Benefits Partner Meeting

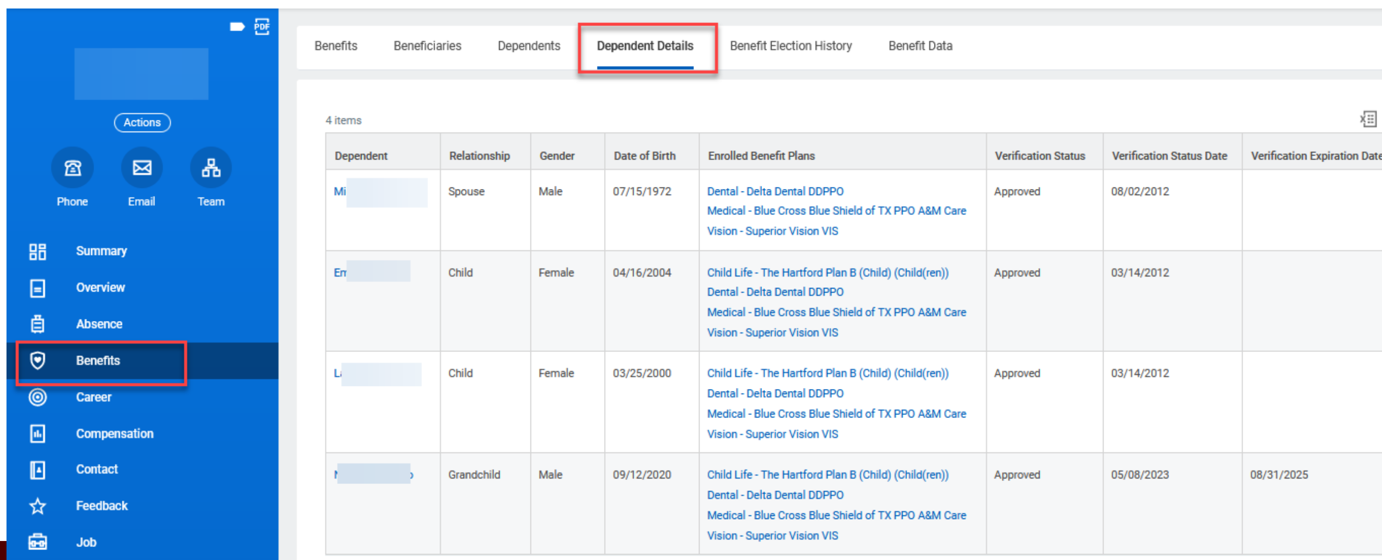
June 20, 2024

AGENDA

- Workday Updates
- BCBSTX Network Update
- Open Enrollment Updates
- ESI – Encircle Program Update
- 65 Plus MAP Update
- Grad Plan Discrepancies
- Annual Grandchild Certification
- Wellness Credits
- Wellness Portal Update
- Insurance Billing Update
- TRS Reports Update
- HR 16 Form
- SBA Updates
- Reminders
- Current/Upcoming Projects
- Support Tickets

Workday Updates

- Separate To Do in Onboarding for ACA Eligible Re-hires
- Benefit Start Date additional data question is now triggered during Change Job (when employee is gaining benefits eligibility)
- New Report: Dependent Details (available on Benefits tab)



Dependent	Relationship	Gender	Date of Birth	Enrolled Benefit Plans	Verification Status	Verification Status Date	Verification Expiration Date
[redacted]	Spouse	Male	07/15/1972	Dental - Delta Dental DDPPO Medical - Blue Cross Blue Shield of TX PPO A&M Care Vision - Superior Vision VIS	Approved	08/02/2012	
[redacted]	Child	Female	04/16/2004	Child Life - The Hartford Plan B (Child) (Child(ren)) Dental - Delta Dental DDPPO Medical - Blue Cross Blue Shield of TX PPO A&M Care Vision - Superior Vision VIS	Approved	03/14/2012	
[redacted]	Child	Female	03/25/2000	Child Life - The Hartford Plan B (Child) (Child(ren)) Dental - Delta Dental DDPPO Medical - Blue Cross Blue Shield of TX PPO A&M Care Vision - Superior Vision VIS	Approved	03/14/2012	
[redacted]	Grandchild	Male	09/12/2020	Child Life - The Hartford Plan B (Child) (Child(ren)) Dental - Delta Dental DDPPO Medical - Blue Cross Blue Shield of TX PPO A&M Care Vision - Superior Vision VIS	Approved	05/08/2023	08/31/2025

Workday Updates

- FY2025 Plan Year definition was added, and new premiums have been loaded effective 9/1/2024
- Open Enrollment has been launched in Sandbox
  - Please test!
  - Note: 12/9 IDs have not yet been added
- **Deadline for Submitting 12/9 List – June 20**
  - Add new employees or employees who will be moving to <12-month positions
  - Flag to remove employees who will be moving to 12-month positions, retiring, terminating, or moving to part-time or biweekly prior to 8/31/2025

BCBSTX Network Update

- BCBSTX and **Hendrick Health in Abilene** are negotiating new contracts.
- If an agreement is not reached by **August 2, 2024 (contract extended)** **Hendrick Medical Center** and **Hendrick Medical Center South** in Abilene, as well as Hendrick Health **doctors** and **home health services** will leave the network.
- Impacted members were notified 30 days prior
- A microsite with information for members is available at https://www.bcbstx.com/hendrick

BCBSTX Network Update

- BCBSTX and **Baylor Scott & White** are negotiating new contracts.
- If an agreement is not reached by **July 1, 2024,** their physicians, hospitals and other facilities in Central and North Texas will be out of network
- Notices have been mailed by BCBSTX
- A microsite with information for members is available at https://www.bcbstx.com/bsw

Open Enrollment Updates

- Locations and meeting formats have been confirmed
- Calendar and meeting information has been sent to BCBSTX to coordinate vendors
- Virtual Meeting URLs
  - July 2nd – all locations – Meeting Link
  - July 19th (AM) – Retirees only – Meeting Link
  - July 19th (PM) – all locations – Meeting Link
- Retiree **in-person** meeting will be held at the RELLIS campus
- Vendors will be required to confirm with the location contact as to whether they will or will not be able to participate/attend the in-person events

Open Enrollment Updates

- Vision Changes
  - Superior Vision by MetLife
  - Plan design changes – increased benefit for frames & contact lenses from $150 to $200 per plan year
  - New TAMUS specific microsite coming soon
  - Change will result in new ID numbers & new ID cards
  - New ID cards will be issued to all employees/retirees enrolled in the plan
- OE website will be up by Wednesday, June 26, 2024
- OE email will be sent on Monday, July 8, 2024

Encircle Rx – GLP1 program

- **Weight Loss:**
  - Members who currently have PAs for weight loss GLP1s (Wegovy, Saxenda, and Zepbound), had their prior authorizations (PA) termed 5/31/24
  - Members will need to go through the PA process to see if they qualify for a GLP1 for weight loss therapy
  - Some members who were previously able to obtain GLP1s medications may no longer be able to due more stringent PA criteria and documentation requirements
  - Letters informing impacted members about the new requirements were sent in April.
  - Members who *are* approved under the more stringent weight loss GLP1 PA criteria will need to enroll in Omada for Prevention. They will need to meet the below requirements in a rolling 30-day window:
    - Use the Omada app four times, by doing lessons or engaging with their health coach, peer group or online community, completing curriculum material, ***and***
    - Weigh in four times using the smart scale provided by Omada

Omada Update – Encircle Rx

- The previous Omada program which was open to the entire population via BCBSTX is no longer available
- Members enrolled in Omada under BCBSTX at the time of the change were moved to the ESI offering
- Moving forward Omada will be offered to a targeted population under the ESI Safeguard program and should not be promoted broadly

Omada Update – Encircle Rx Update

- The goal of the Encircle Rx program is for the member to be actively engaged in a lifestyle modification program
- If a member had access to the Omada program prior to the change **and** was taking a GLP1, they should already be regularly engaging with Omada because the PA label asks the doctor to attest that the patient is doing something – such as lifestyle modification

Omada Update – Encircle Rx Update

- Members enrolled in Omada through BCBSTX at the time of the change who were also on a GLP-1 for weight loss will need to do the following over a 30-day rolling period:
  - Meet the 4 engagements with Omada, ***and***
  - Weigh in 4 times
- Once those requirements are met, then ESI would get notice that the member has met the Omada requirements, until then the prescription claim will deny for PA needed.
- At that point, the member can work with their physician on submitting a new PA for the GLP-1.

65 Plus Medicare Advantage Plan Update

- As you are processing retirements and placing retirees in the 65 Plus Medicare Advantage Plan, please be sure to provide the retiree with a copy of the following items:
  - Enrollment Kit
  - Part B & D Education flier
  - Open Access Provider Notice
- Items can be found on the dedicated TAMUS BCBSTX MAP website at: https://www.bcbstx.com/tamus-retiree-medicare
  - Coverage and Benefits tab

65 Plus Medicare Advantage Plan Open Enrollment

- Retirees and eligible dependents that **Opted Out**, but decide they want to come back into the plan can do so during **Open Enrollment**

- Retirees, Dependents, and/or Survivors who were removed via Administrative Correction (RFI), due to missing **Medicare Part A/B and/or Physical Address** will have the opportunity to re-enroll during Open Enrollment in July 2024
  - Please be sure to confirm that their contact information **and** Medicare information is up to date (*obtain a copy of their Medicare card*)

65 Plus Medicare Advantage Plan Address Updates

- Enrolled dependents’ addresses
  - Same rules apply as for retirees
  - Required to have a Physical Address for their Home/Residence address
  - Separate/different Mailing Address? Ensure the address is updated for each enrolled dependent(s) as well
  - This will help avoid any enrollment issues with CMS

Medicare Advantage Plan Provider Concerns

- As a reminder, the MAP team is always available to reach out to any provider that informs our retirees they do not accept the MAP plan.
- Many times, this is related to **individual** MAP plans and not **group** MAP plans. Our plan is a **group** MAP plan.
- Submit a ticket to SBA with the following information:
  - Retiree name (UIN)
  - Provider Name
  - Clinic Name
  - Clinic Address
  - Phone Number
- Once we receive the ticket, we will reach out to the MAP team for provider outreach

Medicare Advantage Plan & BSW Negotiations

- The 65 Plus Medicare Advantage Plan (PPO) is an **Open Access Plan** and it should ***NOT*** matter whether a provider is considered, "*In-Network*" or "*Out-of-Network*"
- Criteria that must be met for all providers regardless of facility:
  1. Accepts Medicare,
  2. MUST be willing to bill the BCBSTX 65 Plus Medicare Advantage Plan (PPO), ***AND***
  3. MUST be willing to see the member
- If the criteria for 1, 2, **and** 3 above are met by **ANY** provider, the retirees can still see their preferred provider
- Please assure the retirees that the BCBSTX team is still in active negotiations with Baylor Scott & White (BSW)

Grad Plan Discrepancies

- **FY23 is closed**– No further adjustments may be submitted to payroll. Invoices have been emailed to workstations and should be processed for payment within 30 days of receipt.
- **FY24 in progress** – currently there are **68 discrepancies**

Annual Grandchild Certification

- **Total Dependent Grandchildren to be recertified: 142**
- **Certified: 107**
- **Pending: 35**
- Process began Monday, 4/22/2024
  - Letters were sent to retirees and emails were sent to active employees & retirees with email addresses in Workday
  - Reminder emails were sent out 6/03/2024
  - Reminder emails were sent to workstations on 06/18/2024
- Deadline to submit documentation **06/28/2024**
- SBA will collect the Grandchild Certification documentation and update Workday
- If you receive the forms, be sure to confirm dependent is listed on the certification form and on the current filed 2023 tax returns
- 2023 tax returns must include signature pages **OR** the e-filing confirmation
- Forms and tax returns should be sent to SBA for processing and imaging via the ticketing system – **please do not upload to HRConnect.**

Wellness Credits

- Deadline for employees/spouses to complete two activities to earn the wellness credit effective 9/1/2024 is 8/31/2024
- If employee/spouse fails to complete two activities by 8/31/2024, they can complete two activities on or after 9/1/2024
  - Credit will be effective the first of the month after the second activity is completed
  - Will also count as credit for FY25
- Two-Step Wellness Program FAQ on SBA website: https://assets.system.tamus.edu/files/benefits/website/Flyers/TwoStepProgramGuide.pdf

Wellness Portal Update

- Employees and covered spouses will be able to register for WebMD ONE approximately 6-8 weeks after coverage start date
- Implementation is still a work in progress, and we are still working on:
  - Single sign on to insurance carriers – **in progress**
  - Historical files – **in progress**
  - Current FY claims files – **in progress**
- **MOST items on the personal checklist (STEP TWO) can be self-certified**
  - From the checklist item, expand it and at click **ADD EXAM** at the bottom of the section, then add the date and update the checklist.

System Insurance Billing

- 11,583 July invoices generated on 6/12/24, 430 paper bills were mailed via USPS by 6/13/24.
  - Invoices are created mid month, usually on Wednesday afternoon
  - Benefit events that are completed 1 day prior to invoice creation will be reflected; events completed after invoice creation through the EOM will need a support ticket submitted to IB to correct the active mailed Paper invoice
  - Changes/corrections to any active ACH/TRS invoice will require a support ticket submitted to IB 24 hours prior to the last working day of the month.
- Customers/invoices refresh nightly from Workday to the Billing App.
- Benefit events completed outside of the 90-day event date window will not update to IB. Member will show as ineligible.
- IB cannot bill individuals that are not in a billing eligible position, nor can we bill for less than a full month's premiums.

System Insurance Billing

Billing Update // Dwight Baker // 620002442

Service Request ID: 20831799 0

General | Tasks/Activities | People | T&E | My Alerts (1) | Assets/CIs (0) | Read By (4) | Code (0)

Actions | + Add | Refresh | Print View

16 hours old

Drag and drop attachments here to uploa
A maximum of 20 MB can be uploaded at o

Reviewer
Latoya Meriweather

Responsibility
SBA Insurance Billing / Leah Schroeder

Estimated Hours
0.00

Actual Hours
0.00

Date(s)
Starts Tue 7/19/22

Tags

Description

Dwight Baker is retiring 9/1/2022 with last day on payroll being 8/31/2022. Attached is his HR 116. He completed his Retirement Benefit Event 7/11/2022.

TRS reports reduced grace period

- Change from 30-day grace
- September 2024 will have a 21-calendar day grace period
- October 2024- August 2025 will have 14-calendar day grace period
- NO CHANGE to TEXNET deposit and due date for reports
  - Allows RE extra time to bring reports to complete status before penalty fees

Report Month	Regular Payroll Report and TEXNET <u>Due Date</u>	Regular Payroll Report Grace Period Deadline	Employment After Retirement Report and TEXNET <u>Due Date</u>	Employment After Retirement Report Grace Period Deadline
September 2024	Oct. 4, 2024	Oct. 25, 2024	Oct. 10, 2024	Oct. 31, 2024
October 2024	Nov. 6, 2024	Nov. 20, 2024	Nov. 8, 2024	Nov. 22, 2024
November 2024	Dec. 6, 2024	Dec. 20, 2024	Dec. 10, 2024	Dec. 24, 2024
December 2024	Jan. 6, 2025	Jan. 20, 2025	Jan. 10, 2025	Jan. 24, 2025
January 2025	Feb. 6, 2025	Feb. 20, 2025	Feb. 10, 2025	Feb. 24, 2025
February 2025	March 6, 2025	March 20, 2025	March 10, 2025	March 24, 2025
March 2025	April 4, 2025	April 18, 2025	April 10, 2025	April 24, 2025
April 2025	May 6, 2025	May 20, 2025	May 9, 2025	May 23, 2025
May 2025	June 6, 2025	June 20, 2025	June 10, 2025	June 24, 2025
June 2025	July 3, 2025	July 17, 2025	July 10, 2025	July 24, 2025
July 2025	Aug. 6, 2025	Aug. 20, 2025	Aug. 8, 2025	Aug. 22, 2025
August 2025	Sept. 5, 2025	Sept. 19, 2025	Sept. 5, 2025	Sept. 19, 2025

Completing HR 16

- When to complete
  - Full or partial transfers ORP or TDA accounts
    - From one approved vendor to another approved vendor
- Reasons to complete
  - Rollover/transfers within the A&M System ORP or TDA
    - https://assets.system.tamus.edu/files/benefits/pdf/retirement/GuidelinesXferRollover.pdf
    - Active or terminated employee

HR 16 (01/21)

The Texas A&M University System
ORP/TDA Transfer Verification Form

With few exceptions, you have the right to request, receive, review and correct information about yourself collected using this form.

Name (Print) Social Security number

System member name Office phone Date (MM/DD/YYYY)

INSTRUCTIONS

1. Complete Section A as appropriate, then sign Section B.
2. Complete information about receiving vendor representative in Section C. (Required if using individual vendor representative
3. Attach receiving vendor's transfer request.
4. Make a copy for your records.
5. Return to your System member Human Resources or Payroll office.

A. TRANSFER INSTRUCTIONS *(check all that apply)*

I authorize a: Full transfer of: ORP☐ Regular TDA☐ Roth TDA☐ account(s).*
Partial transfer of: ORP☐ Regular TDA☐ Roth TDA☐ account(s).

* *Please note: The surrendering vendor will close your account based on your request for a full transfer; therefore,* ***it is necessary to change your O TDA vendor in Workday in order to direct future payroll contributions to the new/receiving vendor.***

For **full transfers**, indicate only the contract or account number. For **partial transfers**, also indicate the dollar amount or percent of total to be transferred.

ORP Contract or Account #

Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
TOTAL	% or $	

Regular TDA Contract or Account #

Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
Investment Option/Fund Name	% or $	
TOTAL	% or $	

From:
Name of surrendering vendor

To:
Name and address of receiving vendor

According to IRS regulations, transfers must be contract to contract exchanges and the transferred funds must continue to be subject to the same, or more stringent, early distribution rules.

B. EMPLOYEE SIGNATURE

I understand that the account(s) I am transferring may be subject to surrender charges, contingent deferred sales charges or other fees from the surrendering vendor. I authorize the surrendering vendor to liquidate my account if liquidation of investments is necessary and transfer the assets and any subsequent funds that may be received for deposit in this account as described above.

I understand that I bear the risk of the performance of the product(s) I select, that The Texas A&M University System has no fiduciary responsibilities in this area, and that The Texas A&M University System is not liable for any tax consequences occurring under these programs.

Original Signature Required
Employee signature Date (MM/DD/YYYY)

C. RECEIVING VENDOR INFORMATION (required if using individual vendor representative)

Name of Representative Company

Telephone number Fax number E-mail address

D. TO BE COMPLETED BY YOUR SYSTEM MEMBER HUMAN RESOURCES OR PAYROLL OFFICE

❑ I hereby certify that the receiving vendor named above is an active A&M System ORP and/or TDA vendor and the receiving representative is an authorized vendor representative; thus the requested fund transfer may be completed. I also certify that the above employee ❑ does or ❑ does not have a vested interest in the state's matching contribution.

❑ I hereby certify that the receiving vendor is permitted in the case of correction of ORP contributions made in error.

This application is being returned for the following reason(s):

❑ The receiving vendor named above is not an active A&M System ORP and/or TDA vendor.

❑ The receiving representative is not an authorized ORP and/or TDA vendor representative.

A&M System-Authorized Representative: Make a copy and forward (including receiving vendor's transfer request form) directly to surrendering vendor.

Original Signature Required
Name and title Signature Date (MM/DD/YYYY)

SBA Updates

- Staffing Changes
  - Latoya Meriweather last day – Friday, June 14^{th}
  - Working on posting position with HR

Reminders

- Workday Reports
  - Please be sure you are running and working your reports at the recommended frequency
  - Not sure which ones to run? Refer to the ***Critical Reports for Benefits Partner*** on your Benefits app in Workday
- If employees/retirees are reaching out to you regarding an issue with a claim, eligibility, etc. submit a ticket to sba-support@tamus.edu

Reminders cont'd

- Active employees retiring:
  - Should be making benefit elections in Workday, please **do not** provide paper forms – **we are still receiving paper enrollment forms**
  - Should be encouraged to sign up for ACH or TRS deduct (if applicable) – we **should not** have new retirees electing paper bill
  - Electing 65 Plus Plan at retirement –
    - the retiree must already be enrolled in Medicare A&B and must provide you with a copy of their Medicare card **before** retirement.
    - If you do not have the card in-hand, you must enroll them in the A&M Care Plan, and when card is received you can move them to the 65 Plus Plan with a future effective date
    - Send copy of Medicare card to SBA for imaging

Current/Upcoming Projects

- Missing Medicare Info – **In Progress**
- WebMD ONE implementation - **In Progress**
- Benefit Procedure Manual 9/1 Updates - **In Progress**
- Benefits Documents 9/1 Updates (SPD's, forms) - **In Progress**
- Pending EOI (absorbing from workstations) – **In Progress**
- Grandchild Certification – **In Progress**
- Arrears Clean Up – **In Progress**
- Training Development – **In Progress**
- BCBSTX Double Coverage – **on deck**
- HIPAA Access Audit – **on deck**
- Summer SHIP Waivers - **Complete**
- Disability Retiree Audit - **In Progress**
- TRS Letter Audit - **on deck**
- 65 Plus Medicare Advantage Plan age-ins – **on deck**
- Fall SHIP Waivers – **on deck**
- Fall SHIP Audit – **on deck**

SBA Ticketing System

- May Report
  - Total = 628 tickets
  - 602 resolved/closed
  - 26 work in progress
- Total number of current active tickets = 211

System Benefits
Administration