Benefits Module
Beyond HRBEN001

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Legend

Health Insurance

Life Insurance

Information

Introduction

The following information will add to your experience with **HRBEN0001**, *Enrollment*. *If you are not familiar with using HRBEN001, please refer to the Online Help Script*.

Enrolling an employee in Health Plans* and Life Insurance mimics the process for adding a Retirement Plan and Miscellaneous Vendor products with just a little preparation beforehand.

Before enrolling an employee in a plan, an Adjustment Reason** and/or Dependent records must be built first.

**Does not include LSU First. Please see the Online Help Script for LSU First enrollment.*

***The Adjustment Reason infotype is also presented during PA40 actions and can be selected during that dynamic action*

Add Dependents – Infotype 0021

Some health plans cover the employee's dependent(s). If the employee has chosen to elect one of those plans, his/her dependent(s) must be recorded in LaGov HCM on Infotype 0021, *Family Member/Dependents* before enrollment. Most Human Resources personnel is familiar with this infotype used to record Emergency Contacts.

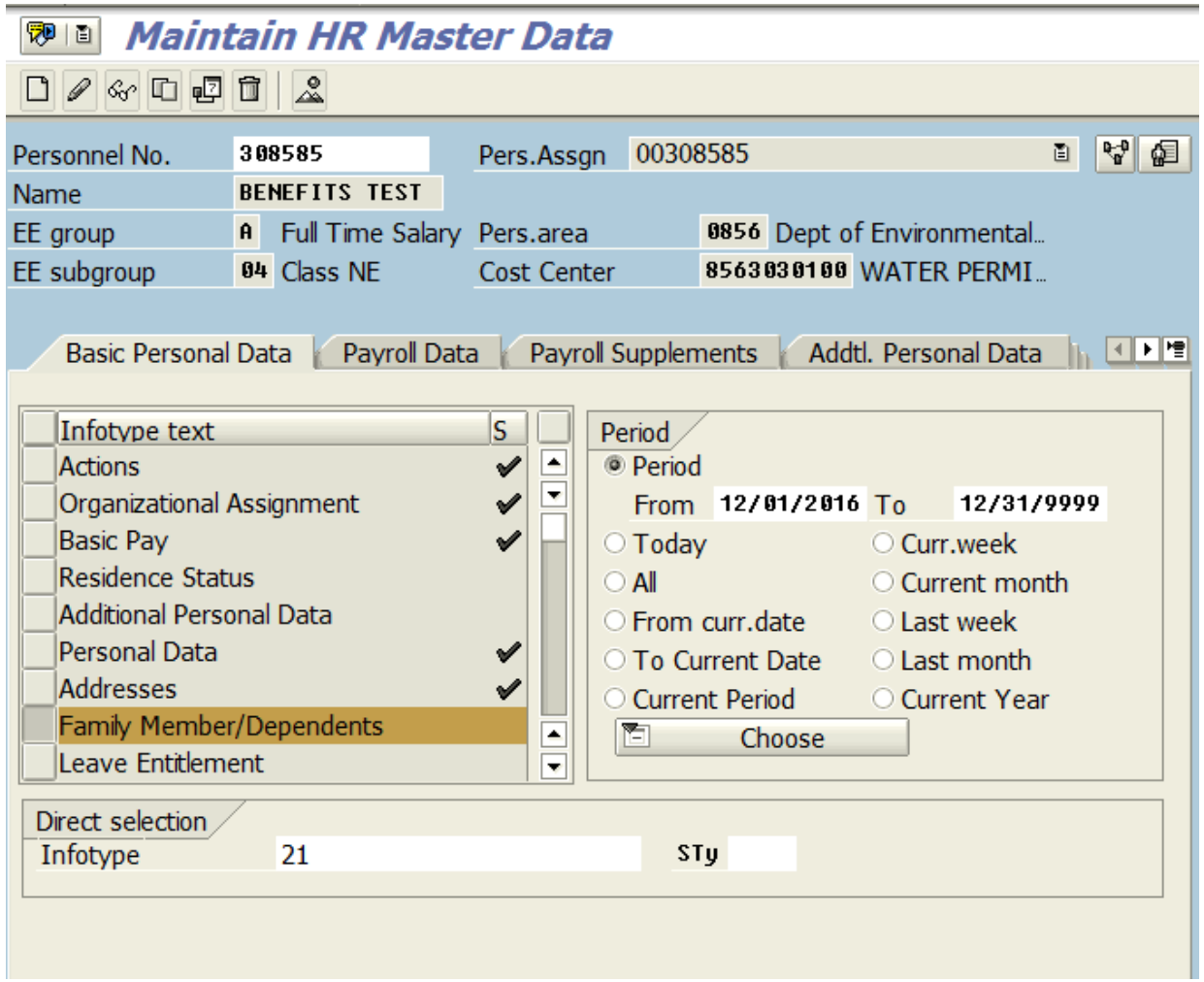
HR Personnel will create an IT21 for spouse, child, stepchild, and/or grandchild. (*Dependent Life records will be discussed during Life Insurance enrollment*.)

Add Dependents – Infotype 0021

1. From Maintain Master Data in PA30, enter the Family Member/Dependents, IT 0021 and the date* of the record.

2. Create.

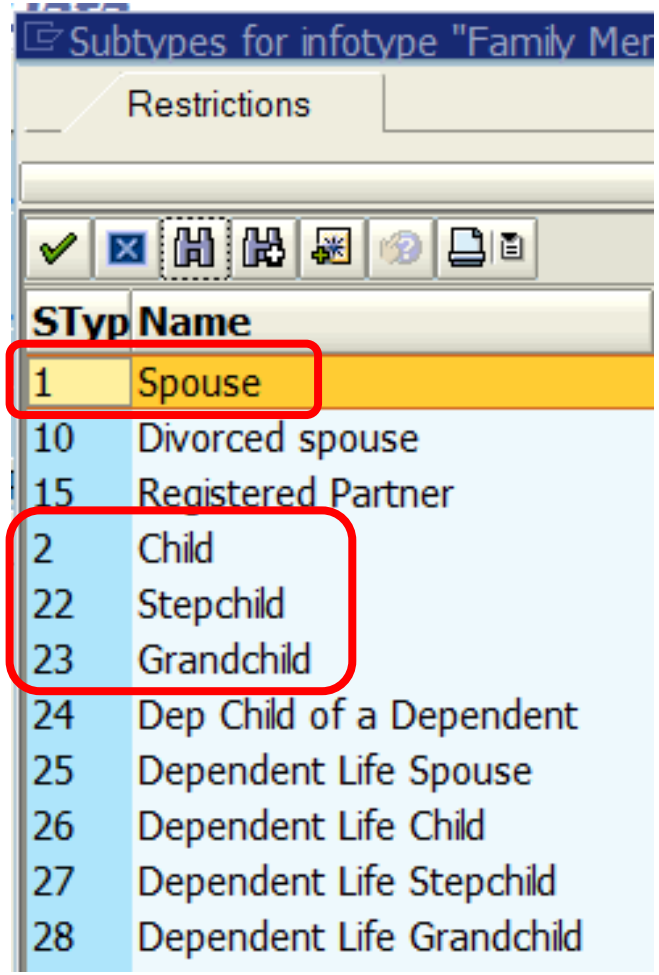
**The start date is the 1st day the dependent can be covered, i.e. birth date of the new child.*



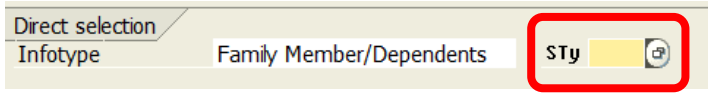
Add Dependents – Infotype 0021

3. Select one of the following subtypes:

   1, 2, 22, or 23



Note: The subtype can be selected on the previous screen.

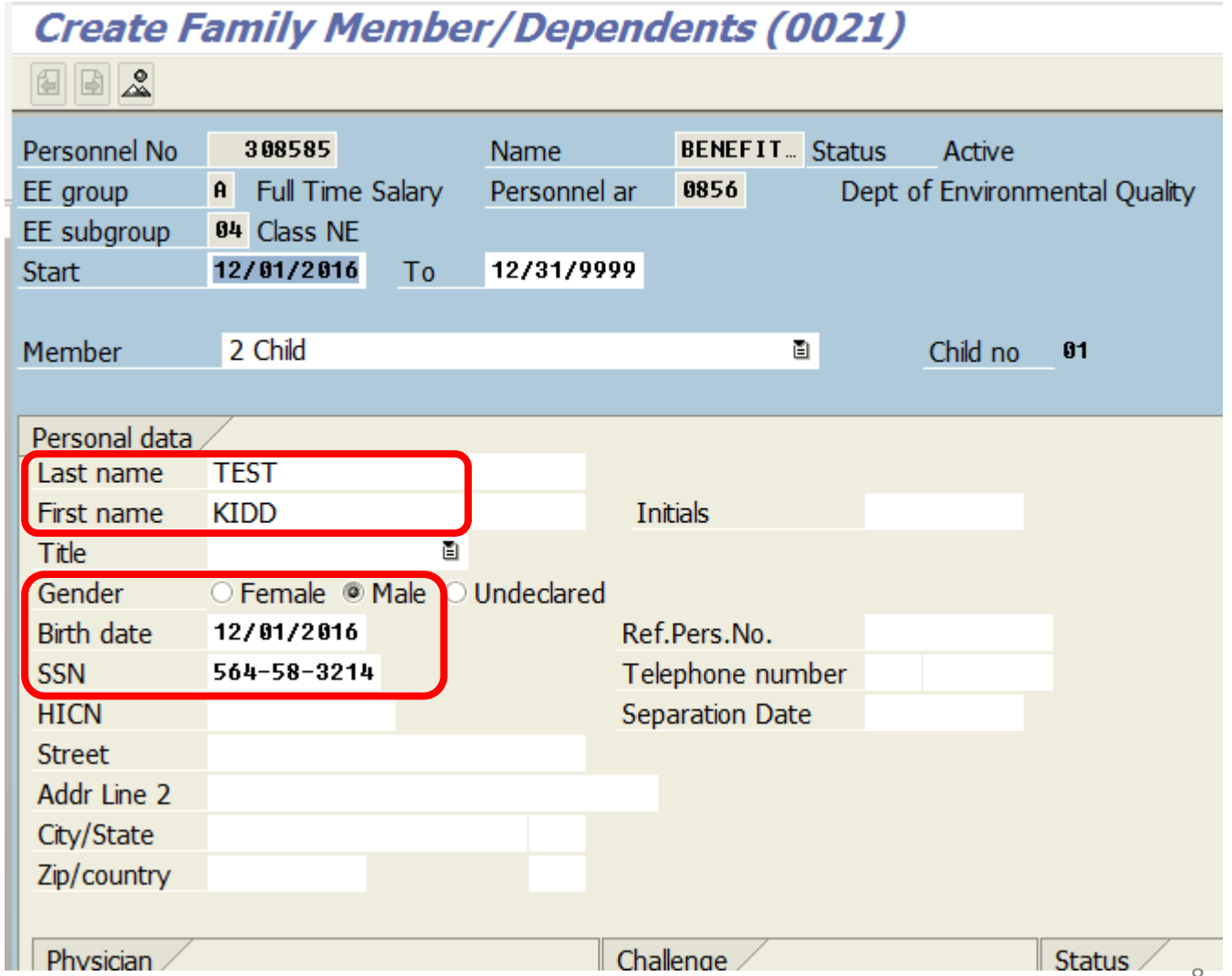


Add Dependents – Infotype 0021

4. Enter the dependent's Last Name, First Name, Gender, Birth Date, and Social Security Number.

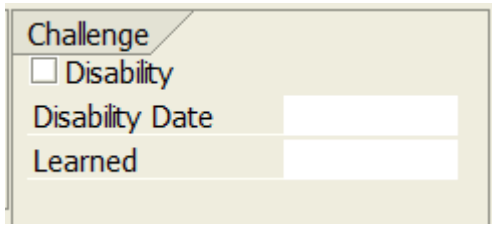
5. Save.

6. Repeat steps for additional dependents.

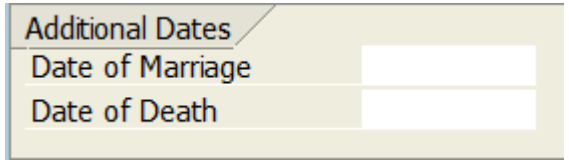


Add Dependents – Infotype 0021

If the dependent is deemed disabled, the Challenge section must be completed.



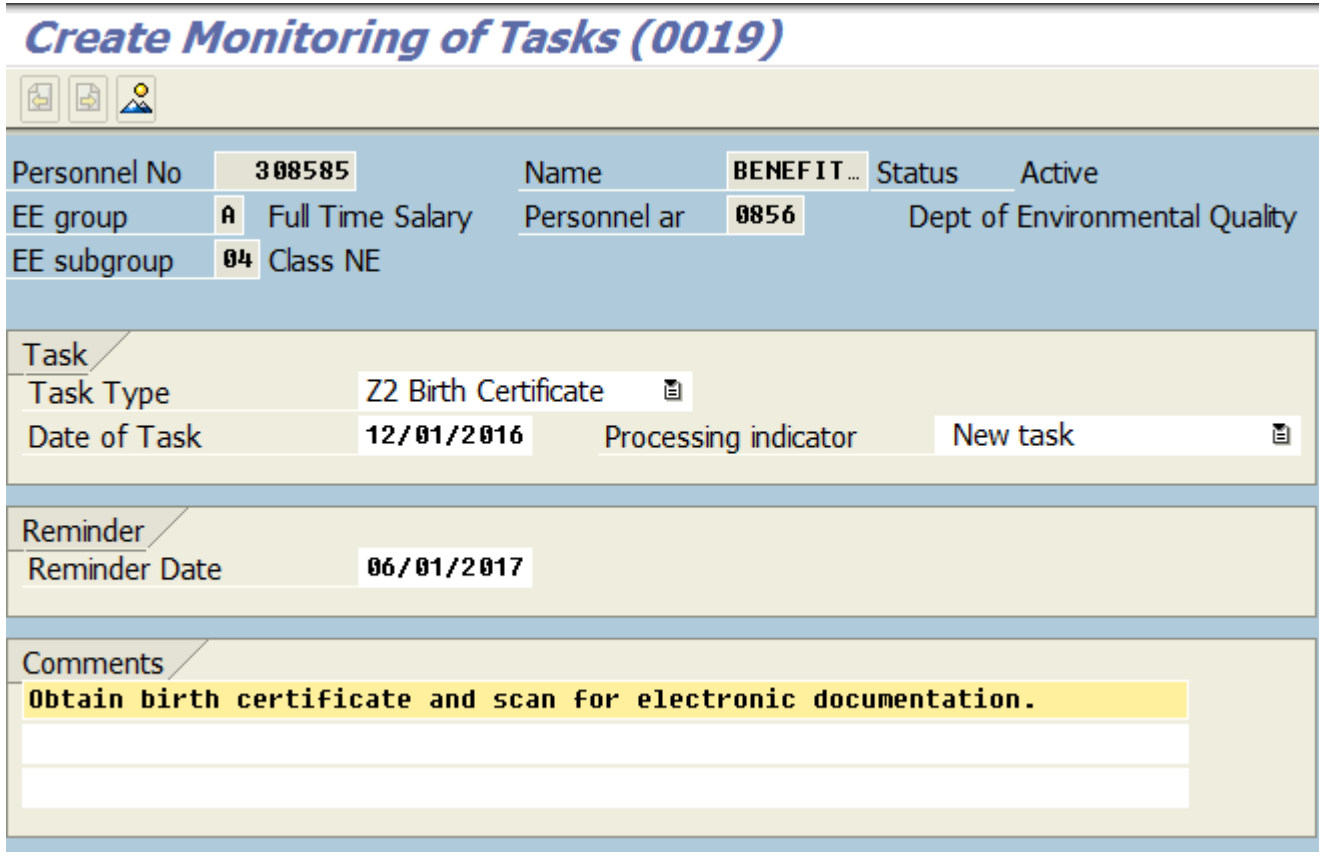
If adding a new spouse to create a qualifying event of marriage, the “Date of Marriage” field should contain a date.



Note: In spring 2017, the option to attach electronic documents, like a marriage license, will be available.

Monitoring of Tasks – Infotype 0019

- After saving the Dependent record, IT 0019, *Monitoring of Tasks*, will be presented.
- HR can use this as a reminder to obtain necessary documentation, such as a birth certificate or marriage license.



Note: The Reminder Date will populate upon validation to 6 months from date of task.

Adjustment Reason – Infotype 0378

An Adjustment Reason is used to determine the changes an employee can make to his/her benefits. These reasons are stored on **Infotype 0378, *Adjustment Reasons***. Those records allow enrollment changes on **HRBEN0001**.

Before modifying the employee's benefits (*medical plans/life insurance*) an adjustment reason record must be created and are allowed based on a qualifying life event (QLE) such as an initial hire, birth, or marriage. A list of QLEs are available from the Office of Group Benefits (OGB) or by clicking on the enclosed link.

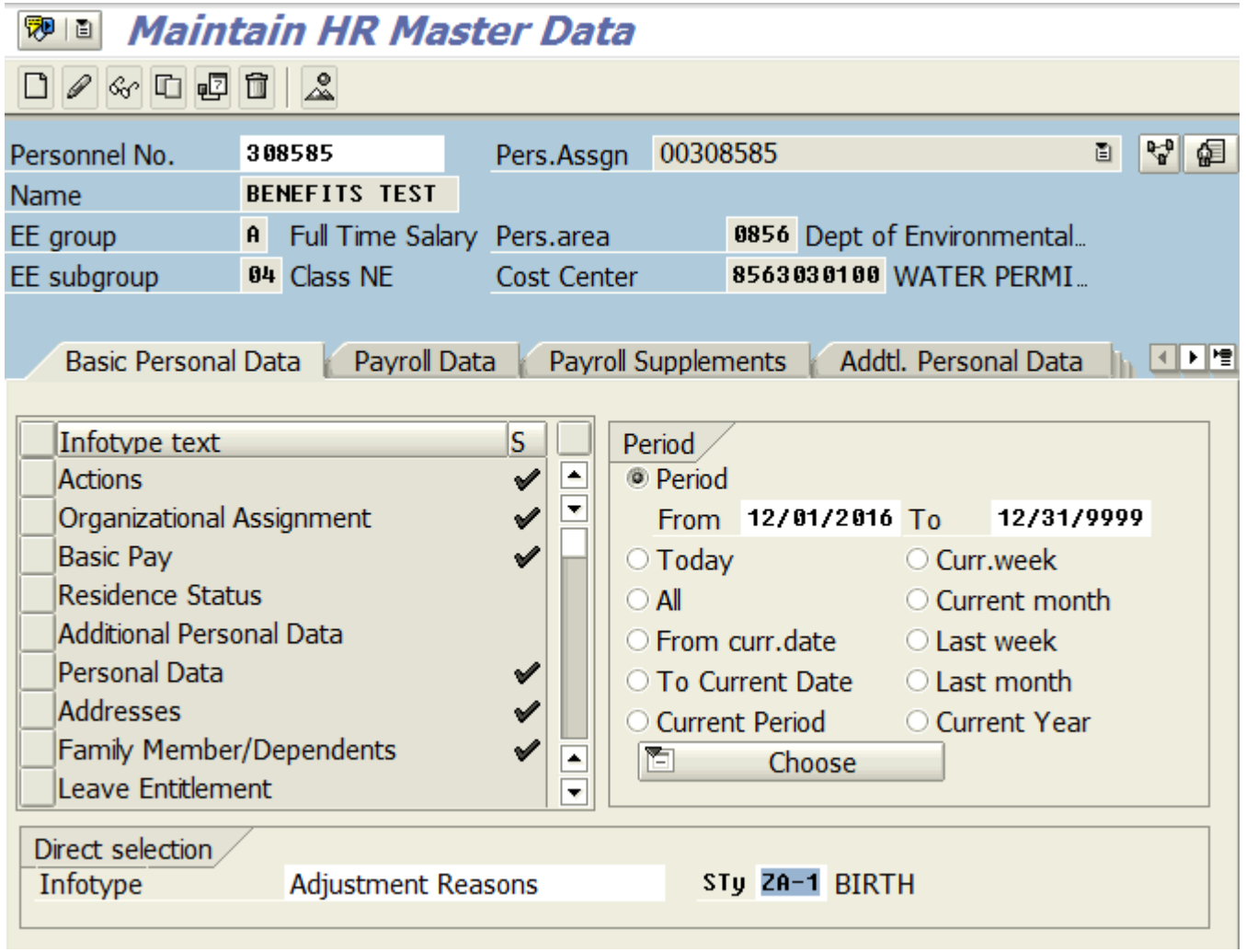
<<QLEs Spreadsheet>>

Adjustment Reason – Infotype 0378

1. From Maintain Master Data in PA30, enter the Adjustment Reason IT0378 and the date* of the record.

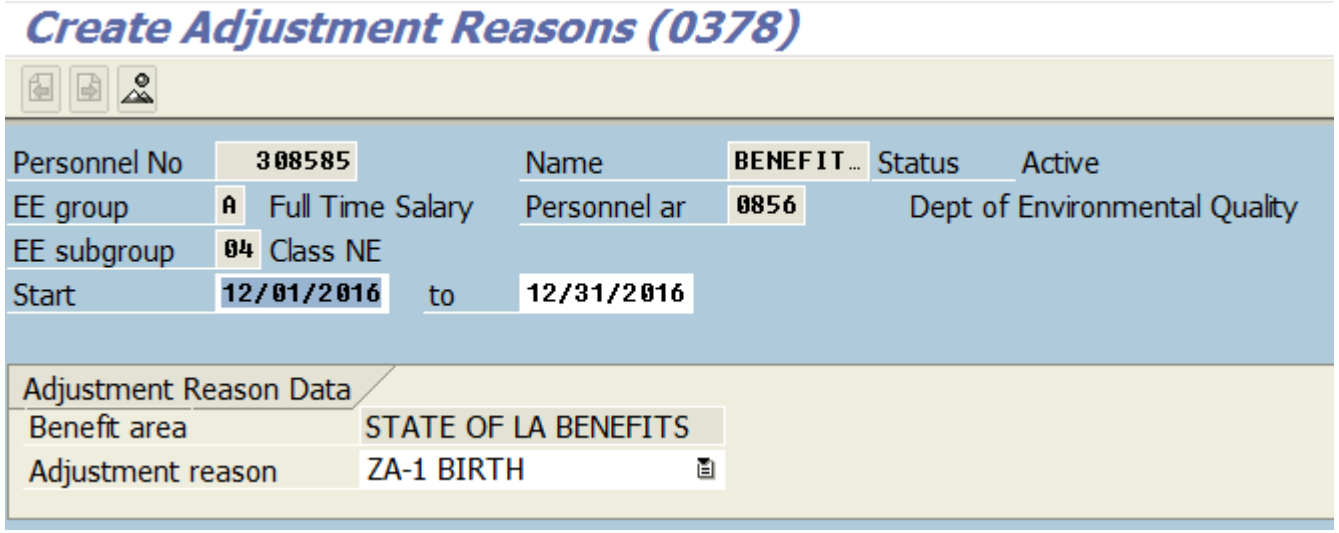
2. Create.

**The start date is the 1st day the dependent can be covered, i.e. birth date of the new child.*



Adjustment Reason – Infotype 0378

3. If the subtype was not selected on the initial screen, choose the correct option from the dropdown menu.

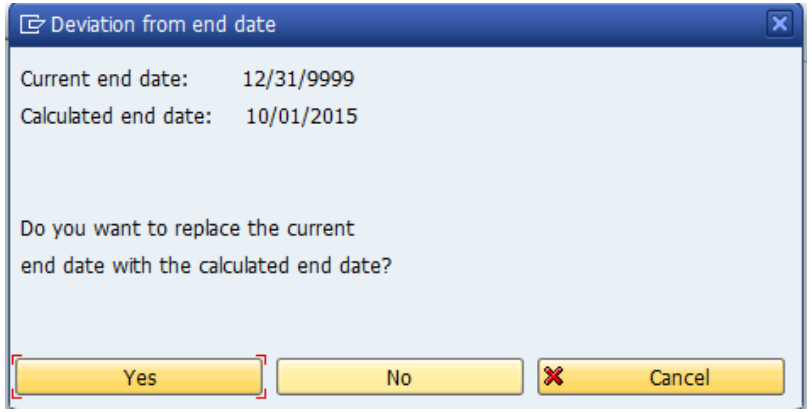


Note: Adjustment reasons cannot begin with "NA" in the title. These reasons are no longer a valid choice for all new selections.

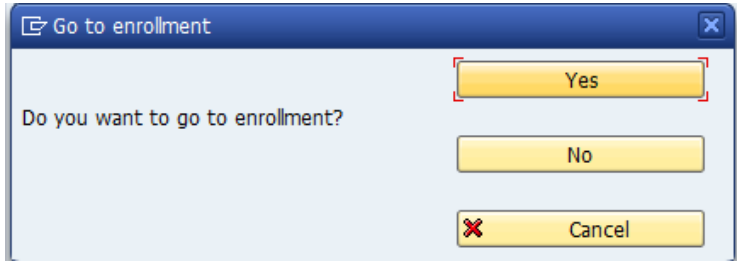
Adjustment Reason – Infotype 0378

4. Save

5. Select the YES button to accept the calculated end date for the event.



6. Select the YES button to go to the Enrollment transaction (HRBEN0001)



Enrollment – HRBEN0001

The following slides will give instruction for enrolling employees with dependents in a Health plan.

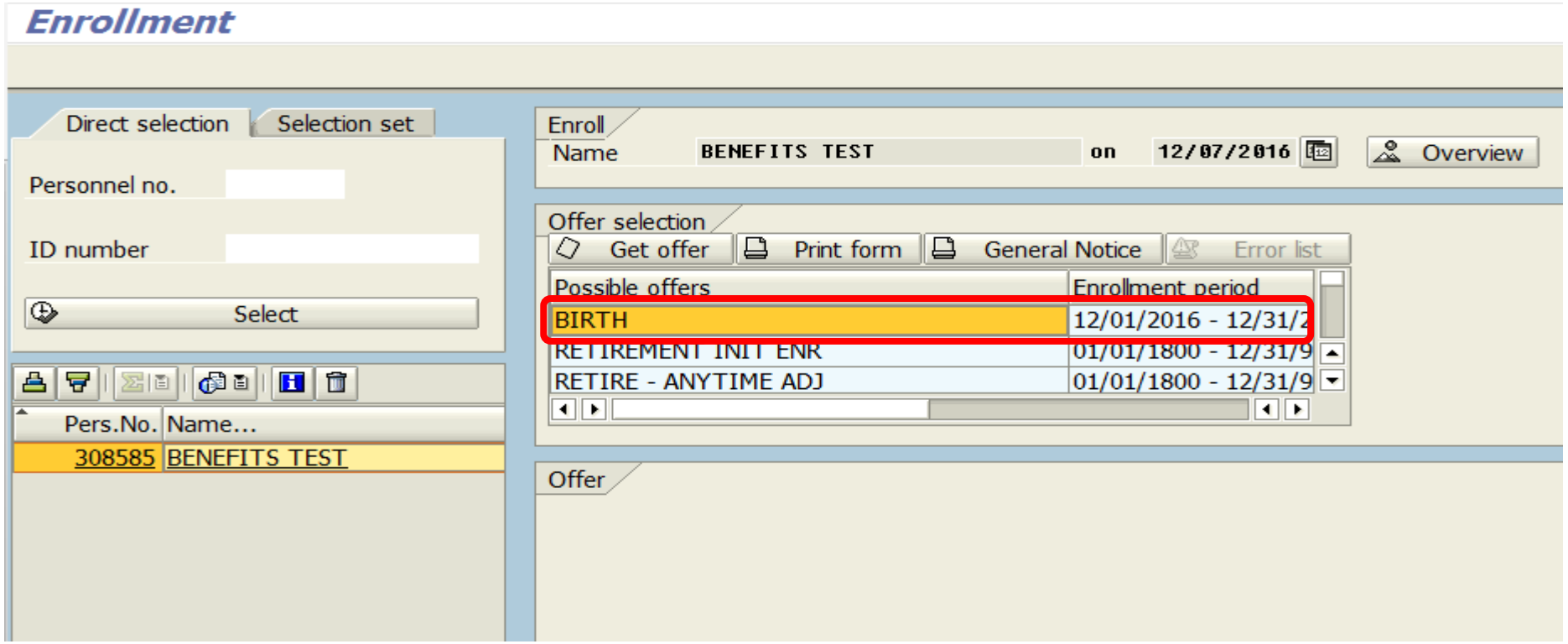
Employees can enroll in plans that cover:

- Employee & Spouse[1]
- Employee & Children[2]
- Employee & Family[3]

[1] Employee's spouse must be recorded on IT0021. Only the spouse will be allowed as a selection for additional coverage
[2] Employee's child(ren), grandchild(ren), and/or stepchild(ren) must be recorded on IT0021. Only the children will be allowed as a selection for additional coverage
[3] Employee's spouse and child(ren) must be recorded on IT0021. A spouse and at least one child must be selected for additional coverage

Enrollment – HRBEN0001

7. HRBEN0001 will automatically open and present the possible offers based on the Adjustment Reason (IT0378).

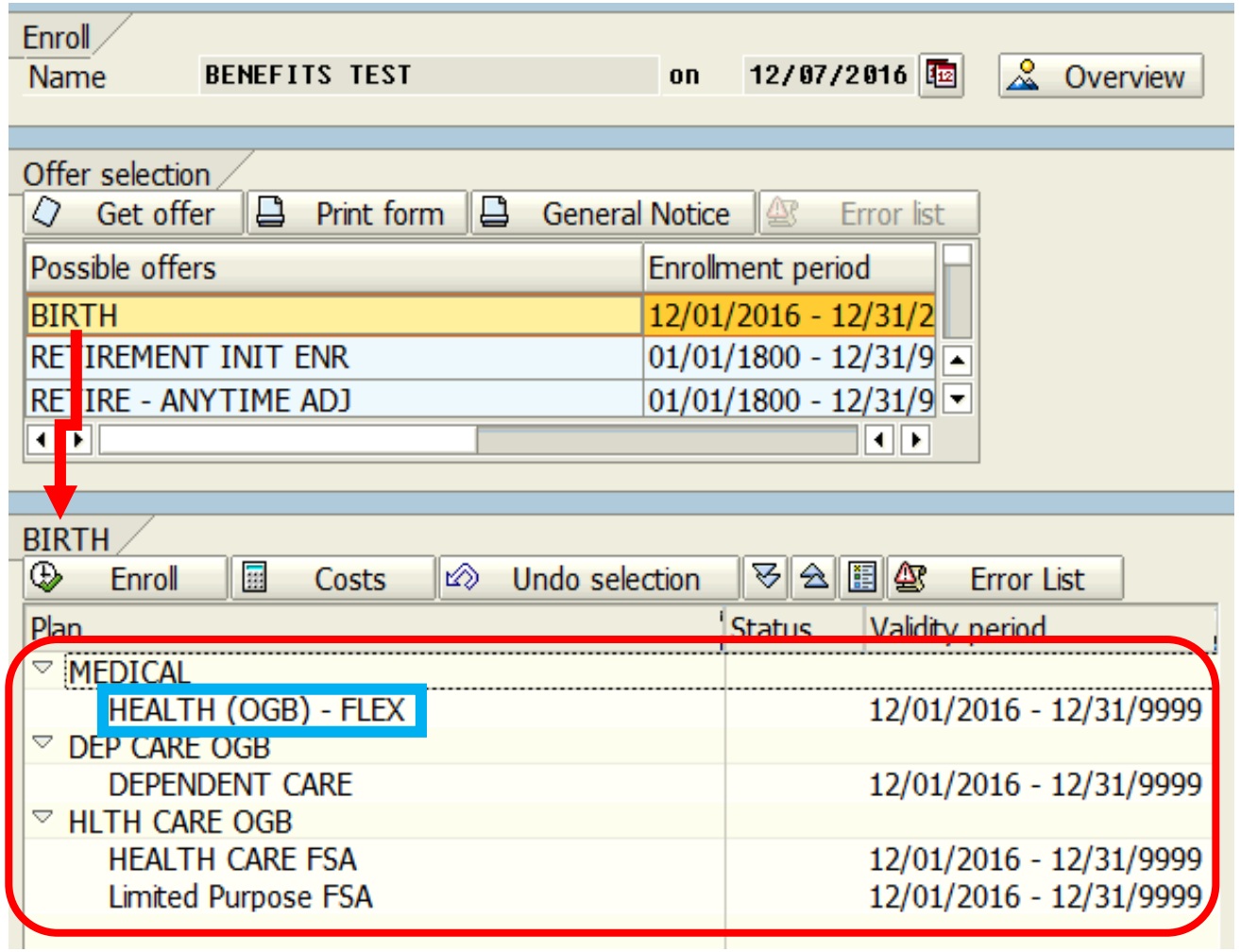


Note: There is no need to change the date as the system will automatically create the record for the correct date based on the QLEs (Qualifying Life Events).

Enrollment – HRBEN0001

8. Click on the newly created Adjustment Reason and select “Get offer” or double click. The available plans will be presented in the Offer section of the screen.

9. Select the plan to enroll.



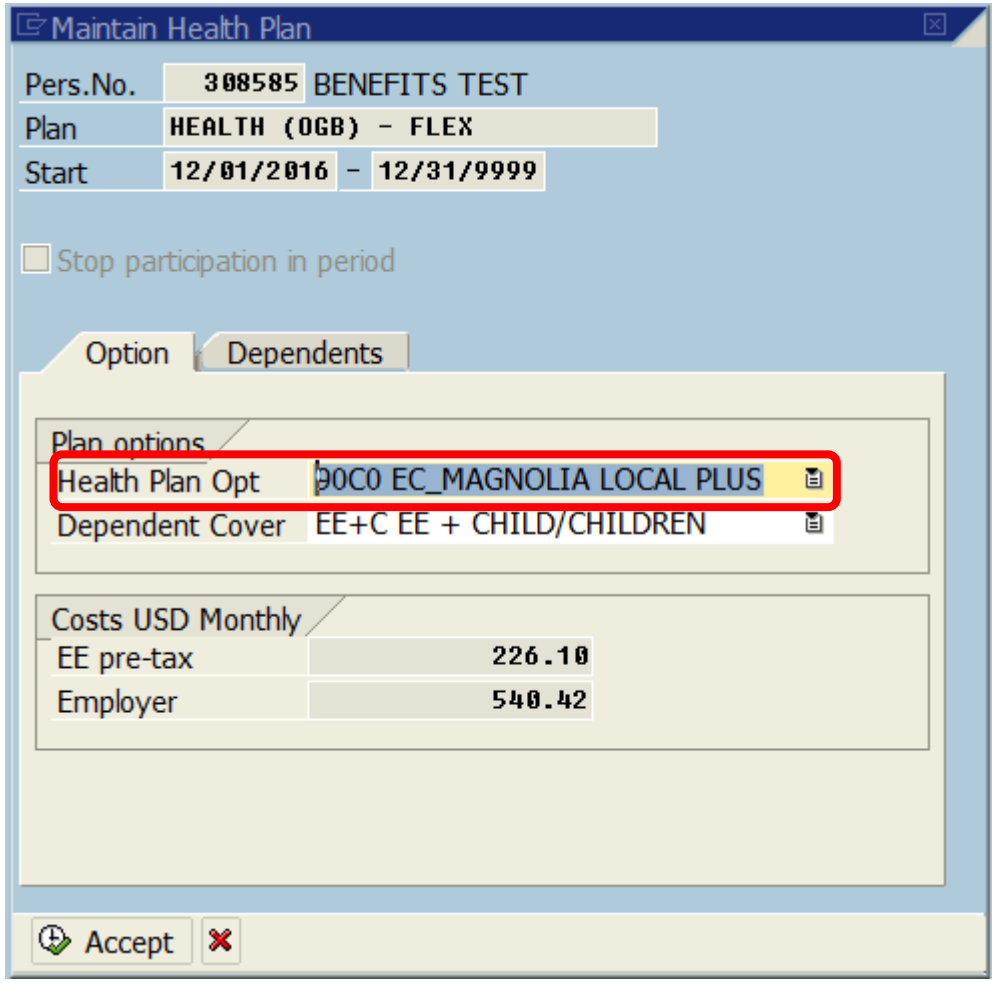
Note: Only plans that can be changed for the event will appear.

Enrollment – HRBEN0001

10. After selecting the plan a window will open to allow for a specific plan choice.

    Use the dropdown menu to select the Plan Option and/or level of coverage.

    Based on the Adjustment Reason of “Birth” the employee is adding a Health plan that includes themselves and the child.

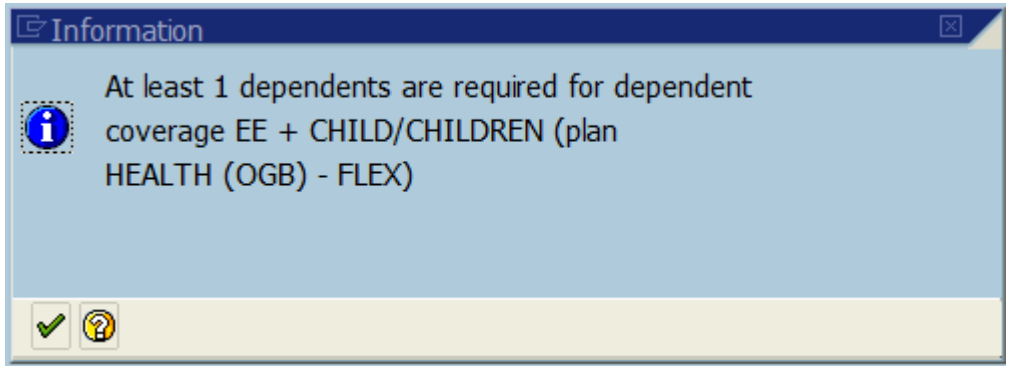


Note: Many Health Plan Options will select the Dependent Coverage.

Enrollment – HRBEN0001

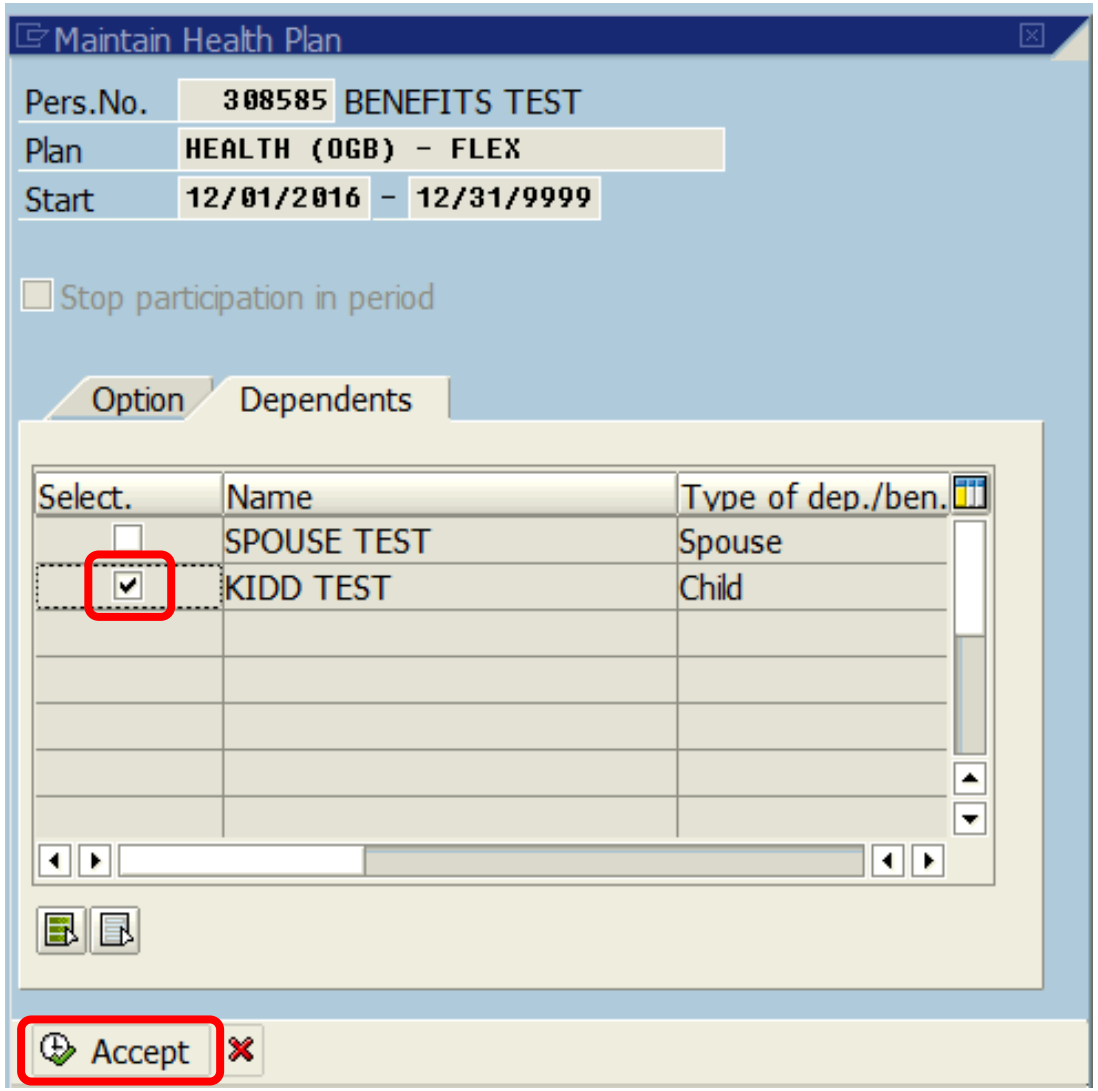
11. After selecting a health plan that includes a child the system will remind you that a child (dependent) must be selected.

    Hit the green check.



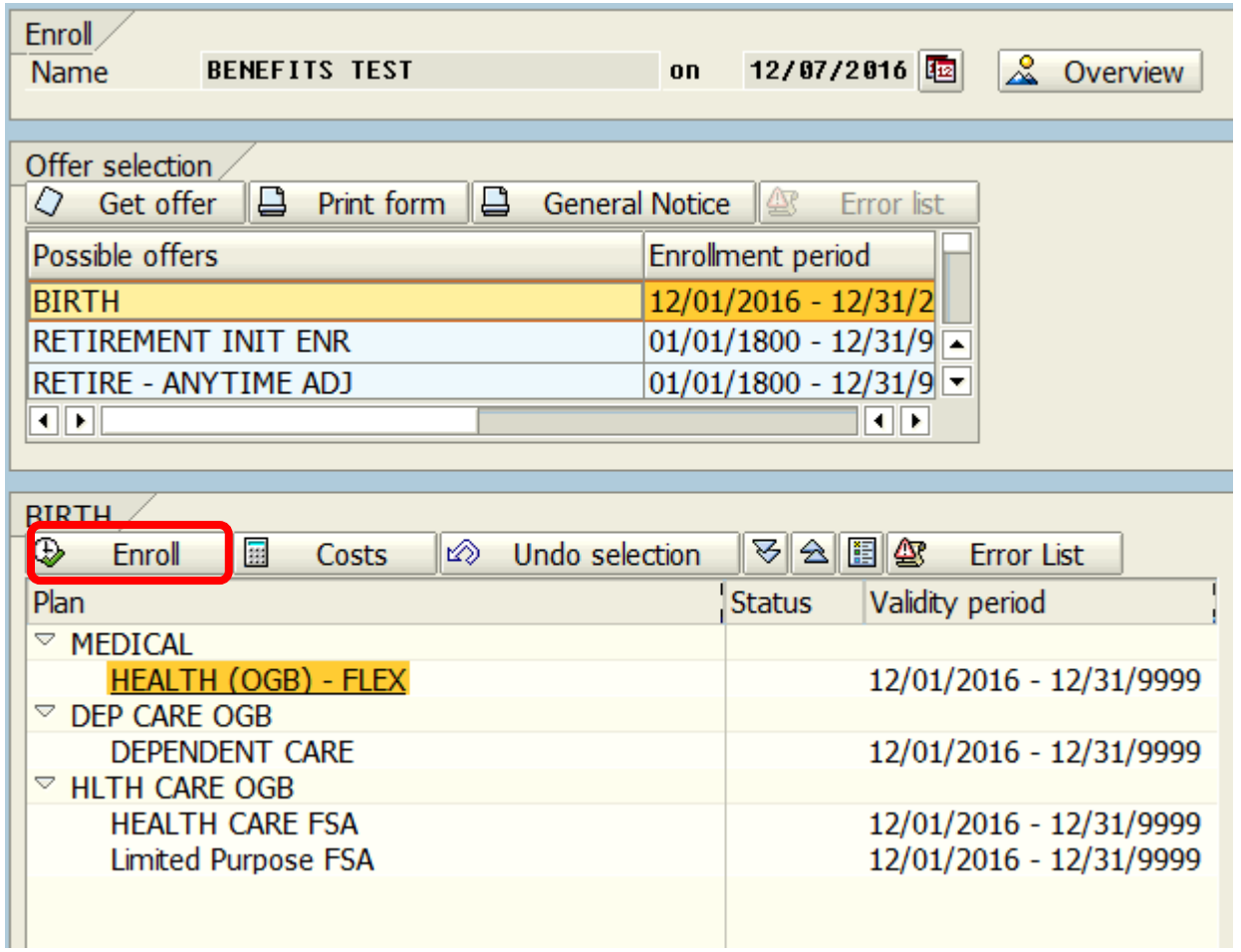
Enrollment – HRBEN0001

12. A window with dependent choices will appear. Select the appropriate dependent(s) and click Accept.



Enrollment – HRBEN0001

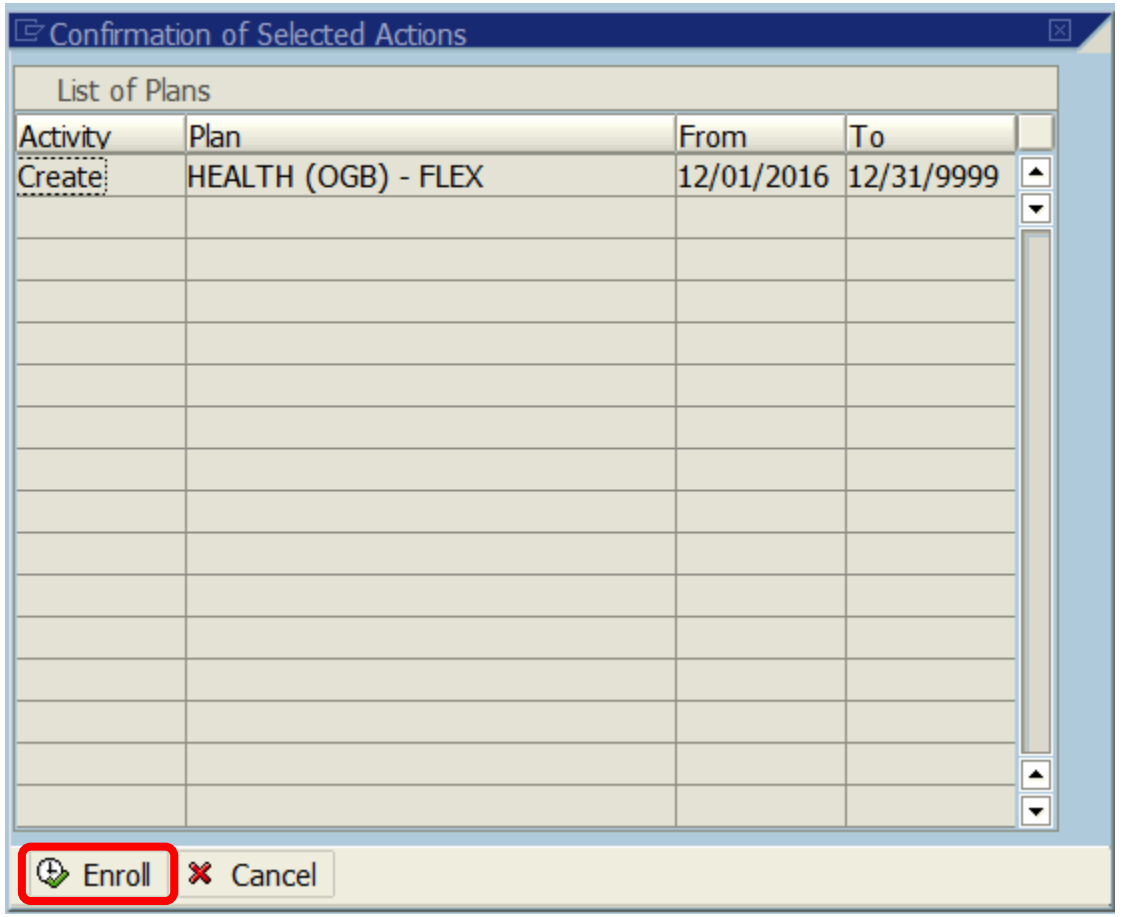
13. The system will revert back to the Offer screen where “Enroll” can be selected.



Enrollment – HRBEN0001

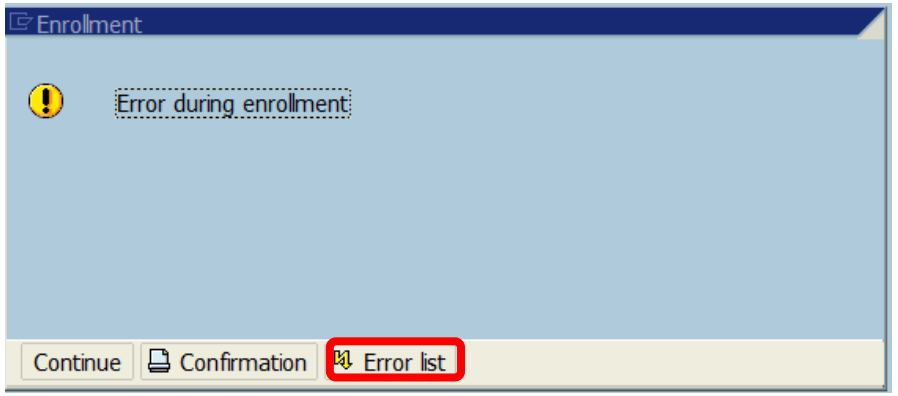
14. A confirmation window will open stating what action is taking place such as Create, Change, or Delete.

    Click the Enroll button to proceed.

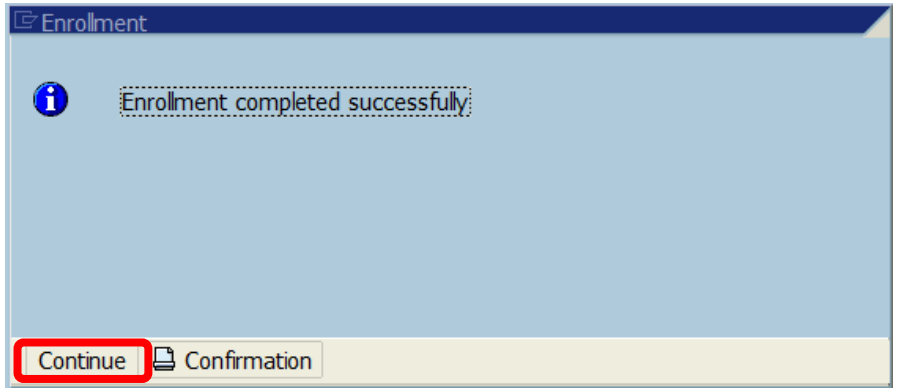


Enrollment – HRBEN0001

If an error is found during the enrollment process, click the “Error list” button to obtain additional information.



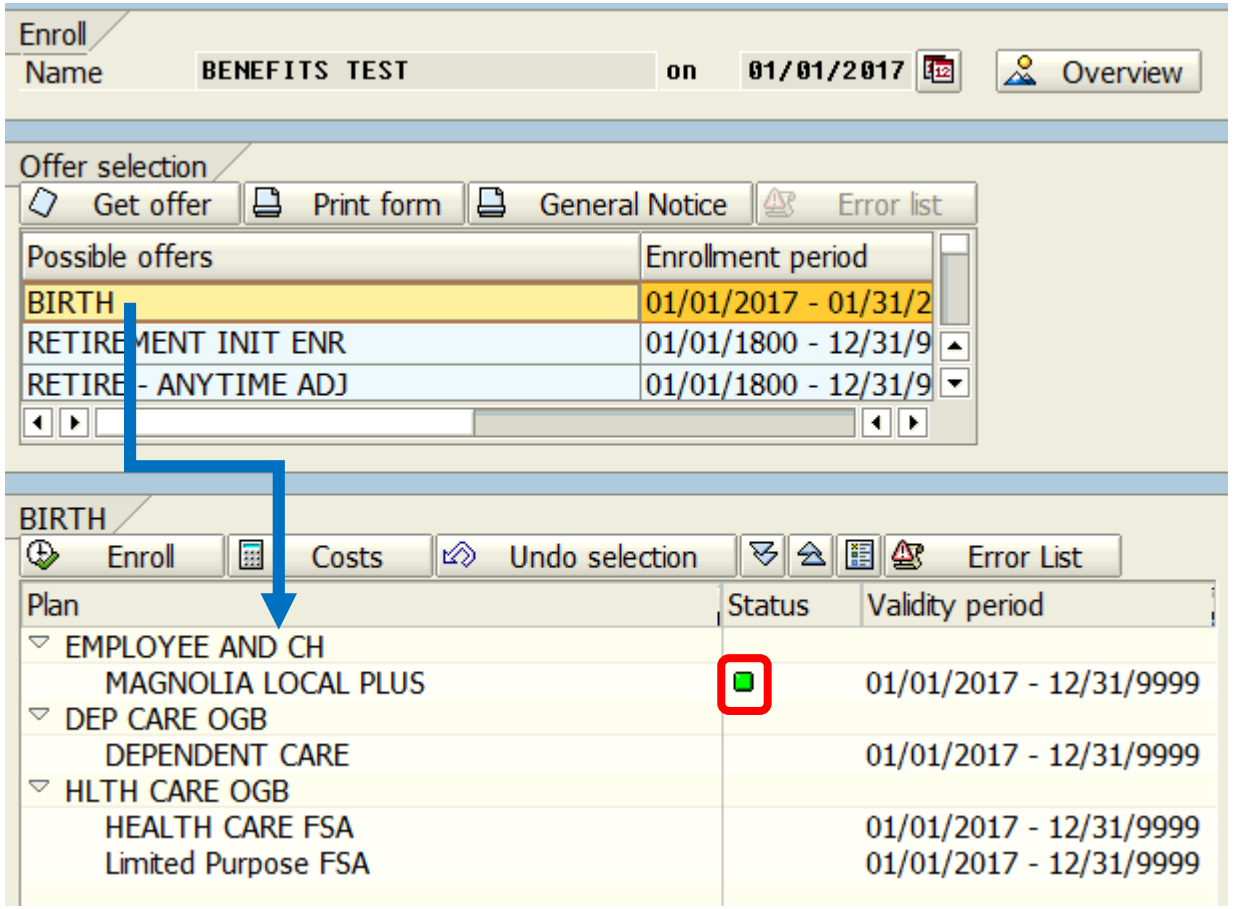
15. If the enrollment is successful, click the “Confirmation” button to print the confirmation page or “Continue” to complete the enrollment.



Note: To print the confirmation page at a later date use HRBEN0015.

Enrollment – HRBEN0001

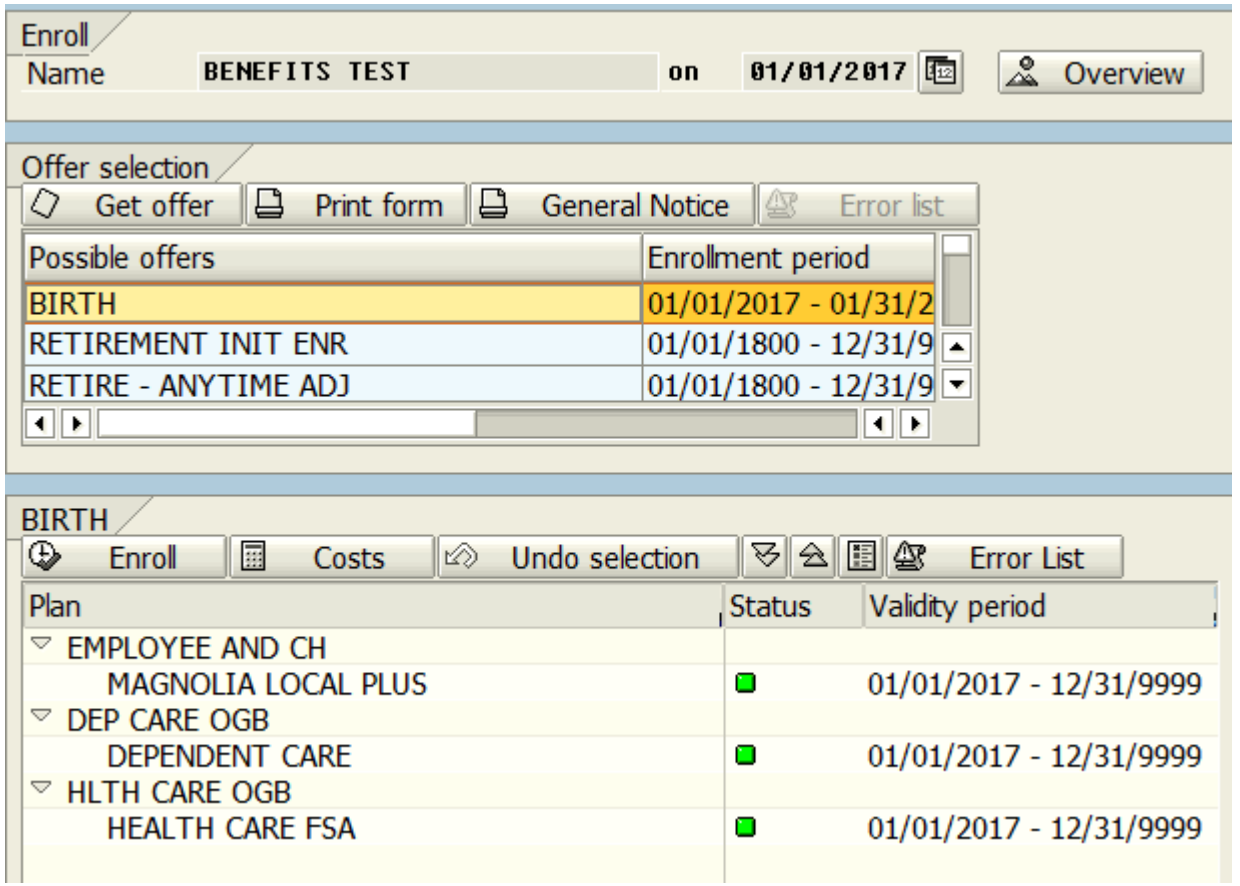
After “Continue” is selected, the system will revert back to the initial HRBEN0001 page. Here the page will display enrolled plans, which are indicated by green square.



Recap: This screen shows that an Adjustment Reason of Birth was created and the employee chose a corresponding plan to include EE + C.

Enrollment – HRBEN0001

The employee may have elected to sign up for other options. For the Adjustment Reason Birth, the employee can elect Dependent Care or a Flexible Spending account. Select the plan and repeat enrollment.



Drop Dependents – Infotype 0378

There may be a need to remove a dependent from a member's plan due to death, divorce, etc. The process works just like an enrollment, but in a different order.

Like an enrollment, an Adjustment Reason is used to determine the changes an employee can make to his/her benefits. Again the Adjustment Reason is selected based on a qualifying event. A list of QLEs are available from the Office of Group Benefits (OGB) or by clicking on the enclosed link.

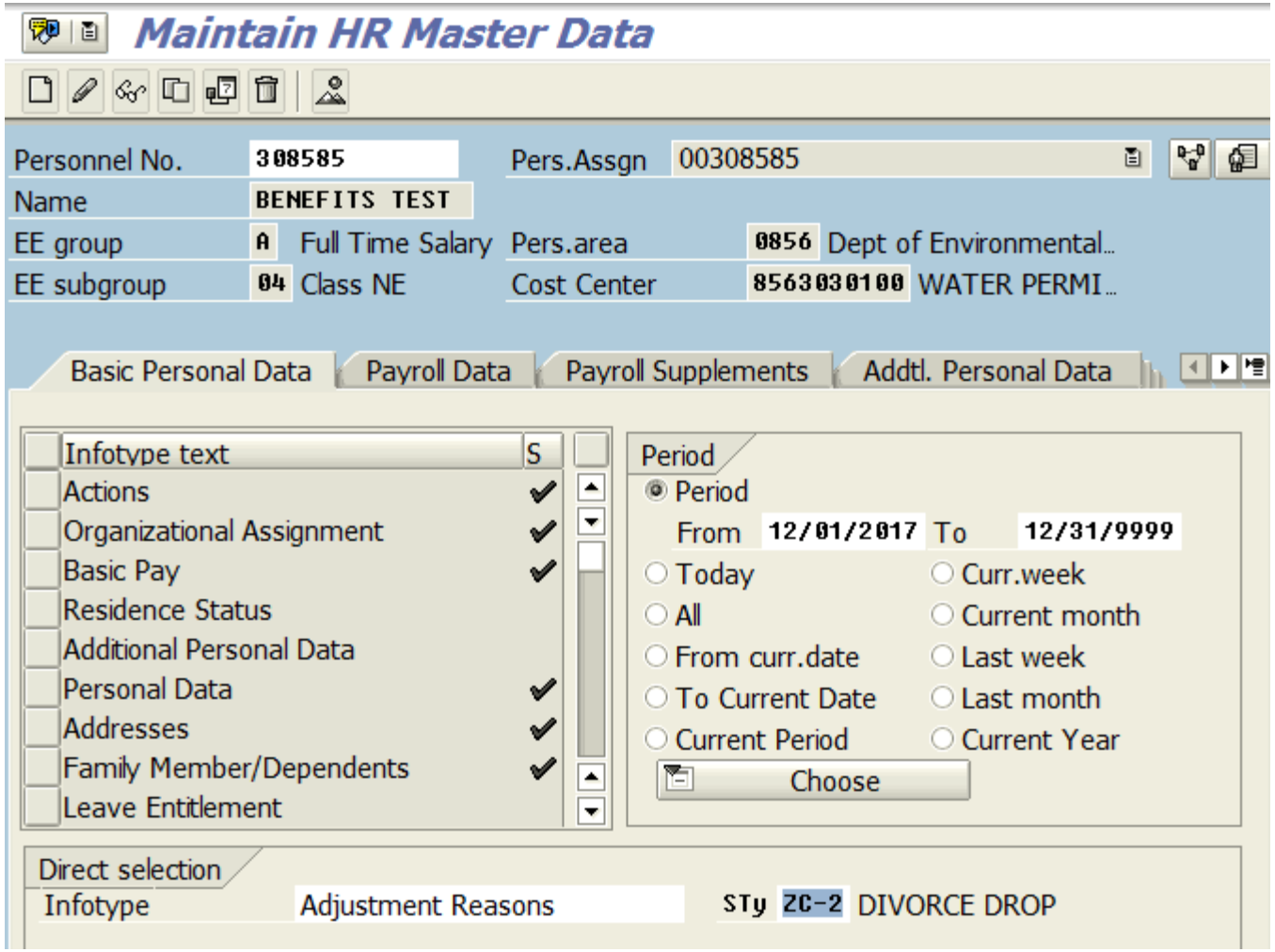
<<QLEs Spreadsheet>>

Adjustment Reason – Infotype 0378

1. From Maintain Master Data in PA30, enter the Adjustment Reason IT0378 and the date* of the record.

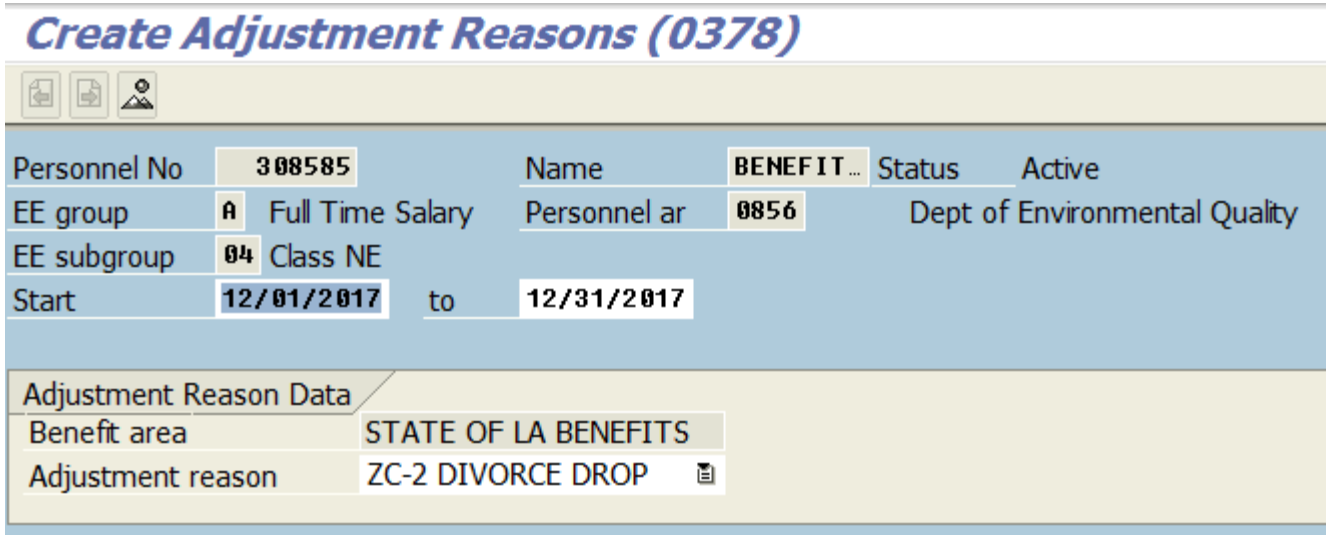
2. Create.

**The start date is the 1st day the dependent can be covered, i.e. birth date of the new child.*



Adjustment Reason – Infotype 0378

3. If the subtype was not selected on the initial screen, choose the correct option from the dropdown menu.

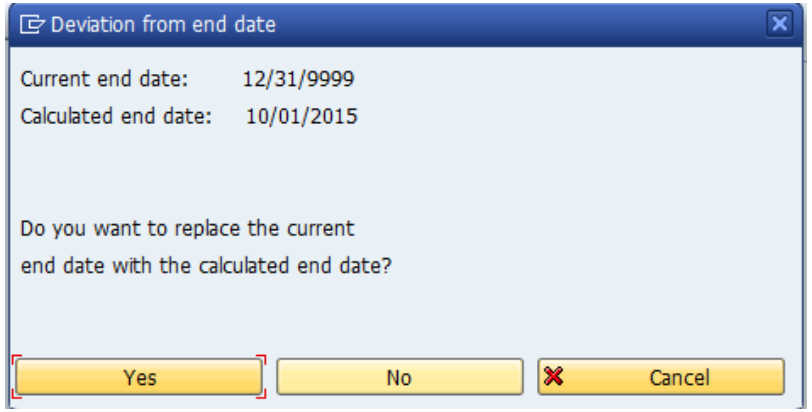


Note: Adjustment reasons cannot begin with "NA" in the title. These reasons are no longer a valid choice for all new selections.

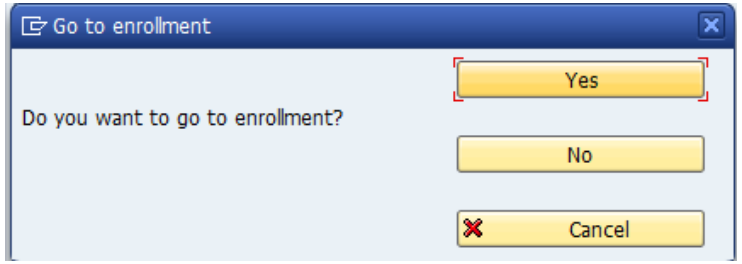
Adjustment Reason – Infotype 0378

4. Save

5. Select the YES button to accept the calculated end date for the event.

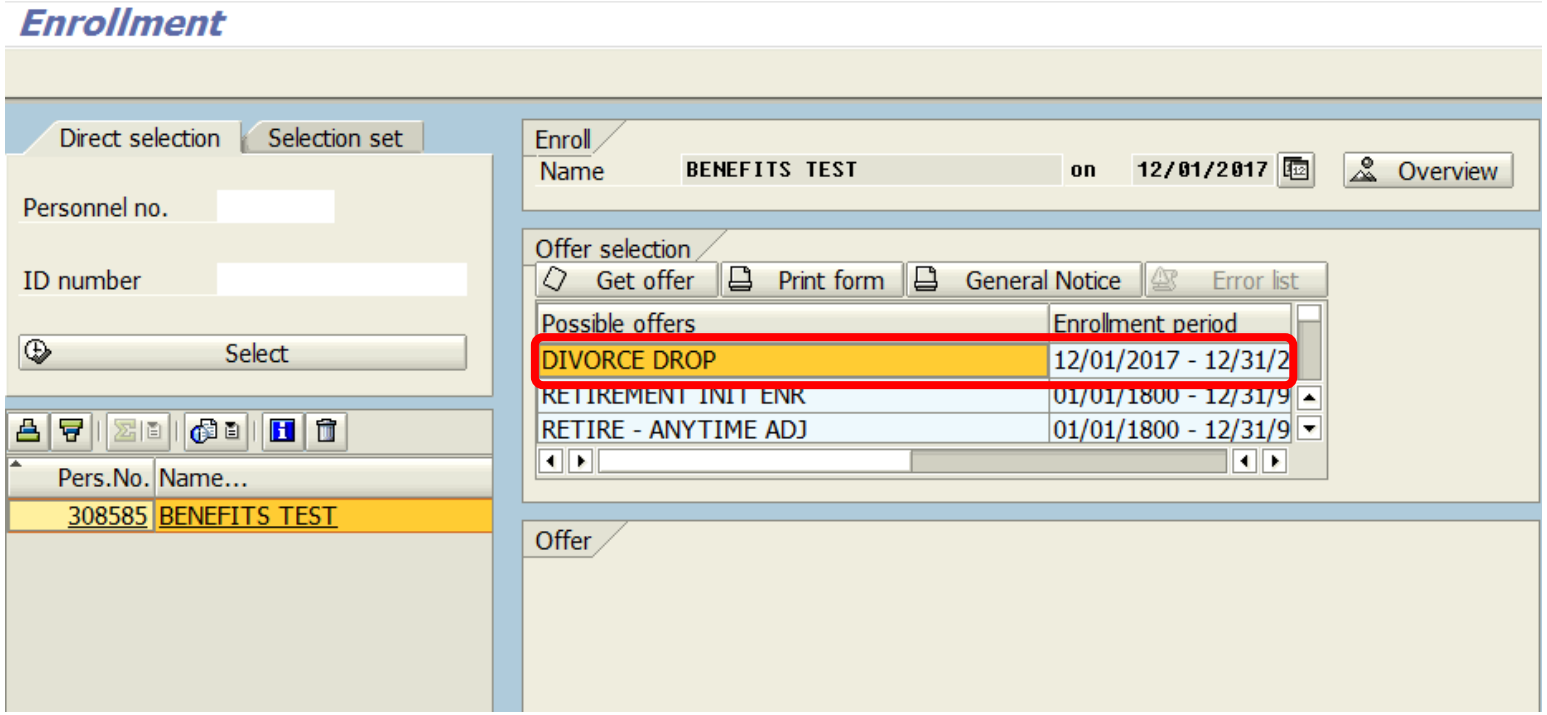


6. Select the YES button to go to the Enrollment transaction (HRBEN0001)



Drop Dependent – HRBEN0001

7. HRBEN0001 will automatically open and present the possible offers based on the Adjustment Reason (IT0378).

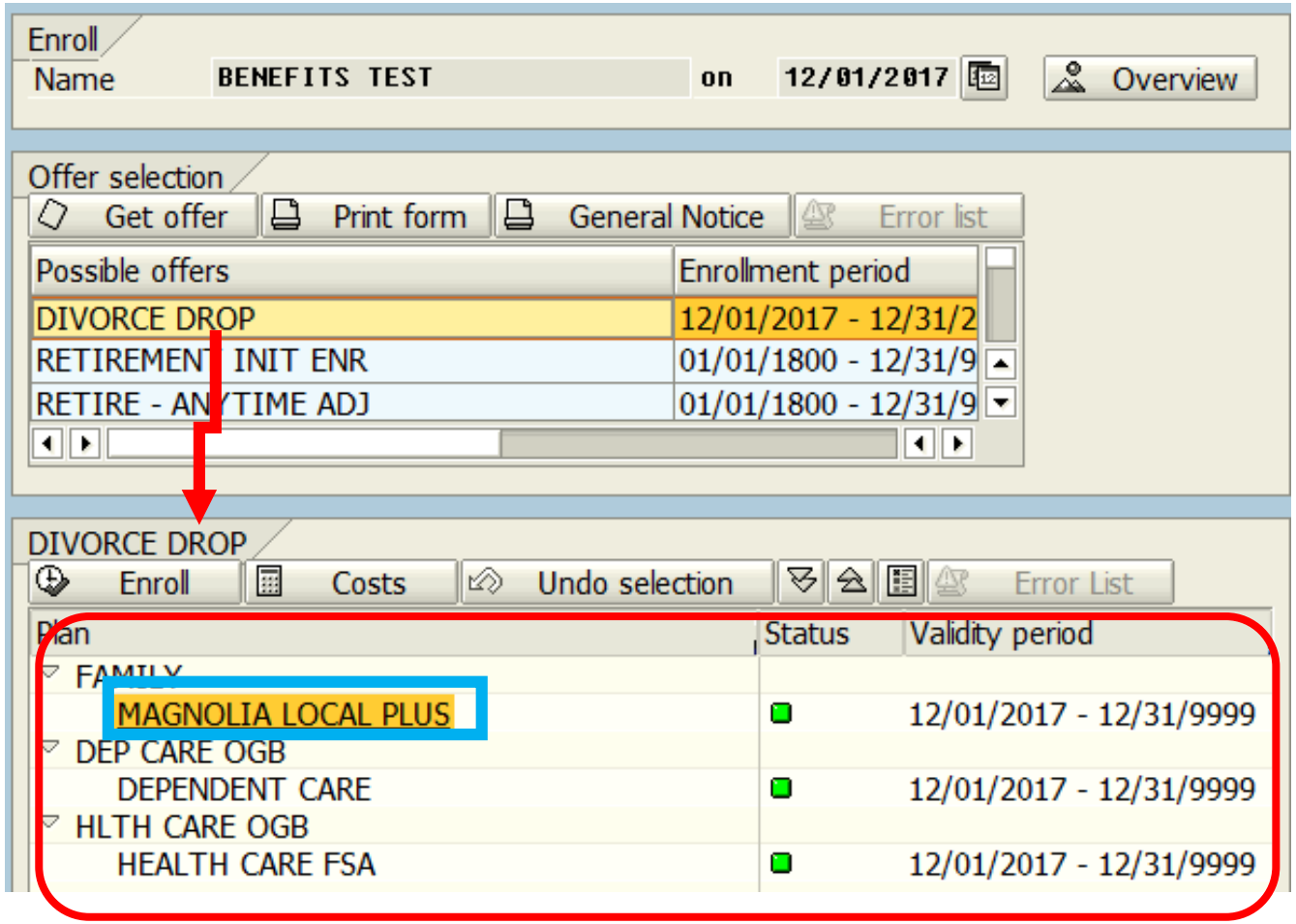


Note: There is no need to change the date as the system will automatically create the record for the correct date based on the QLEs (Qualifying Life Events).

Drop Dependent – HRBEN0001

8. Click on the newly created Adjustment Reason and select “Get offer” or double click. The available plans will be presented in the Offer section of the screen.

9. Select the plan to enroll.

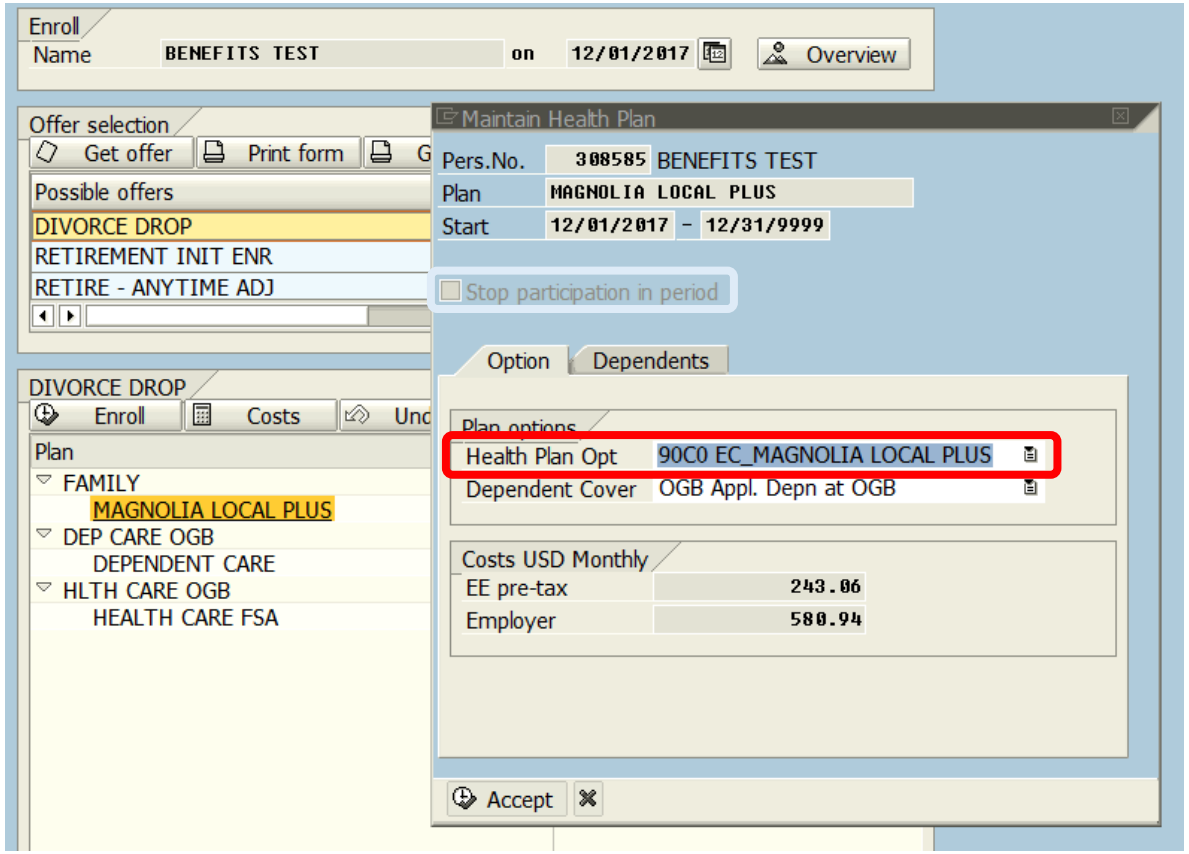


Note: Only plans that can be changed for the event will appear.

Drop Dependent – HRBEN0001

In this example, the employee is dropping the spouse and will continue to carry the child.

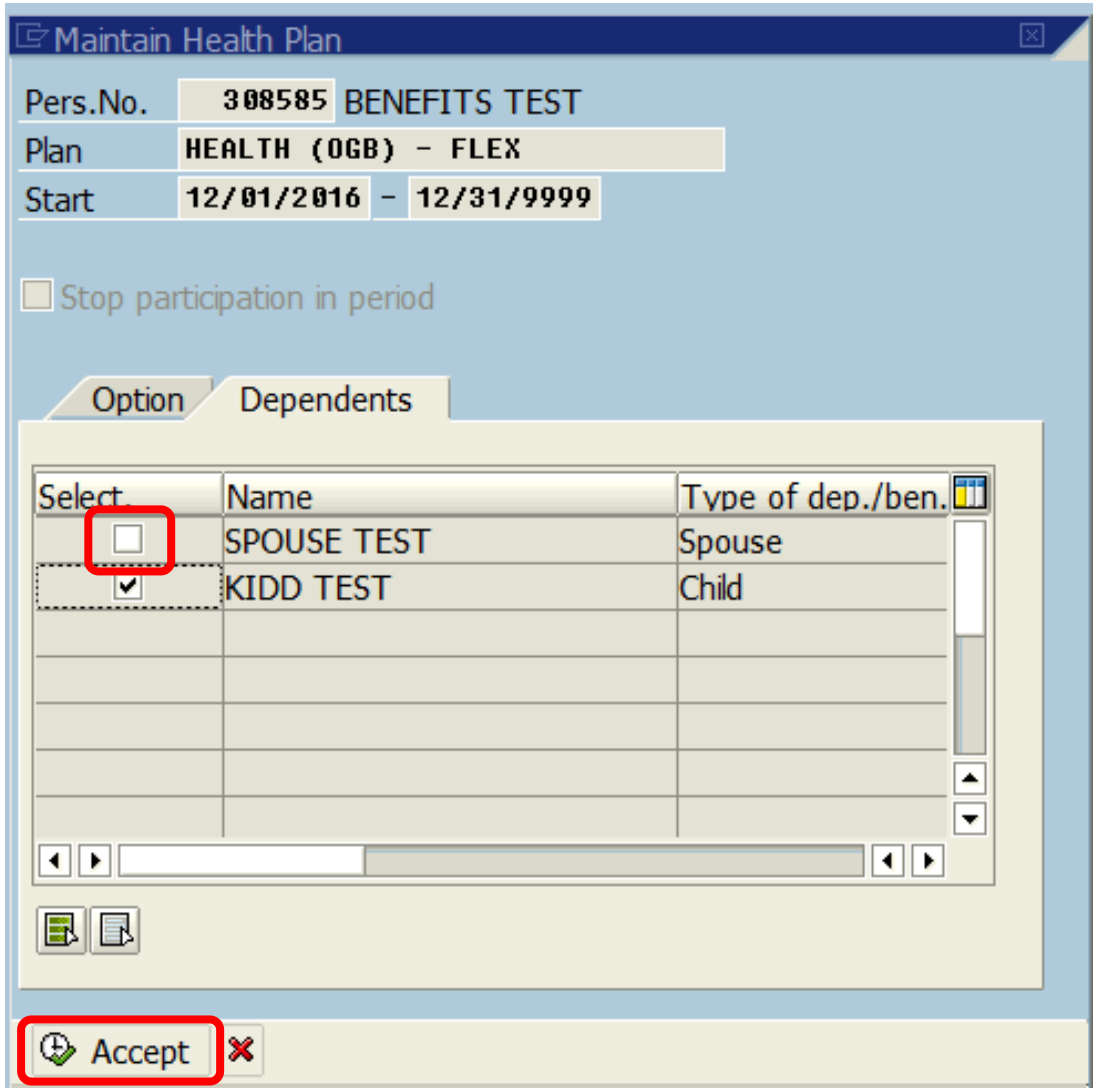
10. Use the dropdown menu to choose a plan that is Employee and Child.



Note: If the option to stop participation would have been allowed the "Stop participation in period" option would not have been grayed out.

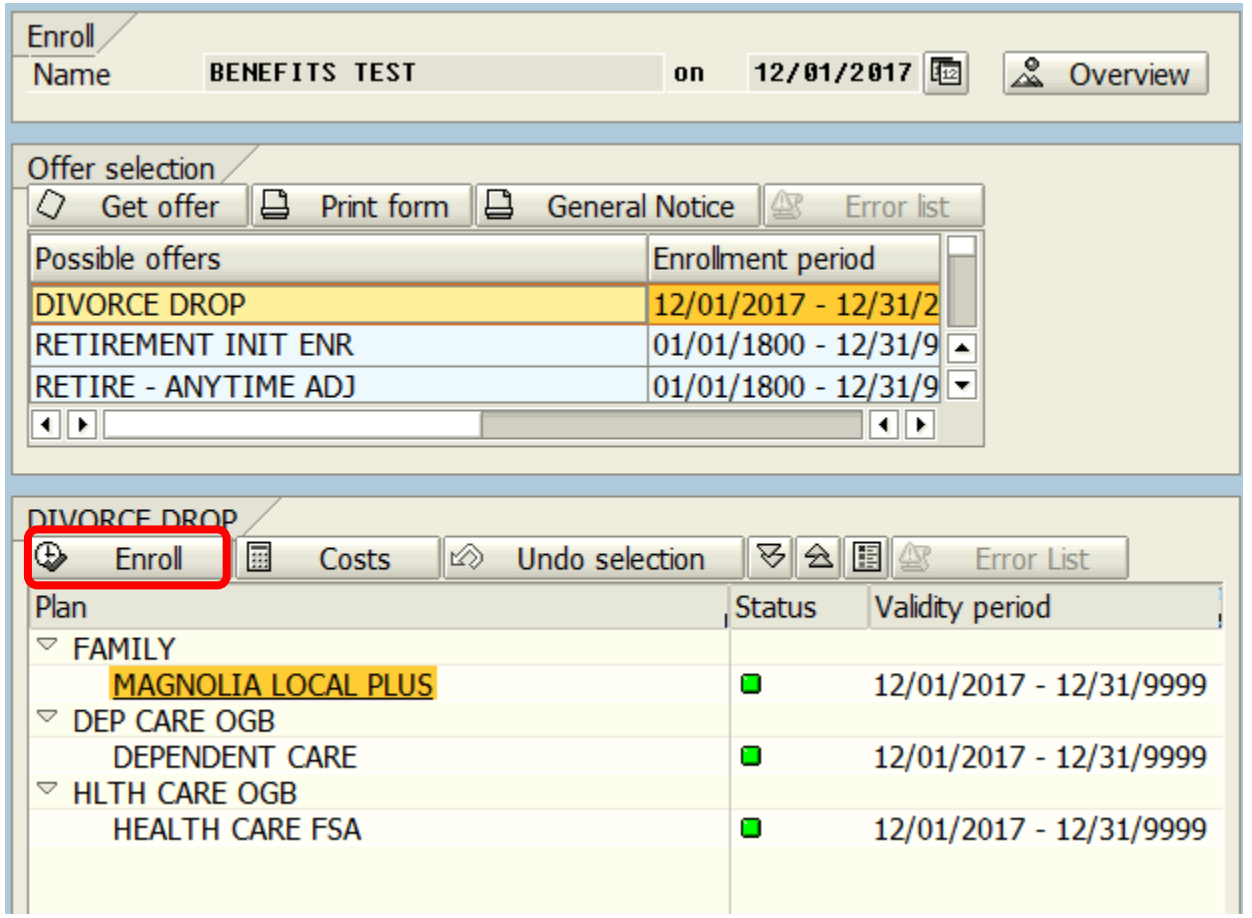
Drop Dependent – HRBEN0001

11. A window with dependent choices will appear. Deselect the appropriate dependent(s) and click Accept.



Drop Dependent – HRBEN0001

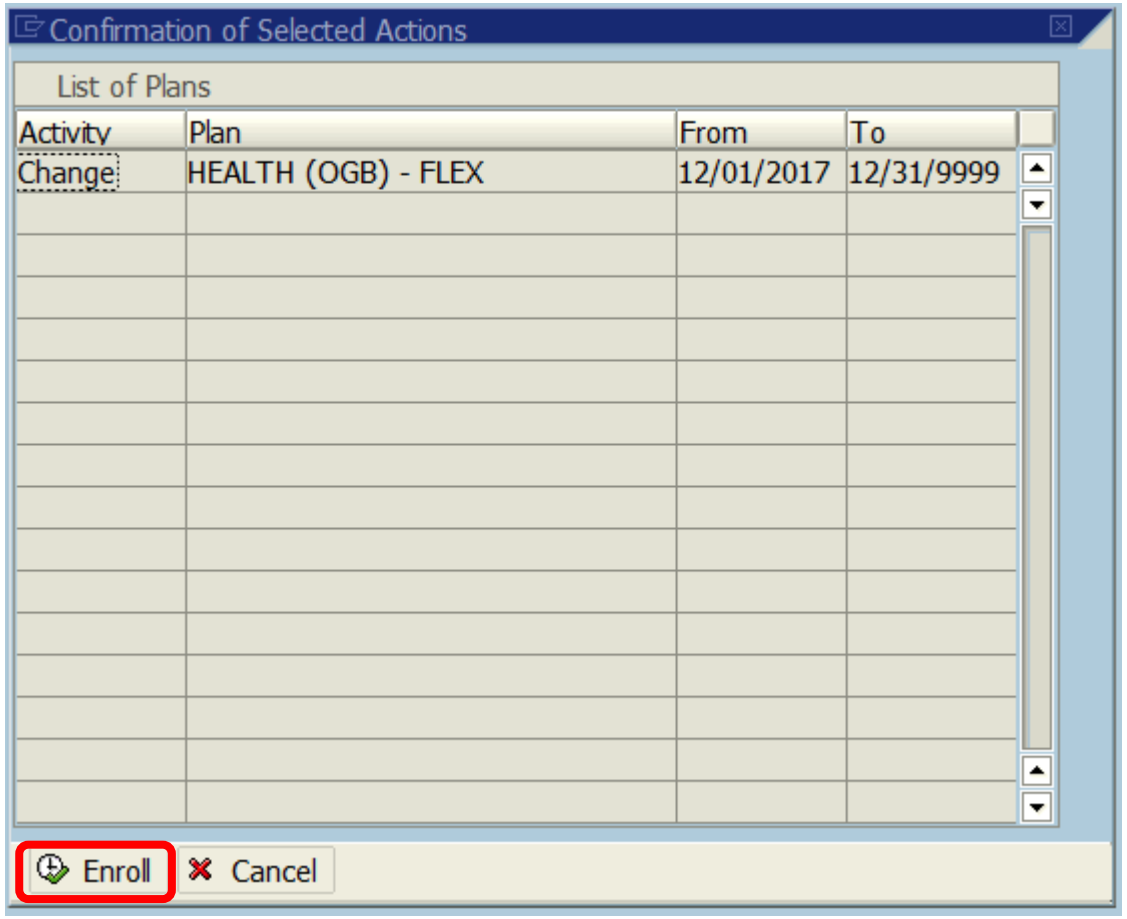
13. The system will revert back to the Offer screen where “Enroll” can be selected.



Drop Dependent – HRBEN0001

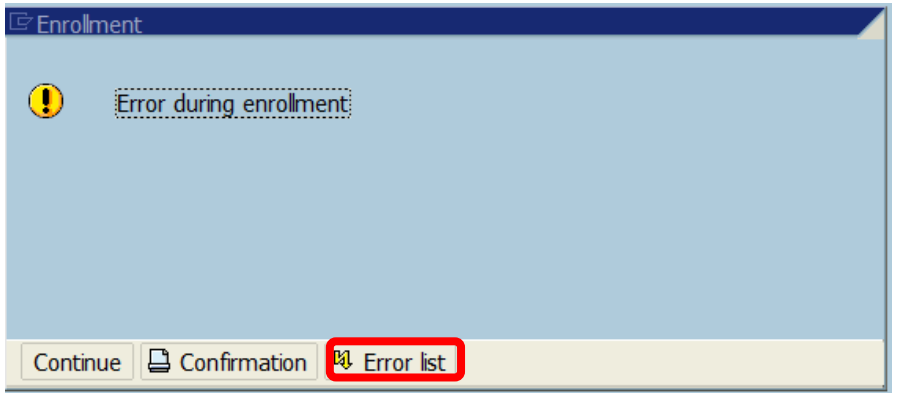
14. A confirmation window will open stating what action is taking place such as Create, Change, or Delete.

    Click the Enroll button to proceed.

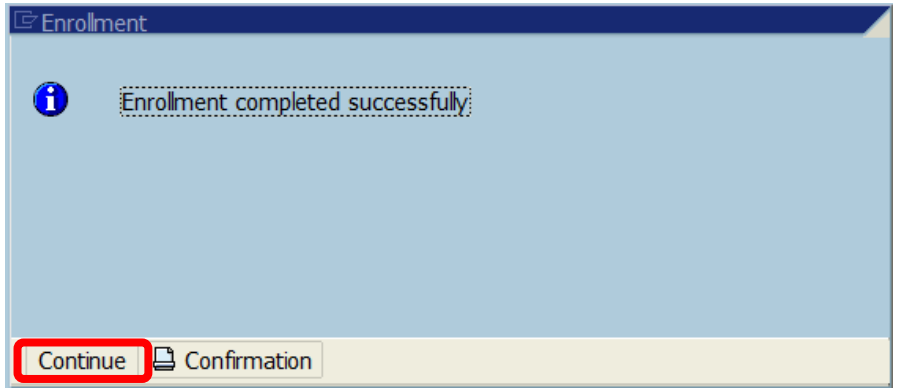


Drop Dependent – HRBEN0001

If an error is found during the enrollment process, click the “Error list” button to obtain additional information.



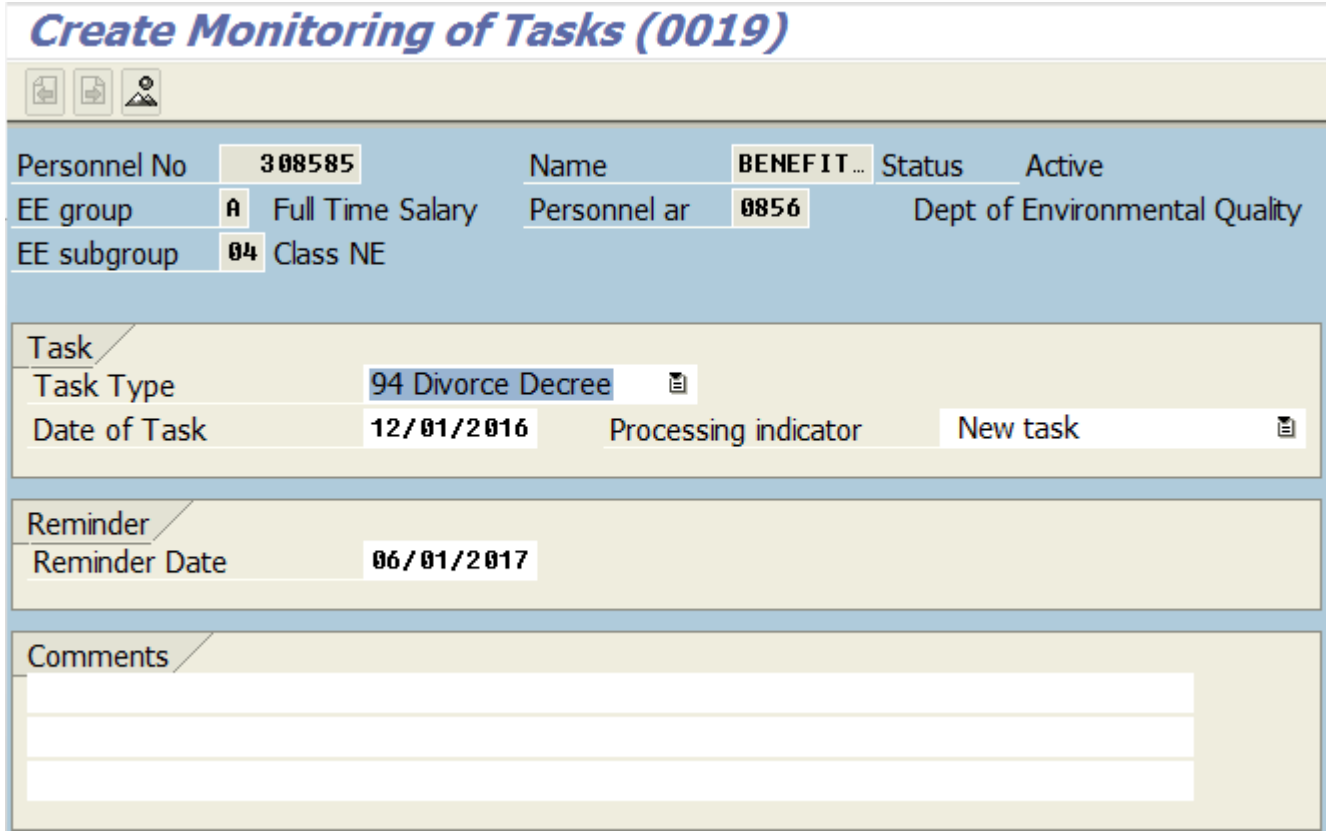
15. If the enrollment is successful, click the “Confirmation” button to print the confirmation page or “Continue” to complete the enrollment.



Note: To print the confirmation page at a later date use HRBEN0015.

Monitoring of Tasks – Infotype 0019

- After saving the Dependent record, IT 0019, *Monitoring of Tasks*, will be presented.
- HR can use this as a reminder to obtain necessary documentation, such as a birth certificate or marriage license.

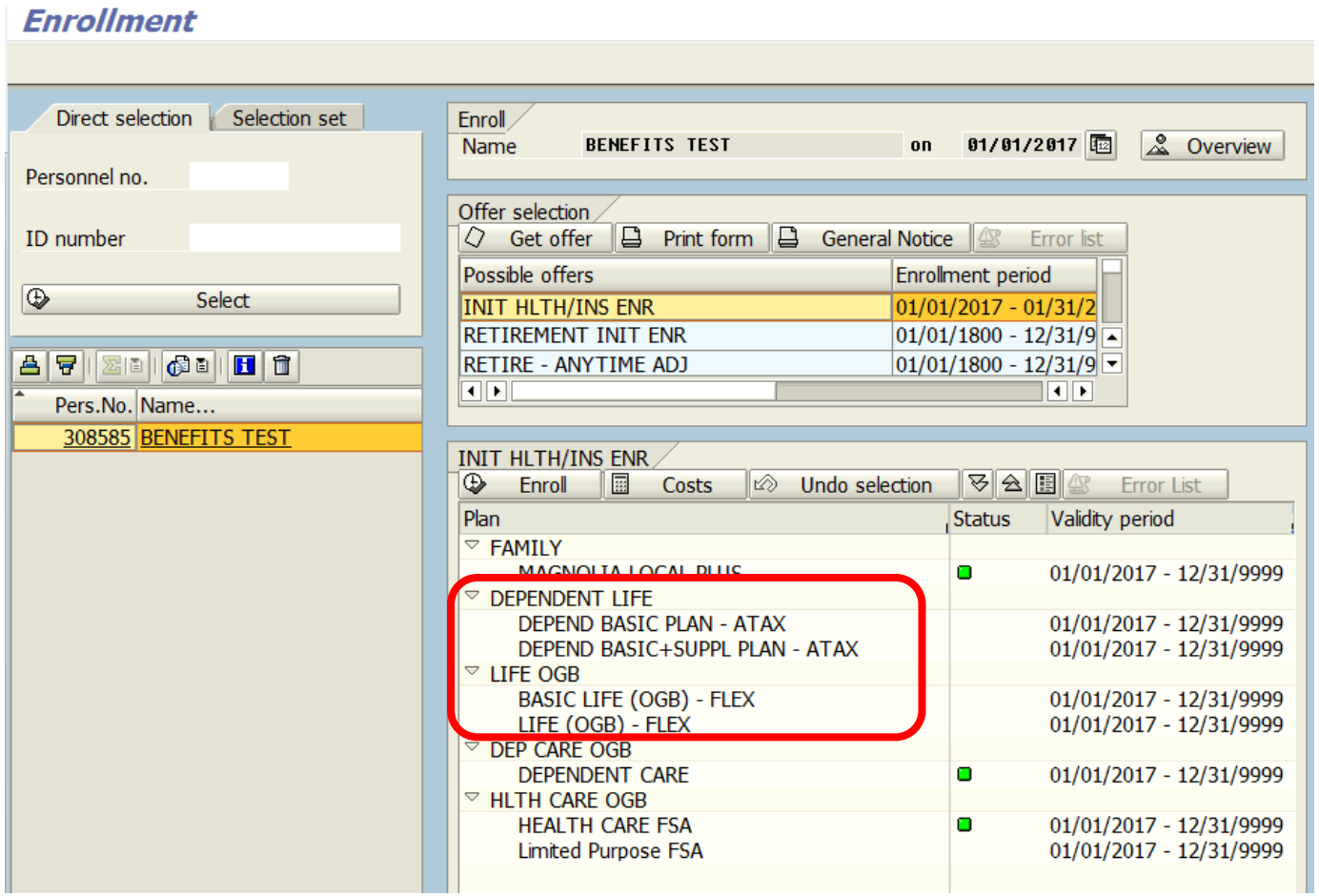


Note: The Reminder Date will populate upon validation to 6 months from date of task.

Life Insurance – HRBEN0001

Enrolling in Life or Dependent Life Insurance will follow the same procedure as Health Plans.

The employee must have a corresponding Dependent Life record on IT0021.

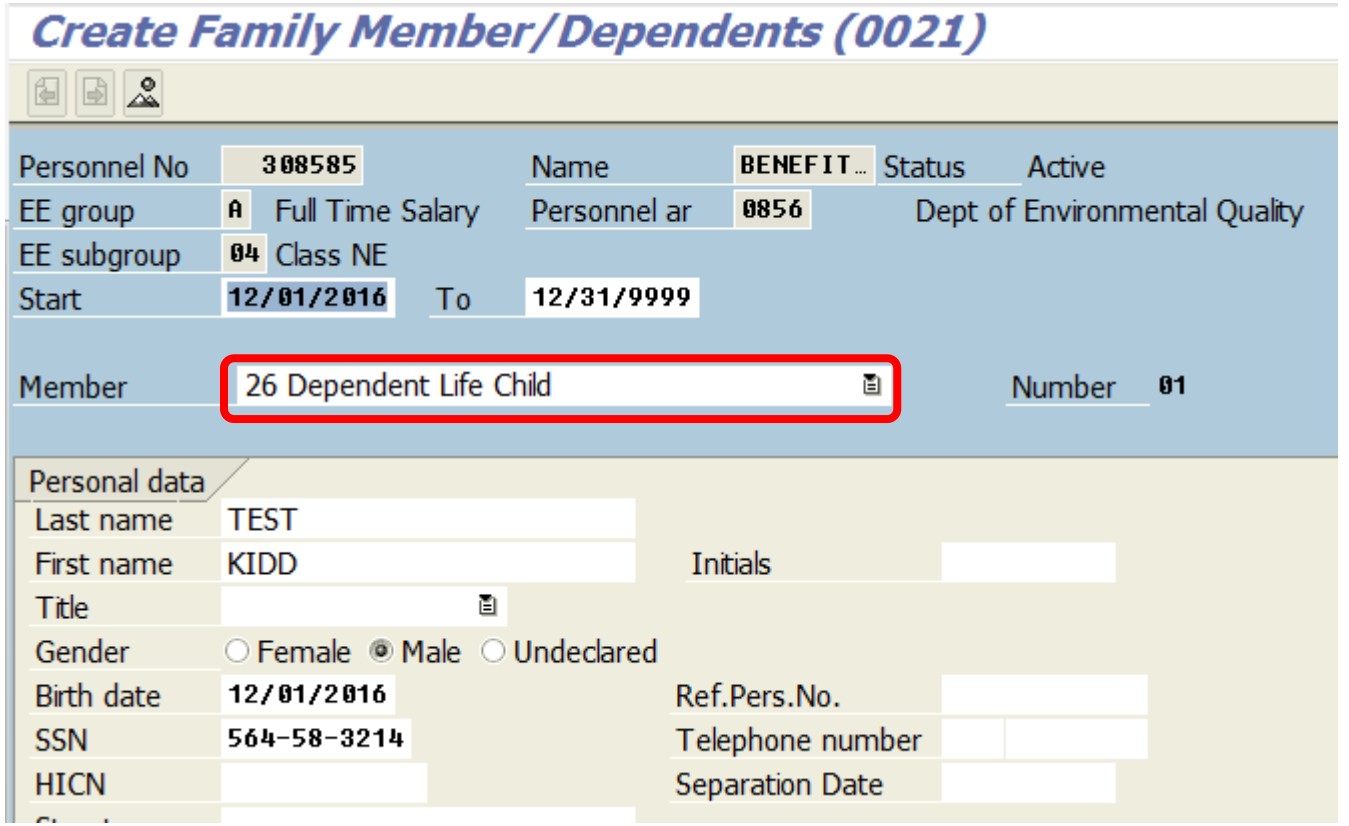


Note: The employee must be enrolled in life insurance before Dependent Life insurance can be selected.

Dependent Life – Infotype 0021

There are four additional options for Dependents on Infotype 0021.

- 25 – Dependent Life Spouse
- 26 – Dependent Life Child
- 27 – Dependent Life Stepchild
- 28 – Dependent Life Grandchild



Note: The employee must have a Dependent Life choice before enrolling in Dependent Life Coverage.

Additional Information

- In Spring 2017, there will be an option to store electronic documents such as birth certificates, marriage licenses, etc.
- Any HRBEN0001 related changes prior to 01/01/2017 will require an electronic web-ticket to the LaGov HCM team.
- Agencies will no longer have maintenance access to Infotypes 0167, 0168, 0170, 0236, and 0377. Maintenance must be conducted in HRBEN0001.
- When adding a dependent, the date of birth must be added.

Additional Information

- To enroll in Dependent Life Insurance, the employee must already be enrolled in Life Insurance.
- Adjustment Reasons are built for specific qualifying events (QLEs). Find a list of those options with description. <<QLEs>>
- A cheat sheet for Create, Change, and Delete options can be found in Online Help. <<CCD Cheat Sheet>>
- ZP255, Plan Participation is an available report to list Benefit plans. It can be run for the entire agency or single employee.
- A dependent may be delimited, but cannot be deleted if ever used as a dependent for Health or Dependent Life Insurance.