life event.

- Enter values in all of the required cells in a row; otherwise, the upload process skips the row.

   Required cells are Enrollment Type, Effective Date, Person Number, Participant Last Name, Participant First Name, Life Event, and Benefit Relationship.

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> If you select **Yes** in **Close Life Event**, then **Close Life Event Date** becomes a required cell.

- Enter one of these valid values for **Enrollment Type**:

  - Participant Enrollment
  - Dependent Designation
  - Beneficiary Designation

- Enter a valid participant name in every row, even if the enrollment type is for dependent or beneficiary.

- Press **Enter** or click out of the current cell to ensure that the workbook recognizes your entry as a change.

  This includes the **Batch Name** cell.

To delete records from the application database tables:

1. Double-click the **Mark for Deletion** cell in each workbook row that you want to delete.
2. Click **Delete Selected Rows**.

Uploading Edits into the Interim Database Table

After you complete your edits:

1. Click the **Batch Name** cell.
2. Click another cell.
3. Click **Upload**.

If the batch:

- Doesn't exist, the upload process creates a batch

- Already exists, the upload process updates the batch lines

  It uploads into the interim database table only the rows that are marked as **Changed**.

The upload process also deletes permanently all of the related effective-dated records from the interim database table for each workbook row marked for deletion. This makes the deleted records unavailable for enrollment processing.

Resolving Errors

The upload process automatically updates the **Status** field in each workbook row. If there are errors that require review, the process:

1. Rolls back the change in the application database
2. Sets the workbook row status to **Upload Failed**
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click **Update Failed** in the **Status** field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

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Next Steps

Next, you must upload your workbook data batch to the database tables. The details of this process are covered in the Uploading Benefit Enrollments Batch to Database Tables: Procedure topic.

Related Topics

- Overview of Managing Benefit Enrollments in the Integrated Workbook
- Upload Benefit Enrollments Batch to Database Tables
- Set Up Desktop Integration for Excel
- Guidelines for Using Desktop Integrated Excel Workbooks
- Benefit Enrollment Integrated Workbook Columns

Upload Benefit Enrollments Batch to Database Tables

Use the Upload Benefit Enrollments batch process to update the application database with enrollment data that you uploaded to interim tables from the integrated Microsoft Excel workbook.

The basic process for updating the database tables using the batch process is:

1. Run the Upload Benefit Enrollments batch process.
2. Download the enrollment processing results and fix any errors.
3. Review the results and reprocess.

Prerequisites

You must first upload your enrollment data batch to the interim tables. The details of this process are covered in the Uploading Enrollment Workbook Data to Interim Tables: Procedure topic.

Running the Upload Benefit Enrollments Batch Process

After uploading the batch lines:

1. In the Evaluation and Reporting work area, select the **Processes** tab.
2. In the Upload Benefit Enrollments row of the Election Processes section, click **Submit**.
3. In the Parameters section **Batch Name** field, select the name that corresponds to the name that you entered in your workbook.
4. Click **Submit**.

   Note the request number in the Confirmation dialog box when the request completes processing to review log files for details.

For each participant, the Upload Benefit Enrollments batch process completes:

1. All participant enrollments
2. All dependent designations
3. All beneficiary designations

The process then moves to the next participant.

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Resolving Enrollment Process Errors

If there are any errors that require review, the process rolls back and continues to the next participant, dependent, or beneficiary.

If a participant enrollment fails, the batch process skips the associated designations, since they may be dependent on the participant enrollment completing without issues.

Reviewing the Results and Reprocessing

To view any data issues with the batch lines and the rows that show errors in the **Row Batch Status** cell, you download the batch details into the workbook.

1. In the Enrollment Uploads tab of the Evaluation and Reporting work area Overview page, click **Prepare Enrollment Batch in Workbook**.
2. Enter the name of the existing batch that you want to review.
3. Click **Download**.

    The workbook downloads all of the batch rows, not just the rows with errors.
4. View messages in the Message cells.

    Each message generally has a line ID indicating the row that is causing issues.
5. Fix the issue with each specified row.
6. Upload the batch again for reprocessing.

In the **Audit Log** field, if you select **Yes** when uploading the batch data, the upload process adds any error or information messages for each line to the audit log.

Related Topics
- Overview of Managing Benefit Enrollments in the Integrated Workbook
- Upload Enrollment Workbook Data to Interim Tables

Manage Benefit Enrollment Certifications in the Integrated Workbook

Use the Upload Enrollment Certifications integrated workbook to upload details of certifications received from participants, dependents, and beneficiaries en masse.

The basic process to manage certifications in the workbook is:

- Generate the workbook.
- Record certifications.
- Upload data.
- Resolve errors.

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Generating the Workbook

In the Evaluation and Reporting work area, Person Data Loaders tab, click **Go to Task** on the Upload Enrollment Certifications row.

Recording Certifications

The workbook columns and choice lists are the same as the fields and choice lists on the Enrollment Activities page in the Benefits Service Center page. Enter a row for each certification for each participant. You can enter multiple action items with several certifications for participants with several dependents or beneficiaries. However, each certification's details must exist as a single row.

Uploading Data

After you complete the edits, in the Enrollment Certifications Upload tab, click **Upload** to load into the application table those rows that are marked as Changed.

> **Note:** You can't edit certifications in the workbook after they upload successfully. However, you can edit certification details on the Enrollment Activities page.

Resolving Errors

The upload process automatically updates the Status field in each workbook row.

If there are errors that require review, the process:

1. Rolls back the change in the application
2. Sets the workbook row status to Upload Failed
3. Continues to the next workbook row

To view and resolve an error:

1. Double-click Update Failed in the Status field.
2. Fix any data issues in the workbook.
3. Upload the latest changes.

FAQs for Integrated Workbooks

How can I prevent time outs when using person-related integrated workbooks in benefits?

Set the Event field in the benefit balances workbook and the benefit groups workbook to No. If you set the Event field to Yes, then the application creates life events for every record that the spreadsheet loader uploads.

This could cause time outs especially when you're loading a large set of data. Set the Event filter to No to skip creating life events, thus reducing the chance of a time out.

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10 Benefits Setup Maintenance

Maintenance Setup Tasks in Benefits: Overview

The rest of the chapters in this guide outline the tasks in the Plan Configuration work area that you can use to add and maintain setup information.

Update configurations of benefits objects, including:

- Eligibility

- Life events

- Plans and programs

- Rates and coverages

- Flex credits

You can also configure display of information in the self service enrollment guided process, and export and import plan configurations.

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11 Court Orders

Overview of Benefit Court Order Administration

You can comply with, record, and view US Qualified Medical Child Support Orders (QMCSO). Use the Benefit Court Orders task in the Benefits Service Center page.

This topic covers the following aspects:

- Enforce dependent enrollment
- Upload scanned documents, such as financial assessments and original court orders
- View court order details during enrollment

Enforce Dependent Enrollment

In the Create or Edit Benefit Court Orders page, select and add dependents identified in the court order. For each dependent, determine the plan or plan type that they must enroll in. The default configuration prevents participants opting out their dependents from enrollment during an active court order. Once the participant designates a dependent in a plan, they can't delete or end date the dependent. When a court sends a release or the dependent ages out, you must enter an end date to stop the court order enforcement.

Upload Scanned Documents

Use the Document Records section to upload scanned financial assessments and the original court order for reference purposes.

View Court Order Details During Enrollment

Use the Enrollment Results page to view court order details. You can also check whether or not a dependent is covered. You can print this page for record keeping.

Participants can view their court order details from the Benefits Confirmation Summary Report page in the self-service pages. The report provides details of the court order, such as the order identification, the plan types or plans included in the court order, and dependents.

Related Topics
- How do I trigger person life events on creating, updating, or deleting a court order?

FAQs for Court Orders

How do I trigger person life events on creating, updating, or deleting a court order?

Use the Manage Life Events task. In the Create Person Change window, you can configure life events to trigger on all user editable fields available on both the master and dependent level tables.

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- BEN_CRT_ORDER_F
- BEN_CRT_ORDR_PL_DPNT

How can I stop benefit court order enforcement if dependent enrollment is no longer required?

In the Edit Benefit Court Order page, Select and Add Dependents section, enter an end date.

How can administrators view a participant's court order?

Go to the Benefits Service Center page of the participant. The court order details appear in the Benefit Court Orders section in the Enrollment Results page.

How can participants view their court order details?

On the Benefits Confirmation Summary Report page that appears after a participant submits their elections. The report provides details of the court order, such as the order identification, the plan types or plans included in the court order, and the covered dependents.

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12 Benefit Plan Comparison

Overview of Plan Comparison

You can compare the different features of your health, vision, and dental plans to decide on the best plan before you enroll. For example, to compare the cost of the plans and options, how they work, and the coinsurance.

You can view and launch plan comparison from the self-service landing page or from quick actions. You can compare up to 3 plans at a time.

Compare Benefits Plans

You can compare different features of your plans to decide on the best plan before you enroll.

Here's how you compare different plans:

1. Click **Me** - **Benefits** on the Home page.
2. Select the appropriate tile for plan comparison.
3. Select the plans that you want to compare from the **Select Plan to Compare** drop-down list.

FAQ for Benefit Plan Comparison

How can I see the estimated cost of the options during plan comparison?

Click the Information icon that's next to the Estimated Cost value.

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