



STATEWIDE PERSONNEL
— S Y S T E M —

ABC Worker History and Reports Refresher Webinar

March 19, 2019

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Course Audiences and Prerequisites



Audiences

- This course is intended for the following audiences:
 - Agency Benefit Coordinators and Agency Benefits Liaisons







Prerequisites

- You should have completed the following prerequisites:
 - SPS-ABC Certification Exam (ABCs only)
 - SPS-BEN 301A-Processing Employee Benefits in Workday (ABCs only)
 - SPS-ABC 101, Introduction to Benefits Fundamentals
 - DBM-EBD HIPAA Certification
 - SPS-HCM 101O, Workday Navigation Basics



Lesson Objectives

After completing this lesson, you should be able to:

-  Review the flow of a benefit event
-  Review how to check the status of a benefit event
-  Review custom Benefit reports in SPS Benefits
-  Become familiar with the SPS website and training resources



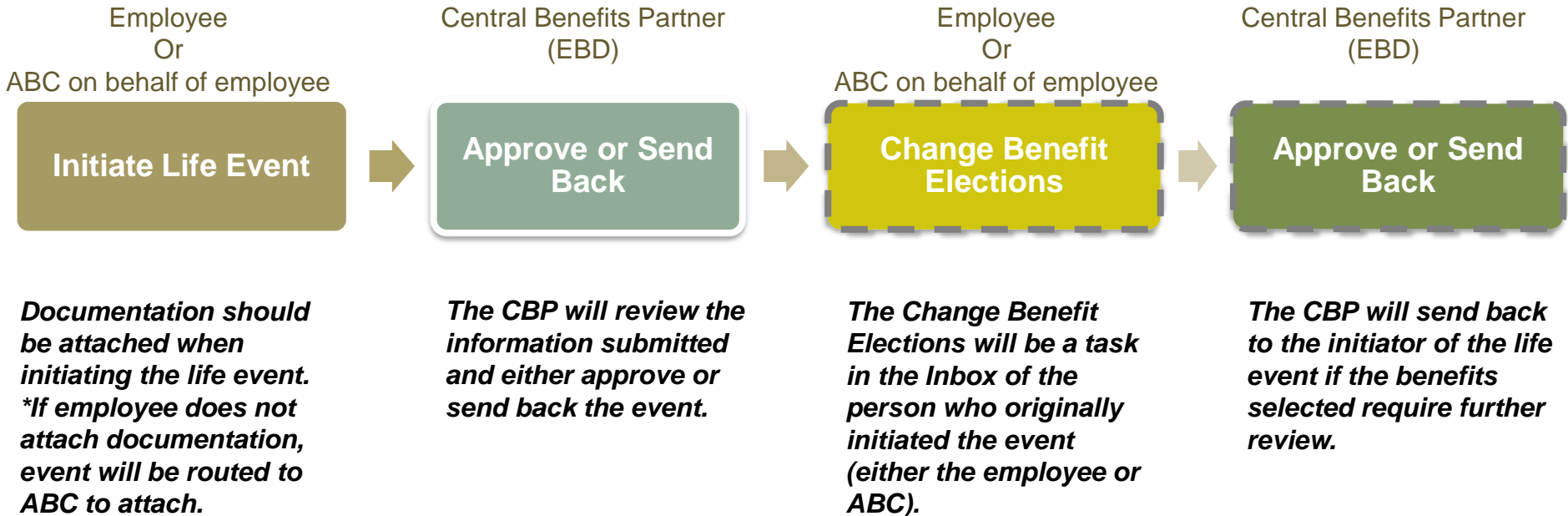


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Life Event Processing Review

Life Event Processing Steps

The steps to initiate a life event are listed below.



Employee can initiate life events.

The role of the ABC is to help the employee initiate the life event if needed. The ABC can also initiate a life event on behalf of an employee.

How Do You Complete a Life Event Change for an Employee?

Search for the employee and go to **Benefits > Change Benefits** from the Related Actions menu.

The screenshot displays the Workday interface for an employee named Diana Prince (W1234521). The 'Actions' menu is open, and the 'Benefits' option is highlighted with a red box. A sub-menu is visible, with 'Change Benefits' also highlighted by a red box. Other options in the 'Benefits' sub-menu include 'View Current Benefit Elections', 'View Benefit Election History', 'View Benefit Coverage History', 'View Benefits Eligibility', 'View Beneficiaries', 'View Dependents', 'View Passive Alerts', and 'View Benefit Statement'. The 'Worker' section shows the employee's current business title as 'Admin Spec III'.

Before initiating an event on behalf of an employee, check the worker history to make sure the event has not already been initiated. **We will cover worker history and duplicate events shortly.**



How Do You Complete a Life Event Change for an Employee? (Cont.)

Change Benefits Diana Prince (W1234521) Actions

Benefit Event Type *

Benefit Event Date *

Submit Elections By *

Open Elections for (empty)

Attachments 0 items

+	Attachment	Comment	File
No Data			

Benefit Election History 1 item

Event	Current	Benefits Details	Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed
Q	<input checked="" type="checkbox"/>	Diana Prince (W1234521) Elections Active on 01/01/2017	Z Conversion-Health	01/01/2017	06/06/2017	06/06/2017	06/06/2017 09:09:51.825 F

enter your comment

This is the same screen that the employee gets when initiating a life event.



How Do You Complete a Life Event Change for an Employee? (Cont.)

Change Benefits Diana Prince (W1234521) Actions

Benefit Event Type * select one

Benefit Event Date * select one

Submit Elections By * Add AD&D - Employee Only

Open Elections for Address Change

Attachments 0 items

Benefit Election Hist

Event	Curre
	<input checked="" type="checkbox"/>

enter your comm

Submit Save for Later Cancel

Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed
Z Conversion-Health	01/01/2017	06/06/2017		017 09:09:51.825 F

The ABC will have a lot of options available to select for the Benefit Event Type. The ABC (or employee) should **ONLY SELECT** types that start with the word **Employee** (e.g., Employee: Birth/Adoption). Any other Benefit Event Type is for EBD use only.

You will get an error and will be unable to continue if you try to select any Benefit Event Type that does not start with the word **Employee**.

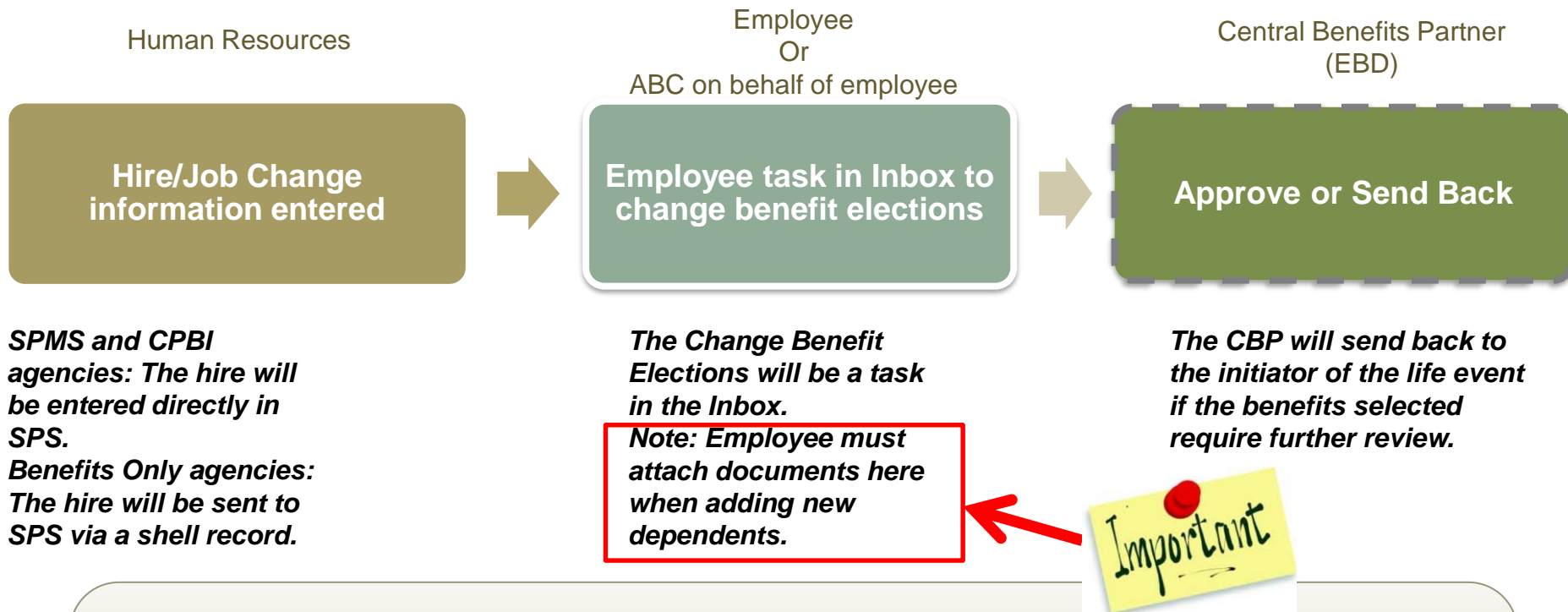
You should not change an employee submitted event type to any event type other than those that begin with the word "Employee".

Initiate a Life Event on Behalf of an Employee



Hire and Job Change Processing Steps

The steps for a hire/job change are listed below.



Employee can change benefit elections in SPS once the hire is complete.

The role of the ABC is to help the new employee change benefit elections if needed. The ABC can also change benefit elections on behalf of a new employee.

What if an Event is Sent Back by EBD for Incorrect Documentation?

- If the incorrect document is attached and it is **Sent Back** to the employee by the Employee Benefits Division, the ABC can attach the documentation on behalf of the employee (even though it's not in the ABCs Inbox as an action item).

View Worker History Donald Duck (W2053649) Actions

View Worker History by Category

Worker History 6 items

Business Process

Personal Information Change: Donald Duck (W2053649)

ID Change: Donald Duck (W2053649)

Service Dates Change: Donald Duck (W2053649)

Benefit Change - New Hire : Donald Duck (W2053649) on 10/18/2017

Assign Pay Group for Hire: Donald Duck (W2053649)

Hire: Donald Duck (W2053649)

Actions

- Benefits
- Business Process
- Favorite
- Integration IDs

Action Event

Cancel Enrollment

Enroll in Benefits

Hold Event

Subject Donald Duck (W2053649)

Overall Status In Progress

Initiated On 11/06/2017 01:34:25 PM

Effective Date 10/18/2017

Event	Start Date	End Date	Start Time	End Time	Status	Details
Assign Pay Group for Hire: Donald Duck (W2053649)	10/18/2017	11/06/2017	01:33:20 PM	11/07/2017	11/06/2017 01:33:20 PM	Successfully Completed
Hire: Donald Duck (W2053649)	10/18/2017	11/06/2017	01:29:42 PM	11/20/2017	11/06/2017 01:33:20 PM	Successfully Completed

Find the event in the Worker History for the employee. From the Related Actions, go to **Benefits – Enroll in Benefits** to go in the event and attach the documentation.



What if an Event is Sent Back by EBD for Incorrect Documentation (Cont.)?

- ABCs should never initiate another life event to submit documentation or upload to the Worker Document folders when there has been a **Send Back**.
 - The document will not get linked to the specific event in this way and the EBD will not see the documentation.





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Using Worker History to Check Status of an Event

Check the Status of a Life Event

- The ABC needs to know how to check the status of a life event throughout the process. They can do that by accessing the Worker History for the employee.

Theo James - D (B1000068)
Benefits Employee

Actions

Team

Summary

Job

Contact

Performance

Professional Profile Job Details All Current Jobs Job History Manager History Management Chain **Worker History**

View Worker History by Category

Worker History 8 items

Business Process	Effective Date	Initiated On		
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 09/29/2018		09/29/2018 03:00:00 AM	09/29/2018 03:00:00 AM	Successfully Completed
Benefit Change - Employee: Birth/Adoption : Theo James - D (B1000068) on 09/03/2018	09/03/2018	09/29/2018 11:54:15 AM		In Progress
Benefit Change - Z Conversion-Health : Theo James - D (B1000068) on 01/01/2018	01/01/2018	09/27/2018 05:18:40 PM	09/27/2018 05:18:40 PM	Successfully Completed
Benefit Change - Z Conversion-Insurance : Theo James - D (B1000068) on 01/01/2018	01/01/2018	09/27/2018 04:36:48 PM	09/27/2018 04:36:48 PM	Successfully Completed
Dependent Event: Selena James - D on 01/01/2017	01/01/2017	09/27/2018 03:41:43 PM	09/27/2018 03:41:43 PM	Successfully Completed

Click the **View Worker History by Category** button so that we can filter by only Benefits events.

Remember that you access the Worker History in the Job tab, Worker History sub-tab of the worker profile.

Check the Status of a Life Event (Cont.)

View Worker History by Category

Theo James - D (B1

The worker history defaults to Staffing events.

Click the Benefits tab to view benefits events.

View Worker History

Staffing

Personal Data

Benefits

Hire History 1 item

Business Process	Initiated On	Start Date	Status	Reason
Hire: Theo James - D (B1000068)	09/26/2018 12:16:45 PM	02/12/2014	Successfully Completed	New Hire > JobAps



Check the Status of a Life Event (Cont.)

Staffing Personal Data

Benefits

Benefits events are now selected.

Benefits 3 items

Business Process	Benefit Event Type	Initiated On	Event Date	Status
Benefit Change - Z Conversion-Insurance : Theo James - D (B1000068) on 01/01/2018	Z Conversion-Insurance	09/27/2018 04:36:48.519 PM	01/01/2018	Successfully Completed
Benefit Change - Z Conversion-Health : Theo James - D (B1000068) on 01/01/2018	Z Conversion-Health	09/27/2018 05:18:40.939 PM	01/01/2018	Successfully Completed
Benefit Change - Employee: Birth/Adoption : Theo James - D (B1000068) on 09/03/2018	Employee: Birth/Adoption	09/29/2018 11:54:15.685 AM	09/03/2018	In Progress

Dependents 4 items

Business Process	Dependent	Relationship	Initiated On	Status
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 01/01/2017	Selena James - D	Child	09/26/2018	Successfully Completed
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 01/01/2017	Kay James - D	Spouse	09/26/2018	Successfully Completed
Dependent Event: Selena James - D on 01/01/2017	Selena James - D	Child	09/27/2018	Successfully Completed
Dependent Event: Theo James - D (B1000068) - Benefits Employee on 09/29/2018	Karla James - D	Child	09/29/2018	Successfully Completed

Click the benefit event for which you want to check the status.



Check the Status of a Life Event (Cont.)

View Event

Benefit Change - Employee: Birth/Adoption : Theo James - D (B1000068) on 09/03/2018 [Actions](#)

For Theo James - D (B1000068)

Overall Process [Benefit Event: Theo James - D \(B1000068\) on 09/03/2018](#)

Overall Status In Progress

Click the **Overall Process** link to see all steps in the process.

Details

Process

Benefit Event Type Employee: Birth/Adoption

Initiated On 09/29/2018

Submit Elections By 11/01/2018

Event Date 09/03/2018

Finalized Date (empty)

Benefit Group FT & PT FTE 50% Bi-Weekly

Enrollment Status In Progress

View the details of the event, to include benefit on the **Details** tab.

Attachments 1 item

Attachment

 Birth Certificate.pdf

Elected Coverages 4 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries
Medical - CareFirst BCBS EPO (Employee)	09/03/2018	09/03/2018	Employee + Family		Karla James Kay James - D	



Check the Status of a Life Event (Cont.)

View Event

Benefit Event: Theo James - D (B1000068) on 09/03/2018 [Actions](#)

For Theo James - D (B1000068)
Overall Process Benefit Event: Theo James - D (B1000068) on 09/03/2018
Overall Status In Progress

You can view the details of the Overall Process on this screen.

Details

Process

Employee Theo James - D (B1000068)
Benefit Event Type Employee: Birth/Adoption
Event Date 09/03/2018
Submit Elections By 11/01/2018
Open Elections for AD&D
Child Life
Dental
Dependent Care FSA
Healthcare FSA
+ More (5)



Check the Status of a Life Event (Cont.)

View Event
Benefit Event: Theo James - D (B1000068) on 09/03/2018 [Actions](#)

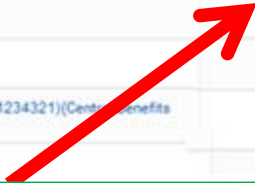
For: Theo James - D (B1000068)
Overall Process: Benefit Event: Theo James - D (B1000068) on 09/03/2018
Overall Status: In Progress

Details: **Process**

Process History 23 items

Process	Step	Status	Completed On	Due Date	Person	Comment
Change Benefits	Change Benefits	Step Completed	09/29/2018 11:53:52 AM		Benefits Coordinator - D20 (B2000080)	The employee needs dental insurance.
Change Benefits	Attach Supporting Documentation	Not Required				
Change Benefits	Attach Supporting Documentation	Not Required				
Change Benefits	Change Benefit: Please Review and Approve Documentation	Approved	09/29/2018 11:54:15 AM		Minnie Mouse (W1234321)(Central Benefits Partner)	
Change Benefits	Medicare Documentation is Required. Please	Not Required				

You can view all of the steps in the process, when they were completed, and who completed them on this screen.



Notice in the **Comments** field there is an area where the employee, ABC or EBD can leave comments. This information will also show up on the **SPS Benefit Open Elections – Employee** report.



Check the Status of a Life Event (Cont.)

Process	Step	Status	Completed On	Due Date	Person	Comment
Change Benefits	Change Benefit Elections	Not Required				
Change Benefits	Change Benefit Elections	Not Required				
Change Benefits for Life Event	Change Benefits for Life Event	Step Completed	09/29/2018 11:56:18 AM		Benefits Coordinator - D20 (B2000080) (Agency Benefits Coordinator)	
Change Benefits for Life Event	Approval by Central Benefits Partner	Awaiting Action			Minnie Mouse (W1234321)(Central Benefits Partner)	

Note that as an ABC, you will not be able to see documentation attached by an employee to a life event until the event is approved by EBD.

Scroll down to see the rest of the steps. In this example, the event is awaiting action for the Central Benefits Partner to approve it.



Check the Status of a Life Event



Duplicate Items in the Worker History

- When you go to the worker history to check the status of an event and see multiple line items for the same event, this means that more than one event has been initiated.

Worker History 38 items

Business Process	Effective Date	Initiated On	Due Date	Completed On	Status
Benefit Event: John Doe (W1234567) on 02/28/2019	02/28/2019	03/16/2019 02:54:58 PM			In Progress
Benefit Event: John Doe (W1234567) on 02/28/2019	02/28/2019	03/14/2019 03:41:51 PM			

Notice that there are two events with the same Effective Date. They were initiated on 2 different days. When you see a duplicate event like this, you will have to open the event to see the "Details" to know what the Event Type is if the event has not yet been approved by EBD. **Always check the worker history to ensure an event is not already in progress before initiating an event on behalf of an employee.**



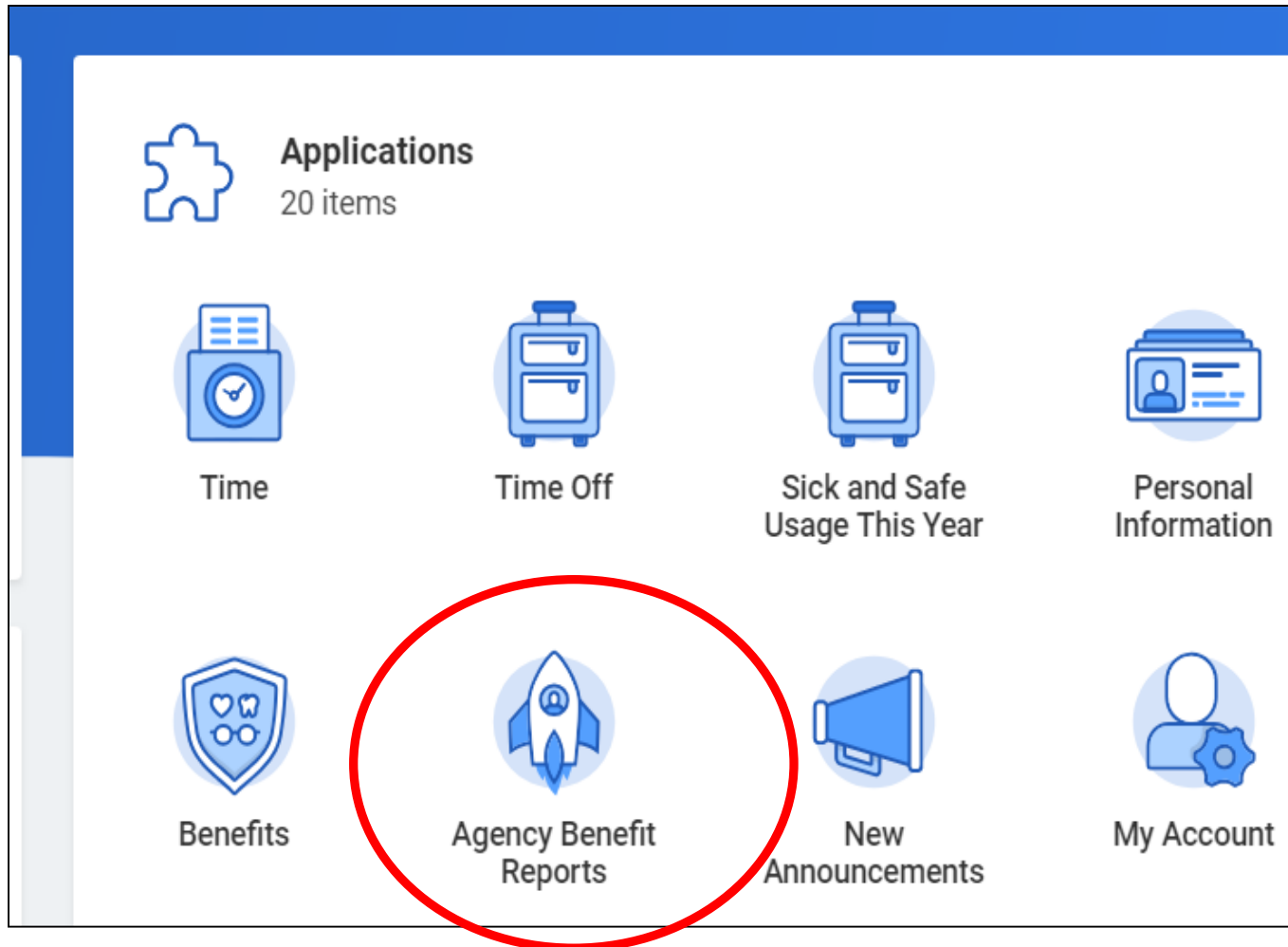


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Reporting Refresher

What Benefit reports are available?

- You can find a list of custom reports on your home page, under **Agency Benefit Reports**.



What Benefit reports are available? (Cont.)

- The name and description of the reports will display after clicking the **Agency Benefit Reports** worklet.

Custom Report	Comments	Number of Times Executed
SPS Benefit All ABC Reports	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	233
SPS Benefit Census Report	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	84
SPS Benefit Expiring Contract Report	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.	112
SPS Benefit Finalized Election Events - Employees	The reports shows employee benefit events that were Successfully Completed within the 60 days prior to a user-specified date. The report can be run for a user-specific Benefit Group or a user-specified Worker.	49
SPS Benefit Group by Sup Org	The report shows employees in a user-specified Benefit Group. The report also has options to run for user-specified Worker and/or Supervisory Org.	21
SPS Benefit Leave Monitoring Report	This report shows all employees with an Unpaid Leave of Absence event along with the event details (Leave Start Date, Estimated Return Date, type of Leave, leave duration, etc). There are no run control parameters; the report pulls all Active Unpaid leave events and returned leave events that were returned in the 60 days prior to the report run date. EBD will use this report to monitor and manage unpaid leave of absence events. ABC's should run this report on a weekly basis to monitor there are unpaid leave events in the system for employees out on a unpaid leave, and that the dates are accurate/up-to-date.	44
SPS Benefit Open Election Events - Employees	This report shows employee benefit events that are either 'Not Started' or 'In Progress'. The report identifies where the event is currently in the workstream and who is the next person designated to take action. The report also displays if the employee has a Work and/or Personal Email address in the system. ABC's should regularly run this report and follow-up with employees as required, specifically with employees without and email address in the system.	195
SPS Benefit Worker Leave Snapshot	The reports shows all leave events for a user-specified employee	34



Running Benefits Reports

- Choose one of the below options to run a report:

1) Click the report name from the list to run the report.

Custom Report	Comments	
SPS Benefit All ABC Reports	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	
SPS Benefit Census Report	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	84
SPS Benefit Expiring Contract Report	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are extended before they expire.	112

Reminder!

Who and what you can see in a report depends on your security.

2) Enter the name of the report in the **Search** field to run the report.



Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

SPS Benefit Group by Sup Org

Instructions The report shows employees in a user-specified Benefit Group.
The report also has options to run for user-specified Worker and/or Supervisory Org

Worker

Organizations

*

Include Subordinate Organizations

Benefit Group

Filter Name

OK

Cancel

Fields marked with an asterisk are required.

Note: Some reports may run immediately upon clicking on the report name.



Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

SPS Benefit Group

Search for Organization >

My Organizations >

Organizations by Type >

Active Organizations by Hierarchy >

Instructions The report shows emp
The report also has op

Worker

Organizations * | ☰

Include Subordinate Organizations

Benefit Group ☰

Filter Name

OK Cancel

Go to **My Organizations** to find the organizations for which you have access.

Running Benefits Reports (Cont.)

- Depending on the report, Workday will prompt the user to fill in specific reporting criteria such as Benefit Group, Supervisory Organization, and Effective as of Date.

The screenshot shows the 'My Organizations' selection interface in Workday. On the left, there is a blue banner for 'SPS Benefit Group'. Below it, there are sections for 'Instructions', 'Worker', and 'Organizations'. The 'Organizations' section is currently active, displaying a list of organizations with checkboxes. A red box highlights the checkboxes for 'SHA Construction Inspection Division', 'SHA District 1', 'SHA District 2', 'SHA District 3', and 'SHA District 4'. A red arrow points from a green callout box to the 'SHA District 1' checkbox. At the bottom, there is a search bar and an 'Include Subordinate Organizations' checkbox.

My Organizations

- SHA Construction Inspection Division
- SHA District 1
- SHA District 2
- SHA District 3
- SHA District 4

search

Include Subordinate Organizations

You may have access to various organizations. Put a checkmark in the organizations for which you want to include in your report.



Running Benefits Reports (Cont.)

SPS Benefit Group by Sup Org

Instructions The report shows employees in a user-specified Benefit Group. The report also

Worker

Organizations

* X SHA Construction
Inspection Division

Include Subordinate Organizations

Benefit Group

Don't forget you can use filters to save your search criteria!

Saving filters saves you from having to input the same information every time you run the report.

Filter Name

Manage Filters

0 Saved Filters

Save

To save the combination of required fields, enter a name and then click on **“Save”**. You can find it the next time you run the report under **“Manage Filters”**. Once the required fields have been completed, click **OK** to run the report. Your report will display after inputting the search criteria and clicking the Submit button.

Access Reports and Create a Filter



Viewing Reports

You can view reports in several ways:

- Online
 - Sort, filter, and view in chart format
- Export to Excel
 - Manipulate the data, as needed

SPS Benefit All ABC Reports Actions



8 items



Custom Report	Comments	Number of Times Executed
SPS Benefit All ABC Reports	This Report will provide a listing of all Benefit Reports available to Agency Benefits Coordinator.	197
SPS Benefit Census Report	The report shows employee/retiree benefit elections (plans, coverage levels, covered dependents) for a user-specified "as of" date. The report has Run Control options to select a specific Supervisory Org and/or Benefit Group.	73
SPS Benefit Expiring Contract Report	This report shows employees with a benefit job contract expiring within the next 30 days. The report indicates if the employee has current benefit elections. ABC's should regularly monitor this report to ensure contracts are	101



NOTE: Data in reports real-time. This means data can change as Benefit events are completed in the system.



SPS Benefit Open Election Events - Employees

- The Submit Elections By Date column should be reviewed to be aware of events coming close to the end of the 60 day window.

SPS Benefit Open Election Events - Employees								
W#	Last Name	First Name	Employee Type	Business Process	Benefit Event	Submit Elections By	Assigned To	Comments
W1123446	Cole	Roger	Contractual - Contract	Benefit Change - Start of New Contract : Roger Cole (W1123446) on 01/08/2019	Benefit Event: Roger Cole (W1123446) on 01/08/2019	5/1/2019	Roger Cole	Sent back for proper documentation.
			Contractual - Contract	Benefit Change - New Hire : Ryan Smith (W1223455) on 01/06/2019	Benefit Event: Ryan Smith (W1223455) on 01/06/2019	5/1/2019	Minnie Mouse Donald Duck	Please note I need to add my new baby to the coverage.

Remember this report should be run routinely to see which events are in progress. To see more detail on any of the benefit events listed on this report, check the worker history for the employee.

The **Comments** field is important as it includes questions from the employees, clues to what the employee is trying to do with the event and/or questions/issues EBD has with approving an event.



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Training Documentation

Where Can I Find Training Documentation?

- Once an employee or ABC clicks the Benefits Worklet, the screen below will display.

The screenshot displays a web interface with two main sections: 'Change' and 'External Links'. The 'Change' section contains two buttons: 'Benefits' and 'Dependents'. The 'External Links' section contains a list of links: 'Benefits Help Center', 'Employee Health Benefits', 'CareFirst', 'Kaiser Permanente', 'United Healthcare', 'CVS Caremark', 'Delta Dental', 'United Concordia Dental', 'P&A Group', 'Securian Life Insurance Co', and 'MetLife'. A red arrow points from a callout box to the 'Benefits Help Center' link. The callout box contains the text: 'Click the Benefits Help Center to find all of the training resources.'

Change

Benefits

Dependents

External Links

Benefits Help Center

Employee Health Benefits

CareFirst

Kaiser Permanente

United Healthcare

CVS Caremark

Delta Dental

United Concordia Dental

P&A Group

Securian Life Insurance Co

MetLife

View


Current Cost

Click the Benefits Help Center to find all of the training resources.



Where Can I Find Training Documentation (Cont.)?

Benefits Help Center



Change HR Time Benefits

SPS Workday Benefits will provide all employees and retirees the ability to enroll, access benefits information from one unified online system. SPS Benefits will be part of Phase I Project. Stay tuned for additional information.

For more information on Open Enrollment and related topics, please visit the [Employee online](#).

Employees

- ➔ Accessing SPS
- ➔ Viewing Benefits Related Information
- ➔ Completing Enrollment Events and Life Changes

Agency Benefits Coordinators

- ➔ Viewing Benefits Related Information
- ➔ Completing Enrollment Events and Life Changes
- ➔ Frequently Asked Questions

All of the training aids for employees and Agency Benefits Coordinators are on this page organized by category.

ABCs should not only be familiar with the ABC job aids, but also the employee job aids in order to assist the employees.



Questions?



**Please remember to type
your name in the Chat
section to receive credit
in the HUB for the
webinar.**



Congratulations! You completed the webinar!



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SYSTEM