

USG Benefits Update



Facilitator: BeNedra Williams
Tuesday, May 7, 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
- Financial Manager Improvement
- Service Connect Tool Enhancements
- Benefit Fairs
- Retro Adjustment Escalation Form
- Well-being Update
- Retirement Update
- Service Center Performance
- Practitioner Reference Materials
- Meeting Platform Change
- Wrap-Up

Known Issue

Subsequent Basic Life AD&D Plan Rate Issue

We identified and corrected a rate issue for the Active Basic Life and AD&D plan. As part of the resolution to that issue, Alight provided you with a modified April PIF that included the retro-active amount and the normal deduction amounts added together. The expectation is that all subsequent PIFs would include only the normal deduction amounts based on the pay schedule.

We recently discovered that the subsequent PIF for the bi-weekly population did not include the updated rate. As a result, the prior one-time adjusted deduction amount was used as the 'general deduction'.

Alight is in the process of making the correction, which will be applied on the next 2 biweekly paychecks. Please be aware that the amount that is sent on the PIF dated 5/20 will become the new 'general deduction' amount for Active Basic Life and AD&D going forward.

Example Correction for Biweekly Employee

Pay Period Begin Date	Pay Period End Date	Date PIF is due from Alight	Pay Date	Pay Run ID	Comments
4/21/2019	5/4/2019	5/6/2019	5/10/2019	95B1	\$7.52 (8.54-1.02)
5/5/2019	5/18/2019	5/20/2019	5/24/2019	95B2	\$8.54

Please let us know if you have additional questions by emailing the SSC Mailbox:

OneUSGSupport@usg.edu



Known Issue

Spouse Life Rate Issue

We recently discovered an issue related to rates for the Spouse Life deductions for Summer Accrual/10-month employees. Please review the details of this issue, impact list and next steps.

Population impacted: 1,219 Summer Accrual/10-month employees

Who is impacted: The impact report is posted in the PSP Folders on the Share Point site

Issue description: The incorrect Spouse Life deduction amounts were sent on the 2019 PIFs. In some instances the rate was higher and in some cases lower. The issue started as early as the 2nd pay check in January 2019 but it showed up starting with first check in April.

Root Cause: Coding error

What should you expect: Alight will send the adjusted amounts on May PIFs so that each employee ends up with the correct total amounts through the end of July.

Payroll	PIF with adjusted amounts
OneUSG 14/10th Biweekly	5/6 PIF for 5/10 Paycheck
OneUSG 7/5th Monthly	No later than 5/23 PIF for 5/31 Paycheck

Corrective Action steps: Alight is reviewing our process to incorporate additional testing and to implement better controls

Known Issue

Limited Purpose – Disenrollment from 2018 to 2019

Issue Description

When Employees disenrolled from a Limited Purpose FSA going into 2019, Alight did not send the stops for the Limited purpose deduction code but instead send stops for the General Purpose FSA Deduction code.

OneUSG Impact: Approximately 50 employees

Root Cause: This was a requirements miss in the Alight set up when changes were made to the rules for the Limited purpose plan

Fix: Alight is going to address the issue to ensure that the 2019 to 2020 stops are sent. This issue was only impactful moving across plan years and not during the year.

Next Steps:

- Post the Ad hoc files to provide impacted employees and send stops

Financial Quality Update

Summer Accruals/Refund Process – Reporting enhancements

- **Purpose:** Identify the population of Summer Accrual employees who are due a premium refund as a result of their change in status prior to 6/1
- **Initial Report:** Reports will be posted on 5/20 and will include all Retirees/Unpaid LOAs who are on the SA and moved off of Active payroll prior to 8/1
- **Ongoing Reports:** Future reports will be posted around the 21st day of each month with any new Participants (May – Aug)
- **Location of the Reports:** Alight will post the reports in the PSP Share Point Folders each month
- **Practitioner Action:** Use the report as a tool to confirm or identify participants who are due a refund as a result of premium overpayments and issue a refund check

Service Connect Enhancements

Reminder

Went Live on 5/2. USG Users of the Service Connect tool see a new look when you log in. The functionality of the tool is not changing.

New Features include

- 'Urgent' button
 - New functionality; use only if urgency is driven by a timing constraint
 - EX: Dr. office, Paycheck amount, death & dismemberment
- Attaching documents
 - File size allows up to 2 GB. Spaces are accepted in file name

Updated reference materials

- Faculty and Staff portal page under the 1st accordion tab called OneUSG Connect – Benefit resources.

link to the page: https://www.usg.edu/shared_services_center/practitioner_services/benefits

Benefit Fairs

2019 Benefits Fair Schedule

Dalton State - Thursday- August 8, 2019 (9am)

College of Coastal Georgia- Monday, August 12, 2019 (10am)

Georgia Highlands College - Friday, August 23, 2019 (8:30am)

University System of Georgia Benefits



we provide · you decide

Monday September 30	Tuesday October 1	Wednesday 2	Thursday 3	Friday 4
10am Atlanta Metropolitan College	10am Albany State Univ (West)	9am South Georgia State College (Douglas) 10am Abraham Baldwin Agricultural College - Tifton 2pm South Georgia State College (Waycross)	9am Abraham Baldwin Agricultural College - Bainbridge	OPEN
7	8	9	10	11
11am Gordon State College	10am Middle Georgia State College (Macon) 2pm Shared Services Center (Sandersville)	9am Fort Valley State University 10am Middle Georgia State College (Cochran)	11am Columbus State University	10am Georgia SW State University
14	15	16	17	18
OPEN	10am Georgia Southern University (Armstrong) 1pm East Georgia State College	9am Augusta University (Summerville) 10am Savannah State University	8am Georgia College and State University	10:30am Kennesaw State University (Kennesaw) 10am University of Georgia
21	22	23	24	25
9am Augusta University (Health Sciences Campus)	10am University of West Georgia	9am University of North Georgia (Gainesville)	9am University of North Georgia (Dahlonega)	10am Georgia Southern University (Statesboro)
28 Open Enrollment begins	29	30	31	November 1
10am Georgia State University (Atlanta)	10am University System Office/GPLS/Archives 11am Kennesaw State University (Marietta)	9:30am Valdosta State University 11am Georgia Gwinnett College	10am University System IT - Athens 12pm Clayton State University	10am Georgia State University (GPC)
November 4	5	6	7	8 Open Enrollment ends
OPEN	10am Georgia Institute of Technology	OPEN	OPEN	OPEN

Retro Adjustment Escalation Form

Adjustments >60 days

- Requires form to be submitted and approval by USO
- Reviewing requests with USO Accounting Team
- Communications will be sent on how to proceed



USG Well-being

Participation rate

- As of 04/29/2019 we are at 12.79%
- 2019 goal is 45% for all campus locations

Well-being Wednesday

- Wednesday, May 8 at 1 p.m. Keeping your health and wellness journey achievable and fun

Communications

- Tuesday, May 7 Physical Activity Awareness Month

Retirement Update

May 1st Changes

- New plans, providers and investment menus available now
- Individual institution 403(b), 457(b) plans terminated
- Fidelity, VALIC and TIAA in process of transferring balances
- New services, including Roth for all institutions, brokerage for all vendors live



Retirement Update

July Process Changes

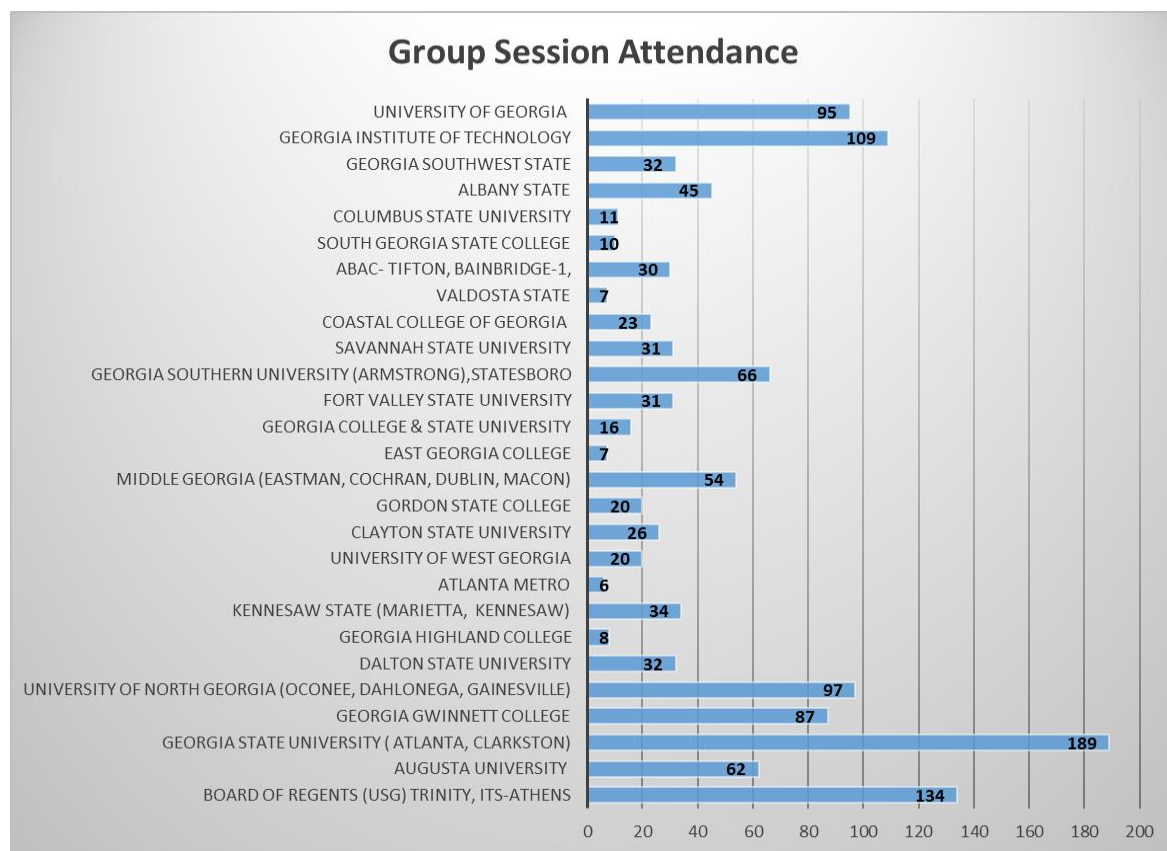
- Automation of Salary Deferral Agreements, vendor allocation, elimination of many paper forms and manual processes
- Daily transmission of employee demographic data to investment providers
- Allocation of investments between vendors will not be maintained in USG systems
- Change to single remittance file per payroll to TIAA – vs. 25+ currently
- File and process support transitioning from institutions to SSC and USO



Retirement Update

USG Retirement Group Session –Final (Jan- March 2019)

- Over 1282 employees informed at the sessions by USO representation
- Over 264 advice desk interactions, 232 Retirement Blueprints prepared. (CAPTRUST)
- 343 Quarterly Newsletters Delivered by CAPTRUST services & available tools
- 396 individual advice sessions attended (CAPTRUST)
- (Communications) 12 participant related mailings (Jan-April)
- (Communications) 9 emails related to transition changes since January. (Newsletters, Retiree, PO Box, etc.)
- Fund Mergers began on 5/1/2019



Retirement Update

1 on 1 Appointments (Jan- April 2019)

- Available appointments : 843
- Slots used by USG employees: 539
- Slots unused by USG employees: 304



- Available appointments : 478
- Slots used by USG employees: 285
- Slots unused by USG employees: 193
- 44 Locations Serviced
- 60% Utilization Rate



- Statistics Pending



AIG Retirement Services

Service Center Performance

Date	Baseline Forecasted Call Volume	Actual Call Volume	Percentage Over/Under Baseline Forecast	Calls Abandoned	Abandonment Rate
15-Apr	126	117	-7.3	6	51.3%
16-Apr	104	82	21%	0	
17-Apr	93	85	8.4	3	3.53%
19-Apr	88	85	4%	21	24.71%
20-Apr	91	81	11%	9	11.11%
22-Apr	132	122	-8%	8	6.56%
23-Apr	109	115	5%	3	2.61%
24-Apr	97	102	5	7	6.86%
25-Apr	92	82	-11%	0	0.00%
26-Apr	95	100	5%	13	13.00%
Total	1027	971	-5.00%	70	7%

Call Trends

Top Topics

- Benefits Inquiries
- Direct Billings and Payments
- Coverage Confirmation

Action Plan for Improvement Initiatives that are targeted to improve First Call Resolution

- Ownership Document - Provides insight on how OneUSG Connect Benefits Call Center partners with University Systems of Georgia to service our USG Employees and Retirees.
- Predictive Routing – Proactively routes calls for specific topics to a supervisor que for assistance
- Potential changes to the Interactive Voice Response (IVR)

Service Tickets

Date	Total # of Internal Request Started	External Request	Number Pending > 5 days	Total Number Pending
15-Apr	29	2	125	203
16-Apr	27	0	126	208
17-Apr	16	0	127	191
18-Apr	16	1	125	195
19-Apr	25	5	124	199
22-Apr	21	3	120	191
23-Apr	21	2	119	185
24-Apr	22	2	121	184
25-Apr	19	1	120	170
26-Apr	18	1	119	169
Averages	21.4	1.7	122.6	189.5

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.)

Meeting Platform Change

June meeting

- Moving from WebEx to Skype
- WebEx invitation will be cancelled
- New Invite for Skype



Next USG Benefits Update WebEx

***Tentatively scheduled for
June 13, 2019***



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Questions and Wrap Up