

DO NOT PLACE PHONE ON HOLD!!!!



- Mute
- Leave off hook
- ~~Place on hold~~

The Creating Adjustment Reason For Life Events
webinar will start soon.

- To discuss the business process for a Life Event/qualifying reason
- To review the Adjustment Reasons available at the Agency level
- To demonstrate the process for creating IT0378 Adjustment Reasons
- To discuss the use of the LATE Entry Adjustment Reason

Life Changing Event Process


1 Within 30 days of his marriage date:



James
a newlywed

- Contacts Agency HR
- Provides **documentation** (marriage certificate) to Agency HR

2



Kay
Agency HR

- Verifies documents
- Creates adjustment reason**


3 Within 30 days of his marriage date:



James
a newlywed

- Uses **ESS** to make the appropriate changes to benefits
OR
- Completes the appropriate **paper** enrollment **forms** and sends them to **BEST Shared Services**

4



Mary, Benefits
Administrator

- If an employee does **not** have access to ESS, manually changes the employee's enrollment in benefits plans.


List of Adjustment Reasons Created by Agencies

- ADDF – Enroll family
- DCAR – FSA Dep Changes (Dependent Child FSA changes)
- DRPF – Drop Family
- DTH – Death of Dependent
- DVC – Divorce
- MRG – Marriage (employee marries)
- MRGD – Dependent marries
- NCHD – Add Foster/Step Child
- NEWB – Birth or Adoption of a Child
- NLS – No longer a Student
- SEP – Separation
- SMC – Substantial Money Change (> \$50)
- SRQ – Subscriber request
- STU – Student

Adjustment Reason Job Aid at <http://help.mybeacon.nc.gov/beaconhelp/>

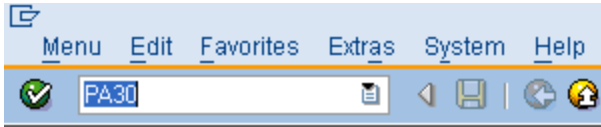
- Benefit Plans start the first of the month after the Adjustment Reason date.
 - If spouse loses job and health coverage on October 1st, then adjustment reason date must be September 30th for plans to start on October 1st
- Use the appropriate Adjustment Reason.
 - COBRA events are triggered through the Adjustment Reason
- HBRs should maintain documentation for all qualifying reasons.

EGroup	A	SPA Employees	PersA	1401	State Controller
ESubgroup	A1	FT N-EL SAOT Perm	Statu	Active	
Start	09/30/2008	to	10/30/2008		

Adjustment Reason Data	
Benefit area	State of NC
Adjustment reason	ADDF Enroll Family 

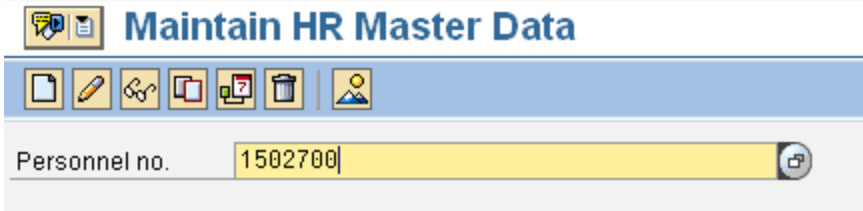
Creating the Adjustment Reason

Use Transaction PA30



SAP Easy Access

Select your employee



Creating the Adjustment Reason

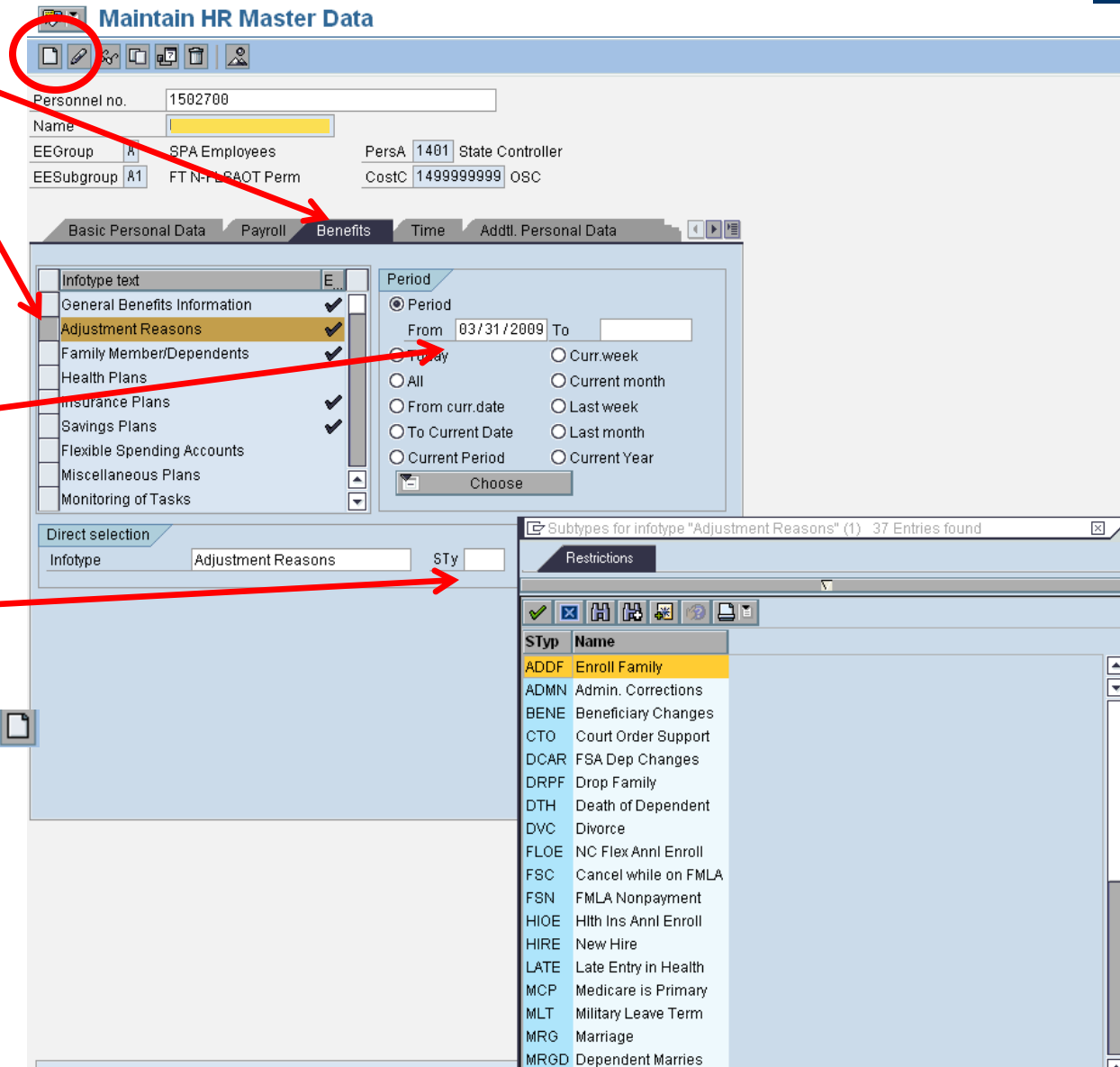
1. Select Benefits Tab.

2. Select Adjustment Reason or enter 378 in the Direct Selection.

3. Enter the appropriate date in the Period.

4. Select the appropriate subtype.

5. Click the create icon 



The screenshot shows the 'Maintain HR Master Data' application interface. The 'Benefits' tab is selected. The 'Direct selection' section shows 'Infotype' set to 'Adjustment Reasons' and 'STy' set to an empty field. A list of subtypes is displayed, with 'ADDF Enroll Family' highlighted. The 'Period' section shows 'From' set to '03/31/2009' and 'To' set to an empty field. The 'Create' icon (a document with a plus sign) is circled in red.

Personnel no. 1502700
Name [redacted]
EEGroup A SPA Employees PersA 1401 State Controller
EESubgroup A1 FTNPL SAOT Perm CostC 149999999 OSC

Basic Personal Data Payroll **Benefits** Time Addtl. Personal Data

Infotype text E...
General Benefits Information ✓
Adjustment Reasons ✓
Family Member/Dependents ✓
Health Plans ✓
Insurance Plans ✓
Savings Plans ✓
Flexible Spending Accounts
Miscellaneous Plans
Monitoring of Tasks

Period
Period
From 03/31/2009 To
Today Curr.week
All Current month
From curr.date Last week
To Current Date Last month
Current Period Current Year
Choose

Direct selection
Infotype Adjustment Reasons STy

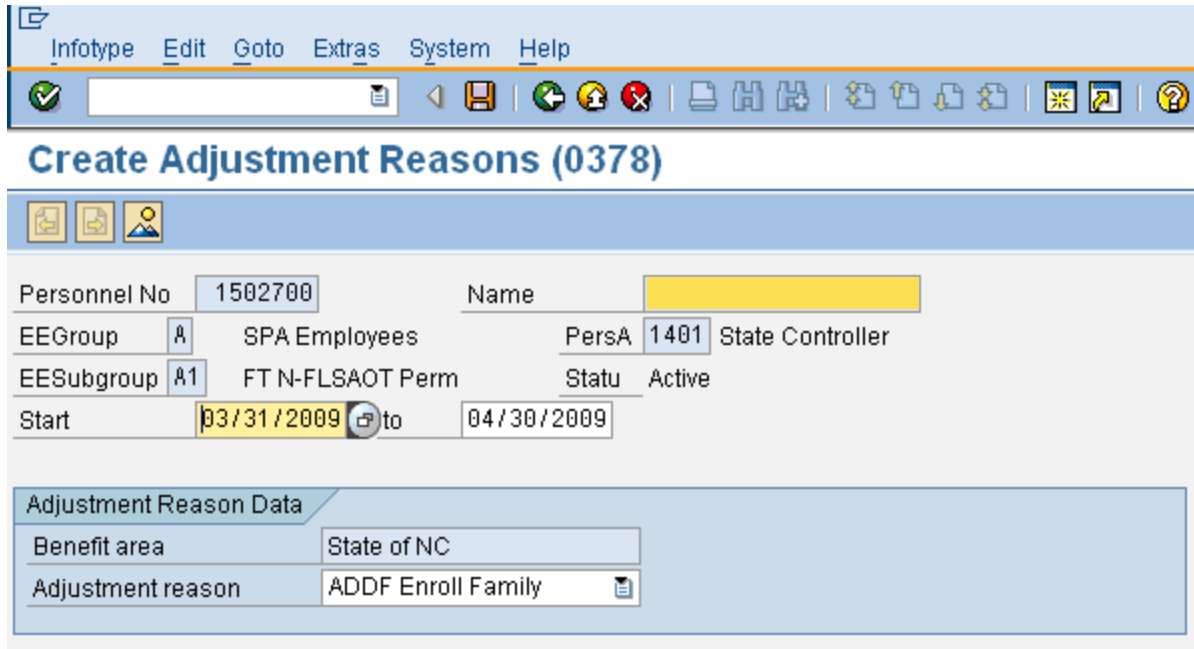
Subtypes for infotype "Adjustment Reasons" (1) 37 Entries found

Restrictions

STyp	Name
ADDF	Enroll Family
ADMN	Admin. Corrections
BENE	Beneficiary Changes
CTO	Court Order Support
DCAR	FSA Dep Changes
DRPF	Drop Family
DTH	Death of Dependent
DVC	Divorce
FLOE	NC Flex Annl Enroll
FSC	Cancel while on FMLA
FSN	FMLA Nonpayment
HIOE	Hlth Ins Annl Enroll
HIRE	New Hire
LATE	Late Entry in Health
MCP	Medicare is Primary
MLT	Military Leave Term
MRG	Marriage
MRGD	Dependent Marries

Creating the Adjustment Reason

Make any adjustments to the date or adjustment reason



Infotype Edit Goto Extras System Help

Create Adjustment Reasons (0378)

Personnel No 1502700 Name [Redacted]

EEGroup A SPA Employees PersA 1401 State Controller

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 03/31/2009 to 04/30/2009

Adjustment Reason Data

Benefit area	State of NC
Adjustment reason	ADDF Enroll Family

Select Edit, Maintain Text – to add any comments to the adjustment reason.

Save record once comments are added and the date and adjustment reason are verified.

Creating the Adjustment Reason

If the Deviation from end date screen displays, click Yes.

The adjustment reasons are automatically configured to allow a 30 day period.

The screenshot shows a web-based application interface for creating adjustment reasons. The main window is titled "Create Adjustment Reasons (0378)". It contains several input fields for personnel information:

Personnel No	1502700	Name	Ray Charles Scerri
EEGroup	A	SPA Employees	PersA 1401 State Controller
EESubgroup	A1	FT N-FLSAOT Perm	Statu Active
Start	03/31/2009	to	05/02/2009

Below this is the "Adjustment Reason Data" section:

Benefit area	State of NC
Adjustment reason	ADDF Enroll Family

A dialog box titled "Deviation from end date" is overlaid on the main window. It displays the following information:

Current end date: 05/02/2009
Calculated end date: 04/30/2009

Do you want to replace the current end date with the calculated end date?

At the bottom of the dialog box are three buttons: "Yes", "No", and "Cancel". The "Yes" button is highlighted with a dashed border, indicating it is the recommended action.

Creating the Adjustment Reason

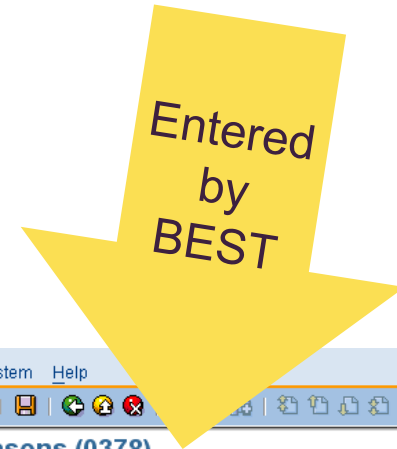
- Demonstration
- Scenario 1: Employee was hired on February 15, 2004. Employee wants to increase his HC FSA due to spouse's loss of coverage (March 31, 2009). HBR created an adjustment reason for Newly Eligible.
 - What is wrong with this scenario?
 - What is the start date of adjustment reason?
 - What will be the employee's plan coverage effective date?
- Scenario 2: Employee had a newborn on March 13th. An adjustment reason is created for "Enroll Family" with a start date of March 13th. Employee is given the option to enroll on April 1st or May 1st. The employee enrolls with an effective date of April 1st.
 - What's wrong with this scenario?

Creating the Adjustment Reason

- Scenario 3: On March 30th, HBR creates an adjustment reason for “Enroll Family” because the spouse lost health coverage on April 30th.
 - What should be the start date of the adjustment reason?
 - Can the employee go into ESS on April 15th to make their enrollment changes?
- Scenario 4: Today, the employee notifies the HBR that their spouse lost health coverage and needs to add the family to the plan effective April 1st.
 - What should be the start date of the adjustment reason?
 - What choices will the employee have to start their State Health Plan?
 - What choices will the employee have to start their NC Flex Plan?

BEST as Late Enrollment

- Scenario: No Longer Student
 - Student graduates May 25
 - Employee notifies Agency September 15
 - Must be processed by **BEST**
- Any claims paid on student after May 31st must be repaid by employee
- Any premiums deducted for the student from June 1 – September will not be reimbursed to employee
- New coverage begins October 1



Infotype Edit Goto Extras System Help

Create Adjustment Reasons (0378)

Personnel No 80000306 Name Patricia Calloway01
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm Statu Active
Start 09/15/2008 to 10/15/2008

Adjustment Reason Data

Benefit area	State of NC
Adjustment reason	Late Entry in Health

Additional fields

Date of Late Event	05/25/2008
Late Event	NLS No longer a Student

- Discussed the business process for a Life Event/qualifying reason
- Showed Adjustment Reasons available at the Agency level
- Demonstrated the process for creating IT0378 Adjustment Reasons
- Discussed the use of the LATE Entry Adjustment Reason

Questions?