ABC Worker History and Reports Refresher Webinar
March 19, 2019

During the webinar, please type your name in the Chat section to receive credit in the HUB for the webinar.

Course Audiences and Prerequisites

Audiences

- This course is intended for the following audiences:
  - Agency Benefit Coordinators and Agency Benefits Liaisons

Prerequisites

- You should have completed the following prerequisites:
  - SPS-ABC Certification Exam (ABCs only)
  - SPS-BEN 301A-Processing Employee Benefits in Workday (ABCs only)
  - SPS-ABC 101, Introduction to Benefits Fundamentals
  - DBM-EBD HIPAA Certification
  - SPS-HCM 101O, Workday Navigation Basics

Lesson Objectives

After completing this lesson, you should be able to:

- Review the flow of a benefit event

- Review how to check the status of a benefit event

- Review custom Benefit reports in SPS Benefits

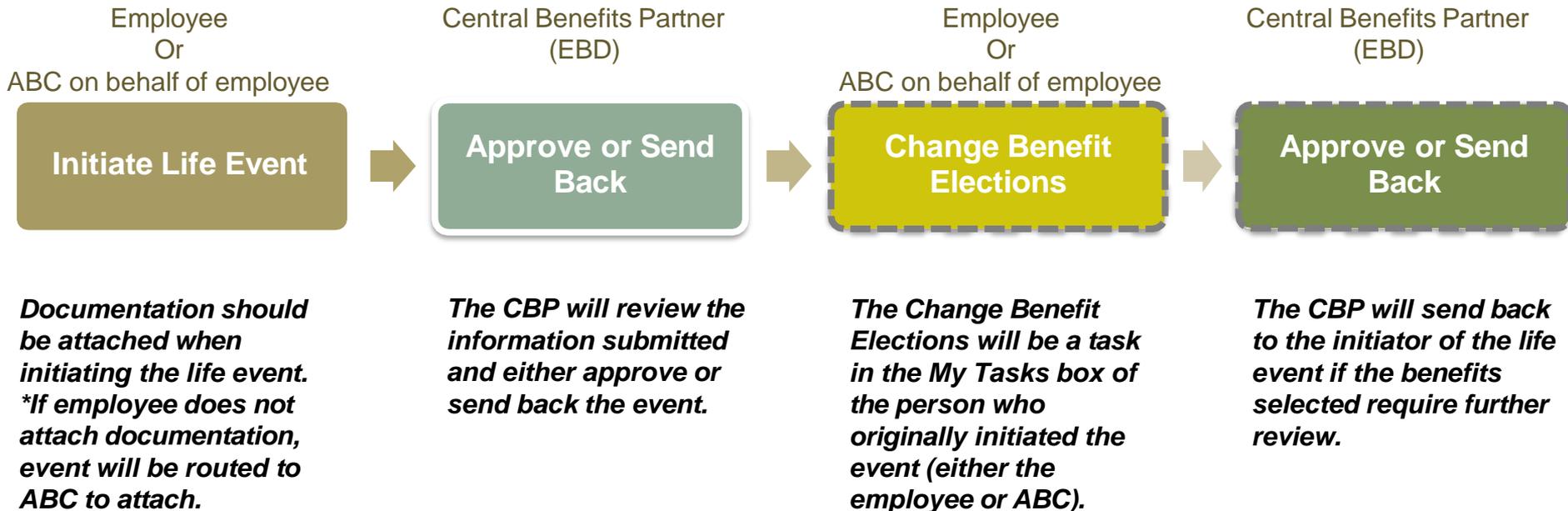- Become familiar with the SPS website and training resources

SPS

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Life Event Processing Review

Life Event Processing Steps

The steps to initiate a life event are listed below.

Employee Or ABC on behalf of employee	Central Benefits Partner (EBD)	Employee Or ABC on behalf of employee	Central Benefits Partner (EBD)
Initiate Life Event	**Approve or Send Back**	**Change Benefit Elections**	**Approve or Send Back**

*Documentation should be attached when initiating the life event. *If employee does not attach documentation, event will be routed to ABC to attach.*

The CBP will review the information submitted and either approve or send back the event.

The Change Benefit Elections will be a task in the My Tasks box of the person who originally initiated the event (either the employee or ABC).

The CBP will send back to the initiator of the life event if the benefits selected require further review.

Employee can initiate life events.

The role of the ABC is to help the employee initiate the life event if needed. The ABC can also initiate a life event on behalf of an employee.

How Do You Complete a Life Event Change for an Employee?

Search for the employee and go to **Benefits > Change Benefits** from the Related Actions menu.

Before initiating an event on behalf of an employee, check the worker history to make sure the event has not already been initiated. *We will cover worker history and duplicate events shortly.*

How Do You Complete a Life Event Change for an Employee? (Cont.)

How Do You Complete a Life Event Change for an Employee? (Cont.)

Change Benefits Diana Prince (W1234521)   Actions

Benefit Event Type *   select one

Benefit Event Date *   select one

Submit Elections By *   Add AD&D - Employee Only

Open Elections for   Address Change

Attachments 0 items   Administrative Correction (EBD Use Only)

Attachme   Armed Services Leave 1-30 Days

Armed Services Leave 31 days or more

Benefit Election Histo   Beginning of New Contract

Event   Curre   Change Benefit Jobs

Death (Retiree)

Death of an Employee

Employee: Birth/Adoption

Employee: Change in

enter your comm

Submit   Save for Later   Cancel

Enrollment Event Type | Event Date | Initiated On | Submit Elections By | Last Changed

Z Conversion-Health | 01/01/2017 | 06/06 | | 017 09:09:51.825 F

The ABC will have a lot of options available to select for the Benefit Event Type. The ABC (or employee) should **ONLY SELECT** types that start with the word **Employee** (e.g., Employee: Birth/Adoption.

Any other Benefit Event Type is for EBD use only.

You will get an error and will be unable to continue if you try to select any Benefit Event Type that does not start with the word **Employee**.
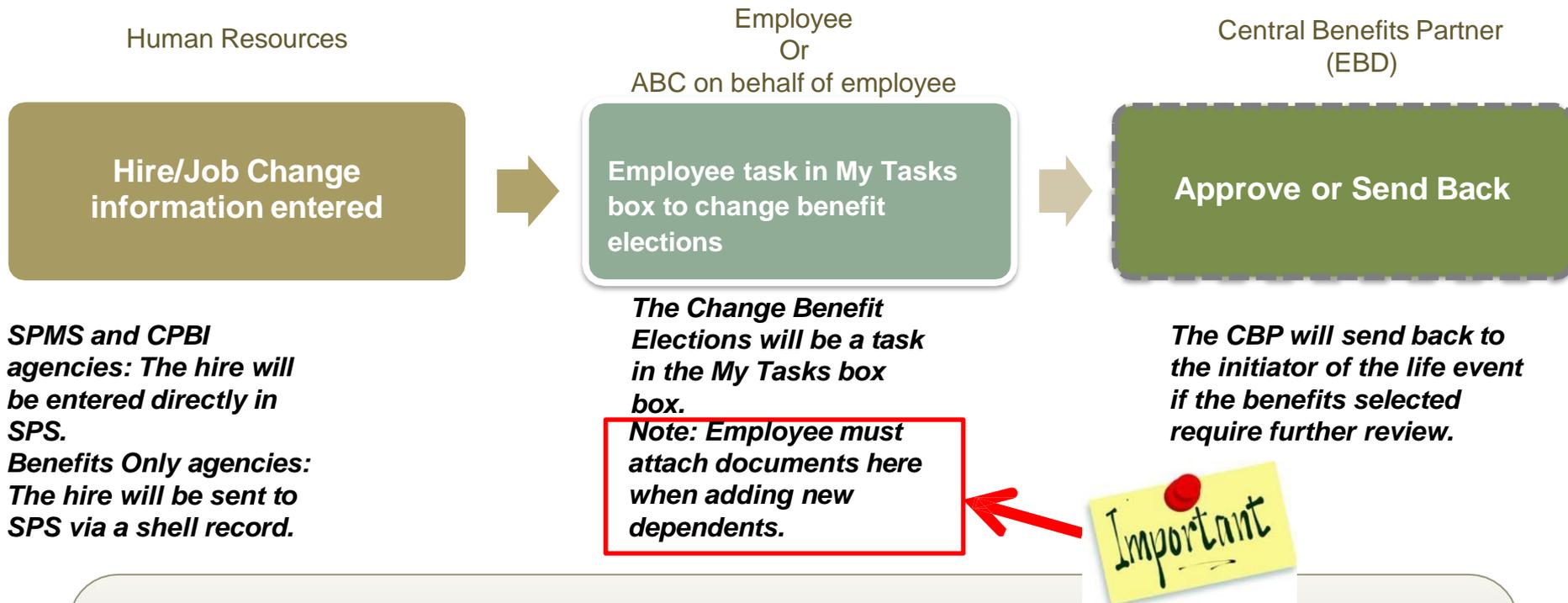
You should not change an employee submitted event type to any event type other than those that begin with the word "Employee".

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Initiate a Life Event on Behalf of an Employee

Hire and Job Change Processing Steps

The steps for a hire/job change are listed below.

Human Resources	Employee Or ABC on behalf of employee	Central Benefits Partner (EBD)

Hire/Job Change information entered → **Employee task in My Tasks box to change benefit elections** → **Approve or Send Back**

SPMS and CPBI agencies: The hire will be entered directly in SPS.
Benefits Only agencies: The hire will be sent to SPS via a shell record.

The Change Benefit Elections will be a task in the My Tasks box box.
Note: Employee must attach documents here when adding new dependents.

The CBP will send back to the initiator of the life event if the benefits selected require further review.

Important

Employee can change benefit elections in SPS once the hire is complete.

The role of the ABC is to help the new employee change benefit elections if needed. The ABC can also change benefit elections on behalf of a new employee.

What if an Event is Sent Back by EBD for Incorrect Documentation?

- If the incorrect document is attached and it is **Sent Back** to the employee by the Employee Benefits Division, the ABC can attach the documentation on behalf of the employee (even though it's not in the ABCs My Tasks box as an action item).

Find the event in the Worker History for the employee. From the Related Actions, go to **Benefits** – **Enroll in Benefits** to go in the event and attach the documentation.

What if an Event is Sent Back by EBD for Incorrect Documentation (Cont.)?

- ABCs should never initiate another life event to submit documentation or upload to the Worker Document folders when there has been a **Send Back**.
  - The document will not get linked to the specific event in this way and the EBD will not see the documentation.

Using Worker History to Check Status of an Event

Check the Status of a Life Event

- The ABC needs to know how to check the status of a life event throughout the process. They can do that by accessing the Worker History for the employee.

Remember that you access the Worker History in the Job tab, Worker History sub-tab of the worker profile.

Click the **View Worker History by Category** button so that we can filter by only Benefits events.

Check the Status of a Life Event (Cont.)

View Worker History by Category

Theo James - D (B1

The worker history defaults to Staffing events.

Click the Benefits tab to view benefits events.

View Worker History

Staffing   Personal Data   Benefits

Hire History 1 item

Business Process	Initiated On	Start Date	Status	Reason
Hire: Theo James - D (B1000068)	09/26/2018 12:16:45 PM	02/12/2014	Successfully Completed	New Hire > JobAps

Check the Status of a Life Event (Cont.)

| Staffing | Personal Data | **Benefits** |

Benefits events are now selected.

Benefits 3 items

Business Process	Benefit Event Type	Initiated On	Event Date	Status
Benefit Change - Z Conversion-Insurance : Theo James - D (B1000068) on 01/01/2018	Z Conversion-Insurance	09/27/2018 04:36:48.519 PM	01/01/2018	Successfully Completed
Benefit Change - Z Conversion-Health : Theo James - D (B1000068) on 01/01/2018	Z Conversion-Health	09/27/2018 05:18:40.939 PM	01/01/2018	Successfully Completed
Benefit Change - Employee: Birth/Adoption : Theo James - D (B1000068) on 09/03/2018	Employee: Birth/Adoption	09/29/2018 11:54:15.685 AM	09/03/2018	In Progress

Dependents 4 items

Business Process	Dependent	Relationship	Initiated On	Status
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 01/01/2017	Selena James - D	Child	09/26/2018	Successfully Completed
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 01/01/2017	Kay James - D	Spouse	09/26/2018	Successfully Completed
Dependent Event: Selena James - D on 01/01/2017	Selena James - D	Child	09/27/2018	Successfully Completed
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 09/29/2018	Karla James	Child	09/29/2018	Successfully Completed

Click the benefit event for which you want to check the status.

Check the Status of a Life Event (Cont.)

View Event

Benefit Change - Employee: Birth/Adoption : Theo James - D (B1000068) on 09/03/2018 (Actions)

For	Theo James - D (B1000068)
Overall Process	Benefit Event: Theo James - D (B1000068) on 09/03/2018
Overall Status	In Progress

Click the **Overall Process** link to see all steps in the process.

Details   Process

Benefit Event Type	Employee: Birth/Adoption
Initiated On	09/29/2018
Submit Elections By	11/01/2018
Event Date	09/03/2018
Finalized Date	(empty)
Benefit Group	FT & PT FTE 50% Bi-Weekly
Enrollment Status	In Progress

View the details of the event, to include benefit on the **Details** tab.

Attachments 1 item

Attachment

Birth Certificate.pdf

<

Elected Coverages 4 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries
Medical - CareFirst BCBS EPO (Employee)	09/03/2018	09/03/2018	Employee + Family		Karla James Kay James - D	

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Check the Status of a Life Event (Cont.)

View Event

Benefit Event: Theo James - D (B1000068) on 09/03/2018 (Actions)

For	Theo James - D (B1000068)
Overall Process	Benefit Event: Theo James - D (B1000068) on 09/03/2018
Overall Status	In Progress

You can view the details of the Overall Process on this screen.

Details   Process

Employee	Theo James - D (B1000068)
Benefit Event Type	Employee: Birth/Adoption
Event Date	09/03/2018
Submit Elections By	11/01/2018
Open Elections for	AD&D
	Child Life
	Dental
	Dependent Care FSA
	Healthcare FSA
	⊕ More (5)

Check the Status of a Life Event (Cont.)

You can view all of the steps in the process, when they were completed, and who completed them on this screen.

Notice in the **Comments** field there is an area where the employee, ABC or EBD can leave comments. This information will also show up on the **SPS Benefit Open Elections – Employee** report.

Check the Status of a Life Event (Cont.)

Process	Step	Status	Completed On	Due Date	Person	Comment
Change Benefits	Change Benefit Elections	Not Required				
Change Benefits	Change Benefit Elections	Not Required				
Change Benefits for Life Event	Change Benefits for Life Event	Step Completed	09/29/2018 11:56:18 AM		Benefits Coordinator - D20 (B2000080) (Agency Benefits Coordinator)	
Change Benefits for Life Event	Approval by Central Benefits Partner	Awaiting Action			Minnie Mouse (W1234321)(Central Benefits Partner)	

Note than as an ABC, you will not be able to see documentation attached by an employee to a life event until the event is approved by EBD.

Scroll down to see the rest of the steps. In this example, the event is awaiting action for the Central Benefits Partner to approve it.

Check the Status of a Life Event

Duplicate Items in the Worker History

- When you go to the worker history to check the status of an event and see multiple line items for the same event, this means that more than one event has been initiated.

Worker History 38 items

Business Process	Effective Date	Initiated On	Due Date	Completed On	Status
Benefit Event: John Doe (W1234567) on 02/28/2019	02/28/2019	03/16/2019 02:54:58 PM			In Progress
Benefit Event: John Doe (W1234567) on 02/28/2019	02/28/2019	03/14/2019 03:41:51 PM			

Notice that there are two events with the same Effective Date. They were initiated on 2 different days.
When you see a duplicate event like this, you will have to open the event to see the "Details" to know what the Event Type is if the event has not yet been approved by EBD.
Always check the worker history to ensure an event is not already in progress before initiating an event on behalf of an employee.
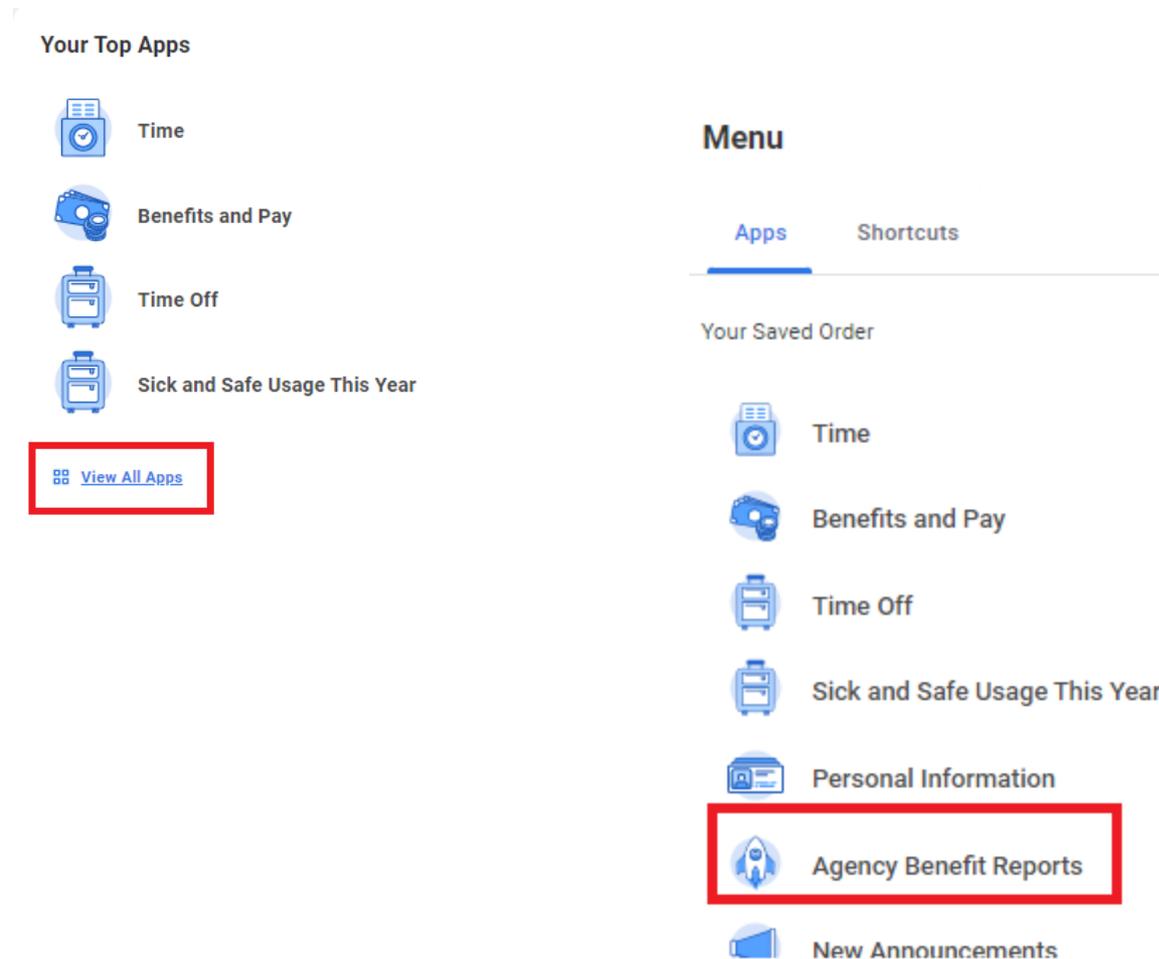
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Reporting Refresher

What Benefit reports are available?

- You can find a list of custom reports on your home page, under *Agency Benefit Reports.*

What Benefit reports are available? (Cont.)

- The name and description of the reports will display after clicking the **Agency Benefit Reports** worklet.

Custom Report	Comments	Number of Times Executed
SPS Benefit All ABC Reports	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	233
SPS Benefit Census Report	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	84
SPS Benefit Expiring Contract Report	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.	112
SPS Benefit Finalized Election Events - Employees	The reports shows employee benefit events that were Successfully Completed within the 60 days prior to a user-specified date. The report can be run for a user-specific Benefit Group or a user-specified Worker.	49
SPS Benefit Group by Sup Org	The report shows employees in a user-specified Benefit Group. The report also has options to run for user-specified Worker and/or Supervisory Org.	21
SPS Benefit Leave Monitoring Report	This report shows all employees with an Unpaid Leave of Absence event along with the event details (Leave Start Date, Estimated Return Date, type of Leave, leave duration, etc). There are no run control parameters; the report pulls all Active Unpaid leave events and returned leave events that were returned in the 60 days prior to the report run date. EBD will use this report to monitor and manage unpaid leave of absence events. ABC's should run this report on a weekly basis to monitor there are unpaid leave events in the system for employees out on a unpaid leave, and that the dates are accurate/up-to-date.	44
SPS Benefit Open Election Events - Employees	This report shows employee benefit events that are either 'Not Started' or 'In Progress'. The report identifies where the event is currently in the workstream and who is the next person designated to take action. The report also displays if the employee has a Work and/or Personal Email address in the system. ABC's should regularly run this report and follow-up with employees as required, specifically with employees without and email address in the system.	195
SPS Benefit Worker Leave Snapshot	The reports shows all leave events for a user-specified employee	34

Running Benefits Reports

- *Choose one of the below options to run a report:*

  1) Click the report name from the list to run the report.

Custom Report	Comments	
SPS Benefit All ABC Reports	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	
SPS Benefit Census Report	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	84
SPS Benefit Expiring Contract Report	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.	112

2) Enter the name of the report in the **Search** field to run the report.

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Reminder!

Who and what you can see in a report depends on your security.

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Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

Fields marked with an asterisk are required.

Note: Some reports may run immediately upon clicking on the report name.

Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

Go to **My Organizations** to find the organizations for which you have access.

Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

You may have access to various organizations. Put a checkmark in the organizations for which you want to include in your report.

Running Benefits Reports (Cont.)

SPS Benefit Group by Sup Org

Instructions   The report shows employees in a user-specified Benefit Group. The report also

Worker

Organizations   *   × SHA Construction
Inspection Division

Include Subordinate Organizations

Benefit Group

Filter Name

Manage Filters
0 Saved Filters   Save

Don't' forget you can use filters to save your search criteria!

Saving filters saves you from having to input the same information every time you run the report.

To save the combination of required fields, enter a name and then click on "**Save**". You can find it the next time you run the report under "Manage Filters". Once the required fields have been completed, click **OK** to run the report. Your report will display after inputting the search criteria and clicking the Submit button.

Access Reports and Create a Filter

Viewing Reports

You can view reports in several ways:

- Online
  - Sort, filter, and view in chart format

- Export to Excel
  - Manipulate the data, as needed

SPS Benefit All ABC Reports (Actions)

8 items

Custom Report	Comments	Number of Times Executed
SPS Benefit All ABC Reports	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	197
SPS Benefit Census Report	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	73
SPS Benefit Expiring Contract Report	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are	101

NOTE: *Data in reports real-time. This means data can change as Benefit events are completed in the system.*

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SPS Benefit Open Election Events - Employees

- The Submit Elections By Date column should be reviewed to be aware of events coming close to the end of the 60 day window.

W#	Last Name	First Name	Employee Type	Business Process	Benefit Event	Submit Elections By	Assigned To	Comments
W1123446	Cole	Roger	Contractual - Contract	Benefit Change - Start of New Contract : Roger Cole (W1123446) on 01/08/2019	Benefit Event: Roger Cole (W1123446) on 01/08/2019	5/1/2019	Roger Cole	Sent back for proper documentation.
			Contractual - Contract	Benefit Change - New Hire : Ryan Smith	Benefit Event: Ryan Smith (W1223455) on 01/06/2019	5/1/2019	Minnie Mouse / Donald Duck	Please note I need to add my new baby to the coverage.
			State/Regular					

Remember this report should be run routinely to see which events are in progress. To see more detail on any of the benefit events listed on this report, check the worker history for the employee.

The **Comments** field is important as it includes questions from the employees, clues to what the employee is trying to do with the event and/or questions/issues EBD has with approving an event.

Training Documentation

Where Can I Find Training Documentation?

- Once an employee or ABC clicks the Benefits Worklet, the screen below will display.

Change

| Benefits |
| Dependents |

External Links

| Benefits Help Center |
| Employee Health Benefits |
| CareFirst |
| Kaiser Permanente |
| United Healthcare |
| CVS Caremark |
| Delta Dental |
| United Concordia Dental |
| P&A Group |
| Securian Life Insurance Co |
| MetLife |

Click the Benefits Help Center to find all of the training resources.

View

Current Cost

Where Can I Find Training Documentation (Cont.)?

Benefits Help Center

Change   HR   Time   Benefits

SPS Workday Benefits will provide all employees and retirees the ability to enroll, acces
benefits information from one unified online system. SPS Benefits will be part of Phase
Project. Stay tuned for additional information.

For more information on Open Enrollment and related topics, please visit the **Employee**
online.

Employees

- ○ **Accessing SPS**
- ○ **Viewing Benefits Related Information**
- ○ **Completing Enrollment Events and Life Changes**

Agency Benefits Coordinators

- ○ **Viewing Benefits Related Information**
- ○ **Completing Enrollment Events and Life Changes**
- ○ **Frequently Asked Questions**

All of the training aids for employees and Agency Benefits Coordinators are on this page organized by category.

ABCs should not only be familiar with the ABC job aids, but also the employee job aids in order to assist the employees.

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Questions?

Please remember to type your name in the Chat section to receive credit in the HUB for the webinar.

Congratulations! You completed the webinar!