Benefit Services

Human Resources & Organizational Effectiveness

October 31, 2018
The Scope of Benefit Services

Benefit Services includes, but is not limited to:

- Employee Benefits
- Retirement
- Workers Compensation
- FMLA
- Sick Leave Pool
- Leave of Absence
The Benefit Services Team

Marlo Kibler  
Assistant Director

- Judy Kurtz  
  HR Administrator

- Ada Green  
  Sr. Employee Benefits Rep

- Laura Fritsch  
  Sr. Employee Benefits Rep

- Betty Gibson  
  Sr. Employee Benefits Rep

- Chris Brooks  
  Employee Benefits Rep

- Paul Castilleja  
  Employee Benefits Rep

- Laura Ellis  
  Financial Accountant I
We Hear You

• We know there are many questions surrounding processes in Workday regarding benefits.
• Our team is here to help you navigate through these processes.
Top Questions

• What To Do’s need to be completed to trigger Benefits, Direct Deposit, Privacy Flag, etc.?
• Waiting period for benefits to be effective for employee?
Onboarding Benefit Questions

- The employee will have to answer all of the onboarding benefits questions.

<table>
<thead>
<tr>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have other medical coverage?</td>
</tr>
<tr>
<td>Have you participated in Teachers Retirement System (TRS) in the past?</td>
</tr>
<tr>
<td>Are you retired from TRS and receiving an annuity?</td>
</tr>
<tr>
<td>Are you enrolled in TRSCare Health insurance and plan to continue this coverage while working for the A&amp;M System?</td>
</tr>
<tr>
<td>Were you enrolled in ORP at your last place of Texas State employment before transferring to the Texas A&amp;M System (and not enrolled in TRS in-between)?</td>
</tr>
<tr>
<td>Are you already retired from ORP?</td>
</tr>
<tr>
<td>Are you already retired from the Employees Retirement System (ERS)?</td>
</tr>
<tr>
<td>Have you declined participation in ORP in the past?</td>
</tr>
<tr>
<td>Have you retired from a Texas state sponsored retirement program (ORP/TRS/ERS)?</td>
</tr>
<tr>
<td>If you answered “Yes” to any of the above, please indicate prior place of employment and retirement date (if applicable):</td>
</tr>
<tr>
<td>Retirement Date</td>
</tr>
</tbody>
</table>
Onboarding Benefit Questions (cont.)

- Teacher Retirement System Election (TRS).
- Employee will answer if they are currently being deducted for TRS.
Benefit Change Hire Task (New Hire)

• Task Received in Employee Workday Inbox
• Task Reads: “Benefit Change – Hire – benefits effective first of month following 60 days: John Doe on 09/01/2018”
Benefit Change Hire Task (New Hire)

Change Benefit Elections
Hire - benefits effective first of month following 60 days for [blank] - [blank]

Event Date: 09/01/2018
Initiated On: 10/22/2018
Submit Elections By: 12/05/2018

Please select your medical, dental and vision elections below. If you indicated that you already have medical coverage elsewhere, you will see that the coverage is set to decline. If you want to add dependents (who are not yet in Workers) to any of your coverages, please return to the benefits portal and edit your Dependents.

Your medical coverage, along with any of the optional coverages you choose, will begin on the first of the month following 60 days after your hire date.

Your elections will be in effect until the next plan year, unless you have a qualified life event and change your elections at that time.

Note:
- Bi-weekly paid employees, the amounts you see are per paycheck, not per month (maximum two per month).
- If you or your spouse use tobacco products, the health plan rates include an additional $30 per month.

Health Information

Question
Have you used tobacco products in the last three months?

Answer
- [ ] Yes
- [ ] No
Benefit Change Hire Task (New Hire)

- Step 1 of 5
- Select “Elect” or “Waive” for each benefit plan
- Then hit “Continue”
Benefit Change Election Task

- Step 2 of 5: Elect or Waive Healthcare Spending Account, Dependent Day Care Spending Account, hit “Continue”

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare Spending Account - Navia</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Elect, Waive</td>
</tr>
<tr>
<td>Dependent Day Care Spending Account - Navia</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Elect, Waive</td>
</tr>
</tbody>
</table>

[Continues]
Benefit Change Election Task (cont.)

- Step 3 of 5
  - Basic Life
  - Optional Life
  - Dependent Life Plan A
  - Dependent Life Plan B
  - Dependent Life Plan C

- Make selections, hit “Continue”
Benefit Change Election Task (cont.)

• Step 4 of 5: Basic Life/AD&D Beneficiary Designations, then hit “Continue”

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Provider Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Life/AD&amp;D - Securian (Employee)</td>
<td>Securian</td>
</tr>
</tbody>
</table>
Benefit Change Election Task (cont.)

- Step 5 of 5: Elected Coverages

**IMPORTANT:** Do not upload your dependent documentation here. Your documents should have been uploaded through HRConnect. The documentation will be approved and your dependents will be verified after you click Submit.

**Elected Coverages - 2 items**

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Coverage Begin Date</th>
<th>Deduction Begin Date</th>
<th>Coverage</th>
<th>Calculated Coverage</th>
<th>Dependents</th>
<th>Beneficiaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - Academic Health Plan PPO Grad Plan</td>
<td>11/01/2018</td>
<td>11/01/2018</td>
<td>Employee Only</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basic Life/AD&amp;D - Securian (Employee)</td>
<td>11/01/2018</td>
<td>11/01/2018</td>
<td>$7,500</td>
<td>$7,500.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Waived Coverages
- Beneficiary Designations
Benefit Change Election Task (cont.)

- Be sure to click “I Agree” on the Electronic Signature page before hitting “Submit”
The Future is Bright

• Trainings have been developed that will be scheduled and available in TrainTraq very soon as part of the HR Liaison Foundational and Functional Training Curriculum
• We have made it through many firsts in Workday, including our first open enrollment
• Our team is expanding
1. We are here to help you
2. Trainings are coming
3. If you need assistance or have questions, contact us at benefits@tamu.edu
Division of Human Resources & Organizational Effectiveness

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HROE CORE VALUES:
Integrity | Diversity & Inclusion | Excellence | Respect | Innovation | Engagement