ADOA-

HRIS – Human Resources Information Solution

RESOURCE GUIDE:

Agency Benefit View

Manage Employee Health Plans

Table of Contents

Introduction 3

Employee Profile 4

Employee Benefit Enrollment 6

Employee Benefit Eligibility 7

Employee Benefit Plans 9

How to review employee's benefit enrollment as of a specific date? 9

How to review a listing of all employees at the agency who are currently enrolled in a benefit plan? 11

Introduction

Welcome to the Agency Benefit Liaison Training lessons. Benefits Services Division is providing this guide to help manage the health plans for all their employees.

Employee Profile

Ensuring that the data on the employee profile (HR11) in HRIS is critical to ensure benefits will process accurately for employees.

In order to view the Employee profile (HR11), please complete the following steps:

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	**Search Box**	R	Type **HR11** in the Search Box.	The Employee (HR11) Form will open.	
2	**Company Field**	R	Enter Company '**1**'.		All forms/actions must contain a 1 in the Company Field.
3	**Employee Field**	R	Type the Employee's **EIN**.	The Employee's name will appear next to the field after moving to the next field.	You must enter the correct EIN.

Once the HR11 is open, review the tabs on the form to ensure the critical information is accurate.

Here are the key data elements that you need to be aware of.

<u>Main Tab</u>

- Status Code: Designates whether an employee is benefits eligible or not.
  - Active (C1, A1, D1, etc.):
    - If you place employee into a benefit eligible status code, employee will automatically receive the New Hire and Open Enrollment (when applicable) links in Y.E.S.
  - Termination (T1, R1, U1, T2, R2, U2)
    - If you place employee into a terminated status code, employee's benefits will automatically end based on BSD policy and procedures (e.g. medical plans end at end of the pay period).

- Hire Date
  - Hire date is critical especially for new hires. New hires can only elect benefits within 30 days. Y.E.S. uses Hire Date to calculate the employee time frames.
  - Used to calculate any waiting periods (if any) for enrollment into ASRS or PSPRS Retirement and LTD plans.

Main Tab (continued)

- Adjusted Hire Date
  - Hire date is critical especially for new hires. New hires can only elect benefits within 30 days. Y.E.S. uses Hire Date to calculate the employee time frames.
  - Used to calculate any waiting periods (if any) for enrollment into ASRS or PSPRS Retirement and LTD plans.

- Termination Date
  - Termination date is critical for employees leaving State employment. Once an agency places an employee into a Termination status, BSD will automatically terminate all voluntary benefit plans at the end of pay period. All benefit plans are ended based on this termination date.

Pay Tab

- Pay Rate
  - Some plans require Example: Supplemental life plans are dependent on pay rate (e.g. employee can enroll in supplemental life based on 3 x annual salary)

Work Tab

- Email
  - Both BSD and health plan vendors need to reach out to employees for critical reasons. Please ensure that employee contact information is accurate.
- Phone
  - Both BSD and health plan vendors need to reach out to employees for critical reasons. Please ensure that employee contact information is accurate.

Please refer to HR HRIS User Guides for specific details on how to update the data mentioned in this chapter.

Employee Benefit Enrollment

Employees can enroll into ADOA benefit plans during specific times of the year. These enrollment periods are defined below.

- New Hire Enrollment
  - New State Employees must complete the enrollment process within 31 days of the hire date found on HR11 /Hire Date field.
  - Employees can utilize Your Employee Services (YES) application to enroll themselves in their selected health plans.
  - These employees can access YES by going to the HRIS website at http://yes.az.gov and clicking on the Login button.
  - Once successfully logged into YES, click Benefits then New Hire Enrollment.

- Open Enrollment
  - Existing employees will have the opportunity to make changes to all benefit plans during the annual enrollment period.
  - Open Enrollment communication will be sent to all employees that are in a benefit eligible status code which can be found on HR11 under Status Code.

- Qualifying Life Event
  - If one of your employees experiences any qualifying life event, please have the employee complete the following steps (forms/charts mentioned below can be found at *benefitoptions.az.gov*.
    - Gather: All required documentation as listed on the Qualified Life Event and Mid-Year Changes Chart
    - Fill out: Declaration for Change Form
    - Fill out: Employee Benefits Enrollment Form
    - Deadline: Submit both forms WITH required documentation within 31 days of the QLE
  - Submit to Benefits Services Division by Email: benefitsissues@azdoa.gov or FAX: 602-542-4744

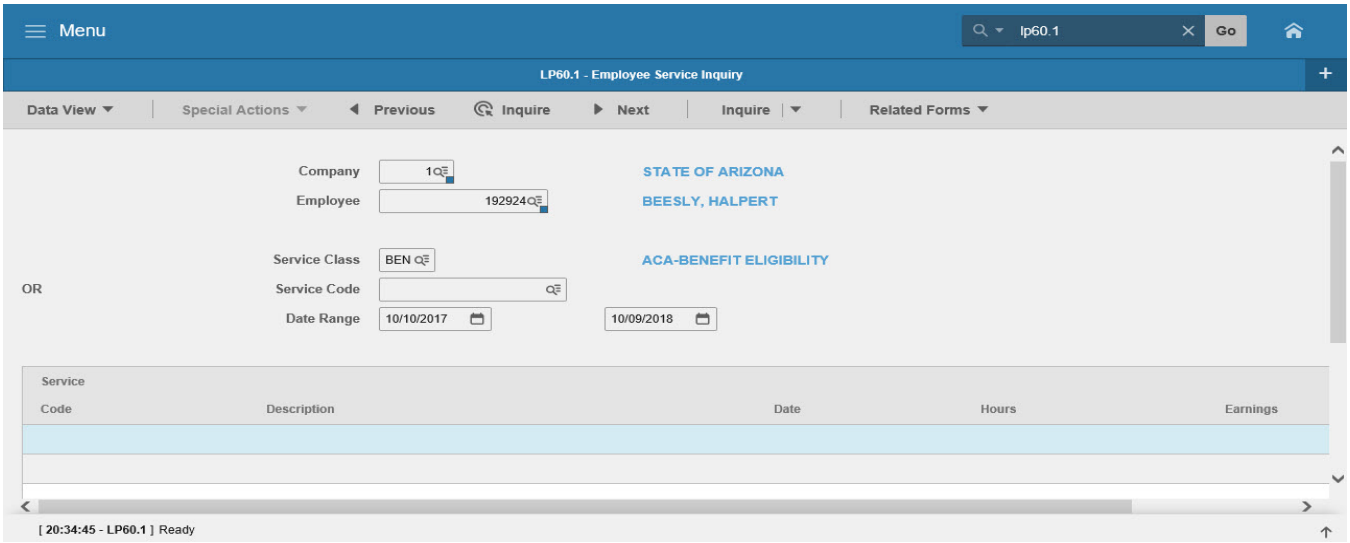
Note: Any missing information or supporting documents will delay processing.

Employee BenefitEligibility

The Patient Protection and Affordable Care Act, known as the "Affordable Care Act" (ACA) requires employers to offer medical benefits to employees who meet certain criteria, otherwise pay a fine.

To determine / review how many hours an employee has worked towards the “ACA Rules” during a specific period, use the Employee Service Inquiry (LP60) in HRIS.

In order to view the Employee Service Inquiry (LP60), please complete the following steps:



	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	**Search Box**	R	Type **LP60** in the Search Box. Press Enter on keyboard	The Employee Service Inquiry (LP60) form will appear	
2	**Company Field**	R	Enter Company ‘**1**’		All forms/actions must contain a 1 in the Company Field.
3	**Employee Field**	R	Type the Employee’s **EIN**.	The Employee’s name will appear next to the field after moving to the next field.	You must enter the correct EIN.
4	**Service Class**	R	Select **BEN - ACA Benefit Eligibility**		Only hours eligible to determine benefit eligibility will be calculated.

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
5	**Date Range**	R	Enter the **Standard Measurement** Period that aligns with the current plan year		State of Arizona defined the standard measurement period as 10/10/YY to 10/9/YY.
6.	**Inquire**	R	Click **Inquire**		Employee data will populate on the bottom portion of the screen.
7.	**Totals**	R	Click **Total**	Once the data is displayed, click Totals. This will summarize the data.	

Review total hours to determine benefit eligibility:

- If the total is greater than 1560, employee must remain benefit eligible throughout the remaining plan year.
- If the total is less than 1560, employee is not eligible for benefits. If an employee has a job change, they should be reviewed again. Employee will automatically be reviewed at next Standard Measurement Period review.

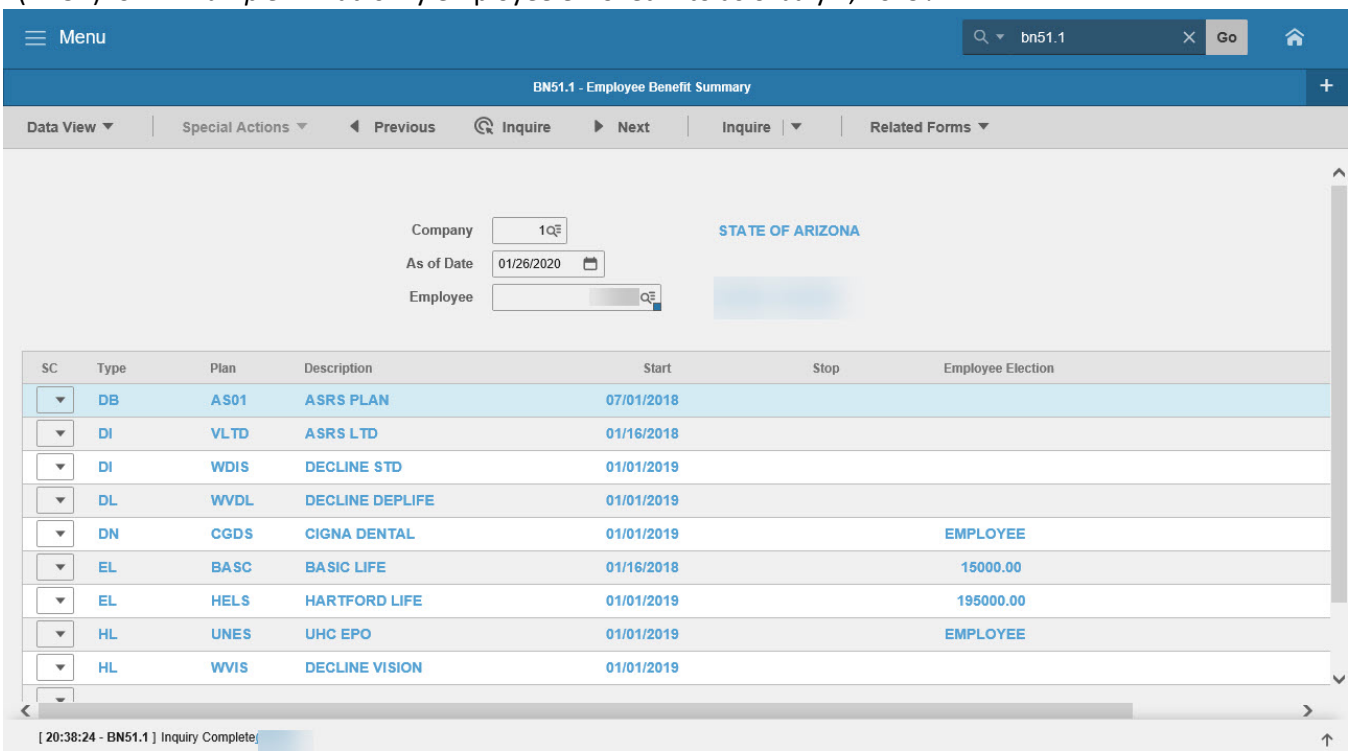
For any Affordable Care Act questions, please refer to our Benefit Website at https://benefitoptions.az.gov/resources/affordable-health-care-act

Employee Benefit Plans

The following information will assist in understanding your employee benefit plan enrollment.

How to review employee's benefit enrollment as of a specific date?

If an agency wants to retrieve review an employee benefit enrollment, use the Employee Benefit Summary (BN51) form. *Example*: What is my employee enrolled into as of July 1, 2019?

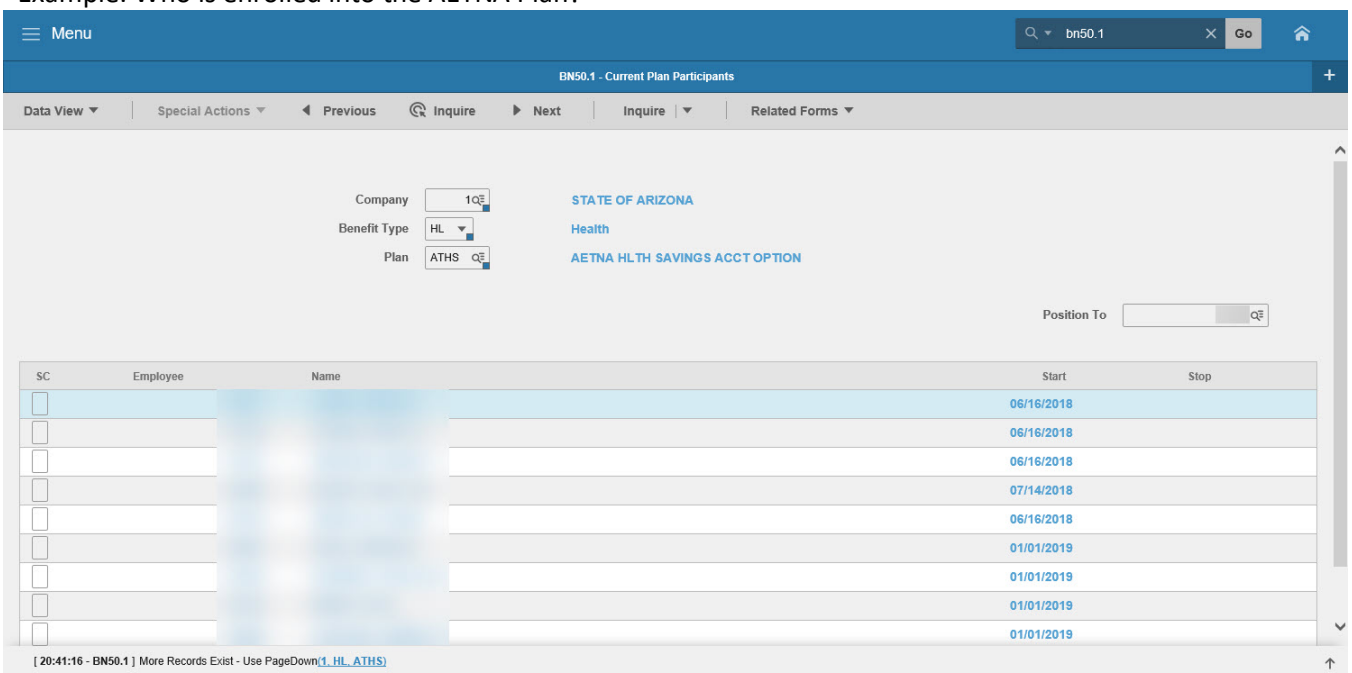


	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	**Search Box**	R	Type BN51.1 in the Search Box.	The Employee Benefit Summary (BN51.1) form will open.	
2	**Company Field**	R	Type **1** in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	**As of Date Field**	O	Type the **Date** for which you want to display the employee's benefits.		If you leave this field blank, the system date will default. BN51.1 displays all benefits with a start date less than and a stop date greater than or equal to this date.

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
4	**Employee Field**	R	Type or select from the drop-down menu the **EIN** for the record to review.		
5	**Inquire Button**	R	Click **Inquire**	You should get the message "Inquiry Complete" in the lower left corner.	
6	**Information area**	N/A	This area of the form will display employee benefit summary for the defined date.		Information that will be displayed includes: • Plan Type: Plan type determines if plan is health, dental, life, reimbursement. • Plan Code: Codes differentiate vendors • Plan Description: Description of the plan will appear. • Start Date: Most recent benefit plan start date will populate. • Stop Date: Benefit stop date will be populated if employee is no longer enrolled into plan. • Employee Election: If enrolled, the employee benefit elections will appear. This is an easy way to determine if a qualifying life event has processed. • Number - indicates number of members enrolled into plan or if medical/dependent reimbursement this will show number of pay periods in calendar year.

How to review a listing of all employees at the agency who are currently enrolled in a benefit plan?

If an agency wants to review a listing of employees, use the Current Plan Participant (BN50) form.
Example: Who is enrolled into the AETNA Plan?

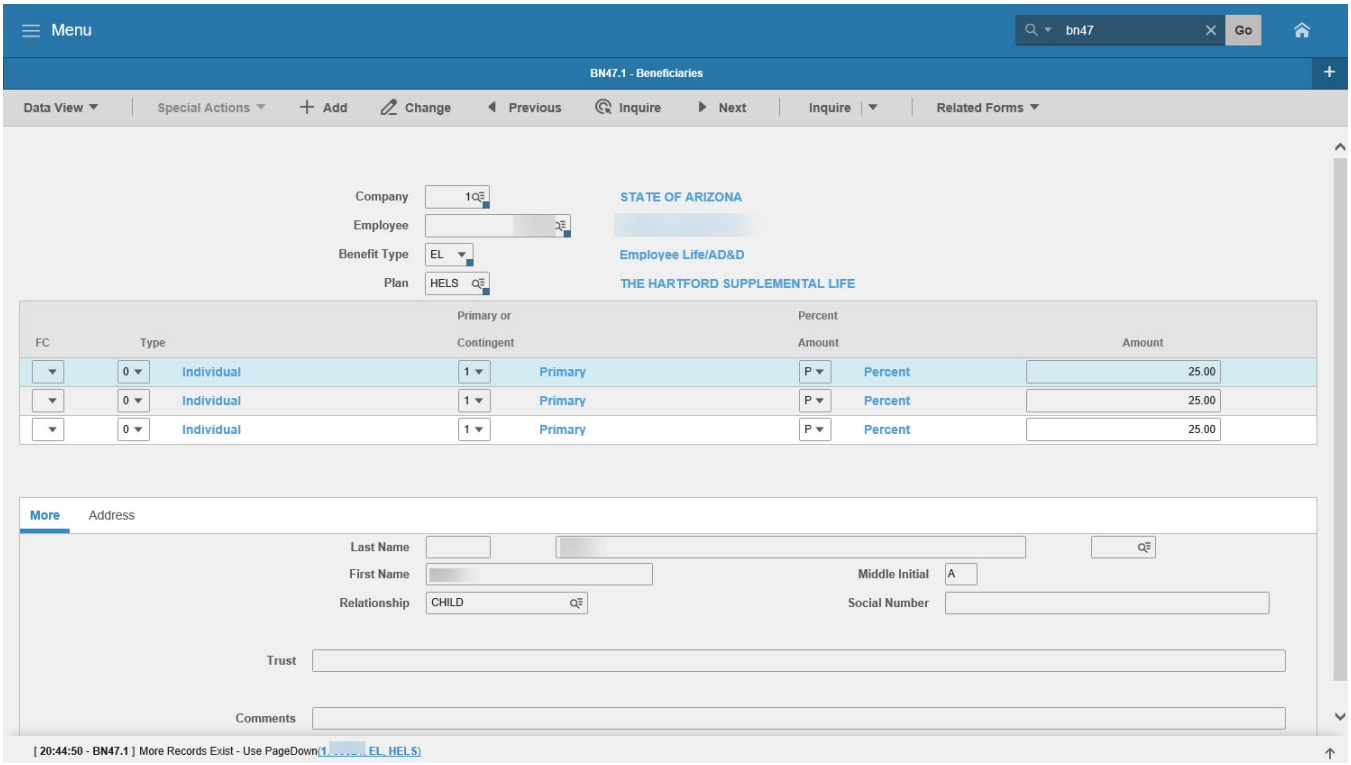


	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	**Search Box**	R	Type **BN50.1** in the Search Box.	The Current Plan Participants (BN50.1) form will open.	
2	**Company Field**	R	Type **1** in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
3	**Benefit Type Field**	R	Type or select from the drop-down menu the **Benefit Plan** for which you want to display current participants.		Valid Values are: • DB: Defined Benefit • DI: Disability • DL: Dependent Life/AD&D • DN: Dental • EL: Employee Life/AD&D • HL: Health • RS: Spending Account
4	**Plan Field**	R	Type or select from the drop-down menu the **Plan** for which you want to display current participants.		Valid values will vary depending on the Benefit Type selected above.
5	**Inquire Button**	R	Click **Inquire**	You should get message "*Inquiry Complete*" in the lower left corner.	
6	**Information area**	N/A	This area of the form will display benefit plan participants for the selected plan.		Information that will be displayed includes: • Employee: EIN will display of those employees enrolled into plan. • Name: Employee name will appear. • Start date for plan: Most recent start date for plan will appear. • Stop date: Date will appear as applicable.

Employee Beneficiaries for Life Plans

If an agency wants to review a listing of employee's beneficiaries for specific plans such as Supplemental Life plans, use the Beneficiaries (BN47) form.



	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
1	**Search Box**	R	Type **BN47.1** in the Search Box.	The Beneficiaries (BN47.1) form will open.	
2	**Company Field**	R	Type **1** in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	**Employee Field**	R	Type or select from the drop-down menu the **EIN** for the record to review.		

	HRIS Field	R/O	Step/Action	Expected Results	Notes/ Additional Information
3	**Benefit Type Field**	R	Type or select from the drop-down menu the **Benefit Plan** for which you want to display beneficiaries.		Valid Values are: • DL: Dependent Life/AD&D • EL: Employee Life/AD&D Remaining plan types do not require beneficiaries.
4	**Plan Field**	R	Type or select from the drop-down menu the **Plan** for which you want to display beneficiaries		Valid values will vary depending on the Benefit Type selected above.
5	**Inquire Button**	R	Click **Inquire**	You should get message "*Inquiry Complete*" in the lower left corner.	
6	**Information area**	N/A	This area of the form will display primary and contingent (if applicable) beneficiaries for the selected plan.		Information that will be displayed includes: • Type: Either Trust or Individual will appear. • Primary or Contingent: Beneficiary can be designated as primary or contingent. • Percent or Amount: Employee can split life insurance amongst several beneficiaries. Split can be done wither with percentage or specific amount. • Amount: Either an amount or percentage amount will be displayed.