



The KBX™ Benefits Open Enrollment Toolkit eases the burden of Open Enrollment by offering beginning-to-end process assistance.

Identify

- People without an Open Life Event
- Backed Out Open Life Events
- Errors from Oracle® Batch Processes without Viewing Log Files
- Rates that have not been recalculated
- First Payroll Check with the new rates

Benchmark

- How many people were processed
- When participants are enrolling
- How many participants are enrolling via Oracle® Self Service
- Volume of Open Life Events that are re-processed
- Change in annual cost to the organization
- Change in pay period cost to the participants

Communicate

- Initial Enrollment Worksheets
- Worksheets for participants who had a life event
- Remind to employees to make their enrollments online
- Find contact information for employees with Action Items
- Generic extract that can be formatted for third-party vendors
- Confirmation Statements

About KBACE

As a proven leader in Oracle® e-Business Suite consulting and operational insight, KBACE enables clients to gain the full perspective on their enterprises. For seven years KBACE has set the standard for implementations, upgrades, education, and strategic services related to Oracle® Applications, representing some of Oracle®'s best ERP success stories.

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Enrollment Progress

Once Open has been processed, elections need to be made either through the Benefits Service Center professional forms by a Benefits user or by employees through Self Service Benefits. Users can use this template to see how many people have made elections and can estimate the remaining work load. It also shows the breakdown of SS OAB enrollments vs. Benefits Service Center enrollments—giving management a benchmark on Self Service usage.

People Processed and Unprocessed

One of the most basic tasks during Open Enrollment is to make sure that all people have had an Open life event processed on them. This may or may not include Terminated Employees or Contacts on COBRA and Retirees on benefits.

Look for people with current benefits who have not been processed through Open. People with no current benefits should also be investigated since they may choose to elect new benefits.

Open Enrollment Reminder Letter—Online Open Enrollment Reminder Letter

Based on the results of bench marking the progress of enrollments, these letters can be sent by the benefits administrators as reminders to the employees who have not sent their enrollment forms to be entered via the Benefits Service Centers or logged into Self Service. The letter will indicate the deadline for when the paperwork must be submitted. The Self Service version does remind the employee of the web address and the user id to be able to log into the application to complete their enrollment.

Potential Issues

Backed Out Open Life Events

Life events that are triggered and processed with an earlier date than the Open life event will back out the Open life event. This completely removes any enrollments that were made for Open enrollment and any rates that were re-calculated with new values.

By knowing the people with these backed out Open life events; users can manually process a new Open event for these people. This ensures that the elections employees made are reflected in Oracle and the rates and deductions for Payroll are correct.

Batch Process Errors and Totals

The log files from the Participation Process and Close Enrollments concurrent programs are a hassle to look through. This template allows you to sort by error message and other basic criteria to logically group errors and warning messages. The Totals template provides a benchmark for how many people are being processed manually vs. through a batch processes.

Worksheets, Letters, and Extract

Generic Data Extract

This extract is a mass dump of the data tables into Access that allows Benefits Staff to use and manipulate the raw information in ways that the other reports cannot accommodate. The information contained within the Data Extract is as-of the date and time that the Kube was run.

Open Enrollment Election Worksheets

Organizations send statements to their employees indicating their current benefits and the benefits being offered as elections during open enrollment. These letters can be sent to the employees indicating how long they have to make changes, their current enrollments, their dependents currently enrolled per plan, the plans they are eligible for during this enrollment, as well as the per pay period amount of the benefits.

Open Enrollment Confirmation Statements

Once the open enrollment process is completed, employees appreciate being informed of their elections including their per pay period amounts.

These statements will inform the employee of the elections they made during open enrollment as well as the per pay period amount they can expect to have deducted from their pay checks.

Worksheet for Newly Processed People

Open Enrollment Worksheet

Qualifying Events do not stop for Open Enrollment. This form can be sent when an employee has already made Open Enrollment elections and then informs the Benefits Administrator that they have had a qualifying event. Based on the results of the event, their electible choices may or may not have changed and the employee has the opportunity to make additional changes.

Rates and Totals

Employer Rate Comparison

Compare the Company's Estimated Annual Benefit Costs Before and After Open Enrollment.

Budgeting is usually done prior to the open enrollment process. Being able to compare the annual benefit costs allow organizations to determine the accuracy of the budgeted amount and allow for overages to be explained.

New Rate Start Dates

Many organizations have an issue with deducting the correct new amount at the right time. Some organizations want to the new rate deducted the last pay period in the year; some want the deduction the first of the next year. This template shows for each the date that the first deduction will occur.

Look for New Rate Start Dates that are different that the majority. For example,

should the new rate be deducted from the first paycheck of the new year or the last paycheck of this year?

Participant Rate Comparison

Many organizations have an issue with deducting the correct new amount at the right time. Some organizations want to the new rate deducted the last pay period in the year; some want the deduction the first of the next year (this template shows for each).

Compare the Employees' Estimated Per Pay Period Benefit Costs—Before and After Open Enrollment.

Rates Not Recalculated

This template allows users to check that the correct amounts will be deducted from Oracle payroll or sent to a 3rd party payroll vendor. Not all rates should be recalculated during Open—401 (k) and other savings plans may remain unchanged. If a rate was recalculated but did not change, it will not be on this template. Double-click on a number in the Total Number of Deductions column to see the employees.

If you know that you changed a rate and it show up here there may be an issue. Then you process the Open Life Event, it sees the changes that you made in the standard rates and changes the rates on the enrollment results.