OE 2020 Webinar Agenda

September 12, 2019

OE Reminders

- Employees and Benefit Class Audit
  - Please ensure all employees are assigned to correct benefit class
    - Run Census (EE Only) report— you may leave all fields as-is and click "Run" at the bottom of the page (we recommend changing output to Excel for easier readability)
- Plan Assignments Audit
  - Please ensure the appropriate benefit classes are assigned the correct plan types/plans
    - Run the Plan Assigned to Class Report—you may leave all fields as-is and click "Run" at the bottom of the page (we recommend changing output to Excel for easier readability)
- New Hire Enrollment Rules Review
  - Run New Hire Enrollment Rules Report—please note you will need to filter the report to only look at recent rules
  - Verify your rules are accurate per your adoption agreement
  - Dental and Voluntary plans will always have an effective date at the beginning of the month (no mid-month effective dates)
- OE Gauge
  - Will be available on the admin home page for an at-a-glance view of your enrollment stats

Employer Application Review

- Employer Information Page
  - Please do not make any changes to your Employer Status—if you believe it is incorrect, please do not complete application and contact VBA
  - If making changes to your FSA offering, please contact VBA after completing the application
  - Please make sure to enter in appropriate OE begin date and end date
- Your Employees Page
  - You may add in new employee information on this page, and this will automatically create a user at your site (but you still may add new employees after completing the application as well)
  - Click Submit Renewal and you will be directed to the Group Elections portion
- Group Elections
  - The plans selected last year will automatically be pre-selected for you. **Please review** these selections and make any necessary updates
- Application Completion Page

- o Please select "**No, do not send an email notification**" and then **Start Enrollment**
- If you are unable to complete the application or have any questions, please contact the VBA and/or submit a ticket

Salary Uploads and Employer Contribution
- 1/1/2020 salary information must be uploaded in October, prior to Open Enrollment for benefits to appear accurately
  - o Please complete this as soon as possible after completing the application per the instructions
  - o You will need to upload for Hourly and Salary employees
  - o This is necessary to do prior to Open Enrollment since it is used to compute premium for benefits-based enrollments that employees will see in the enrollment flow
- Employer contribution amounts for 2020 must be added to the appropriate medical and dental plans (if applicable) prior to Open Enrollment as well
  - o Please complete this as soon as possible after completing the application per the instructions

Ticket Tracker
- An issue-tracking tool that administrators can use for issues, requests, questions, and more
- Always assign the ticket to a user
  - o Otherwise, the team may not receive notification of your ticket which will result in a delayed response or no response
  - o Please *always* assign tickets to "**VBA BENEFITS CORP, Queue**"
- For more information on ticket tracker, including how to submit tickets, please see the Ticket Tracker Training document

Reports
- There are many useful reports available under Reports >> Report Center that can be used to gather a wide range of information, including demographic, benefit, and enrollment information
- You are able to mark reports as a favorite, saved customized reports, and set up reports to run automatically
- Please see the **Report Training Guide** under Content Library for additional information

Open Enrollment Tips & Tricks
- If you see something, say something!
  - o If you notice something appears off, please submit a ticket so we can look into it right away; we prefer to resolve any issues prior to OE so your employees have an easy, pleasant OE experience
- Make note if any of your employees do not step through enrollment

- o You may use your OE Gauge to help determine which employees have not stepped through enrollment, or you can run the Open Enrollment Not Complete report (the Effective Dates should be the dates of your OE period)
- o This is important to do after your OE period ends in order to ensure there are no employees enrolled in plans that are no longer being offered for the new year
- **TEST!**
  - o Please make sure to test the OE window the week prior to OE beginning, and test a wide range of scenarios to ensure the system is operating as expected
- Provide feedback
  - o We *always* welcome feedback—the good, the bad, and the ugly!
  - o If there are any processes you need help on or would like to make more streamlined, please let us know

Admin OE Checklist

Task	Must **be completed by**	Completed?
Employees and Benefit Class Audit	9/30/2019	☐
Plan Assignment Audit	9/30/2019	☐
New Hire Enrollment Rules Review	9/30/2019	☐
Complete Application	10/4/2019	☐
Upload 2020 Salaries	10/17/2019	☐
Enter Employer Contributions	10/17/2019	☐
OE Test - Phase 1	10/24/2019	☐
OE Test - Phase 2	10/31/2019	☐