Benefits Open Enrollment

Checklist

As open enrollment nears, please ensure you review the following through your GreenshadesOnline Benefits setup. If you have any questions about these items and/or your setup, please contact support@greenshades.com.

When reviewing this information, please make sure to check each company independently. To change companies while logged into GreenshadesOnline, use the drop down in the top left corner.

(Parts of the document refers to Dynamics GP. If you are not a Dynamics GP user, you may disregard those references and continue through the document.)

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1 Benefits and Options

1.1 Navigation Path

Settings → Employee Services → Benefits → Benefits tab
Your company's list of Benefits displays here. Click through each Benefit to review the settings.

1.1 Checklist

☐	**New Option(s**) – While it is often not necessary, if you are changing providers for next year you *may* need to add new options as opposed to creating new versions for current options.
	Make sure you create new benefits and deductions in Dynamics GP first. Be sure to include these new options in your Benefits Packages, Display Groups, and Open Enrollment setup.
	You can use the same benefits and options/coverages for the new provider and simply create a new version. In this new version, you will want to rename and set the details appropriately for the new provider. You may want to ensure your codes are not named in a provider specific way in GP; if they are, a new set of codes may be the best route.
☐	**New Version** – Ensure all benefits and options you plan on allowing employees to enroll in for the new plan year have new versions that cover the new plan year. Each new version may have new information and *must* have new dates.

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Dates – Verify the dates of the new version are set correctly.

Benefit Effective Dates – Verify the Benefit Effective dates (Plan Period dates) are set correctly. When a new version is created, it will cement in the previous version's Benefit Effective End date, so ensure that the end dates of your current version are correct before creating the next one.

Payroll Dates – You will have a set of dates you use to define the start and end of the plan's payroll dates.

- The Payroll Start Date is the first day of the first pay period in the plan year.
- The Payroll End Date is the last day of the last pay period in the plan's period.
    - For the Payroll End Date to function accurately in the Benefits module, however, the Payroll End Date should be *set to a date when payroll will no longer need the codes to be active in GP*. This should also be a day or two after the payroll is ran for the *last* pay period in the plan year.

The reason for this is that the Connector will aggressively seek out end dates inside GP and it will inactivate those codes making them unable to be included in a pay run. By setting the Payroll End Date to a *day after the payroll is ran*, it will allow them to be included, and then Greenshades will inactivate the old codes and activate the new elections after that time.

Sync Dates – To ensure that your new version of benefits do not sync down before payroll runs the last pay run of the old version, the Sync Start Date of the new version should be set *at least a day after the last payroll* will be processed for the old version, but also *before when the first payroll of the new version is set to run*. This will mean that the Sync Start Date will likely be after the Payroll Start Date.

Setting a Sync Start Date before a Payroll Start Date will not cause the new elections to sync early; the insertion of new elections will, at the earliest, wait to sync until the Payroll Start Date.

The Sync End Date has the same current functionality as the Payroll End Date. Greenshades suggests that the end date be set to the same date chosen for the Payroll End Date (after the last pay run of the old version of benefits).

☐	**Rate Changes** – Ensure that, when available, any new rates or plan changes are modified within the new versions.
☐	**Details** – Modify any detail changes about each benefit or option(s), such as group numbers, pay frequency, etc.
☐	**Documentation** – Ensure any documentation that may have been attached to the benefit or option(s) is updated to reflect any new documentation for the new plan period.
☐	**Affordable Care Act (ACA) Designations** – Verify that you have marked your benefits as Minimum Essential Coverage, Minimum Value, Self-Insured, etc., if they are so designated under the Affordable Care Act. Mark all designations that are applicable.

2 Benefits Eligibility

2.1 Navigation

Settings → Employee Services → Benefits → Benefit Packages tab
Your Benefit Packages will be listed here. Each Benefit Package is a unique list of benefits offered to employees based on eligibility rules.

2.1 Checklist

☐	**Benefit Package Setup** – Be sure to set up an adequate number of packages to accurately assign an employee to only one package with a unique set of benefits that the employee is eligible for. To review, you may go to edit each package and the final page of the setup wizard will list the employees who will be considered eligible for the given package based on the rules provided.

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☐	**ACA Considerations** – If you intend for certain Benefit Packages to use ACA full-time status as an eligibility rule, be sure to turn on ACA full-time tracking and use the 'ACA Full-Time Status' field in the benefit package rules. When setting up the rules for a Benefit Package that is intended to cover employees per ACA, ensure conflicting requirements, that would exclude employees who are eligible under ACA, are not also selected.
☐	**Active vs Inactive Employees** – Verify that your Benefit Packages exclude inactive employees if you intend for them to be excluded.
☐	**Excessive Employee ID Overrides** – If you get to the rules setup and receive exceptions for employees based on employee ID, your packages may need to be reviewed and cleaned up. Exceptions may occur because you did not accept recommended package changes. Please ensure you intended for these overrides. If not, remove all the employee ID rules and return to the basic eligibility rules (recommended).
☐	**Approve Pending Benefit Eligibility Changes** – All changes made in the Benefit Package Rules require approval. Navigate to Employees → Benefits → Eligibility Changes to see the list of pending changes. Review the changes to ensure they are consistent with your intentions and approve. If you do not approve them, your Benefit Package Rules will not be used for open enrollment.

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3 Open Enrollment

3.1 Navigation

Settings → Employee Services → Benefits → Enrollment Events tab.
You can create a new open enrollment event or review a current one here. Click on your Enrollment Event to review the settings.

3.2 Checklist

☐	**New Open Enrollment Event** – You should set up a new Open Enrollment Event for this year. It is recommended to set up the Open Enrollment event after all new versions and rate changes are complete. You may set it up before, however, you will not be able to select the correct benefit/option(s) and versions that you will need.
☐	**Passive Enrollment Event** – A Passive Enrollment will, in certain circumstances, passively make elections for your employees to remain in the same benefits that they had currently been enrolled in. Should you decide to use our new Passive Enrollment feature, you will find the option in the Open Enrollment Event setup. **When:** If planning to use Passive Enrollment, you must ensure that your Open Enrollment Event is complete and the Passive Enrollment process is completed *before* the current version has expired. If your employees no longer have current enrollment, because the old version has passed the Benefit Effective End Date, the passive enrollment feature will NOT be able to passively enroll employees in benefits for which their enrollment is no longer current. **Which Benefits:** Greenshades will only be able to passively enroll benefits that were included in the Open Enrollment Event in which your employees are still eligible for in their Benefits Package, *and* that are using the same HR or payroll codes between versions.

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	If an employee is making any active elections during the Open Enrollment (changing enrollment, choosing to waive, etc.), the individual will no longer be eligible for Passive Enrollment.
☐	**Dates and Messages** – Review the dates of your Open Enrollment Event and the messaging to ensure they are appropriate for this year.
☐	**Correct Versions –** It is very important that before Open Enrollment starts, you verify that all of the correct benefits and versions are selected. Please select the version of the benefits that correspond to the plan year being elected.

4 Affordable Care Act (ACA)

4.1 Navigation

If you intend to use the ACA features of Benefits and want to make sure your Open Enrollment is properly set up, please verify these important items.

Settings → Employee Services → Benefits → Affordable Care Act tab

4.2 Checklist

☐	**Automatic Full-Time Status Determination** – Verify you have enabled this option if you intend to have Greenshades determine full-time status for your Benefit Packages.

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☐	**Measurement Groups Setup** – Review your Measurement Group settings to ensure your latest measurement period will end *before* you intend to start your Open Enrollment Event. This will allow the Benefit Packages to use the latest results for the Open Enrollment Event.
☐	**Full-Time Determinations** – If you are using Greenshades' full-time determinations, review these results under Employees → Benefits → ACA Dashboard. *Note: This is updated nightly, so your latest results may be available later.*

For additional support, please contact us.

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