



Making the Case for Online Benefits Enrollment

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Agenda

- **Introductions**
- **Economic Conditions**
- **Web Based Self-Service**
- **Potential Returns & Pitfalls**
- **Advantages**
- **Integration to PeopleSoft HR**
- **Q & A**

Self Service Today

- Used to be nice-to-have
- Today it is required
 - Banking
 - Shopping
 - Research
- For Customers & Employees
- Advantages
 - Convenient
 - Self-paced
 - Multiple searchable knowledgebases
 - Information at your fingertips

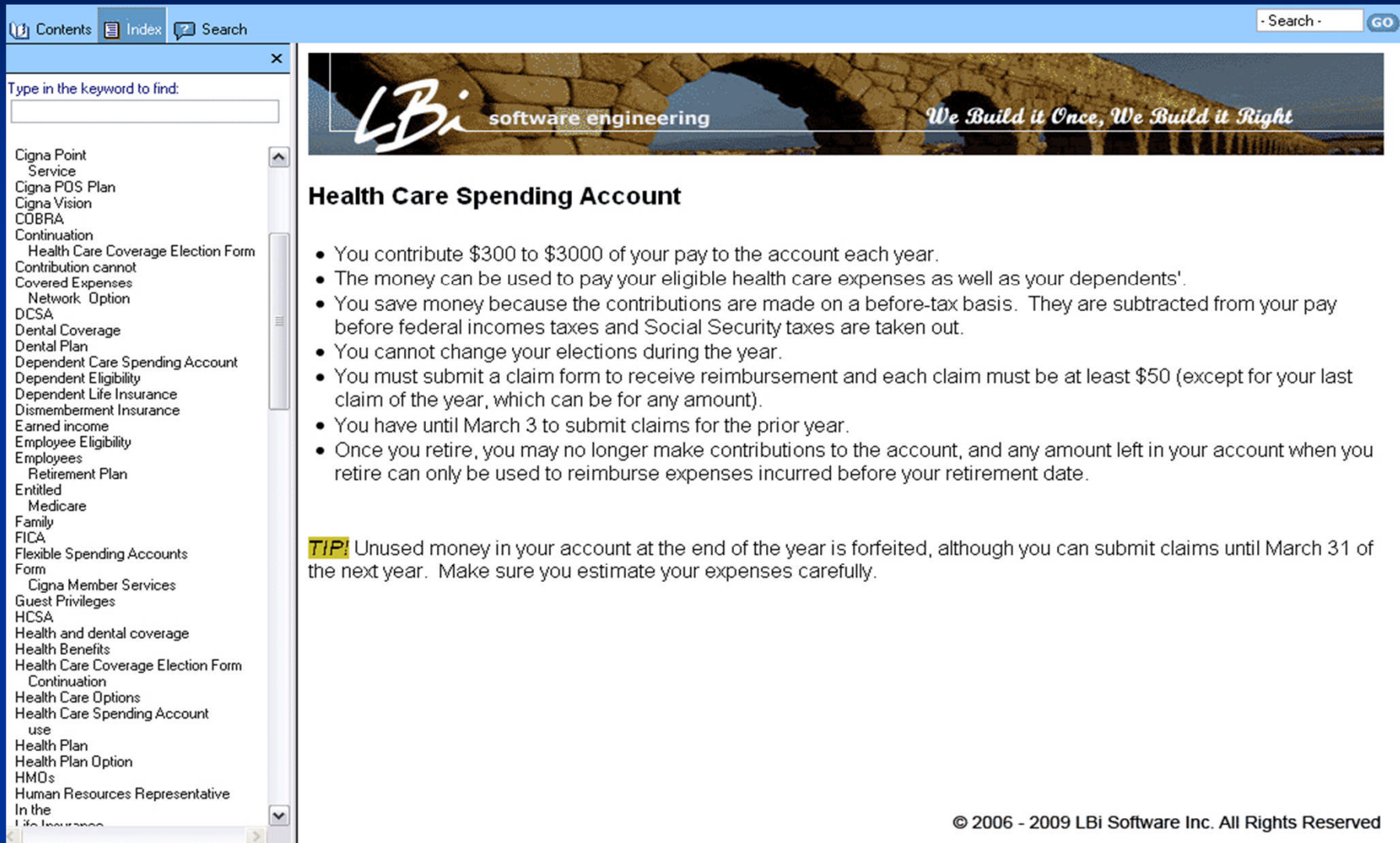
Common Self Service Apps

- Typical Self Service Solutions
 - Compensation/Payroll
 - Attendance/Vacation Scheduling
 - Help Desk
 - Development and Career Opportunities
 - Benefits Enrollment

Online Benefit Enrollment Advantages

- **Greater Convenience**
 - 24 x 7 access
 - Browser based via the web
 - Automates costly manual processes
- **Online Access**
 - Handbooks
 - Manuals
 - Forms
 - Wiki

Wiki Technology for Benefits



The screenshot shows a web browser window displaying a Wiki page. At the top, there is a navigation bar with 'Contents', 'Index', and 'Search' links. A search box with a 'GO' button is on the right. Below the navigation bar is a banner image for 'LBi software engineering' with the tagline 'We Build it Once, We Build it Right'. The main content area is titled 'Health Care Spending Account' and contains a bulleted list of details. A 'TIP' section is highlighted in yellow. On the left side, there is a sidebar with a search box and a list of various benefit-related topics. At the bottom right of the page, there is a copyright notice: '© 2006 - 2009 LBi Software Inc. All Rights Reserved'.

Contents Index Search - Search - GO

Type in the keyword to find:

Cigna Point Service
Cigna POS Plan
Cigna Vision
COBRA
Continuation
Health Care Coverage Election Form
Contribution cannot
Covered Expenses
Network Option
DCSA
Dental Coverage
Dental Plan
Dependent Care Spending Account
Dependent Eligibility
Dependent Life Insurance
Dismemberment Insurance
Earned income
Employee Eligibility
Employees
Retirement Plan
Entitled
Medicare
Family
FICA
Flexible Spending Accounts
Form
Cigna Member Services
Guest Privileges
HCSA
Health and dental coverage
Health Benefits
Health Care Coverage Election Form
Continuation
Health Care Options
Health Care Spending Account
use
Health Plan
Health Plan Option
HMOs
Human Resources Representative
In the
Life Insurance

Health Care Spending Account

- You contribute \$300 to \$3000 of your pay to the account each year.
- The money can be used to pay your eligible health care expenses as well as your dependents'.
- You save money because the contributions are made on a before-tax basis. They are subtracted from your pay before federal incomes taxes and Social Security taxes are taken out.
- You cannot change your elections during the year.
- You must submit a claim form to receive reimbursement and each claim must be at least \$50 (except for your last claim of the year, which can be for any amount).
- You have until March 3 to submit claims for the prior year.
- Once you retire, you may no longer make contributions to the account, and any amount left in your account when you retire can only be used to reimburse expenses incurred before your retirement date.

TIP: Unused money in your account at the end of the year is forfeited, although you can submit claims until March 31 of the next year. Make sure you estimate your expenses carefully.

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Chrysler Digital Owner Manuals

- Starting in 2010
 - DVD based owners' manuals
 - Eliminates 930 tons of paper
 - Saves 20,000 trees
 - Copies available online
 - Adds new Video features
 - Tours
 - Tutorials

Online Benefit Enrollment

- Paperless enrollment
- Customized to brand
- All benefits
- Dependents/Beneficiaries
- Context flyover Help
- Integration with benefits



The screenshot shows the '2009 Open Enrollment' page. At the top, there is a navigation bar with links for Health Plan, Dental Plan, Life Insurance, Spouse Life, Child Life, Confirmation, and Help. Below the navigation bar, a message states: 'Last Year 2008 Health Election was Cigna Network with Family Coverage at a cost of \$88.61 per week.' Two buttons are provided: 'Keep Current Election' and 'Waive Coverage'.

The main section is titled 'Elect 2009 Health Coverage Below'. It features a 'View' dropdown menu set to 'ALL' and a table of available plans. The table has three columns: Plan, Coverage, and Weekly Cost.

Plan	Coverage	Weekly Cost
Cigna Network	Employee	\$
Cigna Network	Employee + One	\$
Cigna Network	Employee + Domestic Partner	\$
Cigna Network	Family	\$
Cigna Network	Domestic Partner + Family	\$
Cigna OAP	Employee	\$
Cigna OAP	Employee + One	\$
Cigna OAP	Employee + Domestic Partner	\$
Cigna OAP	Family	\$
Cigna OAP	Domestic Partner + Family	\$
Harvard Pilgrim	Employee	\$
Harvard Pilgrim	Employee + One	\$

Below the table is a section for 'Current Dependents' with an 'Add Dependents' button. It contains a table with columns for Name, Relationship, D.O.B., Medical, and Dental. The first row shows 'John Jones' as the spouse, with a birth date of 02/02/58, and checkboxes for Medical (checked) and Dental (unchecked). There are 'Modify' and 'Delete' buttons for each row, and empty input fields for adding new dependents.

A 'SUBMIT' button is located at the bottom of the page.

At the very bottom of the page, there is a footer with links: 'Health Plan | Dental Plan | Life Insurance | Spouse Life | Child Life | Help' and 'Copyright Information'.

Online Benefit Enrollment Advantages

- **Reliable**
 - Internet/intranet
 - Improves data accuracy
 - Better service and control
 - Increases security & confidentiality
- **Saves Time/Reduces Cycle Time**
 - Increases communications
 - Increases efficiencies of operational staff
 - Decreases HR resource requirements

Online Benefit Enrollment Features

- New Employee Enrollment
- Existing Employee Maintenance
 - Review
 - Update
- Up to Date Summaries
 - Health and Welfare
 - Life Insurance
- Link to TPA Sites

Online Benefit Enrollment

Health and welfare benefit enrollment process

- ❖ Browser-based
- ❖ Integrated with HRMS

LBi 2009 Open Enrollment Welcome, Jerry Doe! [Logout](#)

Health Plan | Dental Plan | Life Insurance | Spouse Life | Child Life | Confirmation | Help

Jerry, last year 2008 your Health election was Cigna Network plan with Family coverage at a cost of \$23.50 per week.

You can keep your current election by clicking the following button. [Keep Current Election](#)

Or, you can elect no coverage for 2009 by clicking the following button. [Waive Coverage](#)

Or, you can make your 2009 Health election below.

> Elect 2009 Health Coverage Below
Coverage Waived

Plan	Coverage	Weekly Cost
Cigna Network	All	\$13.50
	Employee	\$25.50
Cigna OAP	Employee + One	\$14.50
	Employee + Domestic Partner	\$27.50
	Family	\$12.50
Harvard Pilgrim	Domestic Partner + Family	\$23.50
Oxford	Employee + One	\$16.60
	Family	\$31.50

> Current Dependents [Add Dependents](#)

Name	Relation	D.O.B.	Medical	Dental	Modify	Delete
Jane Doe	Spouse	01/02/1953	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Modify	Delete
John Doe	Child	10/20/1988	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Modify	Delete
Stacy Doe	Child	04/25/1991	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Modify	Delete

[SUBMIT](#)

Online Benefit Enrollment Tools

- Access Benefit Plans
 - Link to current plan handbook - wiki
 - Up to date plan pricing
 - Tools for
 - Filter-down choices
 - “What if” analysis/planning
 - Projected costs
- Update Personal Information
- Update Dependent/Beneficiary Data

Online Benefit Enrollment Integration

- Communicates with HCM Modules
- Can Automatically Begin Open/Annual Enrollment
- Can Utilize HCM Configuration
- Can Be Updated “on the fly”

Online Benefit Enrollment ROI

- Reduces Costs
 - Eliminates paper forms & mailings
 - Saves on printing & distribution of
 - Forms
 - Manuals
 - Handbooks
 - Reduces data errors
 - Decreases HR staff utilization
 - Fewer phone calls/questions for HR
 - Great visual tool

How to get Started

“only 30% of all Enterprise Software features are implemented by Users.”
Oracle presentation at Philadelphia RUG conference

LBI Discovery Process for HCM

- Designed to uncover and document the business challenges and potential returns in the upgrading of old processes and/or the building of new Self-Service solutions. It will assist you in documenting the:
 - Business requirements
 - Impacted business functions
 - Suspected business problems
 - Potential ROI
 - Project justifications

Our Suggestions

Understanding and Documenting the Business Problem and Potential ROI

How is the Discovery Process Accomplished:

- Jointly defining business requirements
- Completely documenting project justifications
- Fully assessing project costs & savings

Outcome of the Discovery Process Service:

- Recommend a design and document a templated solution that meets the customer requirements

LBi Bolt-on Solutions

The logo for CaseManager features a dark blue square containing a white letter 'C'. To the right of the square, the word 'CaseManager' is written in a dark blue, sans-serif font. A light blue, handwritten-style 'LBi' is positioned to the right of the main text, with a dashed light blue line extending from the end of 'CaseManager' to the 'L'.

The logo for At-Trac features a light blue pentagon shape. To the right of the pentagon, the words 'At-Trac' are written in a dark blue, sans-serif font. A light blue, handwritten-style 'LBi' is positioned to the right of the main text, with a dashed light blue line extending from the end of 'At-Trac' to the 'L'.

The logo for B-ENROLL features a light blue circle containing a white letter 'B'. To the right of the circle, the word 'ENROLL' is written in a dark blue, sans-serif font. A light blue, handwritten-style 'LBi' is positioned to the right of the main text, with a dashed light blue line extending from the end of 'ENROLL' to the 'L'.

The logo for ESS features the letters 'ESS' in a white, sans-serif font inside a dark blue arrow shape pointing to the right. A light blue, handwritten-style 'LBi' is positioned to the right of the main text, with a dashed light blue line extending from the end of 'ESS' to the 'L'.

For more information:

www.LBiSoftware.com

Questions



Thank You!

Al Burroughs
Michael DeNezzo



For more information go to www.lbisoftware.com