

Created on: April 19, 2005

SR81214 Payroll Requirements Family Member Verification De-enrollment

Objective:

There are two objectives to this project:

- 1) De-enroll employees from plans in which they have enrolled dependents ineligible for University plan coverage in an automated fashion
- 2) Provide end dates in payroll for the ineligible family members so that they will be removed from the PPS.

Project Type:

This is an enhancement to the Payroll/Personnel System (PPS). It will modify the nightly process to allow processing of benefits de-enrollment transactions as well as provide a means to use existing de-enrollment processes to automate the activity along monthly boundaries. Minor modifications will also be required to the existing de-enrollment processes that terminate coverage on monthly boundaries.

Requested by:

Lily Pang, Health & Welfare Administration

Analyst:

Alice Plebuch

Due Date(s):

The project must be completed by mid-July, 2005.

Background

For many years in the past UC conducted a Tax Verification Audit for those employees who enrolled tax dependents (stepchildren, legal wards, etc.) into their health and welfare plan(s). Last year this audit was expanded to include all dependents of employees who are enrolled in health and welfare plans.

The purpose of the audit is to verify dependents enrolled in UC health and welfare plans meet the eligibility rules as set forth in the Group Insurance Regulations Supplement 6. This is accomplished by asking randomly selected employees to submit appropriate documentation (birth certificates, marriage certificates, tax records, etc.) to substantiate the relationship between the employee and the dependent.

Current Process:

Traditionally, ineligible family members are identified through the "Family Member Verification Process". The process, carried out in HR&B at UCOP, uses an Access database to track the status of potentially ineligible family members. At the conclusion of the process, as ineligible family members are identified, a report is sent to campus and laboratory locations where the ineligible dependents are manually de-enrolled.

Proposed Process:

After identifying ineligible family members, the Research Unit will use a web application to initiate the de-enrollment activity. The daily web process will create transactions that are sent nightly to the locations for processing. The employee (and thus all family members) will be de-enrolled from the plan through the regular PPS monthly maintenance process. The ineligible

family member will be terminated from all enrolled plans. The monthly payroll process will eventually remove family members when all plans are end dated.

Requirements:

1. Control Table Updates

1.1. Modify Code Translation (CTT) as follows:

PPP0438 /PPCTR38 /111903
SYSTEMWIDE

RETN: See Rpts Disp Schedule/Dist.
Maintenance

UNIVERSITY OF CALIFORNIA-
Page No. 1

Control File
Run Date 02/01/05
Code Translation Table

Run Time 12:46:29

DATA BASE/ FILE ID	DATA ELEMENT	CODE VALUE	TRNSLATN LENGTH	OBSOLETE	----- CODE
EDB	0682	AD	25		Administrative De-enroll
EDB	0682	BE	25		BELI Change
EDB	0682	CV	25		Coverage Level Change
EDB	0682	DE	25		De-enrolled
EDB	0682	DR	25		HMO Provider Disruption
EDB	0682	ER	25		Error Correction
EDB	0682	HI	25		HIPAA Enrollment
EDB	0682	IE	25		New Hire Enrollment
EDB	0682	LV	25		Return from Leave
EDB	0682	OE	25		Open Enrollment
EDB	0682	OR	25		Other Reason
EDB	0682	OT	25		One-time Process
EDB	0682	PI	25		New PIE
EDB	0682	UN	25		Unknown Reason
EDB	0685	AD	25		Administrative De-enroll
EDB	0685	BE	25		BELI Change
EDB	0685	CV	25		Coverage Level Change
EDB	0685	DE	25		De-enrolled
EDB	0685	ER	25		Error Correction
EDB	0685	IE	25		New Hire Enrollment
EDB	0685	LV	25		Return from Leave
EDB	0685	OE	25		Open Enrollment
EDB	0685	OR	25		Other Reason
EDB	0685	OT	25		One-time Process
EDB	0685	PI	25		New PIE
EDB	0685	UN	25		Unknown Reason
EDB	0688	AD	25		Administrative De-enroll
EDB	0688	BE	25		BELI Change
EDB	0688	CV	25		Coverage Level Change
EDB	0688	DE	25		De-enrolled
EDB	0688	ER	25		Error Correction
EDB	0688	IE	25		New Hire Enrollment
EDB	0688	LV	25		Return from Leave
EDB	0688	OE	25		Open Enrollment
EDB	0688	OR	25		Other Reason
EDB	0688	OT	25		One-time Process
EDB	0688	PI	25		New PIE

EDB	0688	UN	25	Unknown Reason
EDB	0691	AD	25	Administrative De-enroll
EDB	0691	BE	25	BELI Change
EDB	0691	CV	25	Coverage Level Change
EDB	0691	DE	25	De-enrolled
EDB	0691	ER	25	Error Correction
EDB	0691	IE	25	New Hire Enrollment
EDB	0691	LV	25	Return from Leave
EDB	0691	OE	25	Open Enrollment
EDB	0691	OR	25	Other Reason
EDB	0691	OT	25	One-time Process
EDB	0691	PI	25	New PIE
EDB	0691	UN	25	Unknown Reason

2. Data Elements

- 2.1. Add a new value of “AD” To each of five data elements (Attachment A)
 - 2.1.1. EDB0682-6 Future Medical Enrollment Reason Code
 - 2.1.2. EDB0685-9 Future Dental Enrollment Reason Code
 - 2.1.3. EDB0688-2 Future Vision Enrollment Reason Code
 - 2.1.4. EDB0691-2 Future Legal Enrollment Code
 - 2.1.5. EDB0696-7 Enrollment Reason Code

- 2.2. Add a new value “Y” to each of four data elements (Attachment B)
 - 2.2.1. EDB0158-6 Medical Insurance De-enrollment Indicator
 - 2.2.2. EDB0159-7 Dental Insurance De-enrollment Indicator
 - 2.2.3. EDB0187-6 Vision Insurance De-enrollment Indicator
 - 2.2.4. EDB0165-0 Legal Insurance De-enrollment Indicator

- 2.3. Redefine the definition of code “XD” in each of eight data elements to read “De-enrolled - suspension of premiums or ineligible dependent” (Attachment C)
 - 2.3.1. EDB0292-1 Medical Plan Code
 - 2.3.2. EDB0680-4 Future Medical Plan Code
 - 2.3.3. EDB0272-7 Dental Plan Code
- 2.4. EDB0683-7 Future Dental Plan Code
 - 2.4.1. EDB0347-4 Vision Plan Code
 - 2.4.2. EDB0686-0 Future Vision Plan Code
 - 2.4.3. EDB0353-7 Legal Plan Code
 - 2.4.4. EDB0689-3 Future Legal Plan Code

3. EDB Maintenance

- 3.1. Daily Maintenance
 - 3.1.1. To support applying the employee de-enrollment to the EDB, the PPS daily process that accepts transactions from UCOP must be modified to recognize the De-enrollment Indicator and post it to the EDB.
- 3.2. Monthly Maintenance
 - 3.2.1. Modify the monthly de-enrollment process so “Y” is an accepted value in the medical, dental, vision and legal de-enrollment indicator fields.
 - 3.2.2. The value “Y” will function identically to the value of “X” except that the Enrollment Reason Code for the plan will be “AD”

Attachment A

System Number: EDB0682

User Access Name: 0682-6

Programming Name: FCB_HLTH_ENRL_REAS IN PPPFCB

Revision Date: 7/1/05

Comments

Location(s) N/A

Name: FUTURE MEDICAL ENROLLMENT REASON CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the reason for establishing a future medical enrollment.

Code Interpretation

User Enterable Reason Codes:

ER - Error correction

Attachment A

- DR - HMO Provider Disruption
- HI - HIPAA enrollment (medical only)
- LV - Reinstatement on return from leave of absence
- OE - Open Enrollment
- OR - Other Reason
- PI - Enrollment because of a PIE (other than new hire)

System Derived Reason Codes:

- AD - Administrative De-enrollment due to ineligible dependent
- BE - Enrollment due to BELI change
- CV - Coverage level change because of adding/deleting dependent
- DE - De-enrolled due to suspension of premiums
- IE - New hire initial enrollment
- OT - One-time process
- RH - Rehire enrollment
- UN - Unknown/unspecified reason

System Number: EDB0685

User Access Name: 0685-9

Programming Name: FCB_DEN_ENRL_REAS IN PPPFCB

Revision Date: 7/1/05

Comments

Location(s): N/A

Name: FUTURE DENTAL ENROLLMENT REASON CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the reason for establishing a future dental enrollment.

Code Interpretation

User Enterable Reason Codes:

ER	-	Error correction
LV	-	Reinstatement on return from leave of absence
OE	-	Open Enrollment
OR	-	Other Reason

Attachment A

PI - Enrollment because of a PIE
(other than new hire)

System Derived Reason Codes:

AD - Administrative De-enrollment due to ineligible
dependent
BE - Enrollment due to BELI change
CV - Coverage level change
because of adding/deleting
dependent
DE - De-enrolled due to suspension
of premiums
IE - New hire initial enrollment
OT - One-time process
RT - Rehire enrollment
UN - Unknown/unspecified reason

System Number: EDB0688

User Access Name: 0688-2

Programming Name: FCB_VIS_ENRL_REAS IN PPPFCB

Revision Date: 7/1/05

Comments

Location(s): N/A

Name: FUTURE VISION ENROLLMENT REASON CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the reason for establishing a future vision enrollment.

Code Interpretation

User Enterable Reason Codes:

ER	-	Error correction
LV	-	Reinstatement on return from leave of absence
OE	-	Open Enrollment

Attachment A

- OR - Other Reason
- PI - Enrollment because of a PIE
(other than new hire)

System Derived Reason Codes:

- AD - Administrative De-enrollment due to ineligible dependent
- BE - Enrollment due to BELI change
- CV - Coverage level change because of adding/deleting dependent
- DE - De-enrolled due to suspension of premiums
- IE - New hire initial enrollment
- OT - One-time process
- RT - Rehire enrollment
- UN - Unknown/unspecified reason

System Number: EDB0691

User Access Name: 0691-2

Programming Name: FCB_LEGL_ENRL_REAS IN PPPFCB

Revision Date: 7/1/05

Comments

Location(s):

Name: FUTURE LEGAL ENROLLMENT REASON CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the reason for changing legal enrollment.

Code Interpretation

User Enterable Reason Codes:

ER	-	Error correction
LV	-	Reinstatement on return from leave of absence
OE	-	Open Enrollment

Attachment A

- OR - Other Reason
- PI - Enrollment because of a PIE
(other than new hire)

System Derived Reason Codes:

- AD - Administrative De-enrollment due to ineligible dependent
- BE - Enrollment due to BELI change
- CV - Coverage level change because of adding/deleting dependent
- DE - De-enrolled due to suspension of premiums
- IE - New hire initial enrollment
- OT - One-time process
- RT - Rehire enrollment
- UN - Unknown/unspecified reason

System Number: EDB0696

User Access Name: 0696-7

Programming Name: FCB_ENRL_REAS_CODE IN PPPFCB

Revision Date: 7/1/05

Comments

Location(s):

Name: ENROLLMENT REASON CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the reason for changing the benefits coverage data.

Code Interpretation

User Enterable Reason Codes:

ER	-	Error correction
DR	-	HMO Provider Disruption
HI	-	HIPAA enrollment (medical only)
LV	-	Reinstatement on return from

Attachment A

leave of absence
OE - Open Enrollment
OR - Other Reason
PI - Enrollment because of a PIE
(other than new hire)

System Derived Reason Codes:

AD - Administrative de-enrollment due to ineligible
dependent
BE - Enrollment due to BELI change
CV - Coverage level change
because of adding/deleting
dependent
DE - De-enrolled due to suspension
of premiums
IE - New hire initial enrollment
OT - One-time process
RT - Rehire enrollment
UN - Unknown/unspecified reason

System Number: EDB0158

User Access Name: 0158-6

Programming Name: HLTH_DEENROLL IN PPPBEN

Revision Date: PUBL. 7/1/05

Comments

Location(s): N/A

Name: MEDICAL INSURANCE DE-ENROLLMENT INDICATOR

Type: ALPHANUMERIC

Length: 1

Format

N/A

General Description

Code indicating that data base maintenance is required to reflect the individual's de-enrollment from medical insurance.

Code Interpretation

X	- Data base maintenance required
Y	- Data base maintenance required
blank	- No action required

User Access Name: 0159-7

Programming Name: DENTAL_DEENROLL IN PPPBEN

Revision Date: PUBL. 7/1/05

Comments

Location(s): N/A

Name: DENTAL INSURANCE DE-ENROLLMENT INDICATOR

Type: ALPHANUMERIC

Length: 1

Format

N/A

General Description

Code indicating that data base maintenance is required to reflect the individual's de-enrollment from dental insurance.

Code Interpretation

X	- Data base maintenance required
Y	- Data base maintenance required
blank	- no action required

System Number: EDB0187

User Access Name: 0187-6

Programming Name: VIS_DEENROLL IN PPPBEN

Revision Date: 7/1/05

Comments

Location(s): N/A

Name: VISION INSURANCE DE-ENROLLMENT INDICATOR

Type: ALPHANUMERIC

Length: 1

Format

N/A

General Description

Code indicating that data base maintenance is required to reflect the individual's de-enrollment from vision insurance.

Code Interpretation

X	- Data base maintenance required
Y	- Data base maintenance required
Blank	- No action required

System Number: EDB0165

User Access Name: 0165-0

Programming Name: LEGAL_DEENROLL IN PPPBEN

Revision Date: PUBL. 7/1/05

Comments

Location(s): N/A

Name: LEGAL INSURANCE DE-ENROLLMENT INDICATOR

Type: ALPHANUMERIC

Length: 1

Format

N/A

General Description

Code indicating that data base maintenance is required to reflect the individual's de-enrollment from legal insurance.

Code Interpretation

X	- Data base maintenance required
Y	- Data base maintenance required
Blank	- No action required

System Number: EDB0292

User Access Name: 0292-1

Programming Name: HLTH_PLAN IN PPPBEN

Revision Date: 07/01/05

Comments

Location(s): HBN 4532 - Medical Plan Code-HBN in
HDB
 APS 0953 - Primary Health Plan Code
 BCS 0953 - Primary Health Plan Code
 CPS 0953 - Primary Health Plan Code
 IPS 0953 - Primary Health Plan Code
 OPP 0953 - Primary Health Plan Code

Name: MEDICAL PLAN CODE-EDB

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the medical insurance plan in which the individual is enrolled.

Code Interpretation

Attachment C

BC - Blue Cross Plus
BH - High Option (Blue Cross)
BP - Blue Cross PPO
CM - Core Major Medical (Blue Cross)
DH - Definity Health (UCSF and UCSB only)
FP - PacifiCare
HN - Health Net
KN - Kaiser North
KS - Kaiser South
KU - Kaiser Umbrella
KW - Kaiser MidAtlantic
PN - PacifiCare Nevada
P1 - PSBP Medical HMO
P2 - PSBP Medical PPO
SE - UnitedHealthcare Select EPO
WH - Western Health Advantage
DM - Medical plan not yet selected by the
employee
XX - Opted out of medical
XC - Cancelled medical
XD - De-enrolled - suspension of
Premiums or ineligible dependent

EDB 0292 -- MEDICAL INSURANCE PLAN CODE Previously Valid Codes

FN - Foundation
HA - Heals
HG - FHP Health Care
NA - PruNet
NH - Blue Premier HMO New Mexico
PH - Prudential High Option

Attachment C

UC - UC Care

System Number: EDB0680

User Access Name: 0680-4

Programming Name: FCB_HEALTH_PLAN IN PPPFCB

Revision Date: 07/01/05

Comments

Location(s):

Name: FUTURE MEDICAL PLAN CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the future medical insurance plan in which the individual will be enrolled.

Code Interpretation

- BC - Blue Cross Plus
- BH - High Option (Blue Cross)
- BP - Blue Cross PPO

Attachment C

CM - Core Major Medical (Blue Cross)
DH - Definity Health (UCSF and UCSB only)
FP - PacifiCare
HN - Health Net
KN - Kaiser North
KS - Kaiser South
KU - Kaiser Umbrella
KW - Kaiser MidAtlantic
PN - PacifiCare Nevada
P1 - PSBP Medical HMO
P2 - PSBP Medical PPO
SE - UnitedHealthcare Select EPO
WH - Western Health Advantage
DM - Medical plan not yet selected by the
employee
XX - Opted out of medical
XC - Cancelled medical
XD - De-enrolled - suspension of
Premiums or ineligible dependent

EDB 0680 -- FUTURE MEDICAL INSURANCE PLAN CODE Previously Valid Codes

FN - Foundation
HA - Heals
HG - FHP Health Care
NA - PruNet
NH - Blue Premier HMO New Mexico
PH - Prudential High Option
UC - UC Care

System Number: EDB0272

User Access Name: 0272-7

Programming Name: DENTAL_PLAN IN PPPBEN

Revision Date: 07/01/05

Comments

Locations(s): HBN 4520 - Dental Plan Code-HBN in
HDB
 APS 0125 - Dental Plan Code
 BCS 0125 - Dental Plan Code
 CPS 0125 - Dental Plan Code
 IPS 0125 - Dental Plan Code
 OPP 0125 - Dental Plan Code

Name: DENTAL PLAN CODE-EDB

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the dental plan selected by the individual.

Code Interpretation

Attachment C

D1 - Delta Dental Service
D3 - PMI
P3 - PSBP Dental HMO
P4 - PSBP Dental PPO
DD - Dental plan not yet selected by the
employee
XX - Opted out of dental
XC - Cancelled dental
XD - De-enrolled - suspension of
Premiums or ineligible dependent

Previous codes may be attached

EDB 0272 - Dental Plan Code-EDB Codes deleted January 1995

D2 - Safeguard

System Number: EDB0683

User Access Name: 0683-7

Programming Name: FCB_DENTAL_PLAN IN PPPFCB

Revision Date: 07/01/05

Comments

Location(s):

Name: FUTURE DENTAL PLAN CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the future dental plan in which the individual will be enrolled.

Code Interpretation

- D1 - Delta Dental Service
- D3 - PMI
- P3 - PSBP Dental HMO
- P4 - PSBP Dental PPO
- XX - Opted out of dental
- XC - Cancelled dental
- XD - De-enrolled - suspension of

Premiums or ineligible dependent

System Number: EDB0347

User Access Name: 0347-4

Programming Name: VIS_PLAN IN PPPBEN

Revision Date: 07/01/05

Comments

Location(s): HBN 4545 - Optical Plan Code-HBN in
HDB
 APS 2495 - Optical Plan Code
 BCS 2495 - Optical Plan Code
 CPS 2495 - Optical Plan Code
 IPS 2495 - Optical Plan Code
 OPP 2495 - Optical Plan Code

Name: VISION PLAN CODE-EDB

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the vision insurance plan selected by the individual.

Code Interpretation

Attachment C

- DV - Vision plan not yet selected by the employee
- VI - Vision Care
- P5 - PSBP Vision Plan
- XX - Opted out of vision
- XC - Cancelled vision (valid for Postdoc individuals only)
- XD - De-enrolled - suspension of Premiums or ineligible dependent

System Number: EDB0686

User Access Name: 0686-0

Programming Name: FCB_VISION_PLAN IN PPPFCB

Revision Date: 07/01/05

Comments

Location(s):

Name: FUTURE VISION PLAN CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the future vision plan in which the individual will be enrolled.

Code Interpretation

VI - Vision Care
P5 - PSBP Vision Plan
XX - Opted out of vision
XC - Cancelled vision (valid for Postdoc individuals only)
XD - De-enrolled - suspension of

Premiums or ineligible dependent
System Number: EDB0353

User Access Name: 0353-7

Programming Name: LEGAL_PLAN IN PPPBEN

Revision Date: 07/01/05

Comments

Location(s): HBN 4536 - Legal Plan Code-HBN in
HDB
 APS 2795 - Legal Plan Code
 BCS 2795 - Legal Plan Code
 CPS 2795 - Legal Plan Code
 IPS 2795 - Legal Plan Code
 OPP 2795 - Legal Plan Code

Name: LEGAL PLAN CODE-EDB

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the legal plan selected by the individual.

Code Interpretation

J2 - ARAG Legal Plan

Attachment C

XC - Cancelled legal
XD - De-enrolled - suspension of
Premiums or ineligible dependent

EDB 0353 -- LEGAL PLAN CODE Previously Valid Codes

J1 - Signature Legal Care

System Number: EDB0689

User Access Name: 0689-3

Programming Name: FCB_LEGAL_PLAN IN PPPFCB

Revision Date: 07/01/05

Comments

Location(s):

Name: FUTURE LEGAL PLAN CODE

Type: ALPHANUMERIC

Length: 2

Format

N/A

General Description

Code indicating the future legal insurance plan in which the individual will be enrolled.

Code Interpretation

J2 - ARAG Legal Plan
XC - Cancelled legal
XD - De-enrolled - suspension of

Premiums or ineligible dependent

EDB 0689 -- FUTURE LEGAL INSURANCE PLAN CODE
Previously Valid Codes

J1 - Signature Legal Care