Workday Benefits Training

Benefit Configuration Overview

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Trinity Health
Livonia, MI
Don’t miss out on something that could be great just because it could also be difficult.
Agenda

• Building Blocks of Benefits
• Benefit Groups
• Coverage Type and Benefit Plans
• Benefit Plan Eligibility
• Enrollment Event Rules
Defining Benefits

Benefit Plans

- Benefit Coverage Types
- Benefit Eligibility Rules

Benefit Groups

- Benefit Enrollment Event Types
- Enrollment Event Rules
- Benefit Rates & Credits
- Deductions & Earnings

Enrollment Instructions

Cross Plan Dependencies
Things to Consider When Defining Eligibility for Your Benefit Groups:

• Do you have groups of Workers who are eligible for different groups of Benefits?
• Do you have Open Enrollment periods that run at different times for different groups of Workers?
• Do you apply different Insurance or Health Care Rates to different populations of Workers for the same plan?
• Do you define different coverage begin and end dates, deduction begin and end dates, maximum coverage level or amount increases, waiting periods, or other rules and conditions of enrollment for different groups of Workers?
• Do you have different pay frequencies or pay schedules for different groups of employees?
Trinity Health Benefit Group Eligibility

- HR Company Defines the RHM
- Employment Status (Active/Severance)
- Employment Type (Regular, Casual, Intern, Temp)
- Scheduled Hours Per Week
- Union Collective Bargaining Units
- Hire Date
- Years of Service
- Salary/Hourly Rate
- Employee Class
Trinity Health Benefit Group Example

**Clinton Benefit Eligible:**

- Full Time = 36 scheduled hours per week
- Part Time = 16 scheduled hours per week

<table>
<thead>
<tr>
<th>Benefit Group</th>
<th>HR Company</th>
<th>Self Service Benefit Cost</th>
<th>Employee Status</th>
<th>Employee Type</th>
<th>Weekly Standard Hours</th>
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<td>L01</td>
<td>Biweekly</td>
<td>Active</td>
<td>Regular</td>
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<td>Leave Status</td>
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<td>Active</td>
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</table>
Coverage Types/Benefit Plans

• Healthcare
  • Medical
  • Dental
  • Vision

• Insurance
  • Life Insurance
    • Basic Life/AD&D
    • Supplemental Life
    • Supplemental Spouse Life
    • Supplemental Child Life
    • Supplemental AD&D
  • Disability
    • Short Term
    • Long Term
Coverage Types/Benefit Plans

• Spending Account
  • Health Care
  • Dependent Care

• Health Savings Account
  • Less than 55 years of age
  • 55+ years of age
  • Plan assignment will be determined through Open Enrollment processing

• Retirement (age/contribution limit built into one plan)
  • 403(b)
  • 401(k)
  • 451
  • 457(b)

• Additional Benefit (all others)
  • Hyatt Legal Plan
Plan Eligibility Rules

• Employee Plan Eligibility - Defines a subset of the benefit groups
  Example: Long Term Disability – Management
  Long Term Disability – Non-Management

• Dependent Plan Eligibility – Defines criteria for dependent coverage
  Example: Child dependent age < 26
Enrollment Event Rules

• When does coverage begin?
• When does the deduction begin?
• Is there a waiting period?
• When does coverage end?
• When does the deduction end?
• What are the Evidence of Insurability (EOI) requirements?
• What changes are allowed for each event?
• If an employee does not complete their elections, what should default?
Things to Note

• Beneficiaries will only be captured on Basic Life AD&D and will be the assumed beneficiary should the colleague have Supplemental Life

• Supplemental Life Insurance - covered dependents/eligible adults initially will not be collected in Workday

• We will not be able to require SSN on dependents, reports will be available to identify those without SSN
Training Day 2 – Day to Day Administration

• Managing Eligibility
  • Dependent Verification
  • Court Ordered Dependents
  • Essential Assist Eligibility
  • ACA Eligibility
  • Eligibility Exceptions (Newtown Square only)
  • Benefit Annual Rate
  • Colleagues on Severance

• Managing Enrollment
  • Administrative Corrections
  • Retirement contribution updates

• Training Day 3 – Processes and Reports
Questions