



ADP Pro

Client Conference



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Preparing for 2016 Open Enrollment

Katie Bruno
Project Leader, Annual Enrollment
ADP

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Introductions

Katie Bruno – Annual Enrollment Project Leader

-  15 years experience in Payroll, HR, Benefits, and Accounting
-  5 years doing Payroll & Accounting for an international Hotel chain with various pay types and unions as an ADP Client





Session Agenda

In this session, we will discuss

- Open Enrollment Project Timeline Approximation
- Your ADP WFN site
 - New functionality coming in WFN – Getting Started
 - Key items of impact for OE
- Resources available to you





Open Enrollment Project Timeline Approximation





Open Enrollment – Project Timeline Approximation

Phase	Timing
Pre – OE Period	1-8 Weeks
OE Period	1-3 Weeks
Post OE Period	3-5 Weeks



Open Enrollment – Project Approximation

Task (s)	Phase
Engage broker/providers to establish new plan year offerings	Pre OE Window
Engage with ADP Open Enrollment Team	Pre OE Period
Complete and review OE resources available in WFN and on Support Center	Pre OE Period
Request and provide any carrier connection contacts or revised account structures to ADP OE Resource	Pre OE Period
Update your WFN Site <ul style="list-style-type: none"> • Benefit changes • Employee Self Service • Reports (Pre-OE) • Payroll updates 	Pre OE Period
Manage (Enter) Enrollments	OE Period
Send Enrollment data to carriers	Post OE Period
Update other enrollment profiles with new plans (new hire, life events, etc.)	Post OE Period
Transmit payroll with new deductions	Post OE Period





Workforce Now New Functionality: Open Enrollment Center

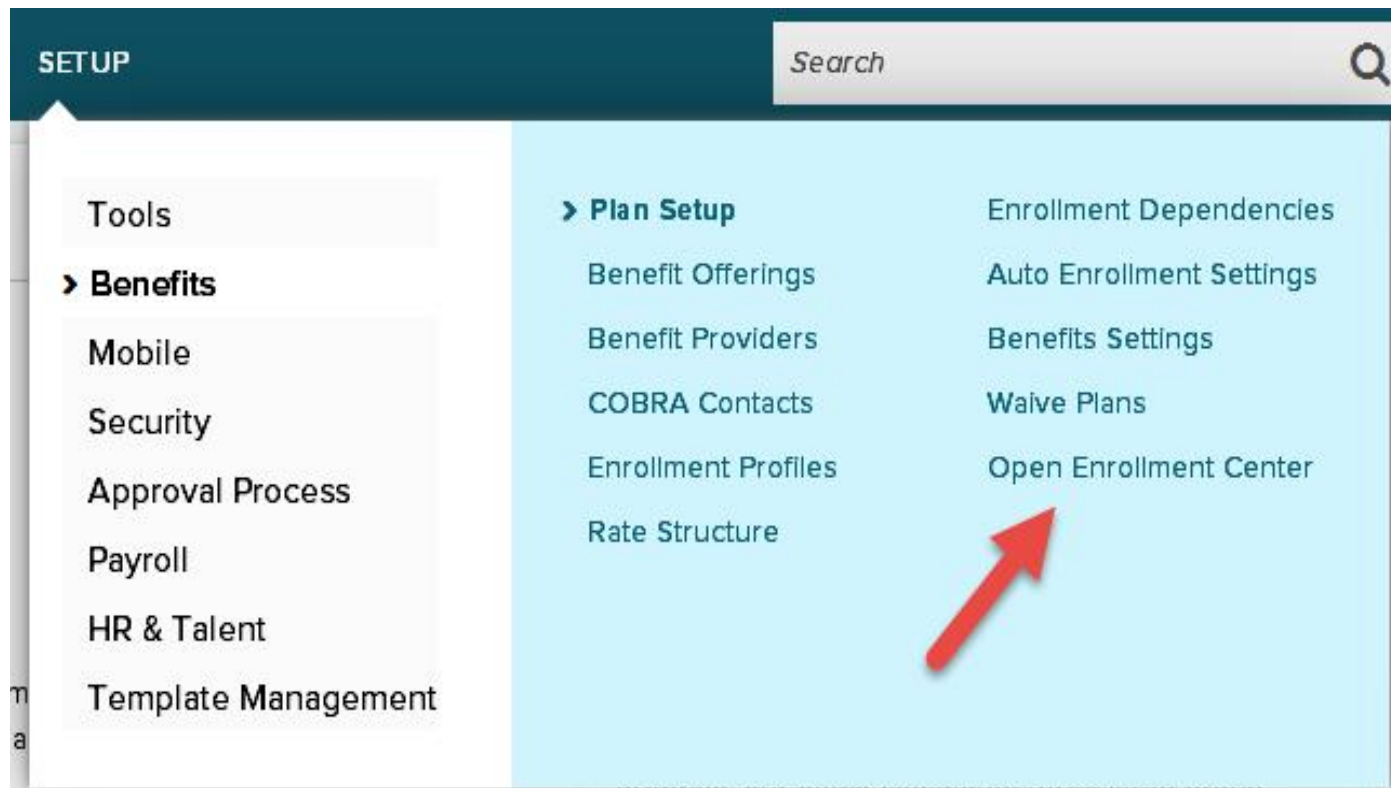
2016 AUGUST

SUN	MON	TUE	WED	THU	FRI	SAT
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

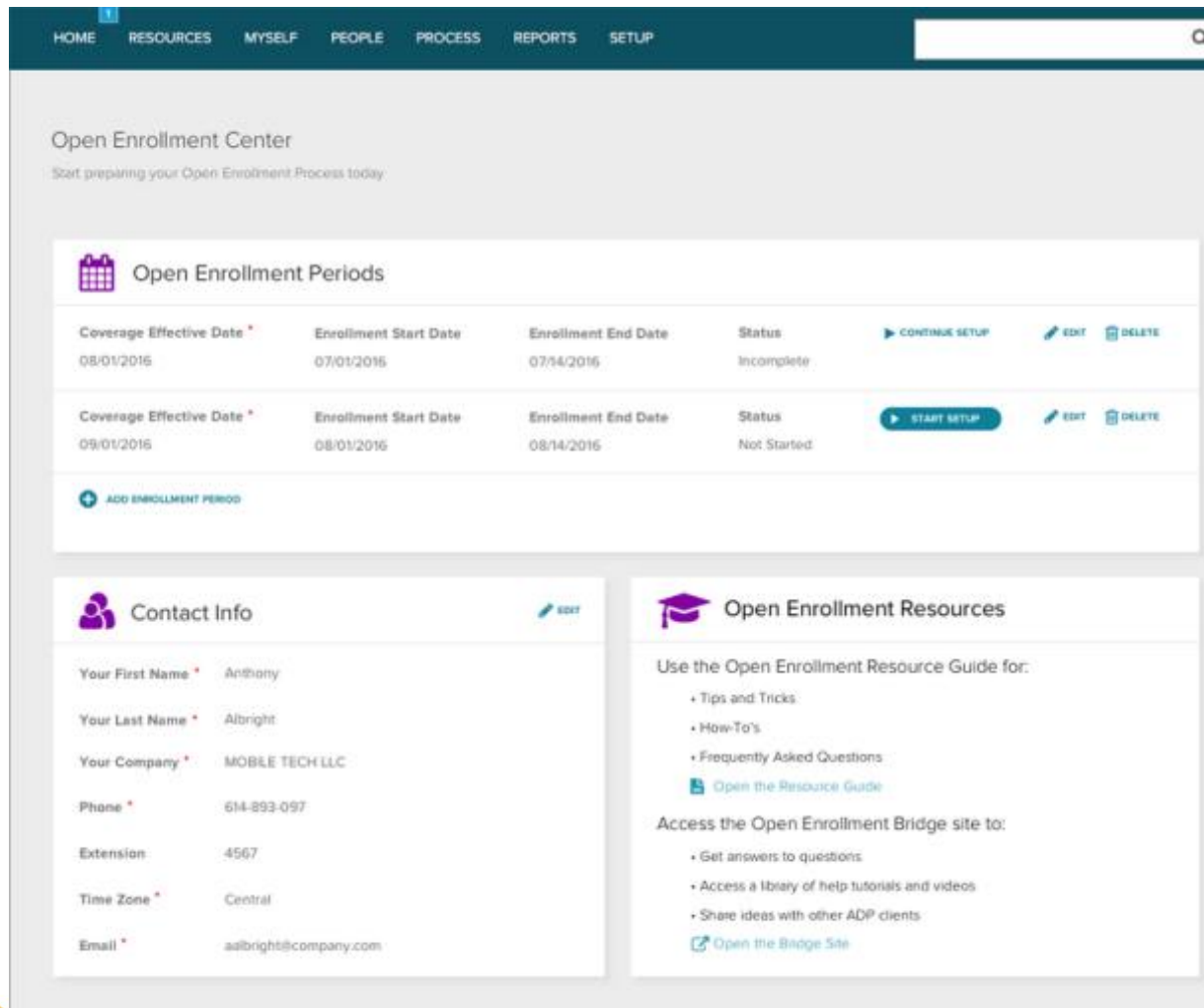




The Open Enrollment Center



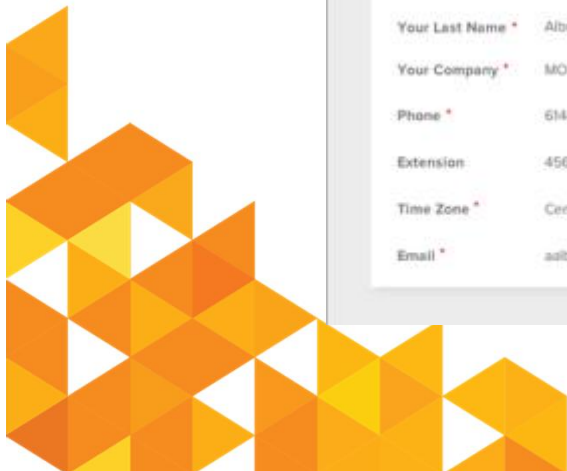
Open Enrollment Center: Landing Page



The screenshot displays the Open Enrollment Center landing page. At the top is a dark teal navigation bar with links for HOME, RESOURCES, MYSELF, PEOPLE, PROCESS, REPORTS, and SETUP. A search bar is located on the right side of the navigation bar. Below the navigation bar, the page title "Open Enrollment Center" is followed by the instruction "Start preparing your Open Enrollment Process today".



The main content area is divided into three sections:

- Open Enrollment Periods:** A table with two rows of enrollment periods. The first row has a status of "Incomplete" and a "CONTINUE SETUP" button. The second row has a status of "Not Started" and a "START SETUP" button. Both rows include "EDIT" and "DELETE" icons. An "ADD ENROLLMENT PERIOD" button is located below the table.
- Contact Info:** A form with fields for "Your First Name" (Anthony), "Your Last Name" (Albright), "Your Company" (MOBLE TECH LLC), "Phone" (614-893-097), "Extension" (4567), "Time Zone" (Central), and "Email" (aalbright@company.com). An "EDIT" button is located to the right of the form.
- Open Enrollment Resources:** A section with a graduation cap icon. It includes the text "Use the Open Enrollment Resource Guide for:" followed by a list of resources: "Tips and Tricks", "How-To's", and "Frequently Asked Questions". A link "Open the Resource Guide" is provided. Below this, it says "Access the Open Enrollment Bridge site to:" followed by a list of benefits: "Get answers to questions", "Access a library of help tutorials and videos", and "Share ideas with other ADP clients". A link "Open the Bridge Site" is provided.










Open Enrollment Center: *Prepare*

Open Enrollment Center  

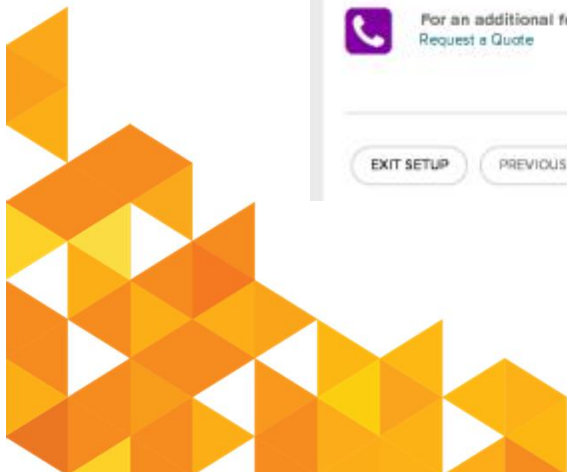
Coverage Effective 10/01/2016

Prepare Gather Info Configure Settings Confirm Settings Conduct Enrollment Enter Enrollments Conclude OE Period

Complete these steps to prepare your Open Enrollment.

-  **Review plans from your broker or provider and finalize selections.**
 - Gather summary plan documents
 - Gather rate sheets (rates must be in a monthly amount)
 - Review and understand benefit plans offered
-  **Verify all employees have an email address to receive information.**
 - Run an employee directory report in the Report Center to verify data
 - Update employee records manually in the Personal Profile
 - Populate and process import spreadsheet to mass upload
 -  Download the Import File
 -  Import File
-  **For an additional fee, ADP can handle your open enrollment for you.**
Request a Quote

[EXIT SETUP](#) [PREVIOUS](#) This step is complete [CONTINUE](#)

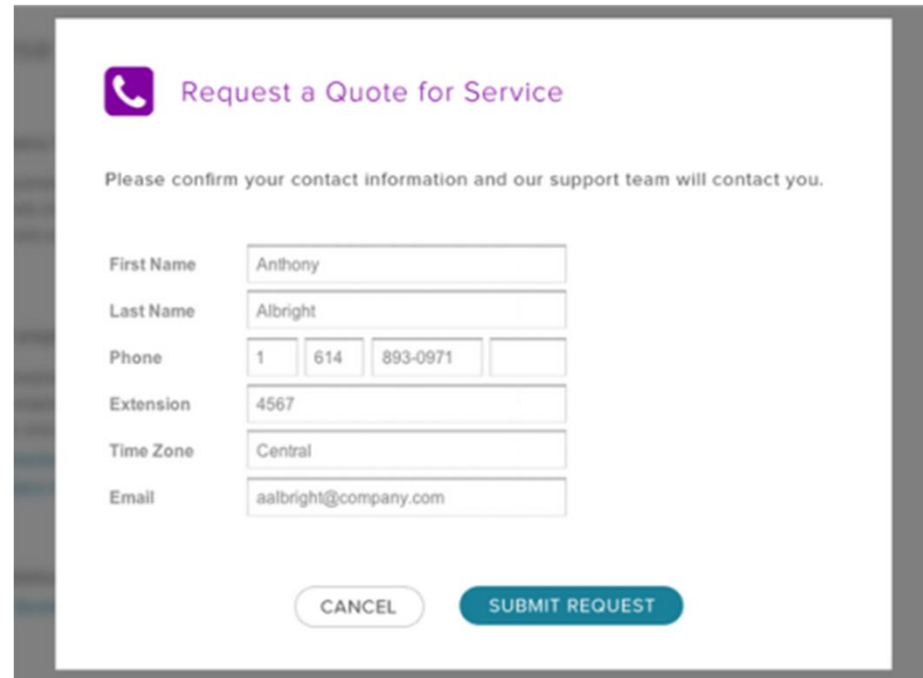





Open Enrollment Center: *Prepare*

ADP Professional Services

- Create benefit plans
- Create enrollment profiles
- Other billable features for a fee



 Request a Quote for Service

Please confirm your contact information and our support team will contact you.

First Name	<input type="text" value="Anthony"/>
Last Name	<input type="text" value="Albright"/>
Phone	<input type="text" value="1"/> <input type="text" value="614"/> <input type="text" value="893-0971"/> <input type="text"/>
Extension	<input type="text" value="4567"/>
Time Zone	<input type="text" value="Central"/>
Email	<input type="text" value="aalbright@company.com"/>



Open Enrollment Center: *Gather Info*

Open Enrollment Center ? ↗

Coverage Effective 10/01/2016

Prepare Gather Info Configure Settings Confirm Settings Conduct Enrollment Enter Enrollments Conclude OE Period

Select the benefits that will be offered during this open enrollment

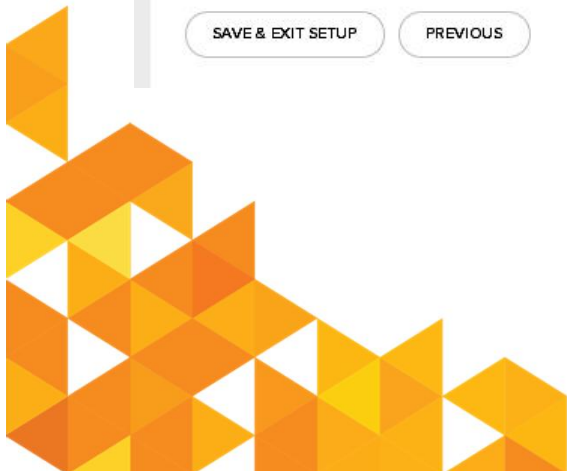
Medical Dental Vision Flex

Life AD&D Disability Any other

SAVE & EXIT SETUP PREVIOUS

You must select one or more plan sub types to proceed.

CONTINUE



Open Enrollment Center: *Gather Info*



Select the benefits that will be offered during this open enrollment.

- Medical Dental Vision Flex
 Life AD&D Disability Any Other

Review your current and future plans.

PLAN NAME	PLAN CLASS NAME	PLAN SUB TYPE	EFFECTIVE DATE	PLAN START DATE	PLAN END DATE
BCBS Premium PPO	Option 1	Medical	1/1/2017	1/1/2016	12/31/2017
BCBS Premium PPO	Option 2	Medical	1/1/2017	1/1/2016	12/31/2017
BCBS HMO	Option 1	Medical	1/1/2017	1/1/2016	12/31/2017
BCBS Dental DMO Plan	Basic	Dental	1/1/2017	1/1/2016	12/31/2017
VSP Vision Care Package	Basic	Vision	1/1/2017	1/1/2016	12/31/2017
Short Term Disability	Basic	Short Term	1/1/2017	1/1/2016	12/31/2017
Long Term Disability	Plan Class 1	Long Term	1/1/2017	1/1/2016	12/31/2017
Long Term Disability	Plan Class 2	Long Term	1/1/2017	1/1/2016	12/31/2017
401k Retirement	Plan A	Retirement	1/1/2017	1/1/2016	12/31/2017
401k Retirement	Plan B	Retirement	1/1/2017	1/1/2016	12/31/2017



Select the changes that will you need for any of your benefit plans. [What's this?](#)

- Make rate changes
 Create new plan



You currently offer self-funded plans. [View Plans](#)

Are any additional plans becoming self-funded, or are any plans being moved from self-funded?

- No Yes



You currently have 5 providers. [View Providers](#)

Do you need to add new providers?

- No Yes



You use Carrier Connections. [What's this?](#)

Do you need to make changes to Carrier Connections specific to this Open Enrollment period?

- No Yes



You used Employee Self Service for your previous Open Enrollment. [What's this?](#)

Will you change this for the upcoming Open Enrollment?

- No Yes





Open Enrollment Center: *Gather Info*

Confirm Payroll Details



You are currently taking payroll deductions for benefit enrollments.

Do you anticipate any changes to deduction codes?

No Yes



You currently have imputed income deduction mappings. [View Details](#)

Do you need to make changes to imputed income mappings? [What's this?](#)

No Yes



You have pay dates scheduled. [Hide details](#)

COMPANY CODE	PAY DATE	PERIOD END	PAY DATE 2	PERIOD END 2
ABC	1/7/2017	12/31/2017	1/7/2017	12/31/2016
DEF	1/21/2017	1/14/2017	1/21/2017	1/14/2017
QRS	2/7/2017	1/31/2017	2/7/2017	

Do you need to make any changes to Open Enrollment deduction dates?

No Yes



Your information has been sent to ADP support specialists.

Based on your selections, you will require some assistance from ADP support. One of our support specialists will contact you.

The next step will help you get started with tasks that can be completed on your own.

EXIT SETUP

PREVIOUS

CONTINUE



Open Enrollment Center: *Configure Settings*



Get started with Open Enrollment Setup.

Here are a few things that you can do on your own.

Manage Plans & Providers

- [Add a New Provider](#)
- [Copy, Create, or Terminate Plans](#)
- [Make Rate Changes](#)

Related Help Videos

- [All Open Enrollment Videos](#)
- [How to Copy a Benefit Plan](#)
- [Editing Benefit Plan Rates](#)

Carrier Connections

- [Request a New Carrier Connection](#)

Self-Service Actions

- [Review Enrollment Profiles](#) Create a new profile and inactive old ones.
- [Review Approval Workflows](#) Specify how employee enrollments are approved.

[VIEW MORE](#)

Please wait to complete the following tasks.

An open enrollment specialist will help you complete these items.

- Wait to **terminate any plans**.
- Wait to create new **flex plans**.
- Wait to create new **life plans**.
- Wait to add or remove **self-funded plans**.
- Wait to add **benefit deduction rules** due to change in pay date.
- Wait to change **imputed income deduction mappings**.

[EXIT SETUP](#)

[PREVIOUS](#)

I have completed this step

[CONTINUE](#)



Returning to Open Enrollment Center

HOME RESOURCES MYSELF PEOPLE PROCESS REPORTS SETUP

Return to Open Enrollment Center

Plan Setup

- 1. Plan Class Details
- 2. Eligibility Rules
- 3. Rate Structure Rules
- 4. Rate Structure Details
- 5. Company Code & T...
- 6. Deductions
- 7. Comparison Informati...
- 8. Summary

Name: Plan Test 2 Type: Health and Welfare Start Date: 5/7/2015 Plan Class Name: PlanTest2 - Class Test 1

Legal Plan Name: Plan Test 2 Sub Type: Medical Effective On: 5/7/2015

Rate Structure: RateTest - HW CovTiers

Enter the total premium rates used by this plan class.

	EMPLOYEE (EE)	EE + SPOUSE	EE + CHILD(REN)	EE + FAMILY
0 - 15	100	150	150	200
16 - 25	100	150	150	200
26 - 45	100	150	150	200
46 - 55	100	150	150	200
56 - 64	100	150	150	200
65 - and over	100	150	150	200

CANCEL PREVIOUS NEXT DONE



Open Enrollment Center: *Confirm Settings*

Open Enrollment Center  Coverage Effective January 1, 2017

 Prepare  Gather Info  Configure Settings  **Confirm Settings**  Monitor Enrollment  Enter Enrollments  Conclude OE Period

Validate Plan Information



Review your current and future plans.

PLAN NAME	PLAN CLASS NAME	PLAN SUB TYPE	EFFECTIVE DATE	PLAN START DATE	PLAN END DATE
BCBS Premium PPO	Option 1	Medical	1/1/2017	1/1/2016	12/31/2017
BCBS Premium PPO	Option 2	Medical	1/1/2017	1/1/2016	12/31/2017
BCBS HMO	Option 1	Medical	1/1/2017	1/1/2016	12/31/2017
BCBS Dental SMO Plan	Basic	Dental	1/1/2017	1/1/2016	12/31/2017
VSP Vision Care Package	Basic	Vision	1/1/2017	1/1/2016	12/31/2017
Short Term Disability	Basic	Short Term	1/1/2017	1/1/2016	12/31/2017
Long Term Disability	Plan Class 1	Long Term	1/1/2017	1/1/2016	12/31/2017
Long Term Disability	Plan Class 2	Long Term	1/1/2017	1/1/2016	12/31/2017
401k Retirement	Plan A	Retirement	1/1/2017	1/1/2016	12/31/2017
401k Retirement	Plan B	Retirement	1/1/2017	1/1/2016	12/31/2017

[Add or Terminate Plans](#)



Conduct Employee Self Service Testing

- [Verify Open Enrollment Profile](#)
- [Testing Open Enrollment Profile](#)

[EXIT SETUP](#)

[PREVIOUS](#)

This step is complete

[CONTINUE](#)





Open Enrollment Center: *Monitor Enrollment*



Complete these steps to monitor your Open Enrollment

 Use the message center to approve pending enrollment changes.
[Open Message Center](#)

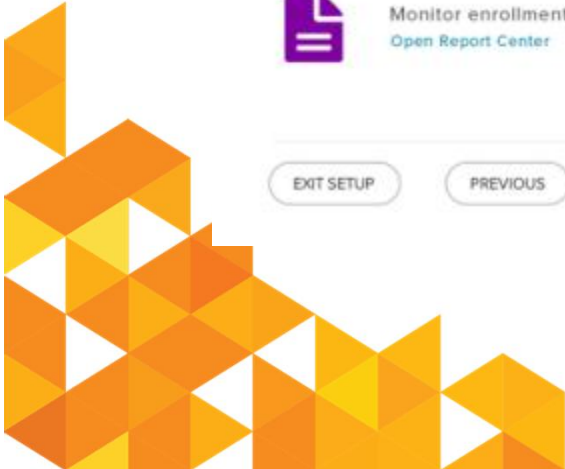
 Monitor enrollment progress using the Activity Report.
[Open Report Center](#)

EXIT SETUP

PREVIOUS

This step is complete

CONTINUE





Open Enrollment Center: *Enter Enrollments*



Enter Enrollments

This step needs attention if you haven't used self service.
You may continue to Conclude OE Period at your convenience.

Tp: New dependents must be imported first before importing employee and dependent enrollment data.

-  **Manual Practitioner Enrollment**
Start enrolling employees manually via the Employee Enrollment screen
[Start process now](#)
-  **Dependent Import**
Import newly added dependents by populating the template and importing
[Download Dependent Template](#)
[Start Dependent Import](#)
-  **Employee & Dependent Enrollment Import**
Import employee & dependent enrollment data by populating the template and importing
[Download Employee Template](#)
[Import Employee File](#)

[EXIT SETUP](#)

[PREVIOUS](#)

This step is complete

[CONTINUE](#)



Open Enrollment Center: *Conclude OE Period*



Go to the Report Center to complete the following

[Open Report Center](#)

- Verify employee enrollment data as of a point in time with [Employee Enrollment Report](#)
- Verify dependent enrollment data as of a point in time with [Dependent Enrollment Report](#)
- Generate [Benefits and Confirmation Statements](#) to view and distribute to employees
- Identify benefit and payroll deduction discrepancies with the [Deduction Compare Report](#)



View payroll schedule and verify payroll deductions on employees

[View Payroll Schedule](#)

- [Watch How to Verify Payroll Deductions on Employees](#)
- Visit [Employee Benefit Enrollment](#) screen to verify enrollments and deductions
- Visit [Employee Payroll Deduction](#) screen to verify deductions
- Verify [Benefit Deduction Rules](#) setup



Follow up with Carriers regarding Carrier Connection files

- Reach out to carrier contact to verify Open Enrollment benefit data received
- If Open Enrollment file was sent, you will likely need to manually provide any current plan year changes directly to carrier
- Visit [My Connections](#) within Workforce Now to verify files

[EXIT SETUP](#)

[PREVIOUS](#)

This step is complete

[FINISH](#)










Workforce Now: Significant (OE) Details





Workforce Now Significant Details

-  Benefit Plan Changes
-  Employee Self Service
-  Reporting
-  Carrier Connections
-  Payroll

Significant Details: Benefit Plan Changes

Item	Details
Benefits> New Rates	Have monthly value
Benefits>Plan Details	Have provider, legal plan name, policy #, eligibility and term rules, deduction code, etc
Benefits>Copy Plan	Will not copy over dependencies or enrollments
Benefits>Life Insurance Plans	Rates are entered as monthly amount per \$1000
Benefits>Terminate Plans	Enter last day of coverage as term date (ex: 12/31/2016)
Benefits>Delete Plans	Do Not! You lose all history

Significant Details: Employee Self Service

Item	Details
Enrollment Profile>OE Profile	Coverage Eff. Date = Benefit Effective Date
Enrollment Profile>Open & Close of OE Period on ESS	The OE Profile automatically opens at 12:01AM EST on start date and closes at 11:59PM EST on close date
Enrollment Profile>Reporting on OE Profile Activity	Standard Report>Benefits>Enrollment Profile Activity Report
Enrollment Profile>Hierarchy of Benefit Profiles	New Hire Profile will appear before the OE Profile is applicable
Enrollment Profile>New Hire & Life Event Profiles	Be sure to add any new plans to your life and new hire profiles as this does not automatically happen

Significant Details: Reporting

Item	Details
Reports>Standard Reports	Provide snapshot of data at identified point in time
Reports>Employee Enrollments (Std Report)	This report will identify employee enrollments on a specific date (can use future date)
Reports>Employee & Dependent Enrollments (Std Report)	This report will identify employee and dependent enrollments on a specific date (can use future date) – great for your providers
Reports>Confirmation Statements	Provides employee elections, dependents, and costs along with a signature line
Reports>Benefits Statements	Provides summary of all enrollments, dependent listing, and costs
Reports>Custom Reporting	ADP can create custom reports to meet your specific reporting needs

Significant Details: Carrier Connections

Item	Prep Work
New Carrier Connections	Implementation period is 8-12 weeks
My Connections>OE Files	Most carriers want to receive new election information approximately 1 month prior to effective date
My Connections>Benefit plan terminations/additions	If you have a carrier connection file contact ADP to ensure no data flow issues
My Connections>Carrier Contact Info & Account Structure	If changes are needed on your carrier connection files you'll need to obtain and provide ADP with a contact at your carrier (EDI) and an account structure
My Connections>ADP Cobra	Update benedirect with any new rates or plans in advance of your effective date to prevent Compliance issues
My Connections>ADP FSA	Update flexdirect with new copay amounts and deduction codes (if applicable)

Significant Details: Payroll

Item	Prep Work
New rate and deduction changes	Update in payroll based on the pay period end
Deduction Rules	Functionality available to you if modifications to deduction timing are needed
Deduction codes	If new deduction codes are needed allow 1 week for ADP to create
How to review deduction changes	Employee Payroll Changes Report (STD>Personal & Employment)
Payroll Preview	We highly recommend you review your payroll deduction information for your new plan year prior to transmitting that payroll
Goals	If you use goals in payroll you must clear them after your last payroll of the year and prior to your transmission of first payroll of the year



Resources





Resources

- Support Center



- The Bridge



- Your Dedicated Client Service Team







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Thank you!



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