

AGENCY BENEFITS SYLLABUS AND KEY NOTES

COURSE NUMBER ABEN

AGENCY BENEFITS – AUDITORIUM

Auditorium Protocol

1. Attendance (Did you sign-in?)
2. Housekeeping and Auditorium Rules
3. Introductions
4. Power Point Presentation

Auditorium Session Expectations

During today's session employees will learn:

1. How to find Edison training information
2. How to use the training tool – User Productivity Kit (UPK)
3. The different Edison Modules
4. New terminology used in Edison
5. How to search for an employee ID by national ID
6. How to view an employee's benefit summary information
7. How to view an employee's job summary information
8. How to view an employee's health benefit elections information
9. About other features available in Edison:
 - How to view the Benefit Program Participation page
 - How to view an employee's summary data information
 - How to view queries
10. Where to request assistance when needed.

It is important to note that this auditorium session serves as an introduction for employees who will be using the Edison system.

How to find Edison Training Information (Demo)

All training materials are available online at <http://intranet.state.tn.us/erp>

How to Use the UPK (PowerPoint Demo from Training Website)

Edison Modules Overview (Discussion)

The Agency Benefits course is designed to equip Agency Benefits Coordinators with the knowledge to provide customer service to employees who have questions about their benefits. The following topics will be discussed:

- How to search for an employee ID by “National ID”
- How to view an employee’s benefit summary information
- How to view an employee’s job summary information
- How to view an employee’s health benefit elections

New Terminology / Definitions

CURRENT TERM	NEW TERM in PeopleSoft/Edison
<i>Budget Code</i>	<i>Department Code / Position Number</i>
<i>Social Security Number (SSN)</i>	<i>National ID</i>
<i>Insurance Program</i>	<i>Benefit Plan</i>
<i>Coverage Type</i>	<i>Plan Type</i>
<i>Coverage Level</i>	<i>Coverage Code</i>

Following are key terms and definitions related to Agency Benefits in Edison:

BAS Activity Table – Repository of online activity that has been identified by the Edison system as event triggers. This information is fed by “PeopleCode” and manually-entered events.

Benefit Plan – The benefits you offer to your employees.

Examples:

- HMO1N = Cigna HMO Memphis Pre-Taxed
- HMO1T = Cigna HMO Memphis Post-Tax
- HMO2N = Cigna HMO Nashville Pre-Taxed
- HMO2T = Cigna HMO Nashville Post-Tax

Benefit Program – A set of benefits/deductions valid for an employee or group of employees.

Effective Dates – Using effective dates is an efficient way for you to maintain accurate records of benefits information. You can create historical records and enter future-dated information.

Employee ID (Empl ID) – A random identification number assigned to each State of Tennessee employee that will be the primary employee identifier in Edison.

Employee Class – A method used to group employees to determine eligibility.

Employee Status – The employee’s status, which is based on the last personnel action for the employee

or the reason for the action (such as termination).

Event – Changes in an employee's personal attributes or job information.

Event Class – Tells system how and what to process. Event Class also is referred to as the BAS Action.

Event ID – Number assigned by the Edison system to events that have been processed by Ben Admin. This number helps to identify the order that events are processed.

Event Maintenance – Daily processing of events placed on the BAS Activity table.

Job Related Event – An effective-date event relevant to the history of an individual's employment that is documented on Job Data.

Non-Job Related Event – Changes in the employee's personal or demographic information, that is unrelated to his/her job but may impact benefit eligibility or elections.

Plans – The individual benefits into which an employee may be enrolled. A plan is always subordinate to a "plan type." For example, you may offer employees a choice of four different medical plans, each from a different HMO (health maintenance organization) or plan provider. In this case, you would be offering four different plans in the medical plan type. Each plan has an associated deduction code, set of rates and calculation rules.

Plan Types – Plan types are essential in a benefit program. They group individual plans or options that may be elected by an employee for a particular type of benefit, such as basic life insurance or medical.

Narrative on External Agency vs. Benefits Administration Roles

State Agency Benefits Coordinators

The State Agency Benefits Coordinator is the person responsible for performing employee orientation. The State Agency Benefits Coordinator also will collect, validate and forward benefit enrollment forms to Benefits Administration. State Agency Benefit Coordinators will do more analysis and less data entry. They will respond to routine inquiries and direct employees to vendors or the Benefits Administration Service Center for information and questions.

Benefits Administration Analysts

The Benefits Administrative Analyst is the person responsible for entering family status changes (FSC) and Medical Underwriting enrollments for both external and internal agencies. Benefits Administration Analysts also will be responsible for adding dependent demographic information. The Benefits Administration Service Center will be staffed with current Division of Insurance personnel plus additional positions. The Benefits Administration Service Center will become the central point of contact for employee benefits questions.

Course Lesson 1: Search by National ID

Discussion

After an employee's basic personal information has been entered into the Edison Workforce Administration additional information can be track for that person.

This lesson will walk you through the steps for conducting a search to determine an employee's National ID. National IDs are associated with employees as well as dependents and beneficiaries. You can use the National ID to locate an individual's records. The Search by National ID page will enable you to search for an individual record, based on the National ID.

Activities (UPK - Demo)

1. Search for an Employee ID by National ID

Course Lesson 2: Viewing Employee Summary Information

Discussion

The Benefits Summary page will allow Edison users to view the benefit plan in which the employee is enrolled, the plan type, coverage, coverage begin date, pay end date, and last deduction taken.

The Job Summary page consists of four tabs: General, Job Information, Work Location and Compensation. Following is a brief description of each tab:

- General tab – Displays information such as: job changes (e.g., hire, pay rate change or promotion), the effective dates of these changes, and the Action Reason.
- Job Information tab – Displays information such as: employee type (e.g., salaried) and an employee's status
- Work Location tab – Displays information such as: an employee's position, an employee's department ID, and an employee's pay group.
- Compensation tab – Displays information such as: an employee's annual and monthly salary rates.

Activities (UPK - Demo)

1. Viewing Benefits Summary Information
2. Viewing an Employee's Job Summary Information

Course Lesson 3: Viewing Employee's Health Benefit Elections Info

Discussion

Use the Health Benefit Elections page to view an employee's benefit history information. Viewable information will include: coverage begin date, benefit plan elected, coverage code elected, election date and the deduction begin date.

Key Notes

- The Health Provider ID box will contain a "Y" for those participants subject to the pre-existing condition clause. This information will have to be entered manually.
- The Previously Seen checkbox must be checked if a "Y" exists in the Health Provider ID box.
- The Option Code field is a number that is assigned to each benefit plan.

Activities (UPK - Demo)

1. View Health Benefit Elections Information

Course Lesson 4: Other Features available to Agencies

URL – <http://intranet.state.tn.us/erp>

Agency Benefits

1. How to view the Benefit Program Participation page
2. How to view an employee's summary data information
3. How to view queries

Review with Question and Comments

Evaluation