

Processing Annual Enrollment through Benefits Administration

This is the first set of instructions for processing the 2006 annual enrollment through Benefits Administration. Near the end of the annual enrollment period, another set of instructions will be sent out to explain the process for finalizing the open enrollment (OE) and making changes to finalized enrollments.

Critical steps to make the Annual Enrollment process as easy as possible:

- Make sure all open events have been processed and closed through benefits administration **prior to running the OE schedule.**
- Do not run the OE schedule for your agency **until you are ready to begin entering** enrollment forms for your employees.
- Once you run the Ben Admin process for the OE schedule (Step 1 on the open enrollment exercise) **do not run it again until we direct you to do so.**
- You may enter enrollment forms as they are received from your employees. **All enrollment forms must be entered by 5:00 p.m. on December 5, 2005.**
- Do not use manual events for processing annual enrollment elections.
- Questions or problems, contact the ITD help desk at 328-4470

New Query

A query has been developed that will provide you with a listing of your employees, their deductions that are eligible to be changed during annual enrollment and their FSA payment options. You may find this helpful when doing election entry. We are currently in the process of migrating the query to the production environment; it should be available for you to run by November 14. Here are the steps to run the query:

Navigation: Peopletools>Query Manager>Use>Query Manager

1. Enter query name NDS_OPEN_ENROLLMENT_DEDUCTIONS and click on Search
2. Click on Run
3. Enter 10/31/2005 as the pay period end date
4. State Agencies enter company 'ND'; Bank of North Dakota enter company 'BND'
5. Click on 'view results'

Important Dates

<u>Now – December 5:</u>	Agencies enter employee election forms
<u>December 6 - 9:</u>	NDPERS will work with agencies to cleanup/finalize open enrollment events
<u>Week of December 12:</u>	NDPERS will generate confirmation statements and mail to employee's home address
<u>Noon on December 23:</u>	Last day to make payroll changes for employees on advanced payroll

2006 OPEN ENROLLMENT EXERCISE

STEP 1: CREATE A NEW RUN CONTROL & PREPARE OPEN ENROLLMENT OPTIONS

NOTE: If there are multiple ben admin users in your agency, only ONE person needs to perform this step.

Navigation: Compensate Employees>Administer Automated Benefits>Process>Run Control

1. Click on the 'add a new value' link
2. Enter the first 3 numbers of your business unit followed by 06 (example: 19206), then click on the ADD button
3. Enter the Schedule ID for your agency and tab out of the field. The schedule ID for open enrollment will be the first 3 numbers of your business unit followed by 06. (example: 19206)
4. Press the Run button to take you to the Process Scheduler.
5. Select Server Name "PSNT" if it is not already selected.
6. Select the Benefits Administration process by clicking on the 2nd box in the Process List
7. Press OK to start the process. This will take you back to the Run Control page. Press Process Monitor to view the status of the Ben Admin process.
8. When the process finishes (Success), press "Go Back to Run Control" to take you back to Ben Admin.

IMPORTANT – ONCE YOU RUN THIS PROCESS FOR THE FIRST TIME DO NOT RUN IT AGAIN UNTIL DIRECTED TO DO SO.

STEP 2: REVIEW OF STATUS

Navigation: Compensate Employees>Administer Automated Benefits>Inquire>Schedule Summary

1. Enter the 06 Schedule ID and press Search.
2. Under Process Status Totals, you should only see totals for the status of 'assigned', 'prepared' and 'pgm none'. If you have totals for any other status, please contact the help desk at 328-4470. The PERS Benefits Administration team will work with each agency individually to help determine what needs to be done with any errors.

STEP 3: PRODUCE ENROLLMENT STATEMENT

Navigation: Compensate Employees>Administer Automated Benefits>Report>Enrollment Statement

1. Enter your 06 Run Control ID.
2. Enter your 06 Schedule ID in the Schedule ID field.
3. Leave the Emplid field blank. This will produce Enrollment Statements for all employees within your schedule who are Prepared.
4. Press the Run button to take you to the Process Scheduler
5. Make sure that **Type = Web, and Format = PDF**
6. Press OK to begin the process. After you press OK, you will be taken back to the Run Control page.
7. Press "Process Monitor" to view the status of the process.
8. When the process has finished successfully, press 'details', view log/trace and then select the .PDF file. Doing so will launch Acrobat where you can view and print the Enrollment Statement.
9. The Enrollment Statement will show the benefits that are eligible to be changed during Open Enrollment and will show the employee's current elections. This form is not intended to be distributed to employees; it should only be used as a data entry tool.

STEP 4: ELECT OPTIONS

Navigation: Compensate Employees>Administer Automated Benefits>Use>Election Entry

1. Enter your 06 Schedule ID.
2. Enter the Emplid for the employee you are entering elections for. This will take you to the Option Election page. Enter the Option Code for each of the plan types, or use the look-up to find the appropriate option. You will only see eligible options that are allowed for the OE event
3. After you have finished with your elections, make sure to press Save.
4. The event Process Status will now change to Entered (Et)

NOTE: You may enter employee enrollment forms as you receive them. The information that you enter will be saved on the election entry page. You may also make changes to the information that has been entered at any time, up until the event has been finalized.

For detailed instructions on how to enter information for each type of benefit, please refer to the 'Election Entry Instructions'.

STEP 5: ENTERING FSA PAYMENT OPTIONS

Navigation: Compensate Employees>Administer Automated Benefits>Use>FSA Payment Options

1. Update the direct deposit and inside mail payment options for each employee who is enrolling in the FlexComp spending accounts.

Annual Enrollment 2006

Instructions for entering employee elections on election entry page (Home>Compensate Employees>Administer Automated Benefits>Use>Election Entry)

Health insurance (Plan type 10)

- Changing level of coverage (ex: single to family). Enter the new option code. Update dependents if necessary.
- Dropping health insurance. Enter option code 'W'.
- If no changes are made, current coverage will remain in force. You do not need to enter anything.

Dental insurance (Plan type 11)

- Changing level of coverage (ex: employee only to family). Enter the new option code. Update dependents if necessary.
- Changing from pre-tax to after tax, or after tax to pre-tax. Enter the new option code. An employee can only pre-tax the premium if they have elected to do so in Part B of the FlexComp Annual Enrollment Form (SFN 17759).
- Dropping dental insurance. Enter option code 'W'
- If no changes are made, current coverage will remain in force. You do not need to enter anything.

Vision insurance (Plan type 14)

- Changing level of coverage (ex: Employee only to family). Enter the new option code. Update dependents if necessary.
- Changing from pre-tax to after tax, or after tax to pre-tax. Enter the new option code. An employee can only pre-tax the premium if they have elected to do so in Part B of the FlexComp Annual Enrollment Form (SFN 17759)
- Dropping vision insurance. Enter option code 'W'
- If no changes are made, current coverage will remain in force. You do not need to enter anything.

Supplemental life insurance (Plan type 21 and 2E)

- Increasing/decreasing amount of coverage. Enter the option code and new coverage amount. Do not enter increases to coverage until you have received a memo from NDPERS notifying you that the coverage has been approved by the carrier.
- Changing from pre-tax to after tax, or after tax to pre-tax. The first \$48,700 (\$50,000 - \$1,300 basic life) of supplemental life coverage is required to be pre-taxed unless the employee has declined in Part B of the FlexComp Annual Enrollment form. Enter pre-tax coverage amounts under plan type 2E; enter after tax coverage amounts under plan type 21.
- Dropping supplemental life insurance. Enter option code 'W'
- If no changes are made, current coverage will remain in force. You do not need to enter anything.

Dependent life insurance (Plan Type 25)

- Increasing/decreasing amount of coverage. Enter the option code for the new coverage. Do not enter increases to coverage until you have received a memo from NDPERS notifying you that the coverage has been approved by the carrier.
- Dropping dependent life insurance. Enter option code 'W'
- If no changes are made, current coverage will remain in force. You do not need to enter anything.

Spouse life insurance (Plan Type 2A)

- Increasing/decreasing amount of coverage. Enter the option code and new coverage amount. Do not enter increases to coverage until you have received a memo from NDPERS notifying you that the coverage has been approved by the carrier.
- Dropping spouse life insurance. Enter option code 'W'
- If no changes are made, current coverage will remain in force. You do not need to enter anything.

Medical/Dependent Care spending accounts (Plan type 60 & 61)

- Enrolling in spending accounts. Enter the annual pledge amounts from Part C and Part D of the FlexComp Annual Enrollment form; [do not use the employee contribution override field](#)
- Entering direct deposit & disbursement authorization from Part E of the FlexComp Annual Enrollment form. Use the FSA payment options page (Compensate Employees>Administer Automated Benefits>Use>FSA Payment Options) to enter the employee's selections for direct deposit or inside mail.
- If no changes are made, current coverage will automatically terminate. You do not need to enter anything.

Pre-tax insurance premiums not sponsored by NDPERS (AFLAC, Colonial, etc).

- Changing from pre-tax to after tax or after tax to pre-tax. These insurance premiums are handled as general deductions. Make changes to these plans by using this navigation: Home>Compensate Employees>Maintain Payroll Data (US)>Use>General Deduction Data. An employee can only pre-tax the premium if they have elected to do so in Part B of the FlexComp Annual Enrollment Form.

Instructions for entering employee elections on election entry page
(Home>Compensate Employees>Administer Automated Benefits>Use>Election Entry)

Benefit Plan	Changing level of coverage	Changing pretax/after tax	Dropping Coverage	No Change or No enrollment form
Health Insurance (Plan type 10)	- Enter new option code - Update dependent information	Not available for pretax.	Enter option code 'W'	Current coverage remains
Dental Insurance (Plan type 11)	- Enter new option code - Update dependent information	* Enter new option code	Enter option code 'W'	Current coverage remains
Vision Insurance (Plan type 14)	- Enter new option code - Update dependent information	* Enter new option code	Enter option code 'W'	Current coverage remains
Supplemental life (Plan type 21 & 2E)	<u>Decreasing amount</u> – Enter new option code and amount <u>Increasing Amount</u> – Enter new code and amount when you receive memo from PERS on approved increase.	The first \$48,700 (\$50,000 - \$1,300 basic life) of supplemental life coverage is required to be pretaxed unless the employee has declined in Part B of the FlexComp Annual Enrollment form. Enter pretax coverage amounts under plan type 2E; enter after tax coverage amounts under plan type 21.	Enter option code 'W'	Current coverage remains
Dependent life (Plan Type 25)	<u>Decreasing amount</u> – Enter new option code and amount <u>Increasing Amount</u> – Enter new code and amount when you receive memo from PERS on approved increase.	Not available for pretax.	Enter option code 'W'	Current coverage remains
Spouse life (Plan Type 2A)	<u>Decreasing amount</u> – Enter new option code and amount <u>Increasing Amount</u> – Enter new code and amount when you receive memo from PERS on approved increase.	Not available for pretax.	Enter option code 'W'	Current coverage remains
Medical/Dependent Care spending accounts (Plan type 60 & 61)	<u>Enrolling in spending accounts</u> - Enter the annual pledge amounts from Part C and Part D of the FlexComp Annual Enrollment form; DO NOT USE THE EMPLOYEE CONTRIBUTION OVERRIDE FIELD. <u>Entering direct deposit & disbursement authorization from Part E of the FlexComp Annual Enrollment form</u> - Use the FSA payment options page (Compensate Employees>Administer Automated Benefits>Use>FSA Payment Options) to enter the employees direct deposit or inside mail elections.			Current coverage will automatically terminate.
Pretax insurance premiums not sponsored by NDPERS (AFLAC, Colonial, etc).	Changing from pretax to after tax or after tax to pretax. These insurance premiums are handled as general deductions. Make changes to these plans by using this navigation: Home>Compensate Employees>Maintain Payroll Data (US)>Use>General Deduction Data . An employee can only pretax the premium if they have elected to do so in Part B of the FlexComp Annual Enrollment Form.			

* An employee can only pretax the premium if they have elected to do so in Part B of the FlexComp Annual Enrollment Form (SFN 17759)