USG Benefits Update

Thursday, June 13, 2019

✓ Place your phone or computer on mute
✓ Don’t place your call on hold
✓ Let us know if you have difficulty hearing
Housekeeping Items

- This WebEx is being recorded and the archive/presentation will be distributed following today’s meeting.

- Feel free to post questions in the chat.

- Please place phone on mute to prevent background noise.
Agenda

- Known Issues - Theresa
- ACA Reports - Theresa
- Cohort 5 - Theresa/USG
- Dependent Audit - USG
- Retirement Update - Jason
- Retirement @ Work - Theresa
- Well-being Update – Karin
- Retiree WebEx Sessions/Onsite Meetings - Monica
- Predictive Routing - Theresa
- Service Center Performance - Theresa
- Practitioner Reference Materials - Theresa
- USG Benefits Team Restructure - Karin
- Wrap-Up
Known Issues

**Issue A:** Retirees enrolled in Retiree Supplemental Life/Retiree Spouse Life; $0 dollar value

In preparation for OE, through an internal audit, we found retirees with an election in a Retiree Life Plan that had a value as $0.

- **Impact:** 18 retirees
- **Root cause:** Administration Processing Error
- **Corrective action steps:** USG approval was given to update coverage prospectively for any Retiree who elects to maintain the coverage. Alight completed outbound calls to reach each retiree and inform them of the find and to see if they would like to have the coverage reinstated or removed.
  - 2 elected to maintain, 4 could not be reached and were sent letters. All others did not want the coverage.
- **Status:** Closed

**Issue B:** Employees with EOI denials received automatic increases to their life plans

Impacted employees who elected to increase life plans during OE and also received pay changes effective 1/1.

- **Impact:** 16 employees
- **Root cause:** Incorrect set up with the logic associated with the autocorrect process
- **Corrective action steps:** USG approval was given to update coverage retroactively back to 1/1/2019. Emails will be sent to the impacted employees. Emails will go out no later than 6/14. The system fix will be applied.
- **Status:** All accounts updated. Closure is Pending email outreach to impacted employees
Known Issues

**Issue C: Employees with EOI approvals received during OE were not applied**

Impacted employees received their EOI approvals before the OE election period window closed did not receive the amount approved by the Securian.

**Population impacted:** Approximately 215

**Root cause:** Incorrect set up

**Corrective action steps:** Alight is doing a full compare between what is on their system to what was received on the Life plan inbound file and amounts will be updated prospectively. Sent adjusted amounts on May PIFs so that each employee ends up with the correct total amounts through the end of July. The system fix will be applied in a future migration prior to the next OE.

**Status:** Pending the completion of the clean up and email outreach

**Issue D: Employees who elected to stop their H SA had them restarted incorrectly**

Impacted employees had their contributions incorrectly restarted after they purposely stopped contributing.

**Population impacted:** 13

**Root cause:** Administrative error

**Corrective action steps:** Alight updated the accounts to stop the deductions going forward. Outbound call attempts have been completed to give the employee the option to keep the funds or to have them refunded. Two employees elected to have the funds refunded and 7 could not be reached. The 2 refund request were sent to Optum so that they can work with the payroll team for refund processing.

**Status:** Closed
# ACA Compliance

## Employer Mandate Reports Definitions

<table>
<thead>
<tr>
<th>Report Name</th>
<th>Purpose</th>
<th>Expected Action by the Institution</th>
<th>Alight Action</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Calc Report – Standard Measurement Period (SMP)</strong></td>
<td>The standard 'final calc' report will include the total hours worked within the full measurement window of 10/3 – 10/2. Additionally, hours will be calc’ed for employees with breaks in service based on averaging hours for the # of weeks in the measurement window and potentially eligible for 501 credit hours.</td>
<td>The report will require USG/Institution sign off or direction.</td>
<td>Alight will use the report to determine FTE, eligibility as week as adjusting the hours in the system with institution instruction.</td>
</tr>
<tr>
<td><strong>Calc Report – Initial Measurement Period (IMP)</strong></td>
<td>The Initial 'final calc' report will include the total hours worked within the full initial measurement window. Additionally, hours will be calc’ed for employees with breaks in service based on averaging hours for the # of weeks in the measurement window and potentially eligible for 501 credit hours.</td>
<td>The report will require USG/Institution sign off or direction.</td>
<td>Alight will use the report to determine FTE, eligibility as week as adjusting the hours in the system with institution instruction.</td>
</tr>
<tr>
<td><strong>Detailed Projection – IMP and SMP</strong></td>
<td>The projection reports will include the total hours as of the report run date and estimate the average hours worked during the weeks works as of the file run date. This report will be produced solely for the purpose of identifying hours estimates that institutions can use for workforce management purposes. Projection Reports will also identify anyone with a break in service of 4 consecutive weeks as 501 credit eligible.</td>
<td>No action is required unless Institution needs Alight to make an adjustment</td>
<td>Alight will take no action unless there is institution instruction.</td>
</tr>
<tr>
<td><strong>Payroll data with Zero Hours</strong></td>
<td>The report identifies employees in pay groups G, L or P and were received on the hours files but reported 0 hrs</td>
<td>Review and make corrections/adjustments for the next period hours file</td>
<td>Alight will post the report to the PSP folders for institution review</td>
</tr>
<tr>
<td><strong>SSN Not on TBA (Alight System)</strong></td>
<td>The “SSN Not on TBA” report identify employees who are reported on the monthly hours files and cannot be found on the Alight System (TBA)</td>
<td>The report will require USG/Institution to review to confirm that the Employee is still active</td>
<td>Alight requires the SSN in order to load the hours. Alight will provide the institutions with the report</td>
</tr>
<tr>
<td><strong>Excessive Hours Report</strong></td>
<td>The “Excessive Hours Report” identifies employees who are report on the hours file with 184 or more hours reported in a month.</td>
<td>The report will require USG/Institution to review to confirm that the accuracy of the hours worked and to make any required adjustments and send on the next available hours file</td>
<td>Alight will load the hours provided.</td>
</tr>
</tbody>
</table>
Cohort 5

- Preparation for OneUSG Cohort 5 (Augusta)
- System Go Live effective 6/16/2019; Effective 7/1/2019
- OneUSG blackout period June 10 – June 19th
  - Expect data delays to OneUSG Connect
Dependent Verification Audit

- Ensure all dependents enrolled in the USG Healthcare Plan are eligible under the plan rules.
- Keep healthcare costs down by only having eligible dependents on coverage.
- Anyone who has certified dependents after 7/01/17 will not have to recertify.

**Communications Timeline:**
- Begins July 22\(^{nd}\); Ends September 6\(^{th}\)
  - 1\(^{st}\) mailing to home address – 7/22/2019
  - Reminder email- 8/1/2019
  - 2\(^{nd}\) mailing to home address - 8/11/2019
  - Reminder email – 8/21/2019

- USG Leadership communication and employee communication will be sent shortly. Information available on USG HR website at: https://www.usg.edu/hr/benefits
2019 Dependent Audit Information

The University System of Georgia (USG) will be conducting a dependent audit. Completing a dependent audit ensures that all dependents enrolled in the health plans are eligible under the plan rules. This helps USG be able to continue to offer healthcare at reasonable costs. Any dependents who were enrolled in the USG health plans prior to July 2017, and therefore not yet verified, you will be required to verify eligibility for.

The OneUSG Connect - Benefits Dependent Verification Center will mail you a notice on July 22nd to request copies of documents that validate the dependent(s) you currently have enrolled are eligible dependent(s), which will be due by September 6, 2019. If your home address requires an update, please do so in OneUSG self-service as soon as possible.

You will be responsible for providing the required documentation to verify the eligibility of your dependent(s), or risk coverage for your dependents being removed. Please see the guidelines in the yellow box to the right for the required documentation and how to prepare for this audit.

If you have questions about the dependent audit, on or after July 22, 2019, please call the OneUSG Connect - Benefits Dependent Verification Center at 1-844-587-4236. Representatives are available Monday-Friday from 8 a.m. to 5 p.m. Eastern Time.

How to prepare for Dependent Audit

https://www.usg.edu/hr/benefits
Retirement Update

Training Begins - Additional Communications

- Web Based Training – All HR, Benefits & Payroll practitioners invited – 90 minutes, June 13th
- Fidelity, VALIC and TIAA balance transfer complete
- June Newsletter – June 15th (approx.)
- Fidelity and AIG Statements mailed with new fees (May and June prorated) – Mid June
- Full-day Practitioner Training Session – Macon – July 16th, 10:00 am to 4:00 pm
Retirement Update

July Go live Progress

- Cutoff/Blackout for participant enrollments/vendor changes/deferral changes – June 20th, 5:00 pm (paper form available for ORP vs. TRS Election)
- Retirement@Work Live – including end of cutoff/blackout – July 3rd, 8:00 am
- System is Live Communication – July 5th, 8:00 am
- TIAA Statements mailed with new fees, October
Retirement@ work

Alight’s transition to TIAA is in progress

Key dates

• June 20 - Last date for enrollment on the Alight system
• June 21 – Pending Enrollment report will be provided to the SSC
• June 21 – PIF will be delivered prior to 12N
USG Well-being

• Participation rate
  – As of 06/04/2019 we are at 15%.
    • University System Office is leading with 30%
    • Dalton State College close 2nd with 29%
  – 2019 goal is 45% for all campus locations

• Well-being Wednesday
  – July 10 at 11:30 a.m., Albany State University
  – Topic: 5 Creative Ways to Hydrate

• Communications
  – Tuesday, July 9: Hydration

• New EAP Vendor
  – ESPYR contract expires June 30, 2019
  – New vendor information will be shared soon
USG Well-being

• Who is Eligible to Participate and earn Well-Being premium credits?
  – Active- Full-time Employees and Spouses.
  – Fully Benefits Eligible.
  – Enrolled in a healthcare plan.

• GRAs and part-time employees are not eligible to register or participate.

• Alight file corrected. Approximately 100 employees impacted. Contact USGwellbeing@usg.edu with questions.
New EAP Vendor - Kepro

• ESPYR contract expires June 30, 2019.

• New vendor information and transition details will be shared today or tomorrow.

• Toll-free number – 844-243-4440

• Web – eaphelplink.com Company code: USGCARES
USG Retiree Transition WebEx and Onsite Meetings

• June 6 WebEx Sessions
  – Morning Session
    • 90+ in attendance
  – Afternoon Session
    • 95+ in attendance
  – Recordings will be posted to USG Retiree Benefits website at:
    https://www.usg.edu/hr/benefits/retiree_benefits

• September Onsite Meetings
  – Meeting dates: Sept 10,11,12
  – Confirming campus/institution locations

• Communications
  – Postcard mailings
  – Listserv Notifications (USG HR/Practitioners, USG Benefits)
  – USG Retiree Benefits Website Updates
  – Retiree Advisory Council
Call Trends

Top Topics
• Benefits Inquiries
• Direct Billings and Payments
• Coverage Confirmation

Action Plan for Improvement Initiatives; First Call Resolution
• Predictive Routing – Predictive routing will go live on 6/29. This update will route callers with previously identified call topics (i.e. Direct billing) to more experienced call center personnel. The goal is to improve the overall employee experience and first call resolution.
OneUSG Connect—Benefits
Call Center summary

4
University of Georgia, Georgia Tech, Augusta and Georgia State remain the top for call center volume

66%
The top four institutions make up 66% of the call volume

104
Current average number of calls received per day

9.9
Average Handle Time minutes per call. Forecasted is 7.4
# Call Volume by Institution—April through May 24

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Service Connect—Origination Trend summary

Service Connect Trending by Origin Jan'19 - Apr'19

- Call Center
  - Jan'19: 939
  - Feb'19: 560
  - Mar'19: 546
  - Apr'19: 521

- Practitioner
  - Jan'19: 89
  - Feb'19: 81
  - Mar'19: 54
  - Apr'19: 45
Service Connect—Institution Trend summary

Trending by Institution & Origin Jan'19 - Apr'19

- Call Center
- Practitioner

Institutions and their corresponding call data:*

- University of Georgia: 665 calls
- Augusta University: 356 calls
- Georgia Institute of Technology: 285 calls
- Kennesaw State University: 318 calls
- Valdosta State University: 25 calls
- Albany State University: 156 calls
- University of North Georgia: 108 calls
- Savannah State University: 75 calls
- University of West Georgia: 20 calls
- Columbus State University: 18 calls
- Georgia College & State Univ: 3 calls
- Fort Valley State University: 4 calls
- Clayton State University: 52 calls
- Georgia Gwinnett College: 100 calls
- Middle Georgia State College: 35 calls
- Southwestern St Univ: 42 calls
- Georgia Southwestern College: 35 calls
- Abraham Baldwin Agri College: 45 calls
- Gordon State College: 35 calls
- East Georgia State College: 40 calls
- College of Coastal Georgia: 10 calls
- South Georgia State College: 4 calls
- Dalton State College: 8 calls

*The numbers represent the number of calls made from each institution.

UNIVERSITY SYSTEM OF GEORGIA
Practitioner Reference Materials

OneUSG Connect – Benefit resources
https://www.usg.edu/shared_services_center/practitioner_services/benefits

Service Center Ownership Document
• Provides insight on how OneUSG Connect Benefits Call Center partners with University Systems of Georgia to service our USG Employees and Retirees

Benefits Toolkit
• Provides process information and samples of printed materials (i.e. COBs)

Training materials for tools (PSP, Service Connect, ECS, etc.)
USO Team Restructure

• Jennifer Kennington and Ranita Lopez are no longer with University System of Georgia.

• Points of Contact
  – Monica Fenton and BeNedra Williams
Next USG Benefits Update

Tentatively scheduled for July 11, 2019

Have a great 4th of July!