

2024 Open Enrollment Administrator Webinar

THURS, SEPT 14, 2023
2:00 PM

PRESENTED BY:
VBA BENEFITS CORP.

Agenda

I. Starting point

Pre-OE reports to run
Employer Application

II. What's next

Salary import
Employer contributions

III. The final step

Testing

IV. Timeline and Interesting tidbits



2024 Changes

New Anthem ID
cards for all

PPO & HMO 3000
plans- changing to
3500

PPO 4000 plan
eliminated

Hospital Indemnity,
Critical Illness and
Accident- moving
to Securian

I. Starting Point



1. Ensure all employees are assigned to the correct benefit class.

- a) Report Center >>**Census (EE Only)** report
- b) Review Benefit Class Name field in report to ensure employees are listed appropriately



2. Ensure all employees have a correct email and/or cell phone listed in bswift

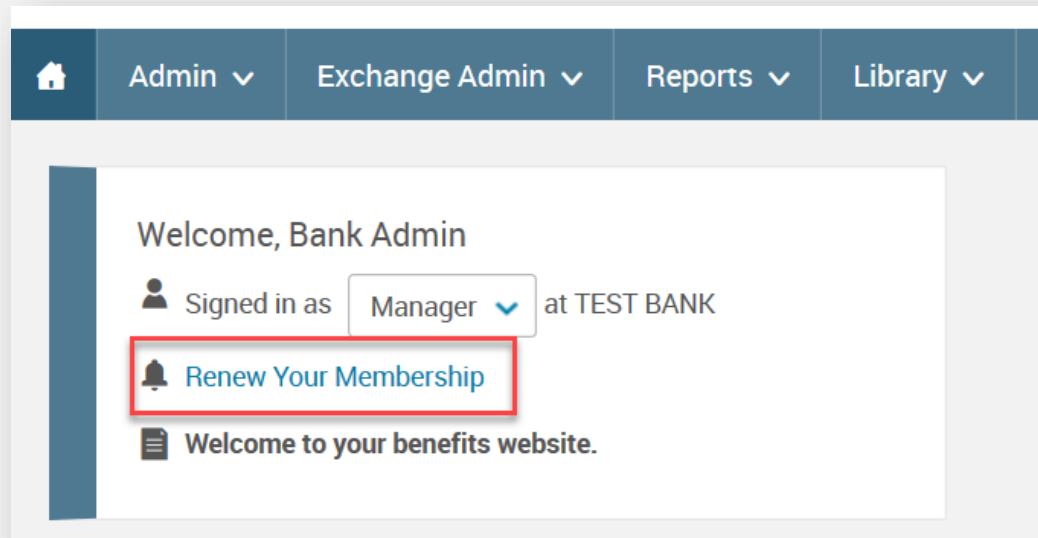
- a) Report Center >>**Census (EE Only)** report
- b) Search for “work email” and/or “cell phone” in Available Report fields and select them so they will show on report.



Helpful Reports

- **“Benefit Elections (EE & Dep. No Codes)”**
 - To review current employee selections
- **“Employees in OE- Not Yet Complete”**
 - To view populations OE completion status (also found on OE Gauge)

Employer Application: Overview



OPENS MON, SEPT 18TH
CLOSES THURS, OCT 5TH

****ALL** Employers must complete their application by Oct 5th

Employer Application: Employer Information Section

Employer Information

Please review the information below and make any necessary updates.

Renewal Information

* Fields are required

* This is your member status. Please do not make any changes. If you have any questions, please contact the VBA.

- ☐ I am a Minimum Premium Bank
- ☐ I am a Regular Associate Member
- ☐ I am a Small Associate Member
- ☒ I am a Pooled Bank
- ☐ I am a Grandfathered Regular Associate Member
- ☐ I am Grandfathered Small Associate Member
- ☐ I am a North Carolina Member

* Do you want to make any changes to your health FSAs next year?

- ☐ Yes - I will contact the VBA to discuss
- ☒ No - they will remain the same

* Do you want to make any changes to your dependent care FSA next year?

- ☐ Yes - I will contact the VBA to discuss
- ☒ No - it will remain the same

* What is going to be the start date for your 2024 Open Enrollment?

11/07/2023 ▼

* What is going to be the end date of your 2024 Open Enrollment?

11/17/2023 ▼

Employer Status

Don't make any changes to status!

If it doesn't look correct, contact the VBA but don't move forward with your application

FSA Offerings

If you want to make changes to your FSA offerings, please contact VBA once you complete your application

Enrollment Begin Date

This date must be November 2nd or later

Enrollment End Date

This date can't be later than November 22nd

Employer Application: Your Employees Section

- If you need to add a new employee, do not add on this page. Complete their new hire enrollment outside of the employer application
- Click **Submit Renewal** at the bottom of the page and you will be directed to the next section of the application.



Employer Application: Group Elections Section

The plans selected last year will automatically be pre-selected for you so **please review selections carefully** and make any necessary updates

Note: if any plans were added to your group after the application last year, they will not be pre-selected so you will need to add

If you need to make any changes after the application is submitted, email the Benefits team at benefits@vabankers.org

Employer Application: Start Enrollment

Employer Information

Your Employees

Group Elections

Company Name.

Thank you for your application!

Open Enrollment: November 02 — November 22

You may now proceed to the Salary upload of the OE process! Be sure to be on the look out for instructions and helpful reminders! Please choose "No, do not send an email notification" from the options below. Your enrollment window will be personalized for you so no email is needed.

Please note that once you select "Start Enrollment" below you will no longer be able to make any other plan offering changes.

Would you like to send an email to employees when you start enrollment?

☐ Yes, send an email notification

☒ No, do not send an email notification

✓ Start Enrollment

1 Group Elections

Plan Offerings

2 Start Enrollment

- Select **"No, do not send an email notification"**
- Select **"Start Enrollment"**

II. What comes next?

Compensation Update Imports

- Must be uploaded to bswift by 10/12/23
- Compensation as of 9/30/23
- Round to the nearest dollar
- Instructions and template for uploading compensation will be available by 9/18/23
- Upload for both Salary and Hourly employees

Employer Contributions

- Add to Medical and Dental plans (if applicable)
- Must be completed in bswift by 10/12/23
- Instructions will be available by 9/18/23
- Make sure the total premium matches your rate sheet once all contributions have been entered

TEST

- Testing period: **10/23-10/26**
- Test in Sandbox environment, not your main bswift environment
- We will provide a test plan with common scenarios but please test any other scenarios that might be common for your population (including part-time employees)

Open Enrollment Timeline

9/18-10/5

Application
Window

10/6

Tobacco
Surcharge
and Wellness
Credits due

10/5-10/12

Employer
Contributions
loaded into
bswift

10/5-10/12

Compensation
uploaded
into bswift

10/23-10/26

Testing Period

11/2-11/22

OE Window

Interesting Tidbits

- If you see something, say something! We want to resolve as many issues as possible prior to OE so your employees have a smooth, pleasant experience.
- **ALL** employees must step through enrollment even if they aren't making any changes
- The OE Gauge will be available on your bswift Home Page for an at-a-glance view of your enrollment stats
 - Make sure to click Refresh under the Gauge to get the most up-to-date data
- Or you can go to Client Quick Lookup on your bswift Home Page and run the "Employees in OE-Not Yet Complete" report
- Once your OE period ends, it's important to ensure there are no employees enrolled in plans that are no longer being offered in 2024

Weekly Newsletters

Problem viewing this email? [Click here](#) for our online version.



Coming up soon...

3. FALL MEETING REGISTRATION

VBA Benefits Corp. will be hosting two fall meeting options this year. This event is free, but advanced registration is required.

Option 1: VBA Office on Wednesday, September 27th at 10am - register [here](#).

Option 2: Virtual Event (via Zoom) on Tuesday, October 3rd at 10am - register [here](#).

PRESENTATION FINISHED



**PLEASE DON'T ASK DIFFICULT
QUESTIONS**