Benefit Only (Shell) Agency Benefit Coordinator Overview

Session Topics:

- Benefits Only/Shell Agency Overview
- Review New Employee Notifications
- Initial Benefit Enrollment Process
- Life Event/Job Change Event Process
- Basic Open Enrollment Overview
- Benefits Reporting
- Troubleshooting
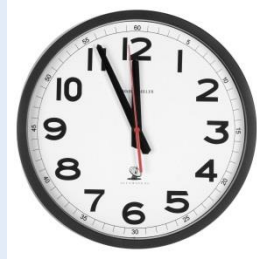- Preventing Delays
- Benefits Resources

SPS Project Timeline/Scope

PHASE 1

- **Implemented:**
  - Workday HCM
- **Go-Live:**
  - Nov 2014
- **Audience:**
  - SPMS Agencies
  - 50K + Employees

PHASE 2

- **Implemented:**
  - Workday Time Tracking, Absence Mgmt & Gross Payroll
- **Go-Live:**
  - March - October 2016
- **Audience:**
  - SPMS Agencies
  - 50K + Employees

PHASE 3

- **Re-Started:**
  - Workday Benefits Implementation
- **Go-Live:**
  - January 2019 EEs
  - May 2019 Retirees
- **Audience:**
  - Statewide
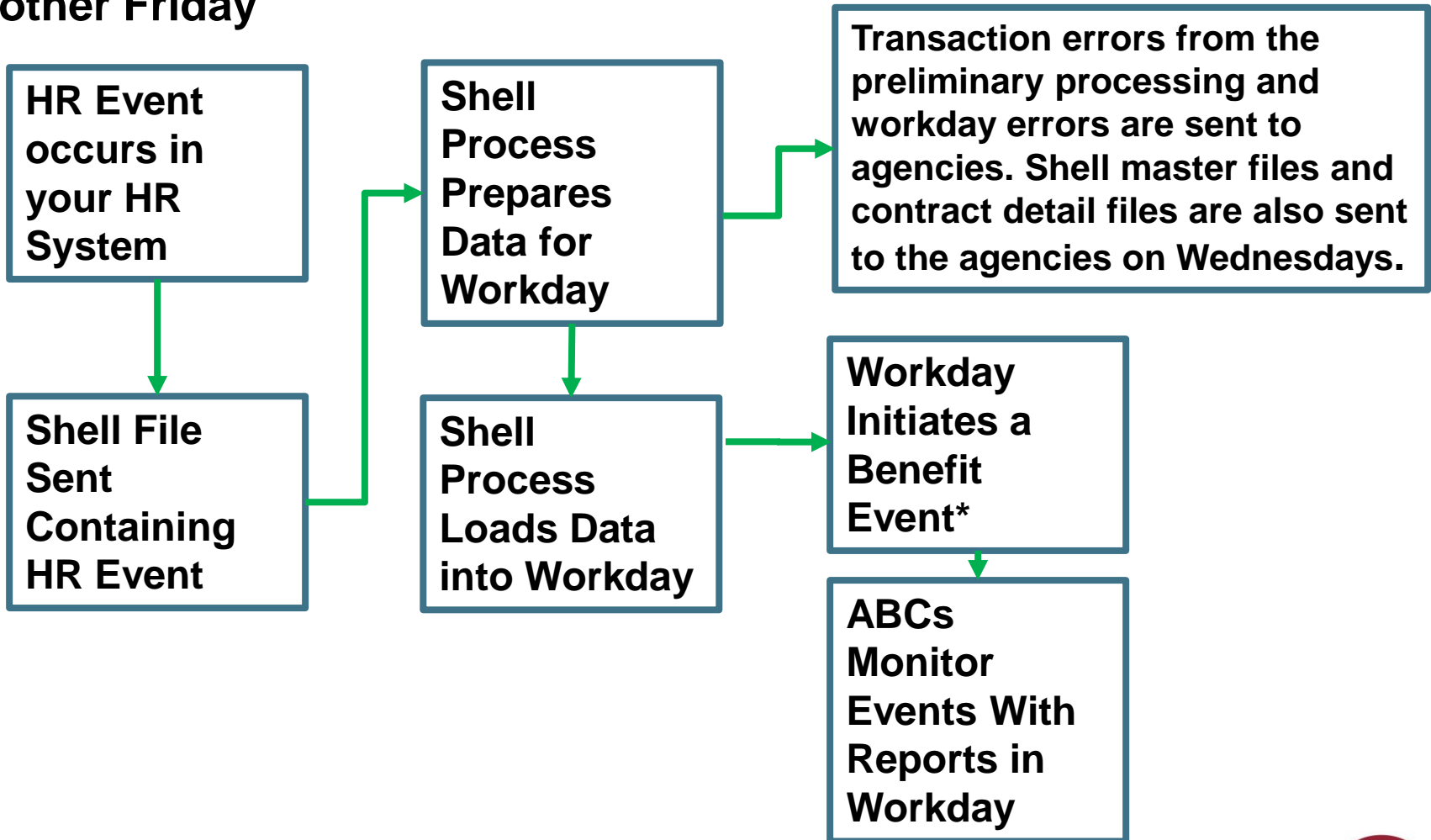 - 160K + Employees & Retirees

Workday Benefits Functionality

- Every employee paid by CPB is required to have a HR record in Workday for Benefits processing
    - This will not be a full employee record, instead just enough data for Benefits processing
    - University HR records will be created and maintained via the Shell Record

- For Benefit Only/Shell employees, the Benefit Workday system is not the HR system of record

- Workday will determine an employee's benefits eligibility

- Workday will generate a benefits enrollment event based on eligibility

- Employees and Retirees will log into Workday to complete the event

- The employee will initiate life event changes (e.g., birth/adoption, marriage or divorce) in Workday via self-service

- Workday Security controls who has access to a person's data and what they can see/do (e.g., initiation/review/approval of benefits processes)

- The Shell file process accept future dated HR events up to 6 days. Typically, future dated transactions are processed on the following Wednesday after comparing with the most recent CPB (RG) Master file.

- The Shell file process **DOES** accept future dated contract records without the aforesaid restrictions.

Shell Timeline

Shell files are sent on a bi-weekly basis and loaded every other Friday

```
HR Event
occurs in
your HR
System
```
↓

```
Shell File
Sent
Containing
HR Event
```
→

```
Shell
Process
Prepares
Data for
Workday
```
→

```
Transaction errors from the
preliminary processing and
workday errors are sent to
agencies. Shell master files and
contract detail files are also sent
to the agencies on Wednesdays.
```

↓

```
Shell
Process
Loads Data
into Workday
```
→

```
Workday
Initiates a
Benefit
Event*
```
↓

```
ABCs
Monitor
Events With
Reports in
Workday
```

* Not all HR events will generate a benefit event. Only HR events that result in a benefit eligibility change.

S P S STATEWIDE PERSONNEL SYSTEM

New Hire Notifications

When an employee is hired, they will receive two separate notifications.
- They will receive a notification from Workday indicating that they have a New Hire Benefit event,
- They will also receive an Email from OneLogin with their W# and login instructions
- Due to the timing of the migration of the new employee to OneLogin, they will most likely receive the New Benefit notification before their W# and Login instructions from OneLogin.

New Hire Workday Benefit Notification

Initiated as soon as the hire is completed in Workday

Message

You have a Benefit Event New Hire in progress in your My Tasks. Please log into Workday to complete by the Submit Elections By date.

If you do not complete and submit the elections by the Submit Elections By date you will have to wait until the next Open Enrollment to make this change.

SPS

STATEWIDE PERSONNEL
S Y S T E M

New User OneLogin Notification

Sent after worker migrates to OneLogin. Can take up to 2 hours after hire in Workday.

Welcome to employment with the State of Maryland!

You are receiving this email because you recently became a State employee. You will be using the Statewide Personnel System (SPS) for certain employee services. The SPS provides Human Resources, Time and Payroll, and Employee/Retiree Benefits services to State employees and Retirees. Depending on your agency, institution, or type of employment, you will use the SPS for certain services. It is important that you follow the instructions below to avoid delays in pay or benefits.

As a new employee, your agency/institution Human Resources Contact can assist you with any questions you may have going forward regarding your use of the SPS. All State employees who are eligible for the State Employee Health Benefits Program will get a Benefits Enrollment Event in SPS and will complete the benefit enrollment process in SPS. Benefits enrollment is time-sensitive, please make sure you address any questions with your Agency HR Contact.

NEXT STEPS:
1) Please click on the link (Password Link) below to set your initial password. This link will expire in 24 hours from the time of this email. If the link has expired, please contact your assigned Help Desk for assistance.
2) Please click on the First Time user Login instructions and follow the same after finishing the first step.

Your user name is: **W2171110**
Password Link: Click Here
First Time user Login instructions: Click Here

User Email address is: : **New.user@maryland.gov**

HR Events/Updates for Shell Record

- **HR Events Needed in Shell Record to Administer Benefits Eligibility**
  - Hires
  - Rehires
  - Job Changes (Employee Type, Employee Sub-Type, FTE%)
  - Adding Additional Jobs
  - Going on/Returning From Unpaid Leave of Absence
  - Terminations by job

- **HR Data/Data Changes Needed in Shell Record** (*refer to Record Layout for all fields*)
  - Date of Birth
  - Gender
  - Mailing Address
  - Contact Information (Home Address, Email, Telephone)
  - Contract Information (Contract #, Contract Start/End Dates)

Initial Benefit Enrollment

Overall Process Hire: Diana Prince (W2171110)

Overall Status Successfully Completed

Due Date 01/21/2022

Calendars In Use Consecutive Days (No Calendars Selected)

New Hire Benefit event is initiated as part of HR Hire event from Shell Integration

Details   Process

Event is indicated as a New Hire benefit event.

Change Reason New Hire

Initiated On 01/07/2022

Submit Elections By 03/03/2022

Benefit Event Date 01/03/2022

Finalized Date 01/13/2022

Benefit Group FT & PT FTE 50% Bi-Weekly

Enrollment Status Finalized

- **Employees should attach supporting documents for dependents to expedite EBD approval**

- **Monitor with reports: SPS Benefit Open Election Events – Employees**

Initial Benefit Enrollment

Overall Process Hire: Diana Prince (W2171110)

Overall Status Successfully Completed

Due Date 01/21/2022

Calendars In Use Consecutive Days (No Calendars Selected)

New Hire Benefit event is initiated as part of HR Hire event from Shell Integration

Details   Process

Change Reason	New Hire
Initiated On	01/07/2022
Submit Elections By	03/03/2022
Benefit Event Date	01/03/2022
Finalized Date	01/13/2022
Benefit Group	FT & PT FTE 50% Bi-Weekly
Enrollment Status	Finalized

Dates:
- **Initiated On**: Date the event was created.
- **Submit Elections By**: Deadline for employee to submit elections and have them approved.
- **Benefit Event Date**: Date qualifying event occurred, in this case it's the hire date. 60 Days starts from this date.
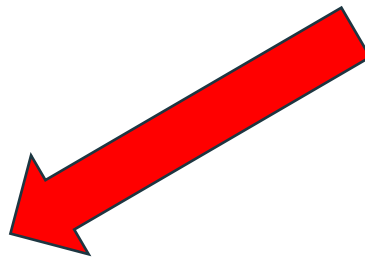- **Finalized Date:** Date benefit elections were committed to employee

STATEWIDE PERSONNEL SYSTEM

Initial Benefit Enrollment

Overall Process Hire: Diana Prince (W2171110)

Overall Status Successfully Completed

Due Date 01/21/2022

Calendars In Use Consecutive Days (No Calendars Selected)

Details   Process

Change Reason New Hire

Initiated On 01/07/2022

Submit Elections By 03/03/2022

Benefit Event Date 01/03/2022

Finalized Date 01/13/2022

Benefit Group FT & PT FTE 50% Bi-Weekly

Enrollment Status Finalized

New Hire Benefit event is initiated as part of HR Hire event from Shell Integration

Benefit Group for this event. Common Employee Benefit Groups:
- FT & PT FTE 50% Bi-Weekly
- FT & PT FTE 50% Bi-Weekly 10 Month
- FT & PT FTE 50% Monthly
- Contractual (ACA)
- Contractual (Non ACA)
- Contractuals (No or Less than 90 day Contract)

STATEWIDE PERSONNEL
— S Y S T E M —

Initial Benefit Enrollment

Overall Process   Hire: Diana Prince (W2171110)

Overall Status   Successfully Completed

Due Date   01/21/2022

Calendars In Use   Consecutive Days (No Calendars Selected)

Details   Process

Change Reason	New Hire
Initiated On	01/07/2022
Submit Elections By	03/03/2022
Benefit Event Date	01/03/2022
Finalized Date	01/13/2022
Benefit Group	FT & PT FTE 50% Bi...
Enrollment Status	Finalized

New Hire Benefit event is initiated as part of HR Hire event from Shell Integration

Enrollment Status:
- Not Started
- In Progress
- Submitted
- Canceled
- Rescinded
- Finalized

STATEWIDE PERSONNEL SYSTEM
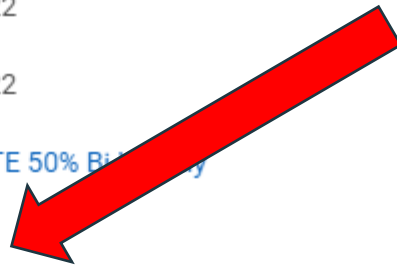
Job Change Events

For	University of Maryland - Baltimore County
Overall Process	Data Change: Diana Prince (W2171110)
Overall Status	Successfully Completed
Due Date	04/19/2022

Details   Process

Change Reason	Job Change
Initiated On	04/12/2022
Submit Elections By	06/01/2022
Benefit Event Date	04/03/2022
Finalized Date	(empty)
Benefit Group	Part-Time (No Subsidy)
Enrollment Status	Not Started

- Job Change Events are kicked off automatically by loaded shell events

STATEWIDE PERSONNEL SYSTEM

Job Change Events

Job Change Events are generated from HR/Data Changes from Shell Record loads.

- **Most frequent shell changes that can result in a Job Change event:**

    - **Contractual ↔ State/Regular**

    - **FTE % Change**

    - **Pay Frequency**

    - **Leave of Absence**

    - **Address Change (Kaiser plan only)**

    - **Start of Contract and End of Contract events are other events impacted by the shell data.**

    - **Monitor with these reports:SPS Benefit Open Election Events - Employees**

Life Events

Benefits

Change Reason *

select one ▼
select one
Employee: Birth/Adoption
Employee: Change in Dependent Daycare
Employee: Child Support Order
Employee: Death of Dependent
Employee: Dependent Arriving in US
Employee: Dependent Leaving US
Employee: Divorce
Employee: Gains Coverage Elsewhere
Employee: Legal Guardianship
Employee: Loses Coverage Elsewhere
Employee: Marriage

- **Qualifying Life Events are initiated by Employee or ABC**

- **Employees should not use Retiree events**

- **Any Life Event that does not have an attachment will route back to ABC**

Start and End of Contract Events

- Start of Contract Event is an event that runs daily that looks for employees who have gained eligibility based on a new contract.
  - Event is automatically pushed to the employee
  - Event date is the contract start date
  - Employee will have normal 60 days to complete the event

- End of Contract process runs on the last day of every month.
  - Finds contractual employees who are enrolled in benefits and contract end date was in the previous month.
  - Those without new contract data with a new end date will have benefits terminated on the last day of the prior month. (The month their contract ended)
  - Example: Employee is enrolled in benefits with the Contractual ACA benefit group. Their contract ends 3/22/2022. On 4/30/2022 End of Contract process will end the employees benefits retroactively to 3/31/2022
  - Late contracts will cause employee to lose benefits and a ticket will be needed to restore benefits

- Monitor with SPS Benefit Expiring Contract Report; SPS Benefit Open Election Events – Employees; IT staff receives Contract detail file from shell process

Open Enrollment Overview

Open Enrollment is open to all eligible employees for a 4 week period every Mid October through Mid November

- **Important Open Enrollment information**

    - **Employees should update their home address in shell record updates prior to Open Enrollment**

    - **All data changes should be up to date prior to open enrollment to insure proper eligibility**

    - **Contractual employees with contract end dates 1/2 or later will be eligible for an Open Enrollment Event**

    - **New dependents need to have proper documentation attached to Open Enrollment event or they will be disenrolled before 1/1**

    - **After beginning of OE. Any life or job change event in the current plan year will cancel the OE event and push a new OE event after**

    - **OE events initiated after 14 days of OE start will receive automatic 14 day enrollment window**

    - **All non FSA elections as of 12/31 will carry over into OE event**

    - **As always, FSA must be re-enrolled each year as previous year enrollments will not carry over**

    - **Monitor with reports: SPS Benefit Open Enrollment Events – Employees; SPS Benefit New Dependents ABC; SPS Benefit Expiring Contract Report**

ABC Reports

- SPS Benefit Census Report
- SPS Benefit Census Report - FSA only
- SPS Benefit Contractuals with Subsidy
- SPS Benefit EEs Marked Non-Tenure Track Faculty
- SPS Benefit EEs Marked Subsidy Eligible Due to Multiple Contracts
- SPS Benefit Expiring Contract Report
- SPS Benefit Finalized Election Events – Employees
- SPS Benefit Group by Sup Org
- SPS Benefit Leave Monitoring Report
- SPS Benefit New Dependents ABC

Agency Benefit Reports

- SPS Benefit Open Election Events – Employees
- SPS Benefit Open Enrollment Events – Employees
- SPS Benefit Shell Record - Active Employees
- SPS Benefit Shell Record - Active Employees - Job Detail
- SPS Benefit Worker Leave Snapshot

Troubleshooting

Issue	Resolution/Troubleshooting
Employee hire is not in Workday	Make sure the transaction is sent through the shell record process. If it is sent, verify shell record error file through your local IT staff. If the record is in pending status, verify if the effective date is future dated and/or check that the employee is active at CPB.
Event was canceled at 60 days even though it was submitted	Events must be approved within the 60 day window, not just submitted. Account for review and approval time
Open enrollment event was redone after life event and not all elections were merged	If an OE event is completed, a subsequent event can cancel the original OE event and create a second one. Coach employees to review OE events after a job change or life event. Monitor in reports.
Employee has no benefits in SPS	Review employee's active Status in Workday
Employee has a password or login issue	Employee should contact your agency IT or Help Desk

Troubleshooting

Issue	Resolution/Troubleshooting
Employee has incorrect contact info in SPS	Contact or make change through your HR system and make sure the changes are sent through the Shell Record process for SPS.
Contractual employee doesn't have an Open Enrollment event	Contractual employees need to have a contract end date of 1/2 or later to receive an OE event
Employee record does not match our HR system	Shell master file and contract detail are sent after every drop to assist your IT team to compare and send the transactions to SPS back correctly; Contact your IT staff before placing a mojo ticket.
Reporting a Shell record issue	Make sure to use the Ben - Shell Integration Issues queue in the Mojo ticketing system. Always consult your local IT staff before placing a ticket in Mojo.

Preventing Delays

Delay or Issue	Tip
Employee doesn't get all email notifications	Include email address in the shell file for all new employees; verify correct address
Employee SSN is incorrect	Require the SSN card review prior to hire event in your HR system; SSN Changes must be sent through shell files. (refer shell IDD)
Employee doesn't complete the benefit event on time	Include specifics in your onboarding process and documentation for all timelines for benefit processes; run the ben event reports on a regular basis and contact employees with pending events
Late contract renewals causing benefit cancellations, gaps in coverage, etc.	These can be sent is as future dated events! Get them in early! Make sure it is sent correctly as per the shell IDD

STATEWIDE PERSONNEL SYSTEM

Preventing Delays

Delay or Issue	Tip
Backdated HR events	Add the following to supervisory and manager training-- **Impacts from delayed HR events on Employees:** **Delayed Health Benefits Coverage**—employee must pay backdated premiums but may not have had access to services **Delayed pre-tax benefit for FSA and Childcare FSA**—employee cannot retroactively participate in the FSA, losing pre-tax benefits for that period **Different Data in SPS than in Your HR System**—any data older than 60 days is sent as an exception, and cannot be older than 6 months; if outside of the 6 month period, the date will be changed in SPS causing confusion for the employee when reviewing info in SPS

- **SPS Help Center:**
  https://dbm.maryland.gov/sps/Pages/Benefits_HelpCenter.aspx

- **Shell Record Information Center (Shell IDD):**
  https://dbm.maryland.gov/sps/pages/benefitsshell.aspx

- **Local Agency IT Staff**

- **SPS Mojo Ticket System: https://spshelp.dbm.md.gov/**