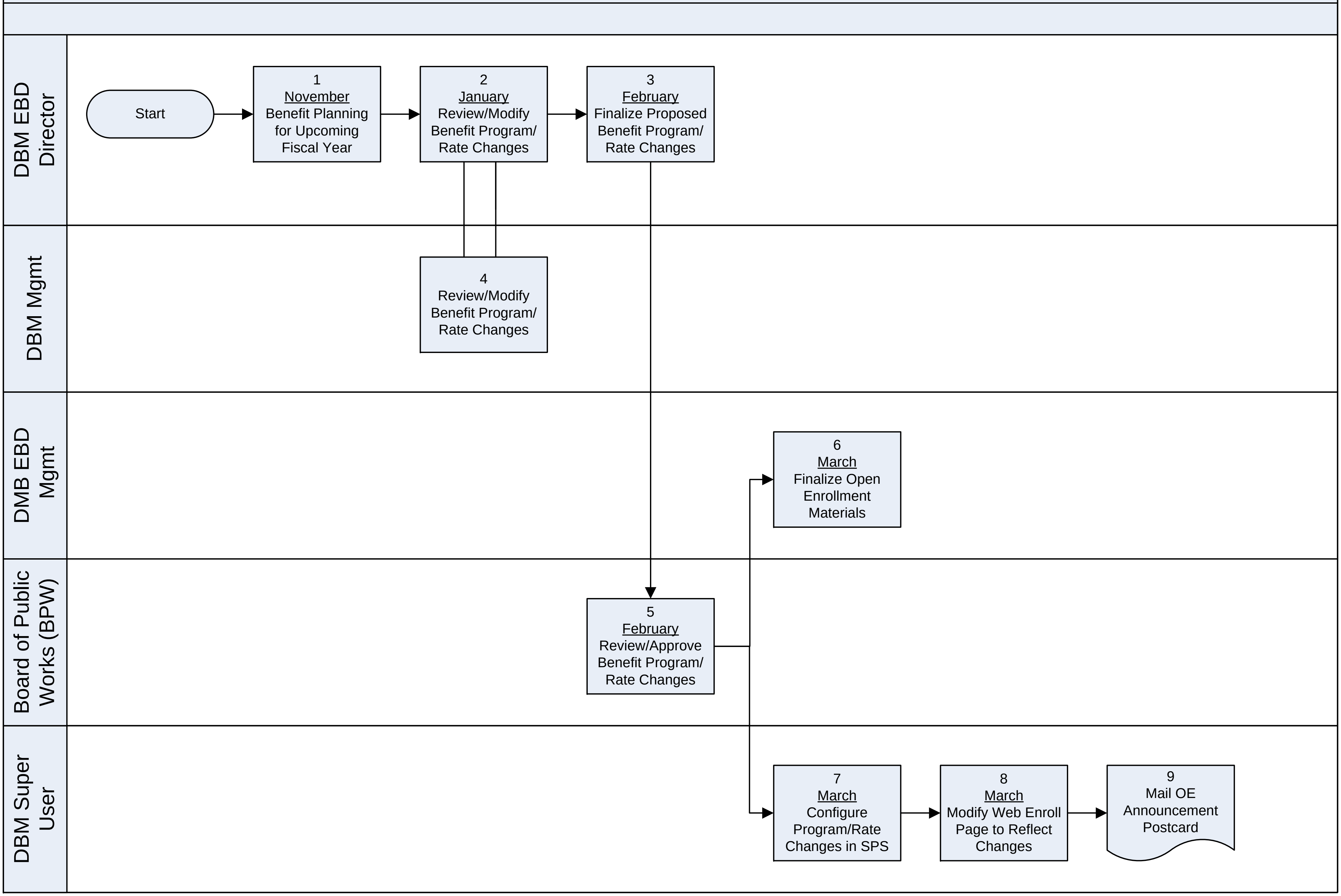
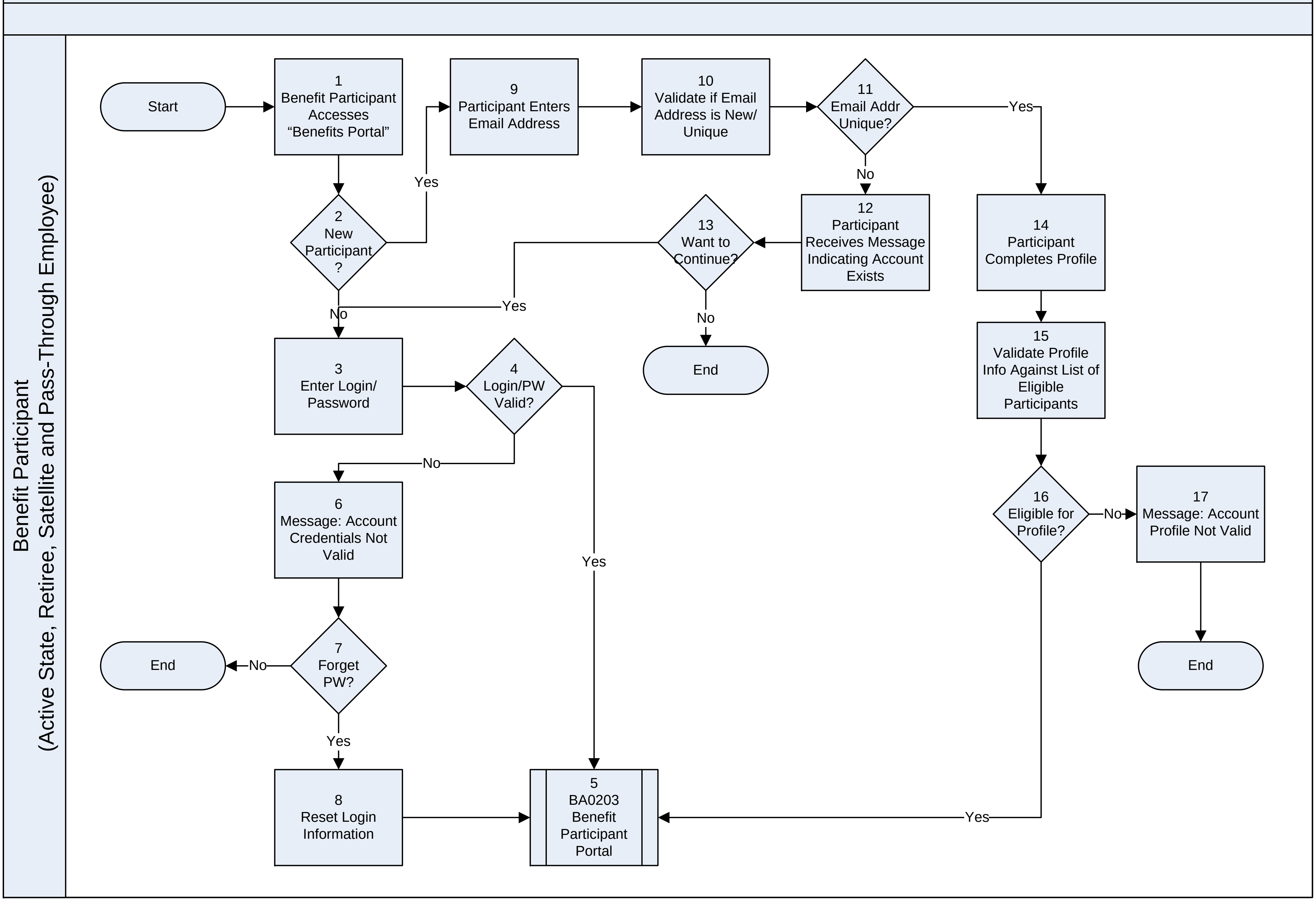
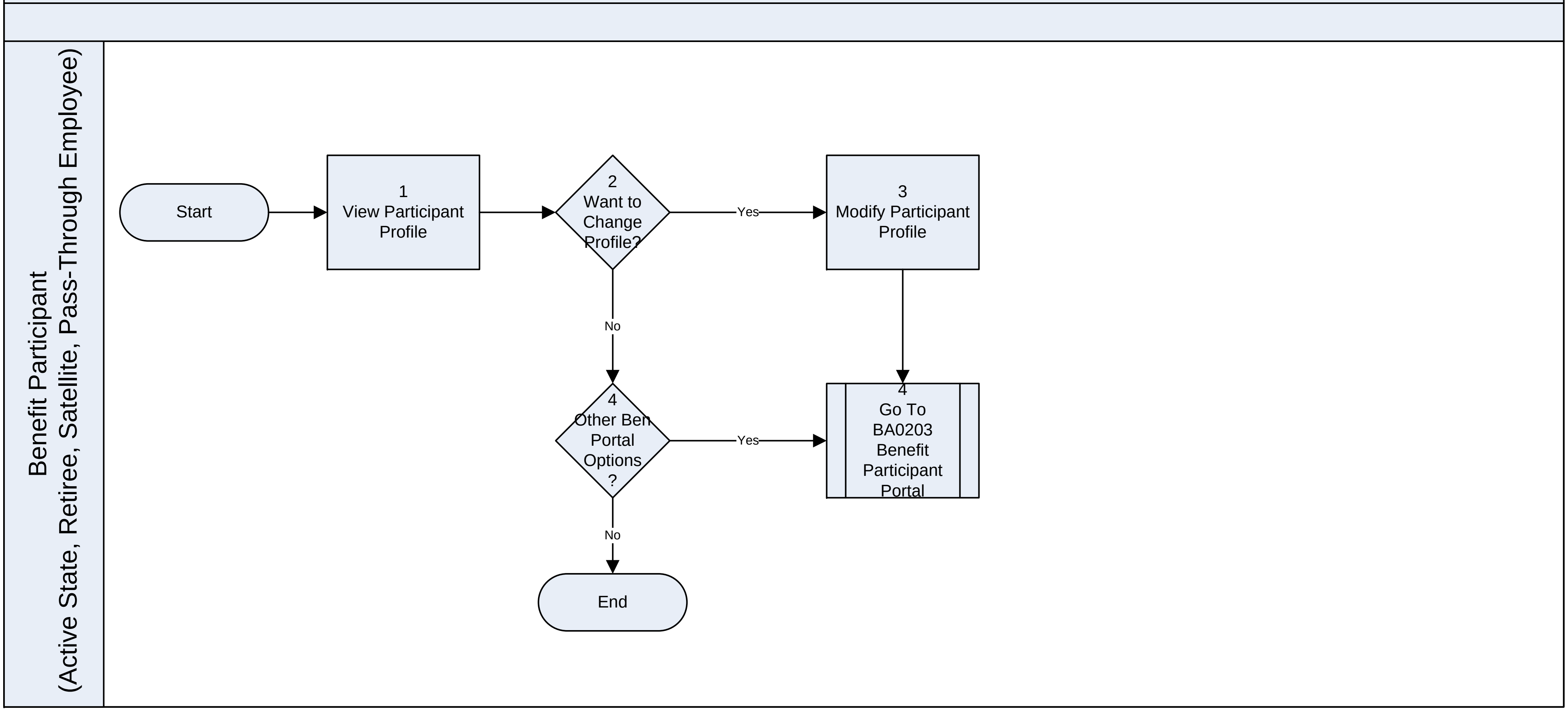
BA0101 – Benefits Administration for Open Enrollment


DBM EBD Director
DBM Mgmt
DMB EBD Mgmt
Board of Public Works (BPW)
DBM Super User
Start
1 November Benefit Planning for Upcoming Fiscal Year
2 January Review/Modify Benefit Program/ Rate Changes
3 February Finalize Proposed Benefit Program/ Rate Changes
4 Review/Modify Benefit Program/ Rate Changes
5 February Review/Approve Benefit Program/ Rate Changes
6 March Finalize Open Enrollment Materials
7 March Configure Program/Rate Changes in SPS
8 March Modify Web Enroll Page to Reflect Changes
9 Mail OE Announcement Postcard

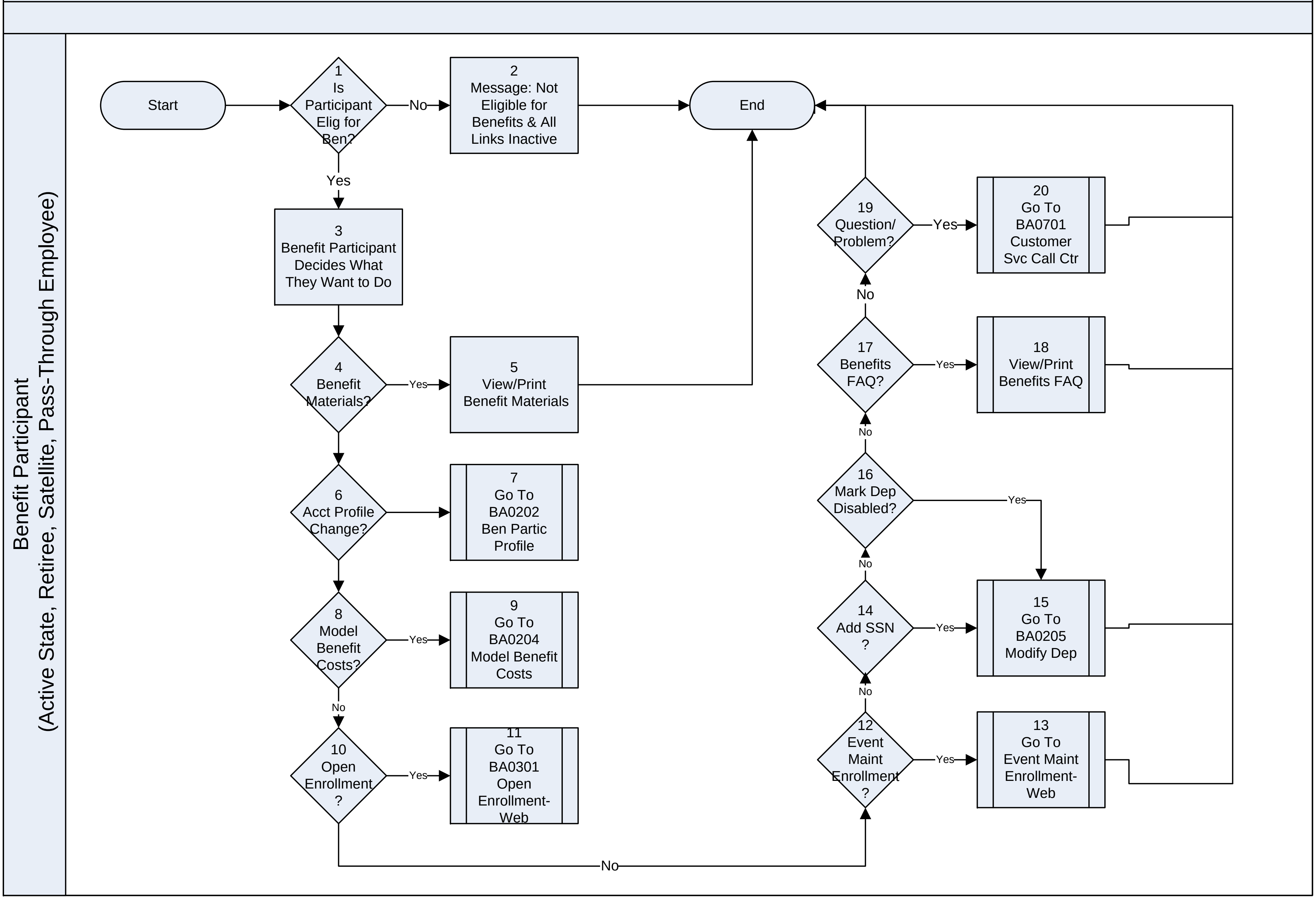
BA0201 – Benefit Participant Account


Benefit Participant
(Active State, Retiree, Satellite and Pass-Through Employee)
Start
1
Benefit Participant Accesses “Benefits Portal”
2
New Participant ?
Yes
No
9
Participant Enters Email Address
10
Validate if Email Address is New/ Unique
11
Email Addr Unique?
Yes
No
12
Participant Receives Message Indicating Account Exists
13
Want to Continue?
Yes
No
End
14
Participant Completes Profile
15
Validate Profile Info Against List of Eligible Participants
16
Eligible for Profile?
No
Yes
17
Message: Account Profile Not Valid
End
3
Enter Login/ Password
4
Login/PW Valid?
No
Yes
6
Message: Account Credentials Not Valid
7
Forget PW?
No
Yes
End
8
Reset Login Information
5
BA0203 Benefit Participant Portal

BA0202 – Benefit Participant Profile

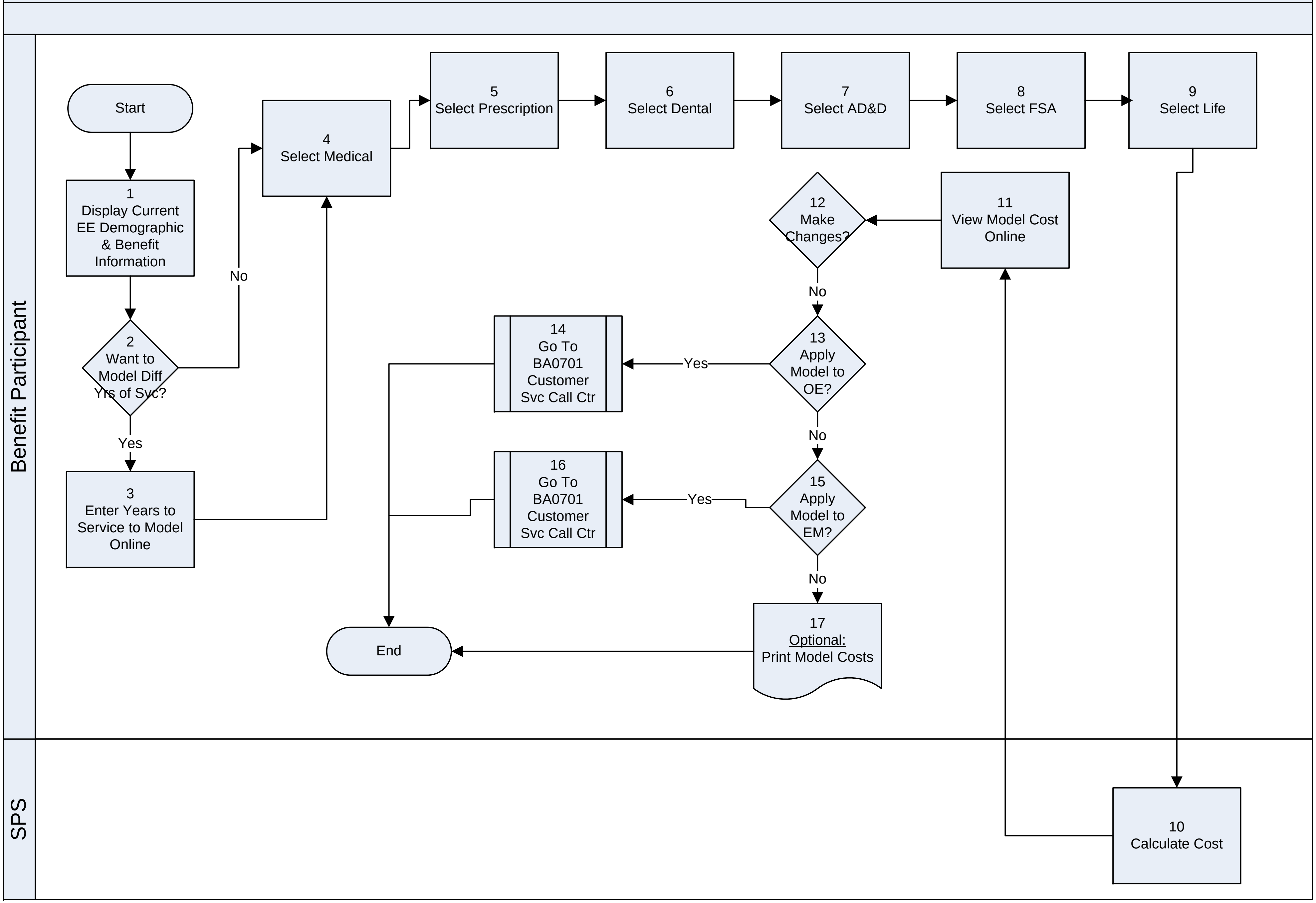

Benefit Participant
(Active State, Retiree, Satellite, Pass-Through Employee)
Start
1
View Participant Profile
2
Want to Change Profile?
Yes
3
Modify Participant Profile
No
4
Other Ben Portal Options ?
Yes
4
Go To BA0203 Benefit Participant Portal
No
End

BA0203 – Benefit Participant Portal

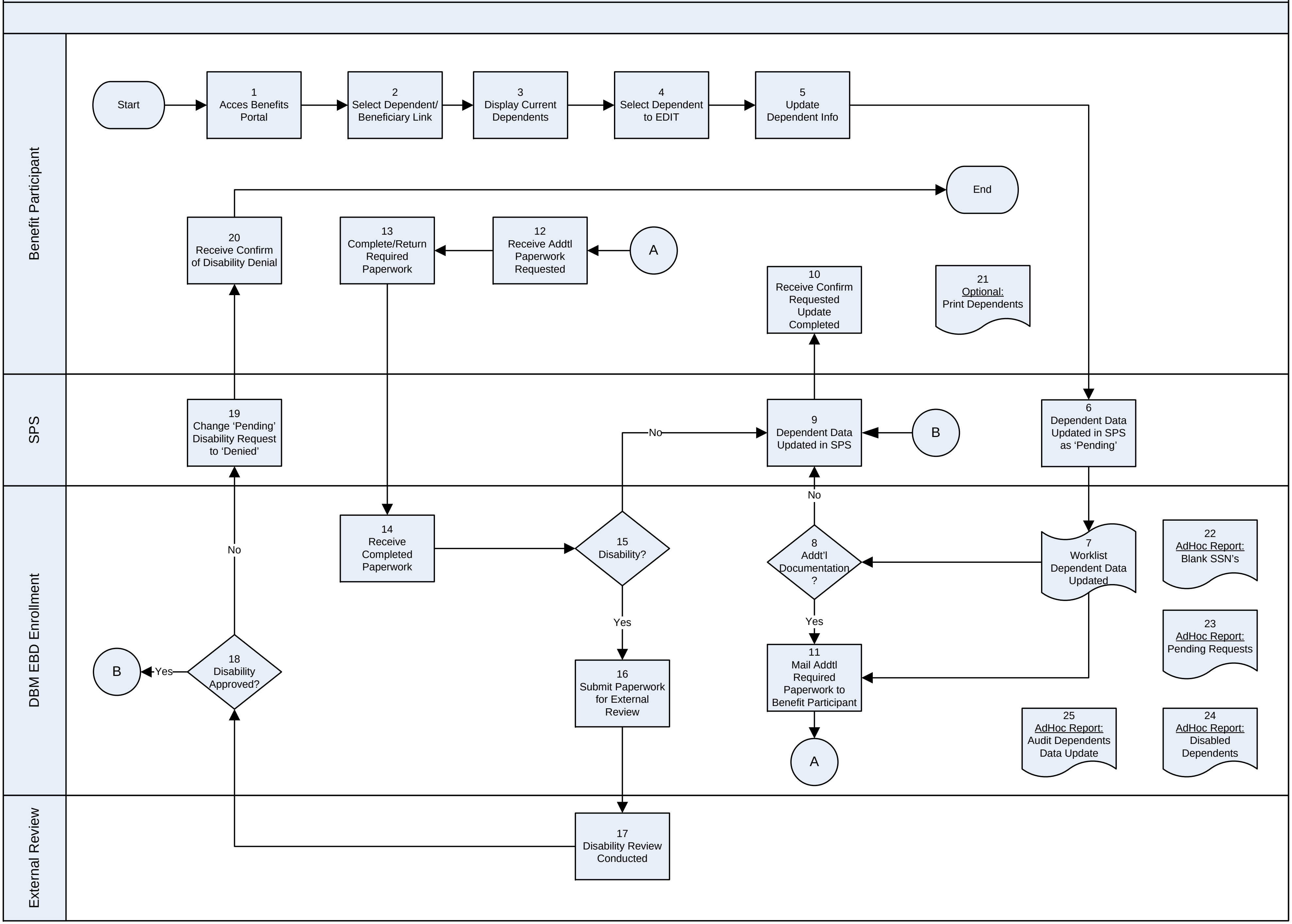

Benefit Participant
(Active State, Retiree, Satellite, Pass-Through Employee)
Start
1 Is Participant Elig for Ben?
No
2 Message: Not Eligible for Benefits & All Links Inactive
End
Yes
3 Benefit Participant Decides What They Want to Do
4 Benefit Materials?
Yes
5 View/Print Benefit Materials
6 Acct Profile Change?
7 Go To BA0202 Ben Partic Profile
8 Model Benefit Costs?
Yes
9 Go To BA0204 Model Benefit Costs
No
10 Open Enrollment ?
Yes
11 Go To BA0301 Open Enrollment-Web
No
12 Event Maint Enrollment ?
Yes
13 Go To Event Maint Enrollment-Web
No
14 Add SSN ?
Yes
15 Go To BA0205 Modify Dep
No
16 Mark Dep Disabled?
Yes
No
17 Benefits FAQ?
Yes
18 View/Print Benefits FAQ
No
19 Question/ Problem?
Yes
20 Go To BA0701 Customer Svc Call Ctr

BA0204 – Model Benefit Costs

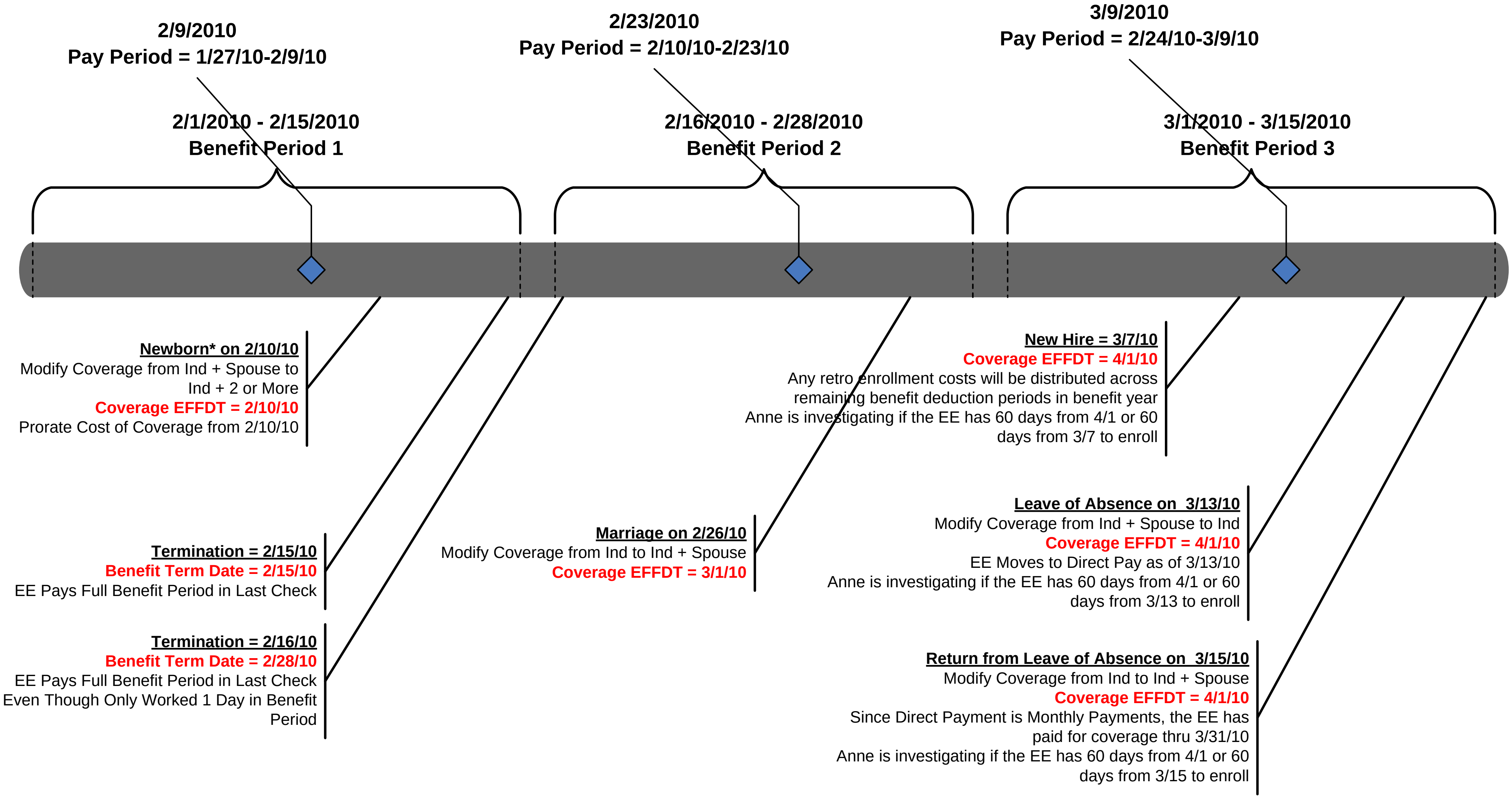
(This feature will not be available for Satellite participants since State does not track employee benefit costs for these Agencies)


Benefit Participant
SPS
Start
1 Display Current EE Demographic & Benefit Information
2 Want to Model Diff Yrs of Svc?
No
Yes
3 Enter Years to Service to Model Online
4 Select Medical
5 Select Prescription
6 Select Dental
7 Select AD&D
8 Select FSA
9 Select Life
10 Calculate Cost
11 View Model Cost Online
12 Make Changes?
No
13 Apply Model to OE?
Yes
14 Go To BA0701 Customer Svc Call Ctr
No
15 Apply Model to EM?
Yes
16 Go To BA0701 Customer Svc Call Ctr
No
17 Optional: Print Model Costs
End

BA0205 – Modify Dependent


Benefit Participant
SPS
DBM EBD Enrollment
External Review
Start
1 Acces Benefits Portal
2 Select Dependent/ Beneficiary Link
3 Display Current Dependents
4 Select Dependent to EDIT
5 Update Dependent Info
End
20 Receive Confirm of Disability Denial
13 Complete/Return Required Paperwork
12 Receive Addtl Paperwork Requested
A
10 Receive Confirm Requested Update Completed
21 Optional: Print Dependents
19 Change 'Pending' Disability Request to 'Denied'
No
9 Dependent Data Updated in SPS
B
6 Dependent Data Updated in SPS as 'Pending'
No
14 Receive Completed Paperwork
15 Disability?
8 Addt'l Documentation ?
7 Worklist Dependent Data Updated
22 AdHoc Report: Blank SSN's
No
Yes
Yes
23 AdHoc Report: Pending Requests
B
Yes
18 Disability Approved?
16 Submit Paperwork for External Review
11 Mail Addtl Required Paperwork to Benefit Participant
A
25 AdHoc Report: Audit Dependents Data Update
24 AdHoc Report: Disabled Dependents
17 Disability Review Conducted

State of Maryland – SPS Project
Benefits Administration Future State Process Design
Event Date vs Effective Date of Coverage



2/9/2010
Pay Period = 1/27/10-2/9/10

2/23/2010
Pay Period = 2/10/10-2/23/10

3/9/2010
Pay Period = 2/24/10-3/9/10

2/1/2010 - 2/15/2010
Benefit Period 1

2/16/2010 - 2/28/2010
Benefit Period 2

3/1/2010 - 3/15/2010
Benefit Period 3

Newborn* on 2/10/10
Modify Coverage from Ind + Spouse to Ind + 2 or More
Coverage EFFDT = 2/10/10
Prorate Cost of Coverage from 2/10/10

Termination = 2/15/10
Benefit Term Date = 2/15/10
EE Pays Full Benefit Period in Last Check

Termination = 2/16/10
Benefit Term Date = 2/28/10
EE Pays Full Benefit Period in Last Check Even Though Only Worked 1 Day in Benefit Period

Marriage on 2/26/10
Modify Coverage from Ind to Ind + Spouse
Coverage EFFDT = 3/1/10

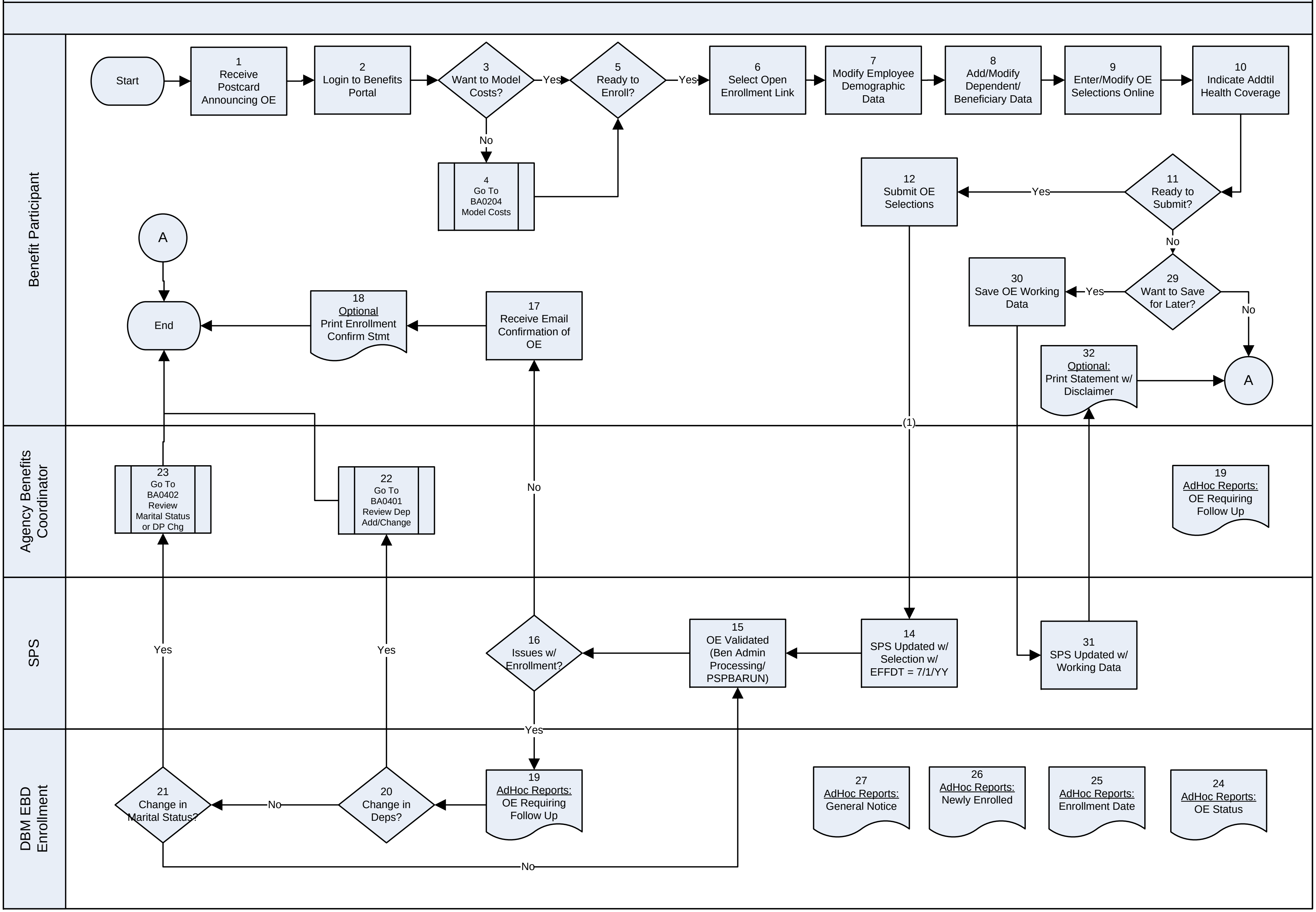
New Hire = 3/7/10
Coverage EFFDT = 4/1/10
Any retro enrollment costs will be distributed across remaining benefit deduction periods in benefit year
Anne is investigating if the EE has 60 days from 4/1 or 60 days from 3/7 to enroll

Leave of Absence on 3/13/10
Modify Coverage from Ind + Spouse to Ind
Coverage EFFDT = 4/1/10
EE Moves to Direct Pay as of 3/13/10
Anne is investigating if the EE has 60 days from 4/1 or 60 days from 3/13 to enroll

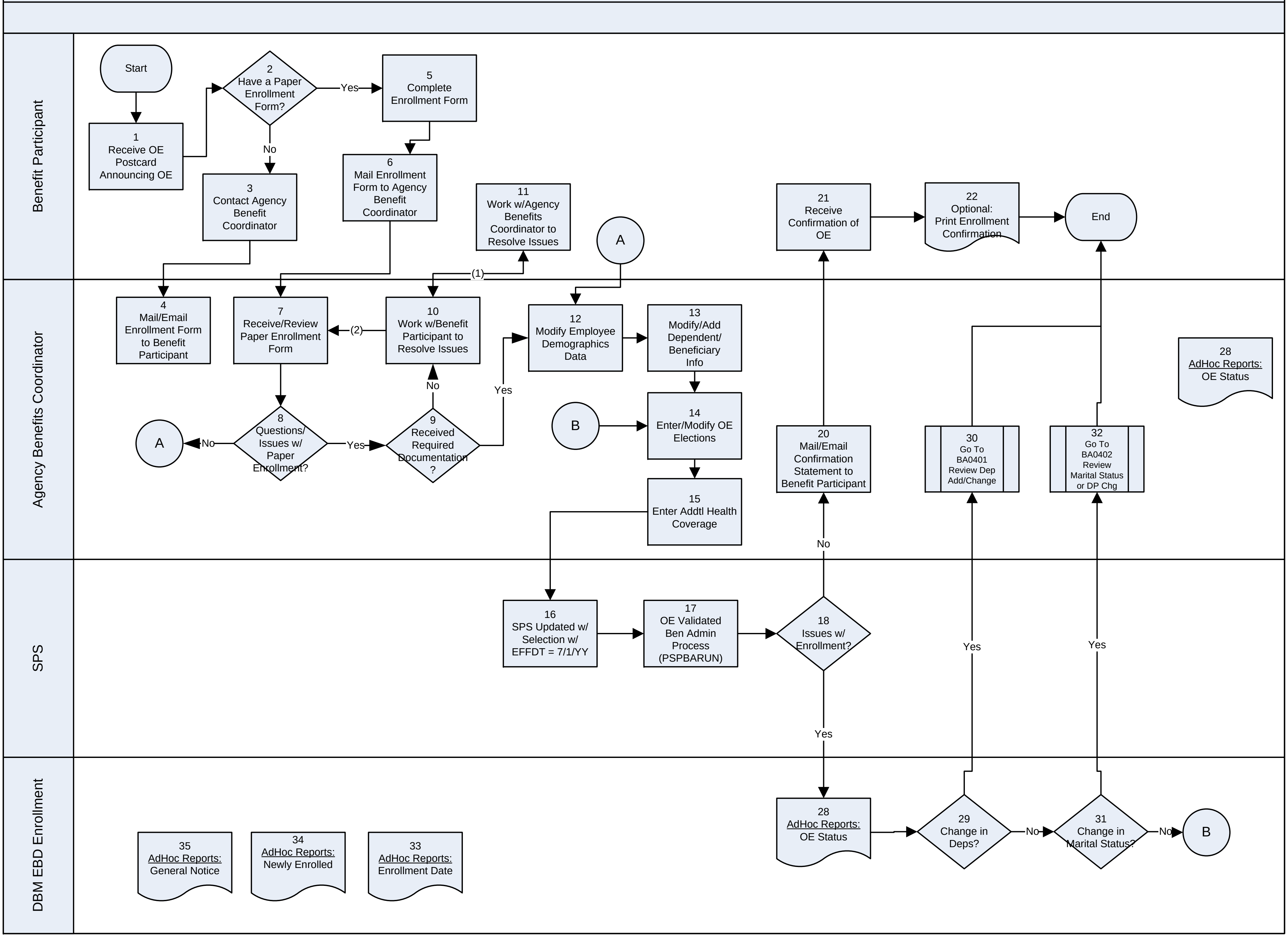
Return from Leave of Absence on 3/15/10
Modify Coverage from Ind to Ind + Spouse
Coverage EFFDT = 4/1/10
Since Direct Payment is Monthly Payments, the EE has paid for coverage thru 3/31/10
Anne is investigating if the EE has 60 days from 4/1 or 60 days from 3/15 to enroll

* Adoptions will follow the same coverage rule; all other dependent additions will be eligible for coverage on the 1st of the month following the event date

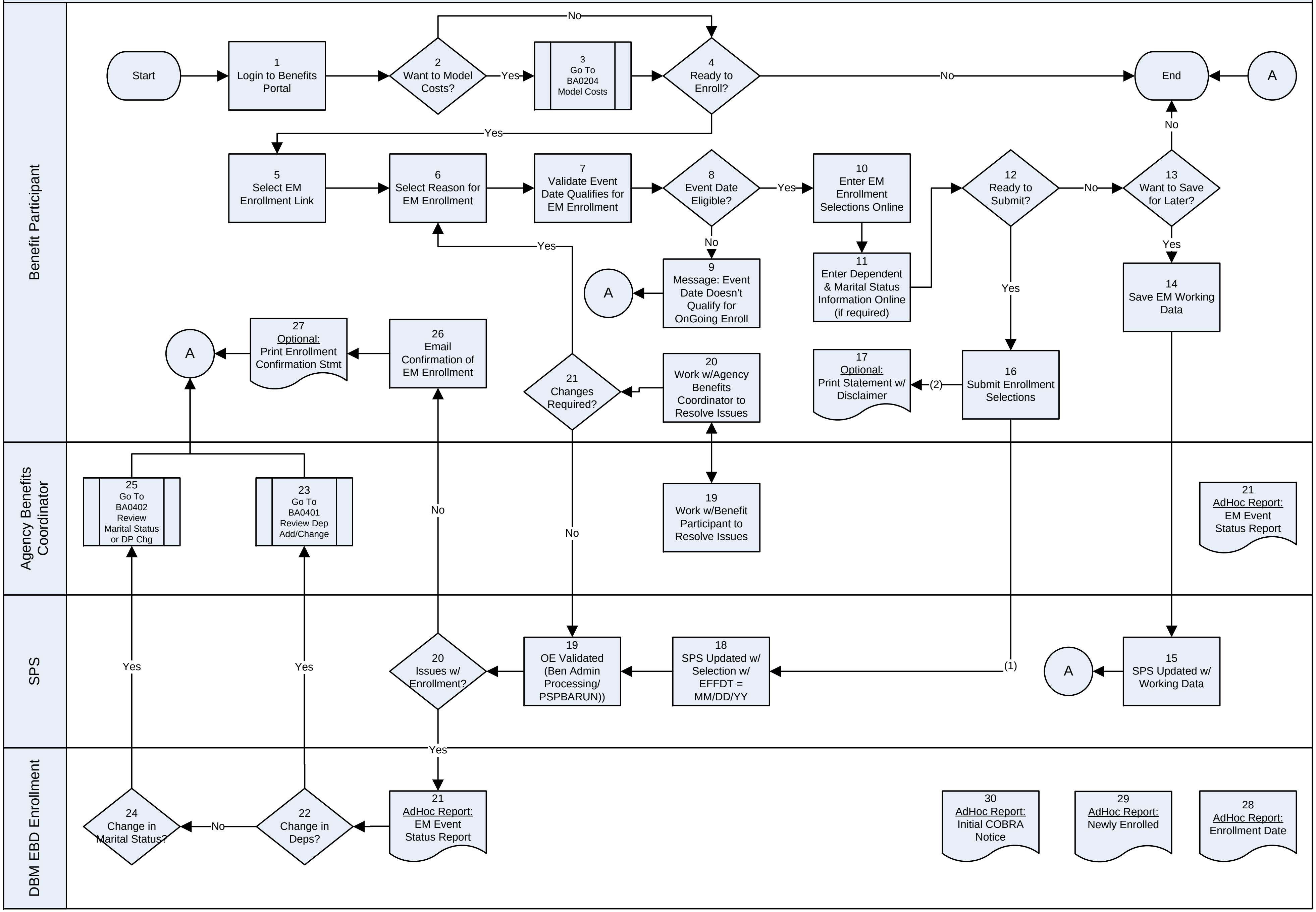
BA0301 – Open Enrollment - Web


Benefit Participant
Agency Benefits Coordinator
SPS
DBM EBD Enrollment
Start
1 Receive Postcard Announcing OE
2 Login to Benefits Portal
3 Want to Model Costs?
Yes
No
4 Go To BA0204 Model Costs
5 Ready to Enroll?
Yes
6 Select Open Enrollment Link
7 Modify Employee Demographic Data
8 Add/Modify Dependent/ Beneficiary Data
9 Enter/Modify OE Selections Online
10 Indicate Addtil Health Coverage
11 Ready to Submit?
Yes
No
12 Submit OE Selections
29 Want to Save for Later?
Yes
No
30 Save OE Working Data
32 Optional: Print Statement w/ Disclaimer
A
A
End
18 Optional Print Enrollment Confirm Stmt
17 Receive Email Confirmation of OE
(1)
No
23 Go To BA0402 Review Marital Status or DP Chg
22 Go To BA0401 Review Dep Add/Change
19 AdHoc Reports: OE Requiring Follow Up
14 SPS Updated w/ Selection w/ EFFDT = 7/1/YY
15 OE Validated (Ben Admin Processing/ PSPBARUN)
16 Issues w/ Enrollment?
31 SPS Updated w/ Working Data
Yes
Yes
Yes
19 AdHoc Reports: OE Requiring Follow Up
20 Change in Deps?
No
21 Change in Marital Status?
No
27 AdHoc Reports: General Notice
26 AdHoc Reports: Newly Enrolled
25 AdHoc Reports: Enrollment Date
24 AdHoc Reports: OE Status

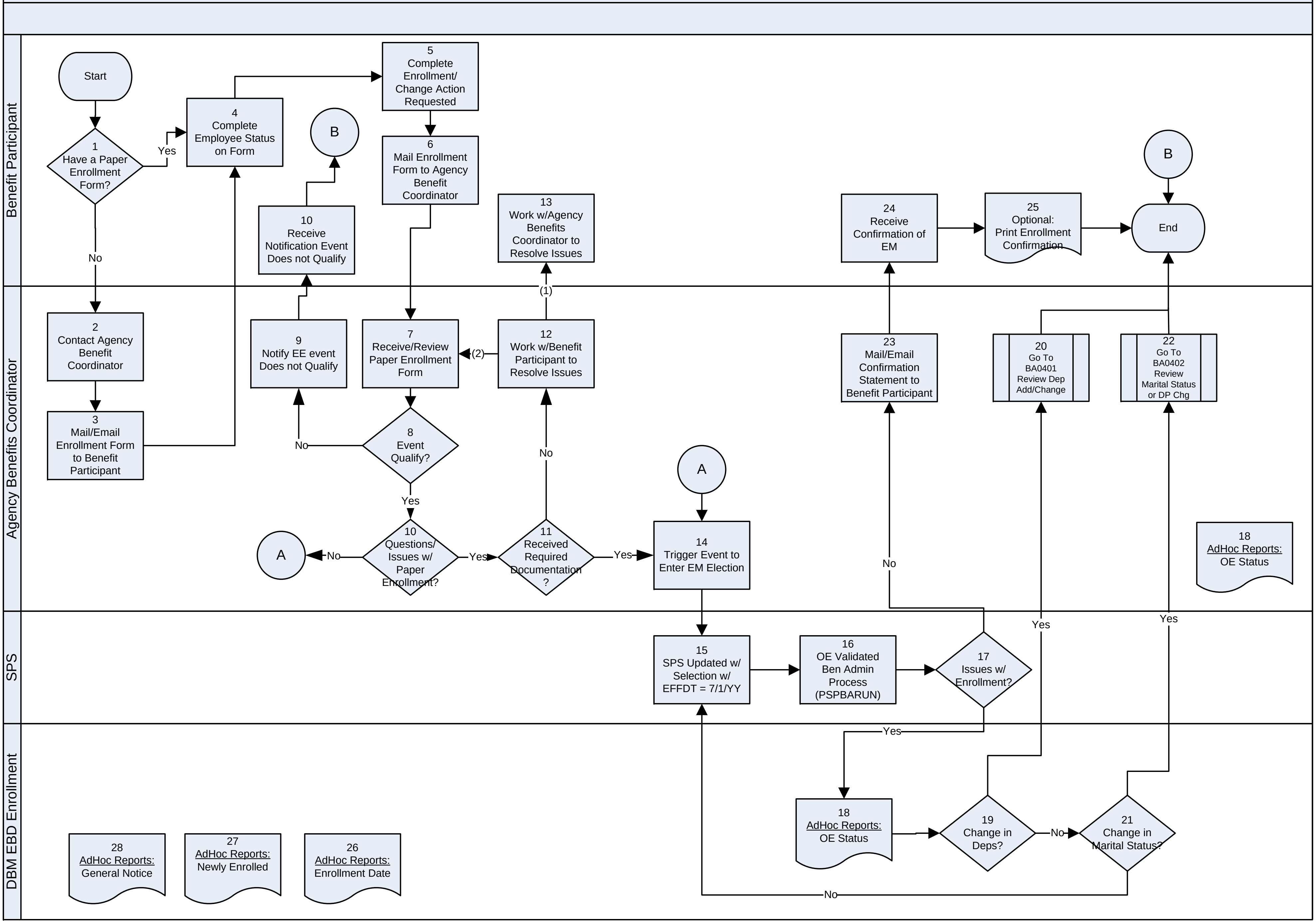
BA0302 – Open Enrollment – Paper Enrollment


Benefit Participant
Agency Benefits Coordinator
SPS
DBM EBD Enrollment
Start
1 Receive OE Postcard Announcing OE
2 Have a Paper Enrollment Form?
Yes
No
5 Complete Enrollment Form
3 Contact Agency Benefit Coordinator
6 Mail Enrollment Form to Agency Benefit Coordinator
11 Work w/Agency Benefits Coordinator to Resolve Issues
A
21 Receive Confirmation of OE
22 Optional: Print Enrollment Confirmation
End
(1)
4 Mail/Email Enrollment Form to Benefit Participant
7 Receive/Review Paper Enrollment Form
(2)
10 Work w/Benefit Participant to Resolve Issues
12 Modify Employee Demographics Data
13 Modify/Add Dependent/ Beneficiary Info
28 AdHoc Reports: OE Status
No
Yes
A
No
8 Questions/ Issues w/ Paper Enrollment?
Yes
9 Received Required Documentation ?
B
14 Enter/Modify OE Elections
20 Mail/Email Confirmation Statement to Benefit Participant
30 Go To BA0401 Review Dep Add/Change
32 Go To BA0402 Review Marital Status or DP Chg
15 Enter Addtl Health Coverage
No
16 SPS Updated w/ Selection w/ EFFDT = 7/1/YY
17 OE Validated Ben Admin Process (PSPBARUN)
18 Issues w/ Enrollment?
Yes
Yes
Yes
35 AdHoc Reports: General Notice
34 AdHoc Reports: Newly Enrolled
33 AdHoc Reports: Enrollment Date
28 AdHoc Reports: OE Status
29 Change in Deps?
No
31 Change in Marital Status?
No
B

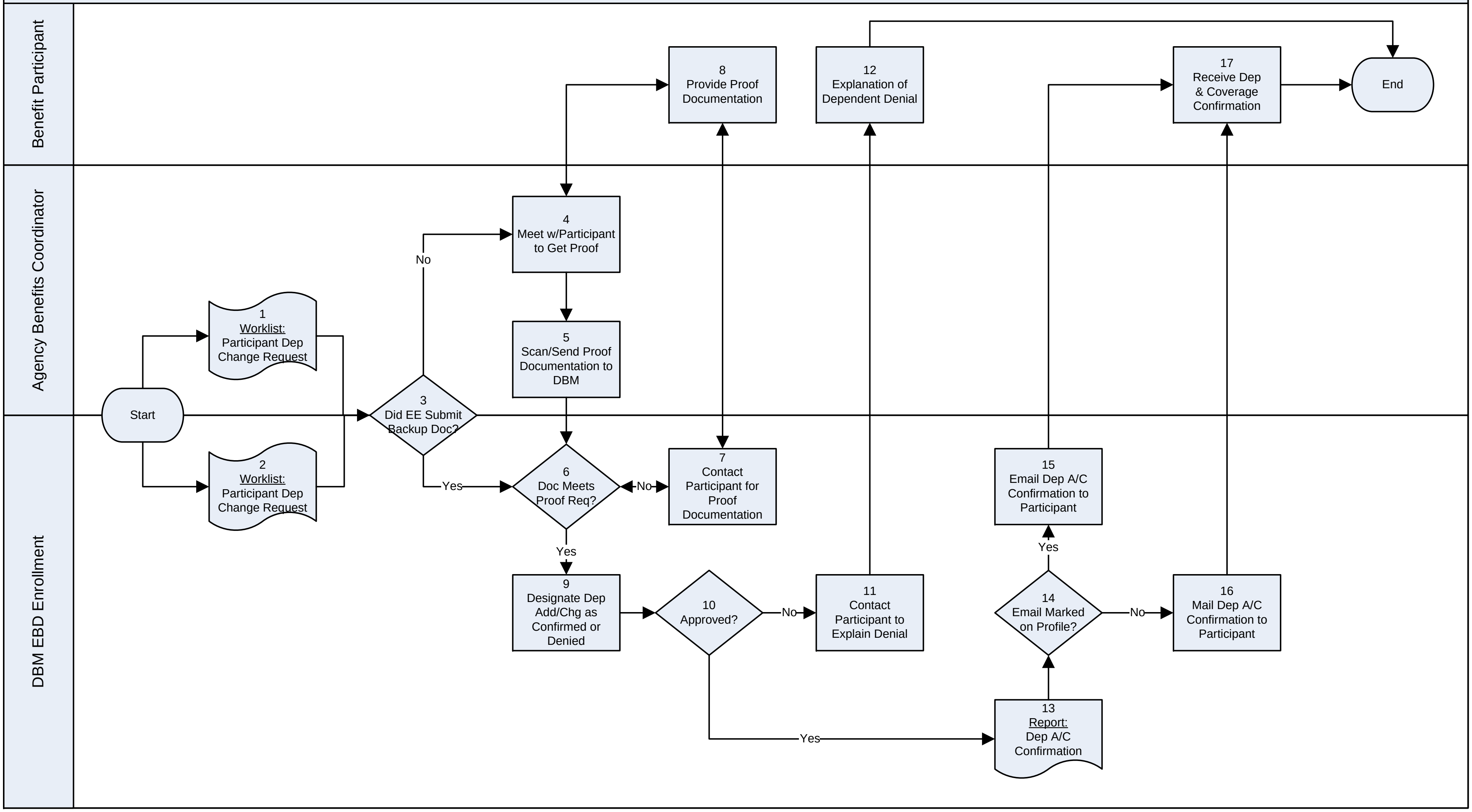
BA0303 – Event Maintenance (EM) Enrollment - Web


Benefit Participant
Agency Benefits Coordinator
SPS
DBM EBD Enrollment
Start
1 Login to Benefits Portal
2 Want to Model Costs?
Yes
No
3 Go To BA0204 Model Costs
4 Ready to Enroll?
No
End
A
Yes
5 Select EM Enrollment Link
6 Select Reason for EM Enrollment
7 Validate Event Date Qualifies for EM Enrollment
8 Event Date Eligible?
Yes
No
9 Message: Event Date Doesn't Qualify for OnGoing Enroll
A
10 Enter EM Enrollment Selections Online
11 Enter Dependent & Marital Status Information Online (if required)
12 Ready to Submit?
No
Yes
13 Want to Save for Later?
No
Yes
14 Save EM Working Data
A
27 Optional: Print Enrollment Confirmation Stmt
26 Email Confirmation of EM Enrollment
Yes
21 Changes Required?
20 Work w/Agency Benefits Coordinator to Resolve Issues
17 Optional: Print Statement w/ Disclaimer
(2)
16 Submit Enrollment Selections
25 Go To BA0402 Review Marital Status or DP Chg
23 Go To BA0401 Review Dep Add/Change
No
No
19 Work w/Benefit Participant to Resolve Issues
21 AdHoc Report: EM Event Status Report
Yes
Yes
20 Issues w/ Enrollment?
19 OE Validated (Ben Admin Processing/ PSPBARUN))
18 SPS Updated w/ Selection w/ EFFDT = MM/DD/YY
(1)
A
15 SPS Updated w/ Working Data
Yes
24 Change in Marital Status?
No
22 Change in Deps?
21 AdHoc Report: EM Event Status Report
30 AdHoc Report: Initial COBRA Notice
29 AdHoc Report: Newly Enrolled
28 AdHoc Report: Enrollment Date

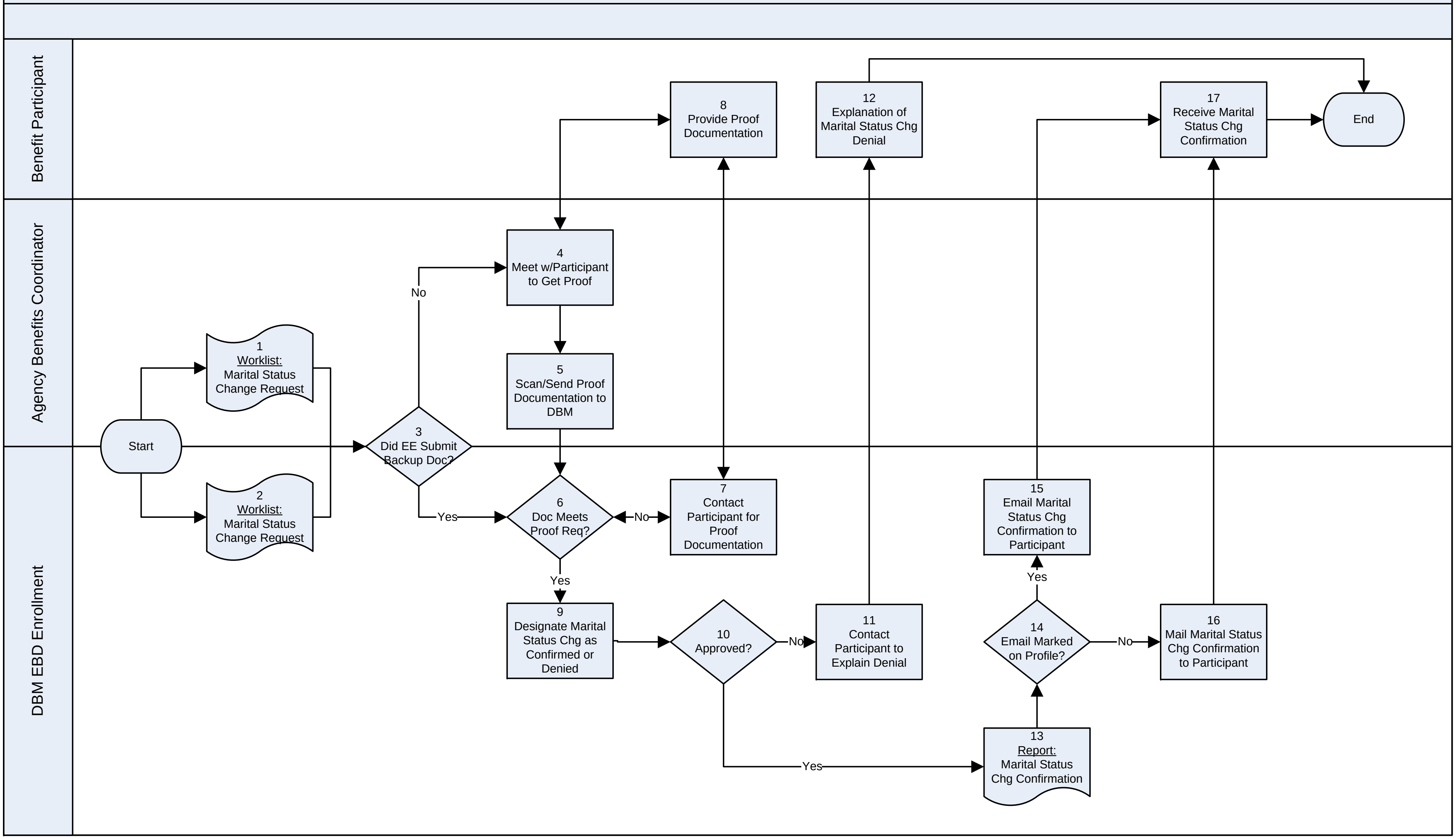
BA0304 – Event Maintenance (EM) Enrollment – Paper


Benefit Participant
Agency Benefits Coordinator
SPS
DBM EBD Enrollment
Start
1 Have a Paper Enrollment Form?
Yes
No
2 Contact Agency Benefit Coordinator
3 Mail/Email Enrollment Form to Benefit Participant
4 Complete Employee Status on Form
5 Complete Enrollment/ Change Action Requested
6 Mail Enrollment Form to Agency Benefit Coordinator
7 Receive/Review Paper Enrollment Form
(2)
8 Event Qualify?
No
Yes
9 Notify EE event Does not Qualify
10 Receive Notification Event Does not Qualify
B
10 Questions/ Issues w/ Paper Enrollment?
No
A
Yes
11 Received Required Documentation ?
No
Yes
12 Work w/Benefit Participant to Resolve Issues
(1)
13 Work w/Agency Benefits Coordinator to Resolve Issues
A
14 Trigger Event to Enter EM Election
15 SPS Updated w/ Selection w/ EFFDT = 7/1/YY
16 OE Validated Ben Admin Process (PSPBARUN)
17 Issues w/ Enrollment?
No
Yes
18 AdHoc Reports: OE Status
19 Change in Deps?
Yes
No
21 Change in Marital Status?
Yes
No
20 Go To BA0401 Review Dep Add/Change
22 Go To BA0402 Review Marital Status or DP Chg
23 Mail/Email Confirmation Statement to Benefit Participant
24 Receive Confirmation of EM
25 Optional: Print Enrollment Confirmation
B
End
18 AdHoc Reports: OE Status
28 AdHoc Reports: General Notice
27 AdHoc Reports: Newly Enrolled
26 AdHoc Reports: Enrollment Date

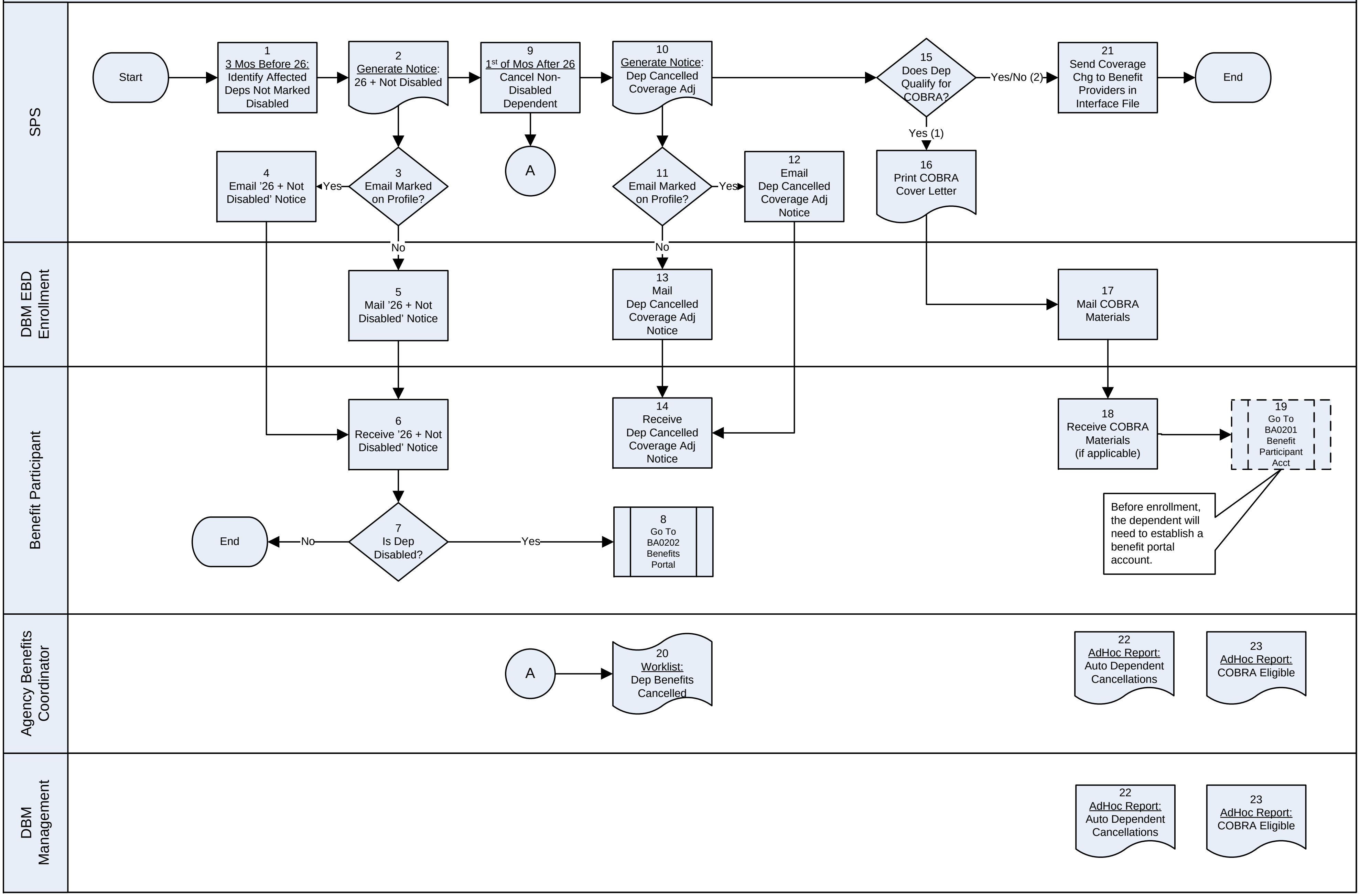
BA0401 – Review Dependent Add/Change/Remove Request


Benefit Participant
Agency Benefits Coordinator
DBM EBD Enrollment
Start
1 Worklist: Participant Dep Change Request
2 Worklist: Participant Dep Change Request
3 Did EE Submit Backup Doc?
No
Yes
4 Meet w/Participant to Get Proof
5 Scan/Send Proof Documentation to DBM
6 Doc Meets Proof Req?
No
Yes
7 Contact Participant for Proof Documentation
8 Provide Proof Documentation
9 Designate Dep Add/Chg as Confirmed or Denied
10 Approved?
No
Yes
11 Contact Participant to Explain Denial
12 Explanation of Dependent Denial
13 Report: Dep A/C Confirmation
14 Email Marked on Profile?
Yes
No
15 Email Dep A/C Confirmation to Participant
16 Mail Dep A/C Confirmation to Participant
17 Receive Dep & Coverage Confirmation
End

BA0402– Review Marital Status Change Request

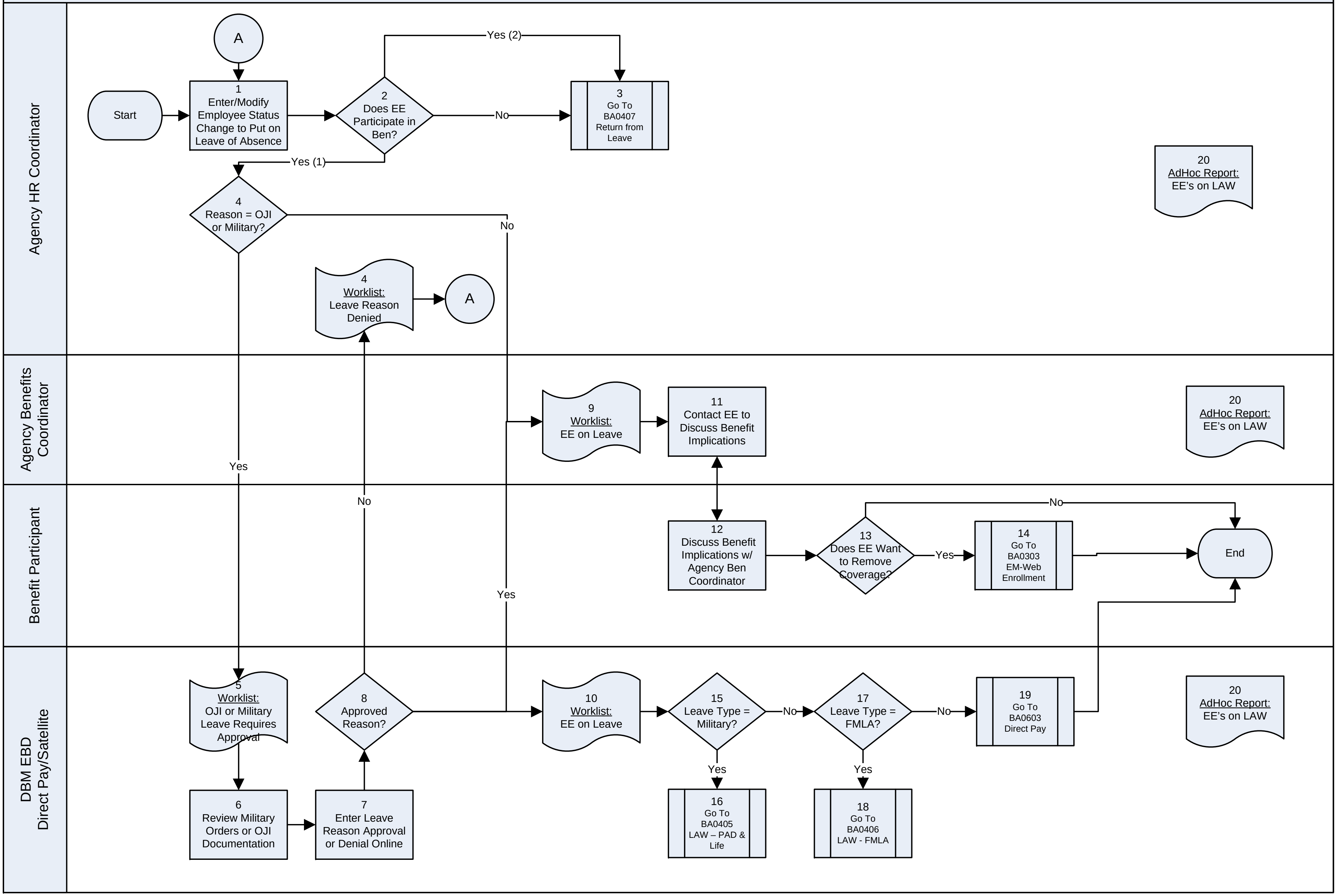

Benefit Participant
Agency Benefits Coordinator
DBM EBD Enrollment
Start
1 Worklist: Marital Status Change Request
2 Worklist: Marital Status Change Request
3 Did EE Submit Backup Doc?
No
Yes
4 Meet w/Participant to Get Proof
5 Scan/Send Proof Documentation to DBM
6 Doc Meets Proof Req?
No
Yes
7 Contact Participant for Proof Documentation
8 Provide Proof Documentation
9 Designate Marital Status Chg as Confirmed or Denied
10 Approved?
No
Yes
11 Contact Participant to Explain Denial
12 Explanation of Marital Status Chg Denial
13 Report: Marital Status Chg Confirmation
14 Email Marked on Profile?
Yes
No
15 Email Marital Status Chg Confirmation to Participant
16 Mail Marital Status Chg Confirmation to Participant
17 Receive Marital Status Chg Confirmation
End

BA0403 – Dependent Turns 26


SPS
DBM EBD Enrollment
Benefit Participant
Agency Benefits Coordinator
DBM Management
Start
1 3 Mos Before 26: Identify Affected Deps Not Marked Disabled
2 Generate Notice: 26 + Not Disabled
9 1st of Mos After 26 Cancel Non-Disabled Dependent
10 Generate Notice: Dep Cancelled Coverage Adj
15 Does Dep Qualify for COBRA?
Yes/No (2)
21 Send Coverage Chg to Benefit Providers in Interface File
End
Yes (1)
4 Email '26 + Not Disabled' Notice
Yes
3 Email Marked on Profile?
A
11 Email Marked on Profile?
Yes
12 Email Dep Cancelled Coverage Adj Notice
16 Print COBRA Cover Letter
No
No
5 Mail '26 + Not Disabled' Notice
13 Mail Dep Cancelled Coverage Adj Notice
17 Mail COBRA Materials
6 Receive '26 + Not Disabled' Notice
14 Receive Dep Cancelled Coverage Adj Notice
18 Receive COBRA Materials (if applicable)
19 Go To BA0201 Benefit Participant Acct
Before enrollment, the dependent will need to establish a benefit portal account.
End
No
7 Is Dep Disabled?
Yes
8 Go To BA0202 Benefits Portal
A
20 Worklist: Dep Benefits Cancelled
22 AdHoc Report: Auto Dependent Cancellations
23 AdHoc Report: COBRA Eligible
22 AdHoc Report: Auto Dependent Cancellations
23 AdHoc Report: COBRA Eligible

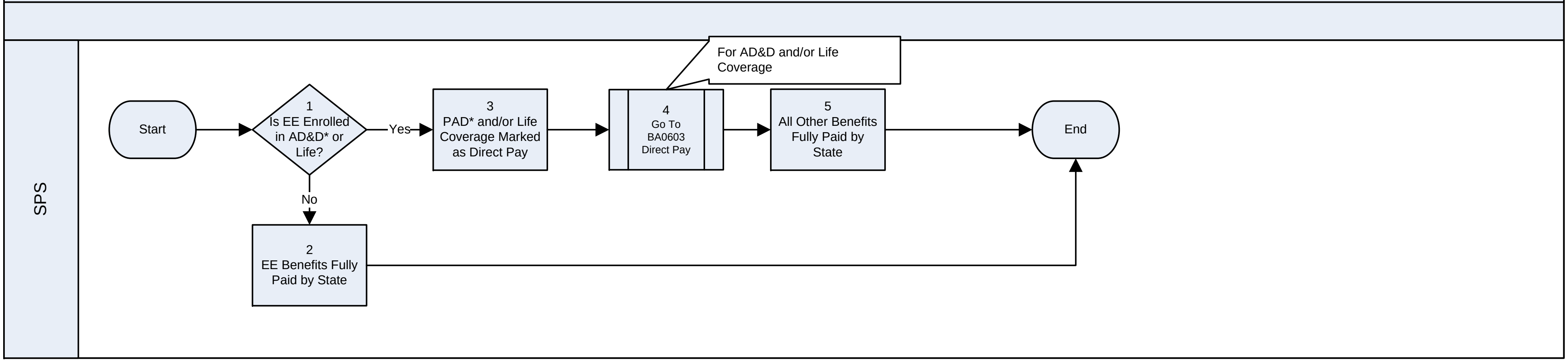
BA0404 – Leave of Absence

(This process would be used to capture Leaves of Absence for SPS Agencies)


Agency HR Coordinator
Agency Benefits Coordinator
Benefit Participant
DBM EBD Direct Pay/Satellite
A
Start
1 Enter/Modify Employee Status Change to Put on Leave of Absence
2 Does EE Participate in Ben?
Yes (2)
No
3 Go To BA0407 Return from Leave
Yes (1)
4 Reason = OJI or Military?
No
4 Worklist: Leave Reason Denied
A
20 AdHoc Report: EE's on LAW
9 Worklist: EE on Leave
11 Contact EE to Discuss Benefit Implications
20 AdHoc Report: EE's on LAW
Yes
No
12 Discuss Benefit Implications w/ Agency Ben Coordinator
13 Does EE Want to Remove Coverage?
No
Yes
14 Go To BA0303 EM-Web Enrollment
End
Yes
5 Worklist: OJI or Military Leave Requires Approval
8 Approved Reason?
10 Worklist: EE on Leave
15 Leave Type = Military?
No
17 Leave Type = FMLA?
No
19 Go To BA0603 Direct Pay
20 AdHoc Report: EE's on LAW
Yes
Yes
6 Review Military Orders or OJI Documentation
7 Enter Leave Reason Approval or Denial Online
16 Go To BA0405 LAW – PAD & Life
18 Go To BA0406 LAW - FMLA

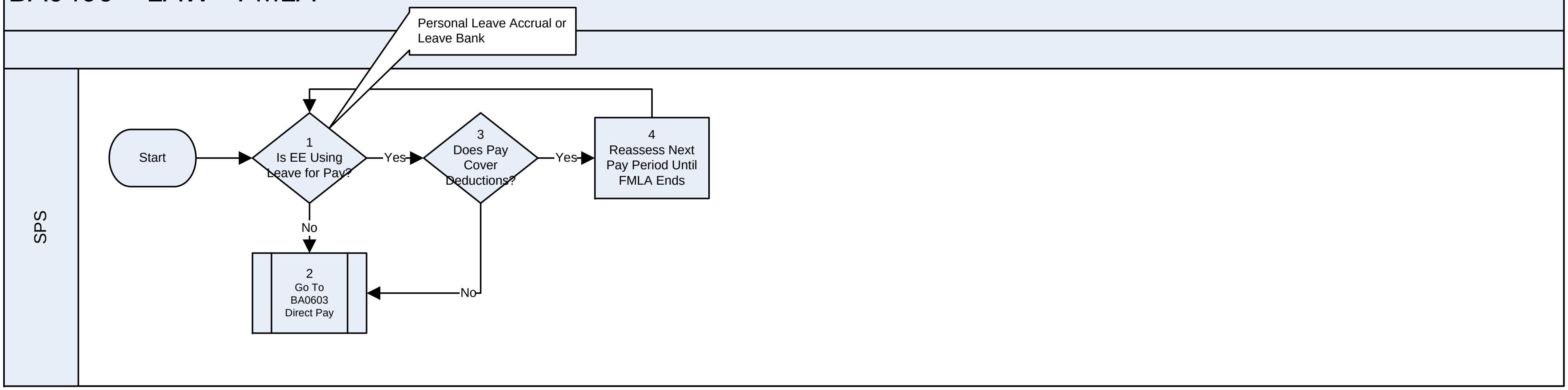
BA0405 – LAW – AD&D & Life Insurance Coverage

(This process would be used to capture Leaves of Absence for SPS Agencies)

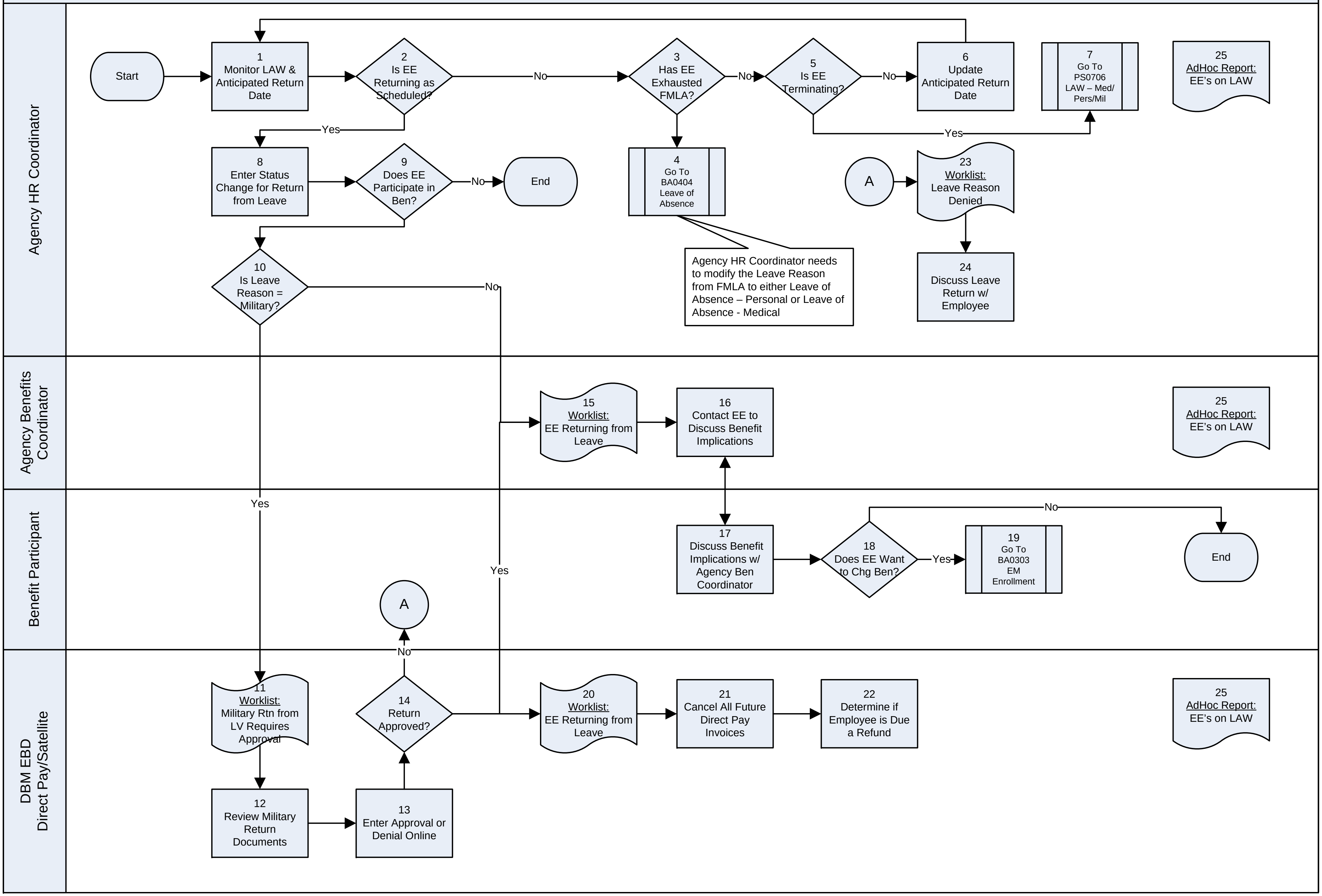

SPS
Start
1
Is EE Enrolled in AD&D* or Life?
Yes
No
2
EE Benefits Fully Paid by State
3
PAD* and/or Life Coverage Marked as Direct Pay
For AD&D and/or Life Coverage
4
Go To BA0603 Direct Pay
5
All Other Benefits Fully Paid by State
End

* AD&D = Accidental Death & Dismemberment Plan

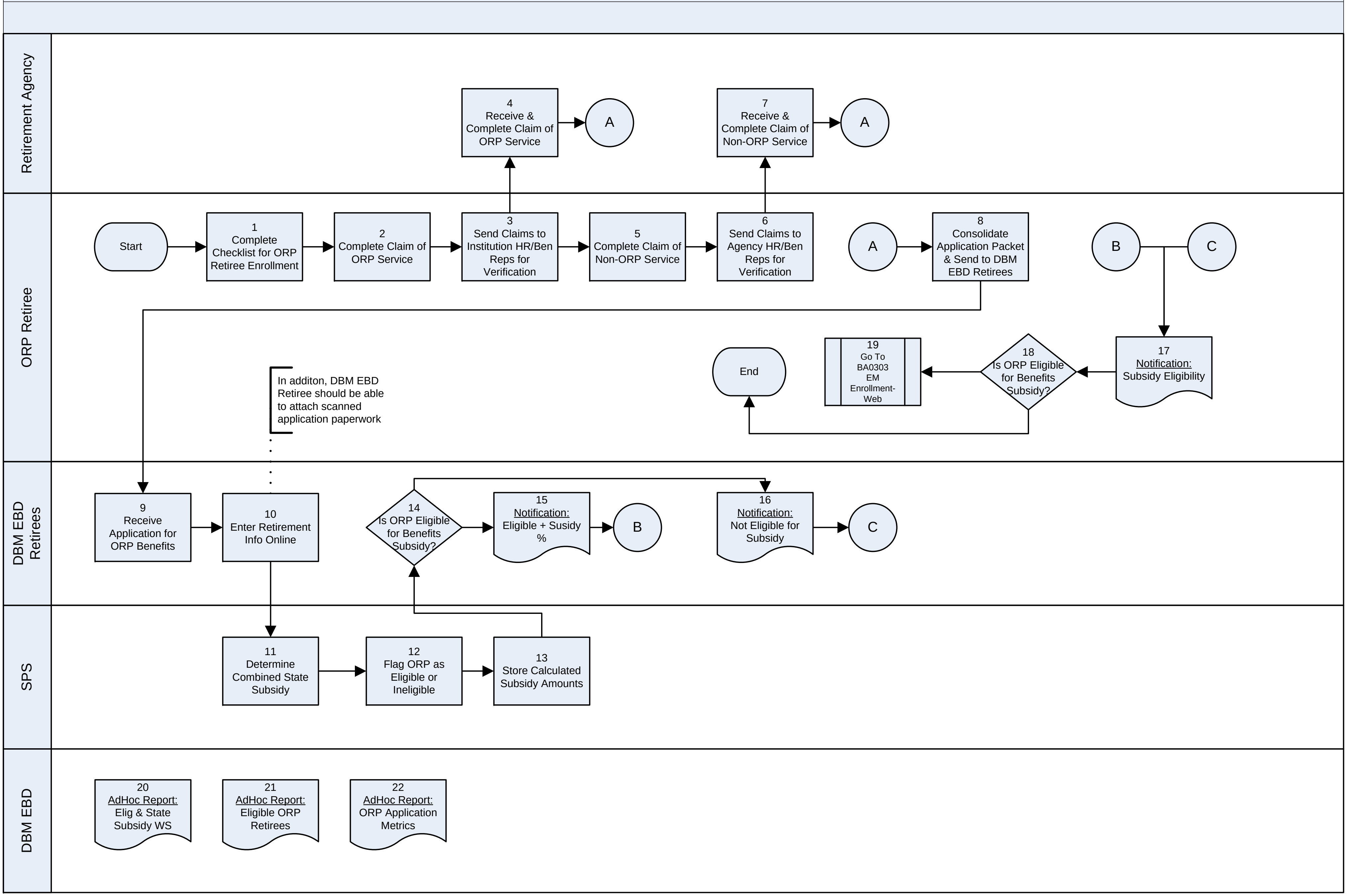
BA0406 – LAW - FMLA


Personal Leave Accrual or Leave Bank
SPS
Start
1
Is EE Using Leave for Pay?
Yes
No
2
Go To BA0603 Direct Pay
3
Does Pay Cover Deductions?
Yes
No
4
Reassess Next Pay Period Until FMLA Ends

BA0407 – Return from Leave of Absence

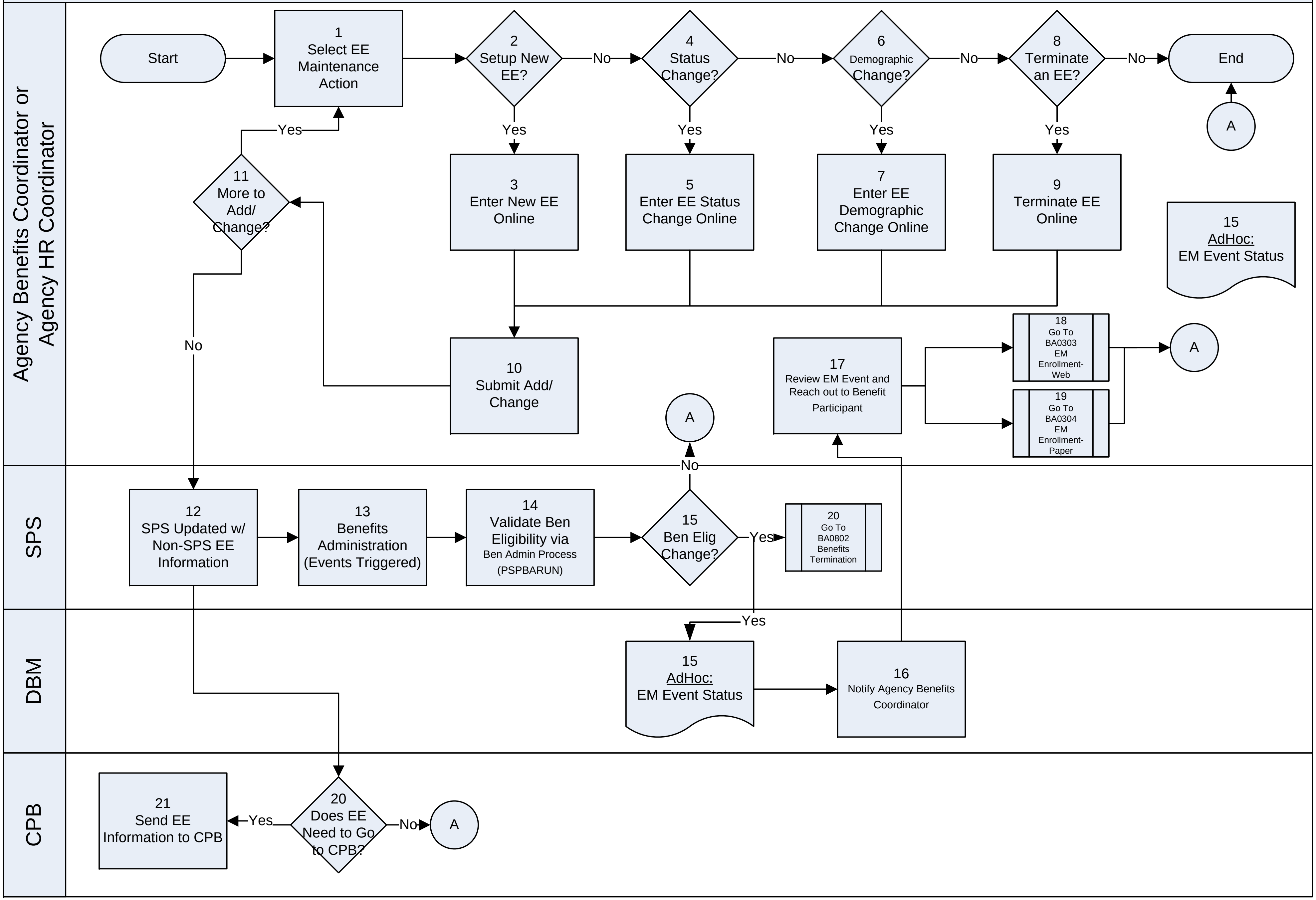

Agency HR Coordinator
Agency Benefits Coordinator
Benefit Participant
DBM EBD Direct Pay/Satellite
Start
1 Monitor LAW & Anticipated Return Date
2 Is EE Returning as Scheduled?
No
3 Has EE Exhausted FMLA?
No
5 Is EE Terminating?
No
6 Update Anticipated Return Date
7 Go To PS0706 LAW – Med/ Pers/Mil
25 AdHoc Report: EE's on LAW
Yes
8 Enter Status Change for Return from Leave
9 Does EE Participate in Ben?
No
End
4 Go To BA0404 Leave of Absence
Yes
A
23 Worklist: Leave Reason Denied
Agency HR Coordinator needs to modify the Leave Reason from FMLA to either Leave of Absence – Personal or Leave of Absence - Medical
10 Is Leave Reason = Military?
No
24 Discuss Leave Return w/ Employee
15 Worklist: EE Returning from Leave
16 Contact EE to Discuss Benefit Implications
25 AdHoc Report: EE's on LAW
Yes
No
17 Discuss Benefit Implications w/ Agency Ben Coordinator
18 Does EE Want to Chg Ben?
Yes
19 Go To BA0303 EM Enrollment
End
Yes
A
No
11 Worklist: Military Rtn from LV Requires Approval
14 Return Approved?
20 Worklist: EE Returning from Leave
21 Cancel All Future Direct Pay Invoices
22 Determine if Employee is Due a Refund
25 AdHoc Report: EE's on LAW
12 Review Military Return Documents
13 Enter Approval or Denial Online

BA0408 – Determine ORP Eligibility

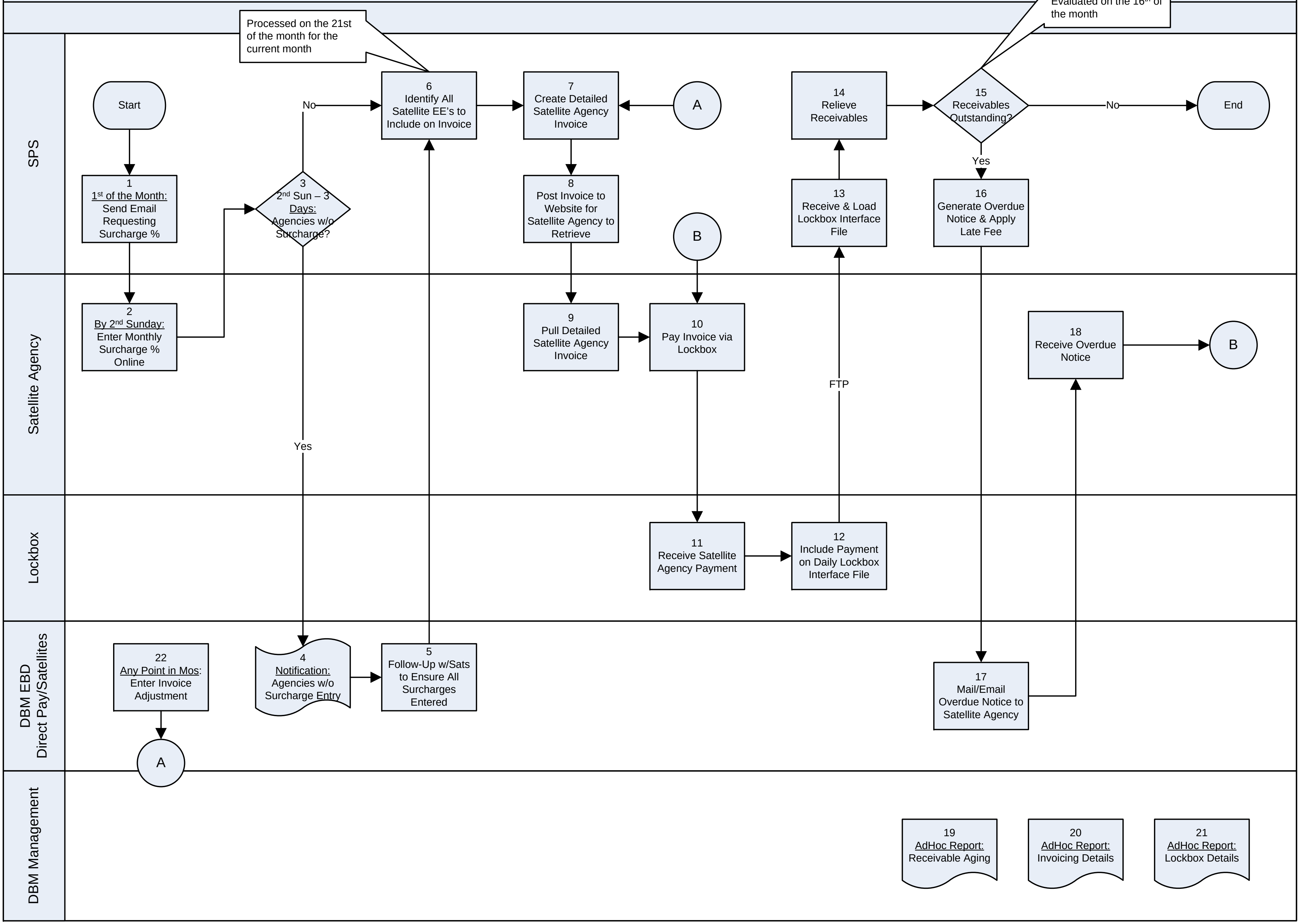

Retirement Agency
ORP Retiree
DBM EBD Retirees
SPS
DBM EBD
4 Receive & Complete Claim of ORP Service
A
7 Receive & Complete Claim of Non-ORP Service
A
Start
1 Complete Checklist for ORP Retiree Enrollment
2 Complete Claim of ORP Service
3 Send Claims to Institution HR/Ben Reps for Verification
5 Complete Claim of Non-ORP Service
6 Send Claims to Agency HR/Ben Reps for Verification
A
8 Consolidate Application Packet & Send to DBM EBD Retirees
B
C
In additon, DBM EBD Retiree should be able to attach scanned application paperwork
End
19 Go To BA0303 EM Enrollment-Web
18 Is ORP Eligible for Benefits Subsidy?
17 Notification: Subsidy Eligibility
9 Receive Application for ORP Benefits
10 Enter Retirement Info Online
14 Is ORP Eligible for Benefits Subsidy?
15 Notification: Eligible + Susidy %
B
16 Notification: Not Eligible for Subsidy
C
11 Determine Combined State Subsidy
12 Flag ORP as Eligible or Ineligible
13 Store Calculated Subsidy Amounts
20 AdHoc Report: Elig & State Subsidy WS
21 AdHoc Report: Eligible ORP Retirees
22 AdHoc Report: ORP Application Metrics

BA0501 – Non-SPS Employee Maintenance

(This process will support the entry/maintenance of Satellite, University System and MDOT employees into SPS for benefits)

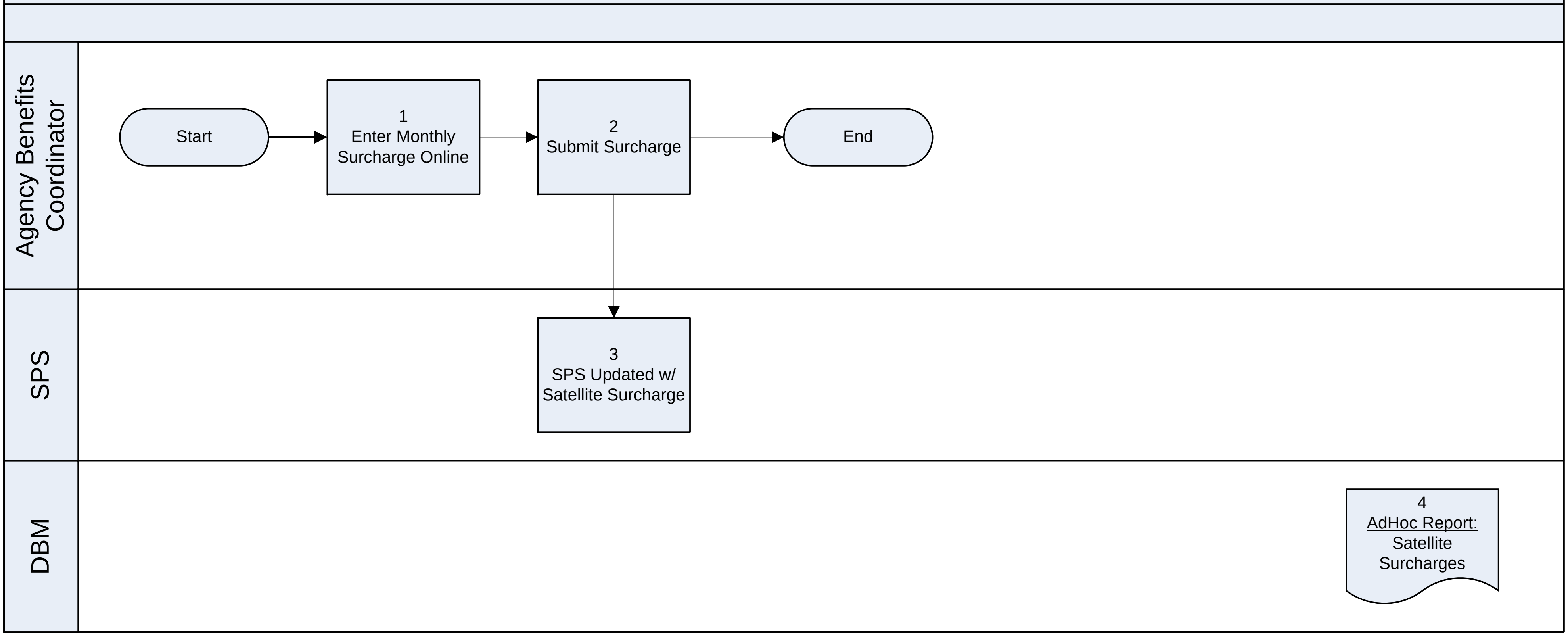

Agency Benefits Coordinator or Agency HR Coordinator
SPS
DBM
CPB
Start
1 Select EE Maintenance Action
2 Setup New EE?
No
4 Status Change?
No
6 Demographic Change?
No
8 Terminate an EE?
No
End
Yes
Yes
Yes
Yes
3 Enter New EE Online
5 Enter EE Status Change Online
7 Enter EE Demographic Change Online
9 Terminate EE Online
A
15 AdHoc: EM Event Status
Yes
11 More to Add/ Change?
No
10 Submit Add/ Change
17 Review EM Event and Reach out to Benefit Participant
18 Go To BA0303 EM Enrollment-Web
19 Go To BA0304 EM Enrollment-Paper
A
A
No
12 SPS Updated w/ Non-SPS EE Information
13 Benefits Administration (Events Triggered)
14 Validate Ben Eligibility via Ben Admin Process (PSPBARUN)
15 Ben Elig Change?
Yes
20 Go To BA0802 Benefits Termination
Yes
15 AdHoc: EM Event Status
16 Notify Agency Benefits Coordinator
21 Send EE Information to CPB
Yes
20 Does EE Need to Go to CPB?
No
A

BA0601 – Satellite Agency Invoicing & Lockbox Receivables


SPS
Satellite Agency
Lockbox
DBM EBD Direct Pay/Satellites
DBM Management
Start
1 1st of the Month: Send Email Requesting Surcharge %
2 By 2nd Sunday: Enter Monthly Surcharge % Online
3 2nd Sun – 3 Days: Agencies w/o Surcharge?
No
Yes
4 Notification: Agencies w/o Surcharge Entry
5 Follow-Up w/Sats to Ensure All Surcharges Entered
Processed on the 21st of the month for the current month
6 Identify All Satellite EE's to Include on Invoice
7 Create Detailed Satellite Agency Invoice
A
8 Post Invoice to Website for Satellite Agency to Retrieve
9 Pull Detailed Satellite Agency Invoice
B
10 Pay Invoice via Lockbox
11 Receive Satellite Agency Payment
12 Include Payment on Daily Lockbox Interface File
FTP
13 Receive & Load Lockbox Interface File
14 Relieve Receivables
Evaluated on the 16th of the month
15 Receivables Outstanding?
No
End
Yes
16 Generate Overdue Notice & Apply Late Fee
17 Mail/Email Overdue Notice to Satellite Agency
18 Receive Overdue Notice
B
22 Any Point in Mos: Enter Invoice Adjustment
A
19 AdHoc Report: Receivable Aging
20 AdHoc Report: Invoicing Details
21 AdHoc Report: Lockbox Details

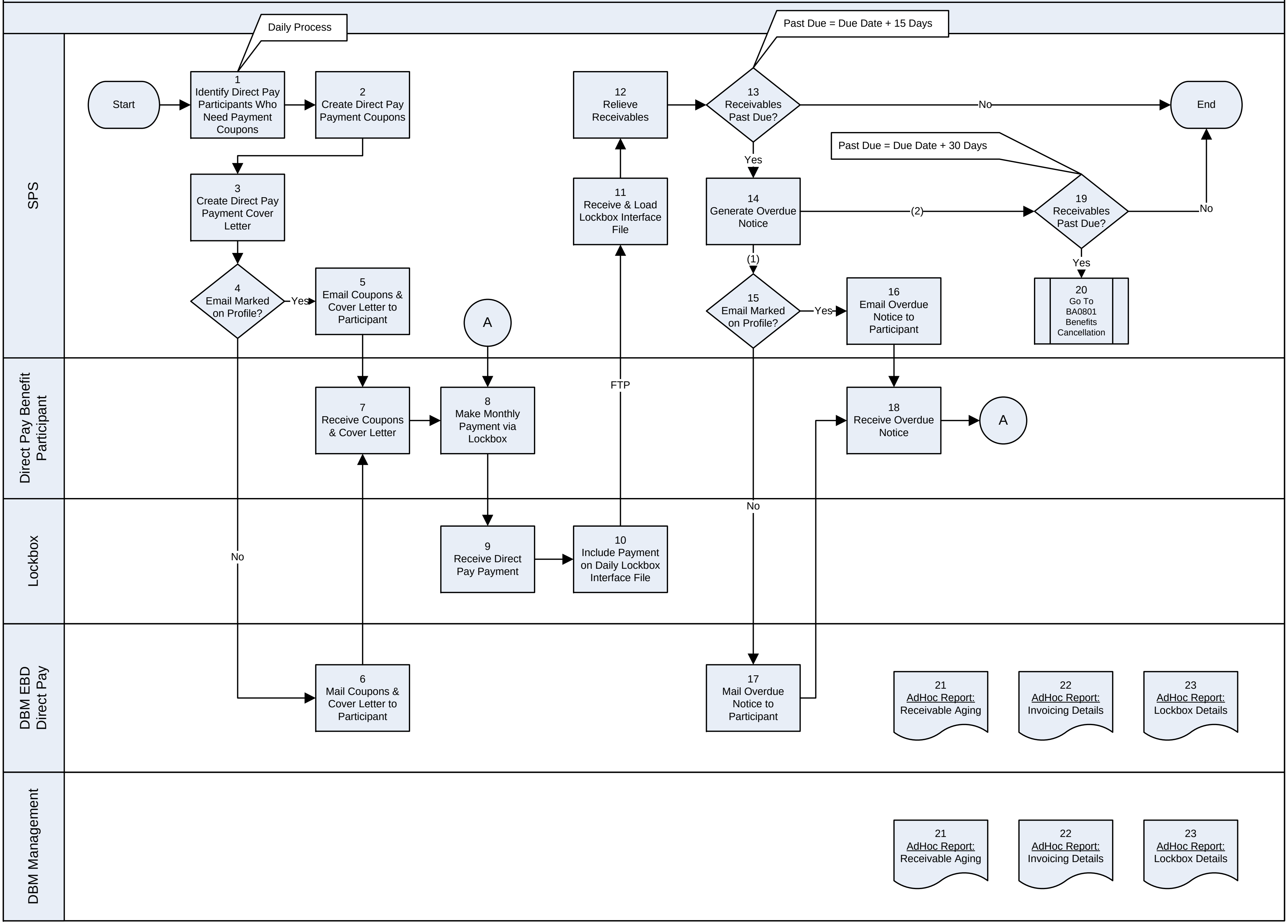
BA0602 – Monthly Surcharge Entry

(This process will support the Satellite invoicing process)


Agency Benefits Coordinator
SPS
DBM
Start
1
Enter Monthly Surcharge Online
2
Submit Surcharge
End
3
SPS Updated w/ Satellite Surcharge
4
AdHoc Report:
Satellite Surcharges

BA0603 – Direct Pay Invoicing & Lockbox Receivables

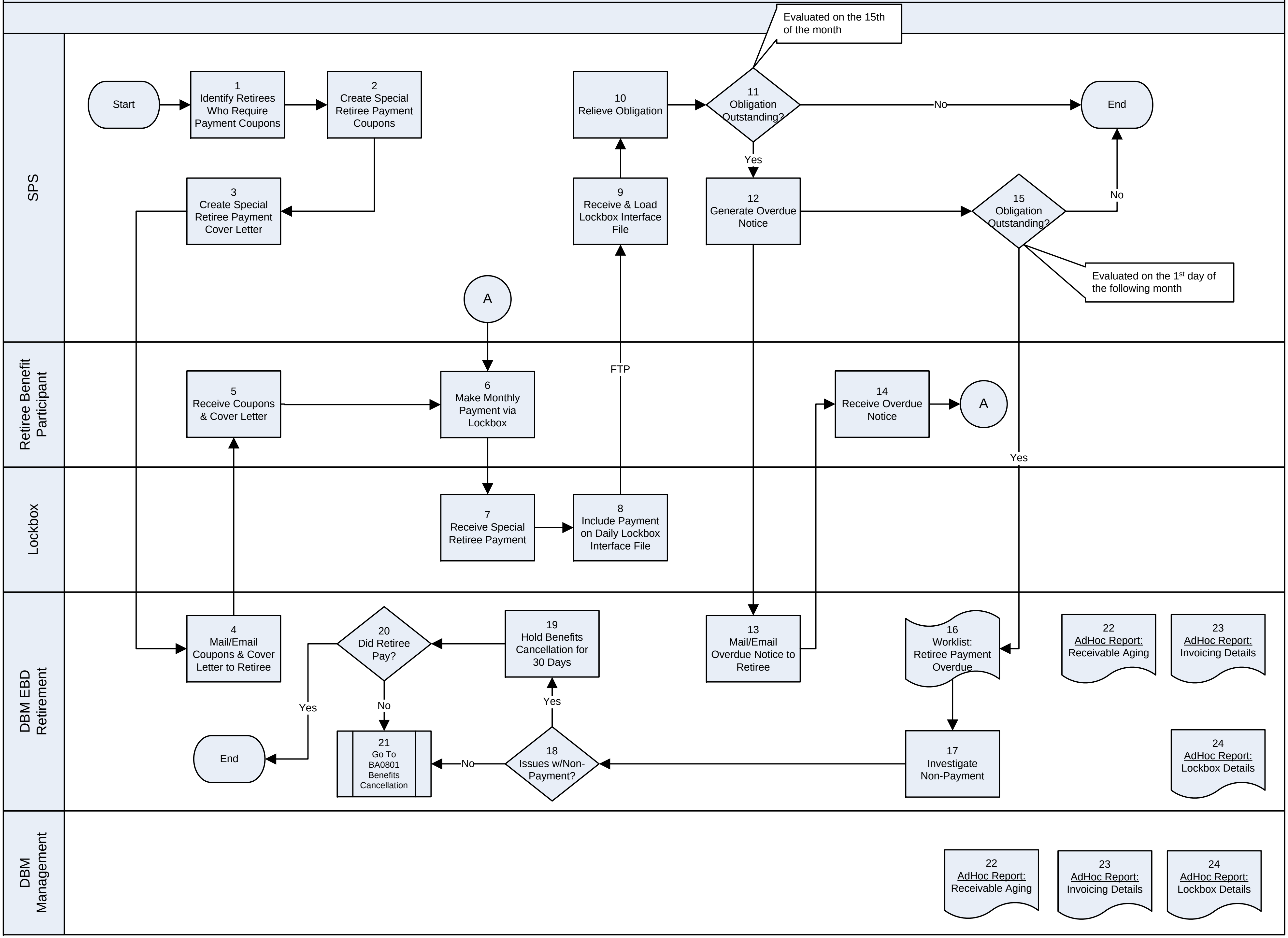
(This process covers workers on COBRA, military leave, leave without pay (LAW), Contractual and PT who are directly paying for their benefits)



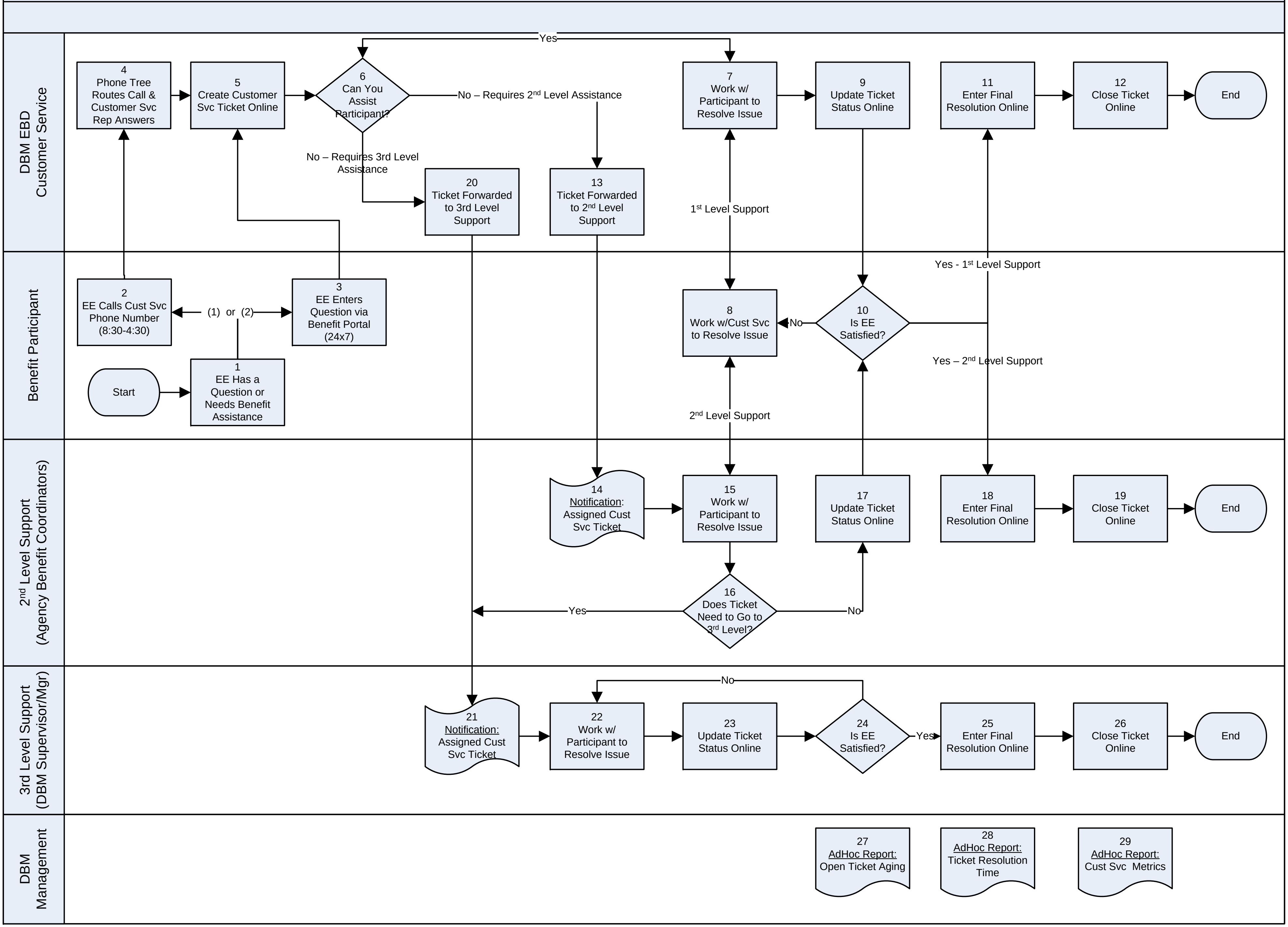
SPS
Direct Pay Benefit Participant
Lockbox
DBM EBD Direct Pay
DBM Management
Daily Process
Start
1 Identify Direct Pay Participants Who Need Payment Coupons
2 Create Direct Pay Payment Coupons
3 Create Direct Pay Payment Cover Letter
4 Email Marked on Profile?
Yes
No
5 Email Coupons & Cover Letter to Participant
6 Mail Coupons & Cover Letter to Participant
7 Receive Coupons & Cover Letter
A
8 Make Monthly Payment via Lockbox
9 Receive Direct Pay Payment
10 Include Payment on Daily Lockbox Interface File
FTP
11 Receive & Load Lockbox Interface File
12 Relieve Receivables
Past Due = Due Date + 15 Days
13 Receivables Past Due?
No
End
Yes
14 Generate Overdue Notice
(1)
(2)
15 Email Marked on Profile?
Yes
No
16 Email Overdue Notice to Participant
17 Mail Overdue Notice to Participant
18 Receive Overdue Notice
A
Past Due = Due Date + 30 Days
19 Receivables Past Due?
No
Yes
20 Go To BA0801 Benefits Cancellation
21 AdHoc Report: Receivable Aging
22 AdHoc Report: Invoicing Details
23 AdHoc Report: Lockbox Details
21 AdHoc Report: Receivable Aging
22 AdHoc Report: Invoicing Details
23 AdHoc Report: Lockbox Details

BA0604 – Special Retiree Invoicing & Lockbox Receivables

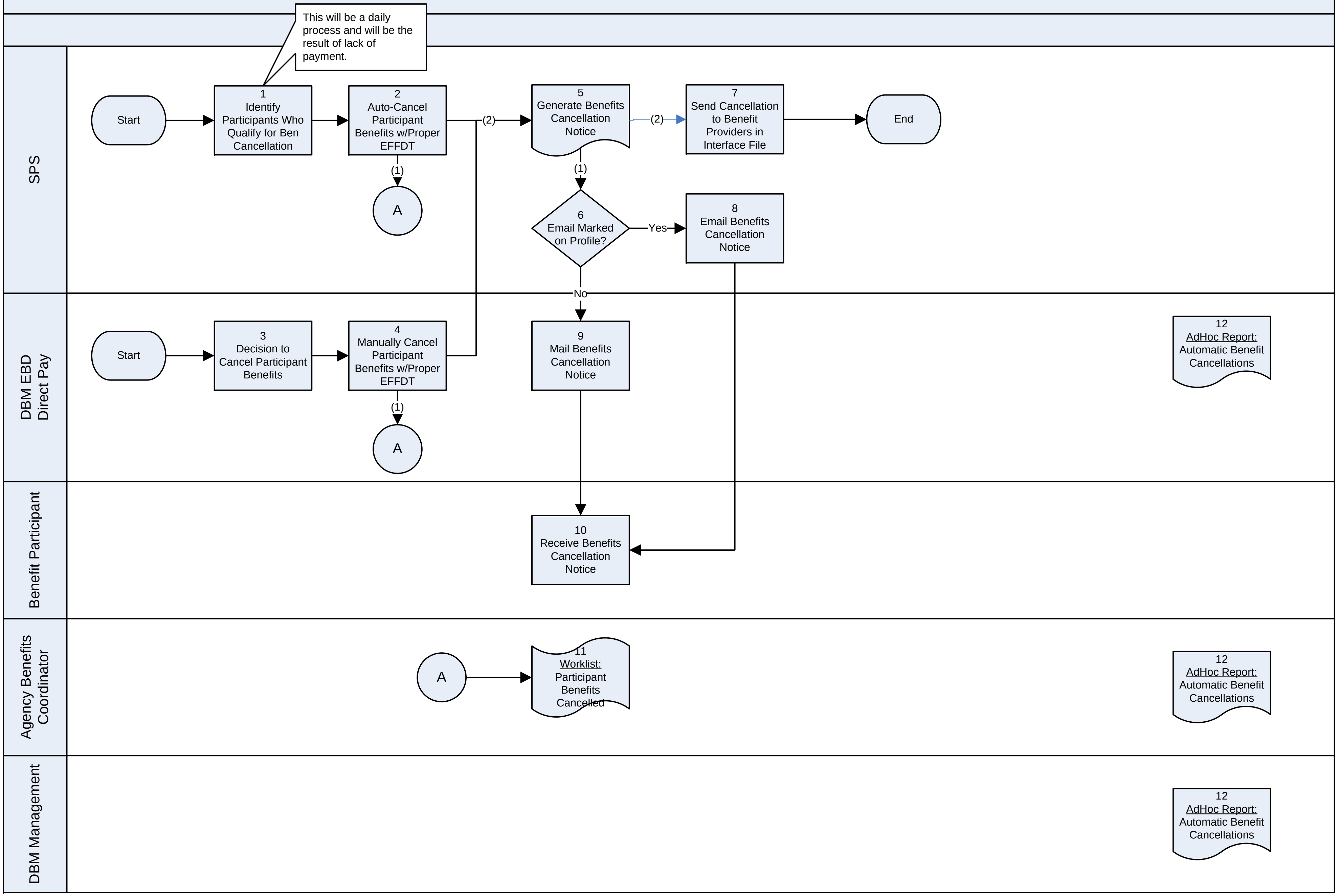
(This process covers retirees whose retirement checks do not cover all of their benefit premiums)


SPS
Retiree Benefit Participant
Lockbox
DBM EBD Retirement
DBM Management
Start
1 Identify Retirees Who Require Payment Coupons
2 Create Special Retiree Payment Coupons
3 Create Special Retiree Payment Cover Letter
4 Mail/Email Coupons & Cover Letter to Retiree
5 Receive Coupons & Cover Letter
A
6 Make Monthly Payment via Lockbox
7 Receive Special Retiree Payment
8 Include Payment on Daily Lockbox Interface File
FTP
9 Receive & Load Lockbox Interface File
10 Relieve Obligation
Evaluated on the 15th of the month
11 Obligation Outstanding?
No
Yes
End
12 Generate Overdue Notice
13 Mail/Email Overdue Notice to Retiree
14 Receive Overdue Notice
A
15 Obligation Outstanding?
No
Yes
Evaluated on the 1st day of the following month
16 Worklist: Retiree Payment Overdue
17 Investigate Non-Payment
18 Issues w/Non-Payment?
Yes
No
19 Hold Benefits Cancellation for 30 Days
20 Did Retiree Pay?
Yes
No
End
21 Go To BA0801 Benefits Cancellation
22 AdHoc Report: Receivable Aging
23 AdHoc Report: Invoicing Details
24 AdHoc Report: Lockbox Details
22 AdHoc Report: Receivable Aging
23 AdHoc Report: Invoicing Details
24 AdHoc Report: Lockbox Details

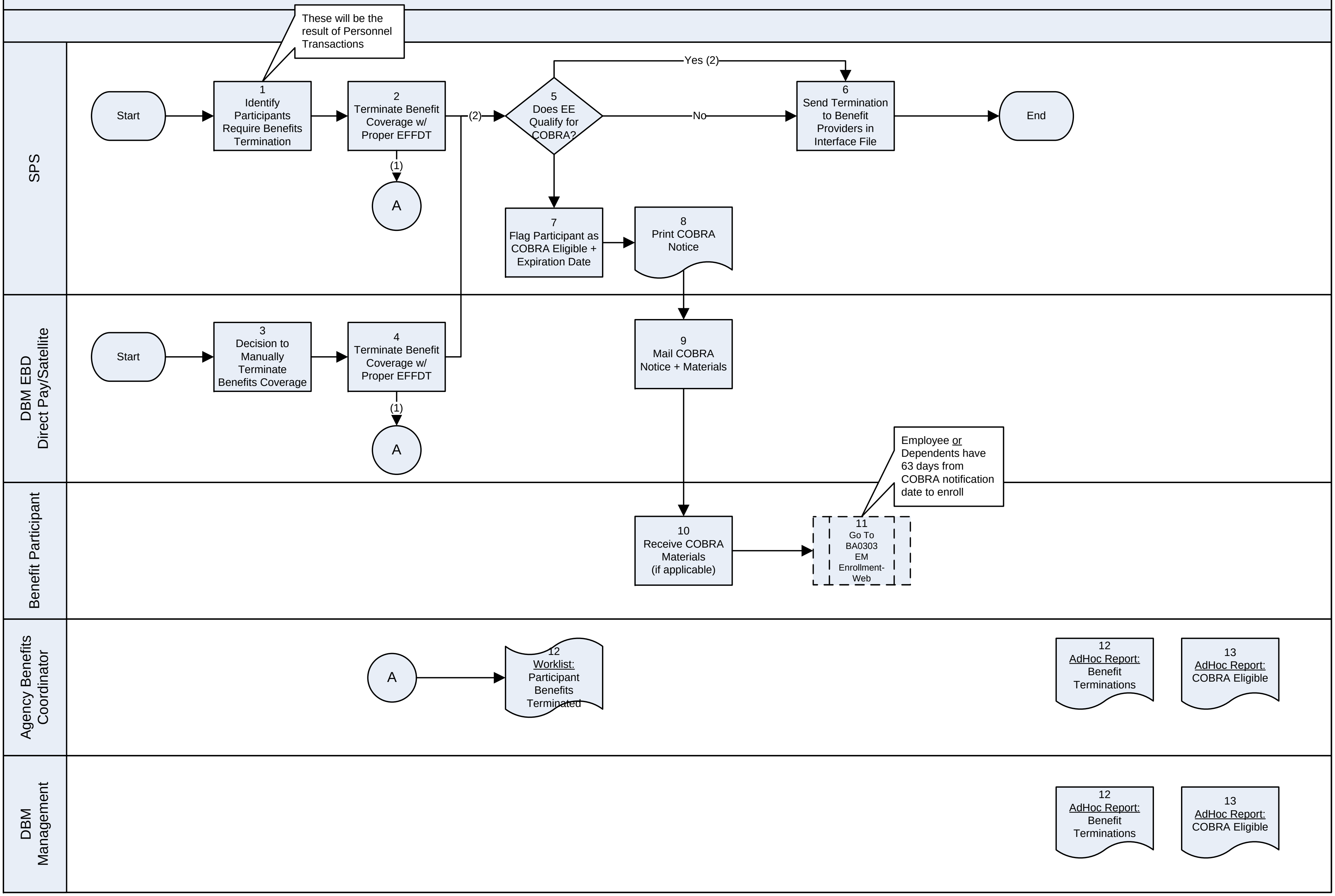
BA0701 – Customer Service Call Center


DBM EBD Customer Service
Benefit Participant
2nd Level Support (Agency Benefit Coordinators)
3rd Level Support (DBM Supervisor/Mgr)
DBM Management
Start
1 EE Has a Question or Needs Benefit Assistance
(1) or (2)
2 EE Calls Cust Svc Phone Number (8:30-4:30)
3 EE Enters Question via Benefit Portal (24x7)
4 Phone Tree Routes Call & Customer Svc Rep Answers
5 Create Customer Svc Ticket Online
6 Can You Assist Participant?
Yes
No – Requires 2nd Level Assistance
No – Requires 3rd Level Assistance
7 Work w/ Participant to Resolve Issue
1st Level Support
8 Work w/Cust Svc to Resolve Issue
2nd Level Support
9 Update Ticket Status Online
10 Is EE Satisfied?
No
Yes - 1st Level Support
Yes – 2nd Level Support
11 Enter Final Resolution Online
12 Close Ticket Online
End
13 Ticket Forwarded to 2nd Level Support
14 Notification: Assigned Cust Svc Ticket
15 Work w/ Participant to Resolve Issue
16 Does Ticket Need to Go to 3rd Level?
Yes
No
17 Update Ticket Status Online
18 Enter Final Resolution Online
19 Close Ticket Online
End
20 Ticket Forwarded to 3rd Level Support
21 Notification: Assigned Cust Svc Ticket
22 Work w/ Participant to Resolve Issue
23 Update Ticket Status Online
24 Is EE Satisfied?
No
Yes
25 Enter Final Resolution Online
26 Close Ticket Online
End
27 AdHoc Report: Open Ticket Aging
28 AdHoc Report: Ticket Resolution Time
29 AdHoc Report: Cust Svc Metrics

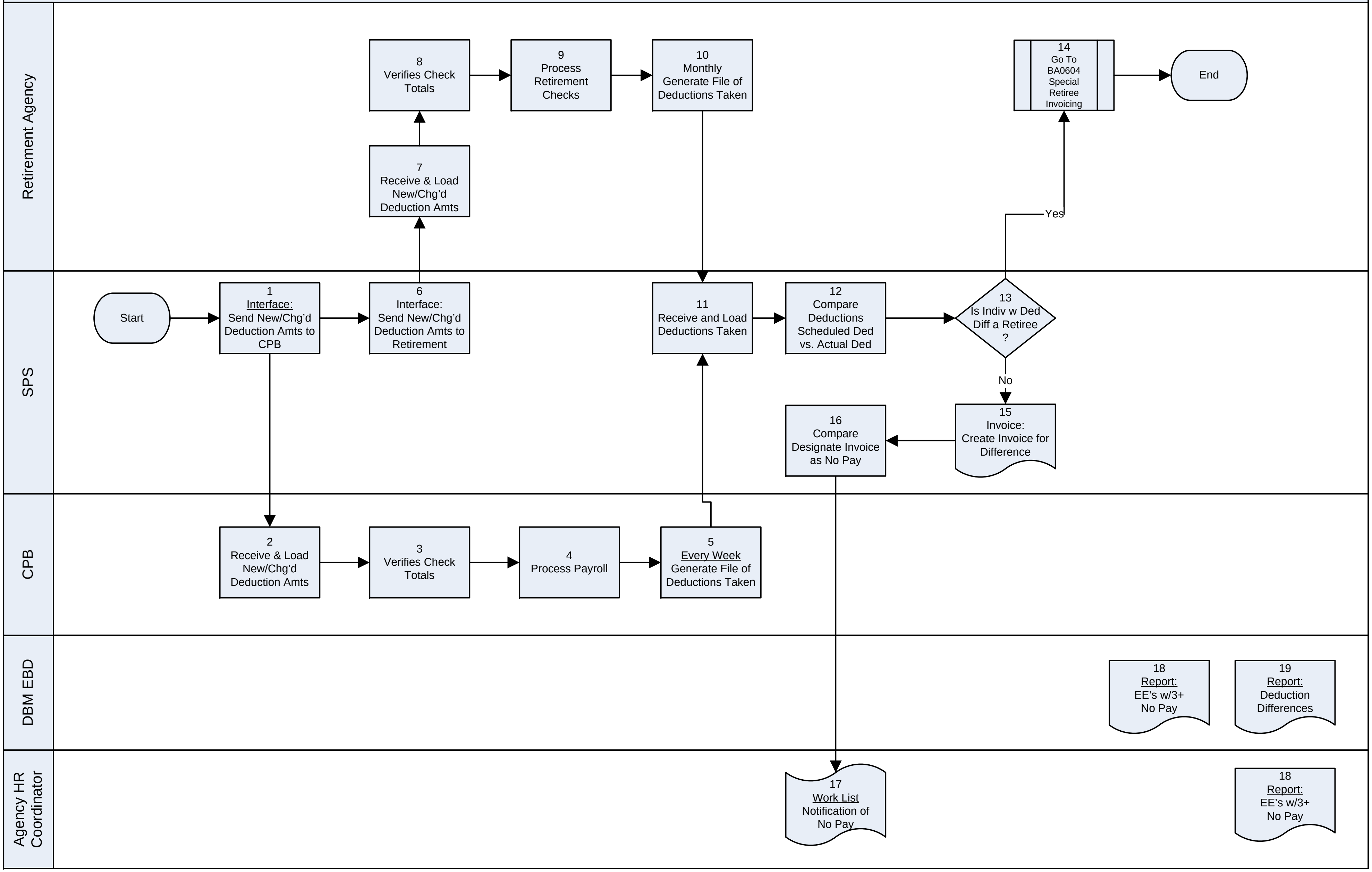
BA0801 – Benefits Cancellation


SPS
DBM EBD Direct Pay
Benefit Participant
Agency Benefits Coordinator
DBM Management
This will be a daily process and will be the result of lack of payment.
Start
1 Identify Participants Who Qualify for Ben Cancellation
2 Auto-Cancel Participant Benefits w/Proper EFFDT
(1)
A
(2)
5 Generate Benefits Cancellation Notice
(2)
7 Send Cancellation to Benefit Providers in Interface File
End
(1)
6 Email Marked on Profile?
Yes
8 Email Benefits Cancellation Notice
No
Start
3 Decision to Cancel Participant Benefits
4 Manually Cancel Participant Benefits w/Proper EFFDT
(1)
A
9 Mail Benefits Cancellation Notice
12 AdHoc Report: Automatic Benefit Cancellations
10 Receive Benefits Cancellation Notice
A
11 Worklist: Participant Benefits Cancelled
12 AdHoc Report: Automatic Benefit Cancellations
12 AdHoc Report: Automatic Benefit Cancellations

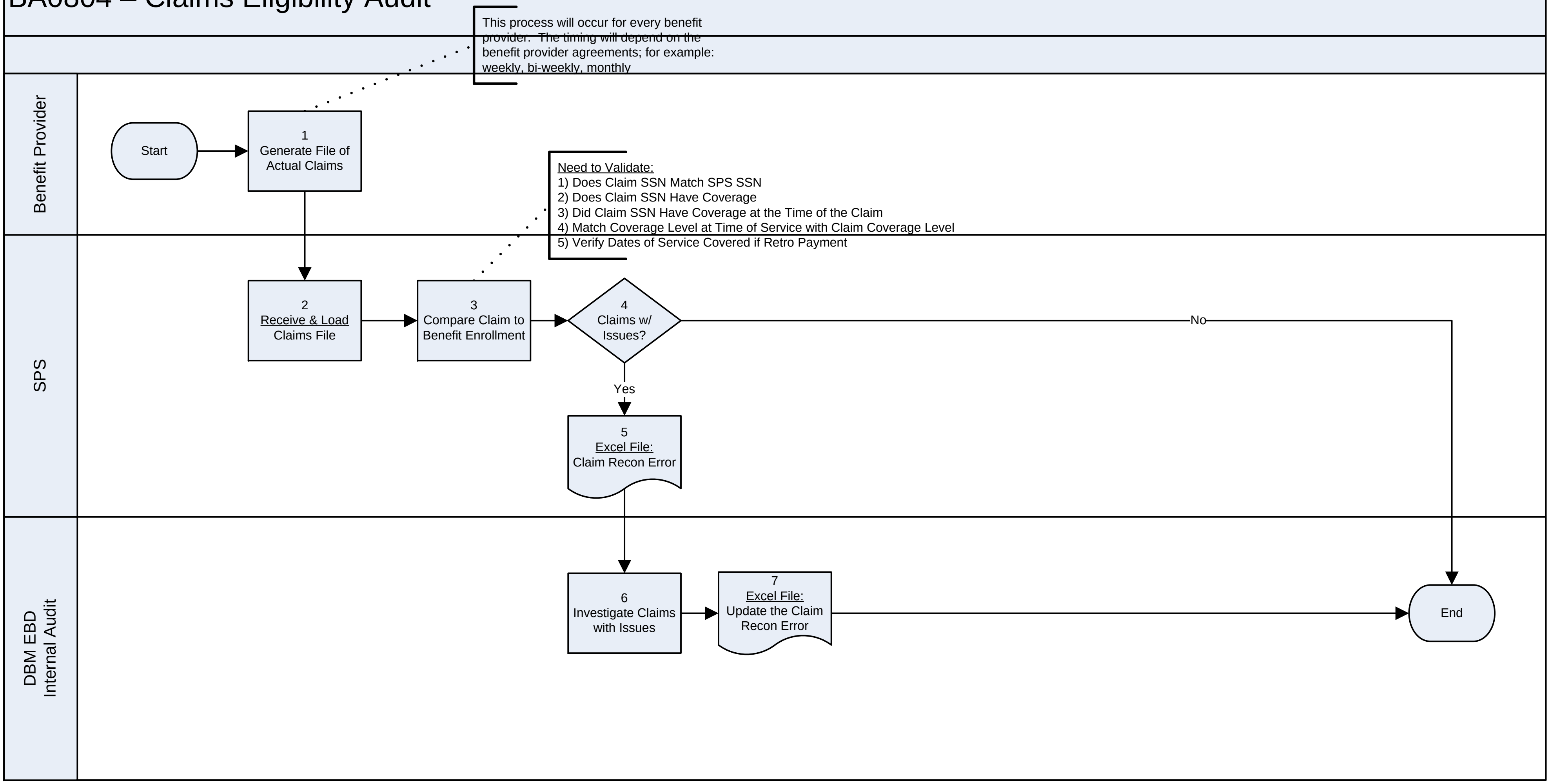
BA0802 – Benefits Termination


SPS
DBM EBD Direct Pay/Satellite
Benefit Participant
Agency Benefits Coordinator
DBM Management
These will be the result of Personnel Transactions
Start
1 Identify Participants Require Benefits Termination
2 Terminate Benefit Coverage w/ Proper EFFDT
(1)
A
(2)
5 Does EE Qualify for COBRA?
Yes (2)
No
6 Send Termination to Benefit Providers in Interface File
End
7 Flag Participant as COBRA Eligible + Expiration Date
8 Print COBRA Notice
Start
3 Decision to Manually Terminate Benefits Coverage
4 Terminate Benefit Coverage w/ Proper EFFDT
(1)
A
9 Mail COBRA Notice + Materials
Employee or Dependents have 63 days from COBRA notification date to enroll
10 Receive COBRA Materials (if applicable)
11 Go To BA0303 EM Enrollment-Web
A
12 Worklist: Participant Benefits Terminated
12 AdHoc Report: Benefit Terminations
13 AdHoc Report: COBRA Eligible
12 AdHoc Report: Benefit Terminations
13 AdHoc Report: COBRA Eligible

BA0803 – Deduction Reconciliation


Retirement Agency
SPS
CPB
DBM EBD
Agency HR Coordinator
Start
1 Interface: Send New/Chg'd Deduction Amts to CPB
2 Receive & Load New/Chg'd Deduction Amts
3 Verifies Check Totals
4 Process Payroll
5 Every Week Generate File of Deductions Taken
6 Interface: Send New/Chg'd Deduction Amts to Retirement
7 Receive & Load New/Chg'd Deduction Amts
8 Verifies Check Totals
9 Process Retirement Checks
10 Monthly Generate File of Deductions Taken
11 Receive and Load Deductions Taken
12 Compare Deductions Scheduled Ded vs. Actual Ded
13 Is Indiv w Ded Diff a Retiree ?
Yes
No
14 Go To BA0604 Special Retiree Invoicing
End
15 Invoice: Create Invoice for Difference
16 Compare Designate Invoice as No Pay
17 Work List Notification of No Pay
18 Report: EE's w/3+ No Pay
19 Report: Deduction Differences
18 Report: EE's w/3+ No Pay

BA0804 – Claims Eligibility Audit

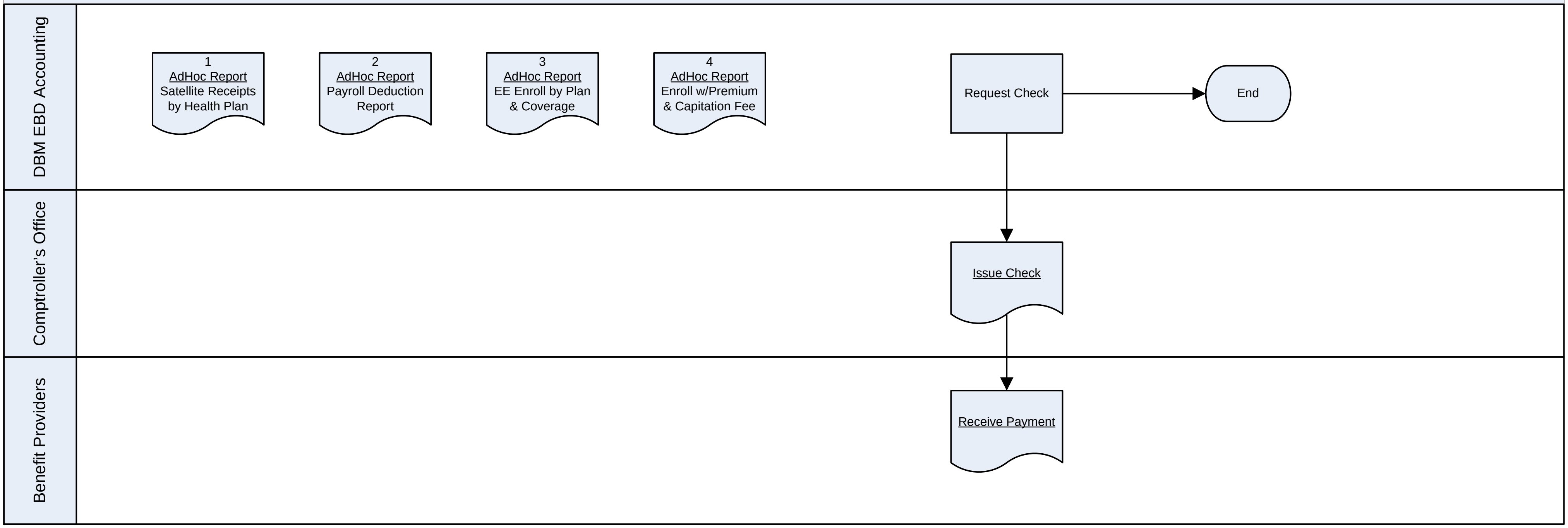


This process will occur for every benefit provider. The timing will depend on the benefit provider agreements; for example: weekly, bi-weekly, monthly

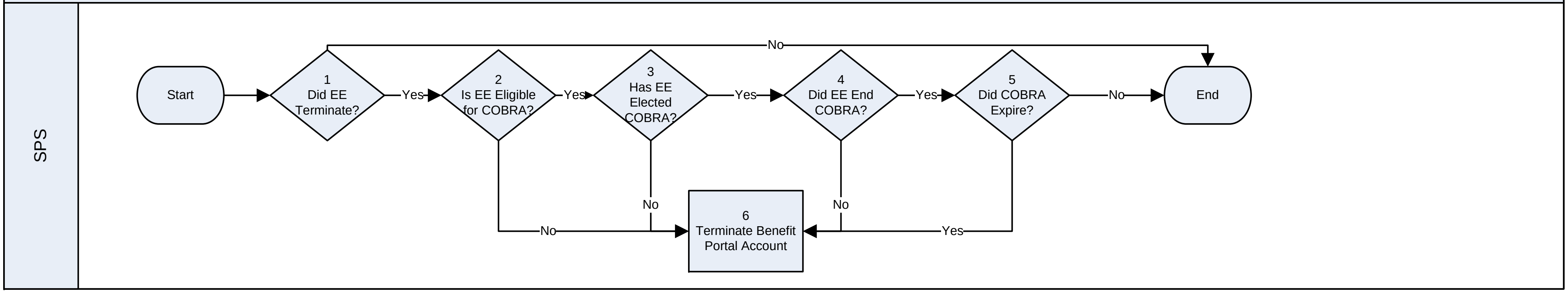
Need to Validate:
1) Does Claim SSN Match SPS SSN
2) Does Claim SSN Have Coverage
3) Did Claim SSN Have Coverage at the Time of the Claim
4) Match Coverage Level at Time of Service with Claim Coverage Level
5) Verify Dates of Service Covered if Retro Payment

Benefit Provider
SPS
DBM EBD Internal Audit
Start
1 Generate File of Actual Claims
2 Receive & Load Claims File
3 Compare Claim to Benefit Enrollment
4 Claims w/ Issues?
No
Yes
5 Excel File: Claim Recon Error
6 Investigate Claims with Issues
7 Excel File: Update the Claim Recon Error
End

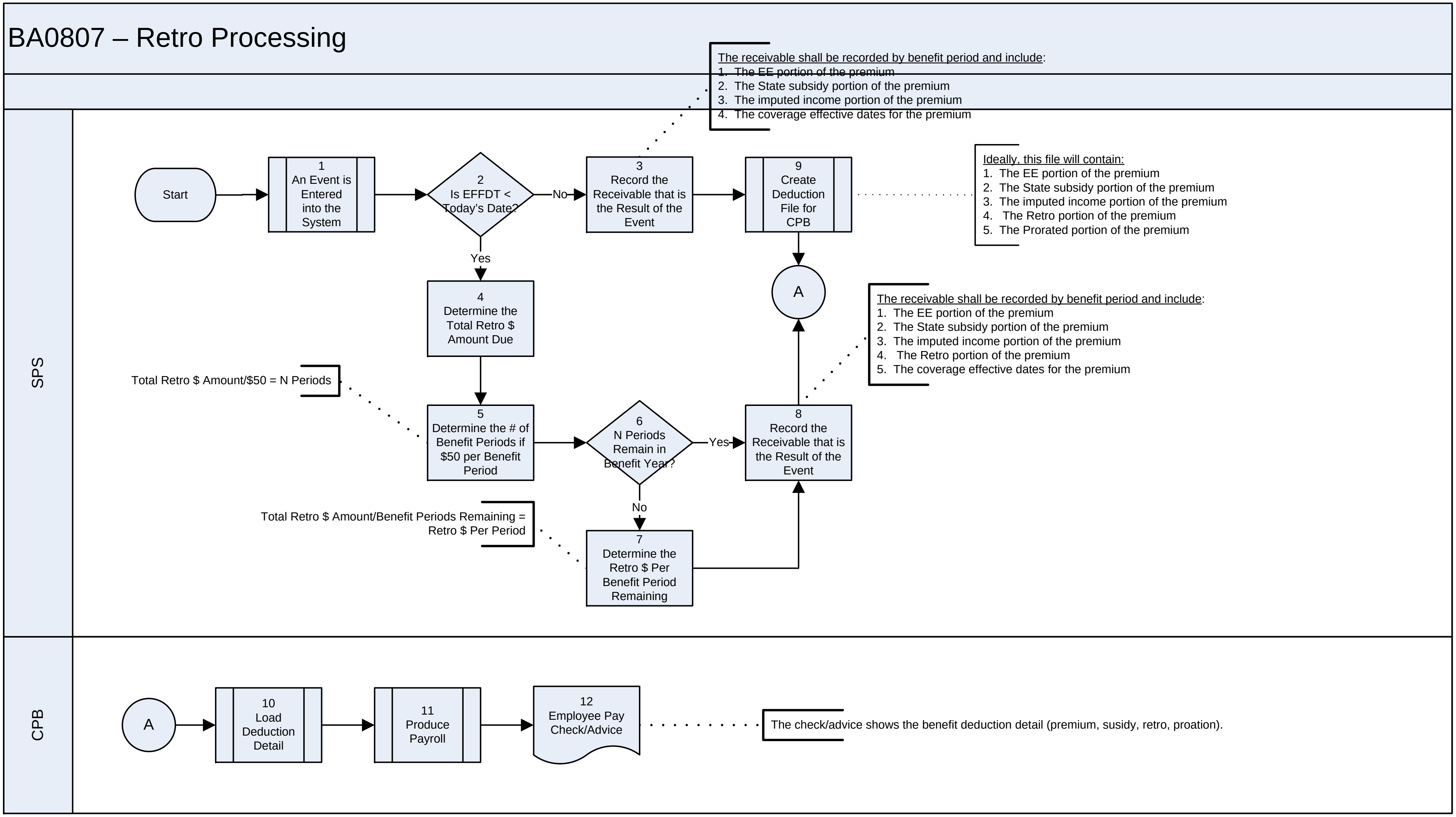
BA0805 – Benefit Provider Payments


DBM EBD Accounting
Comptroller's Office
Benefit Providers
1
AdHoc Report
Satellite Receipts by Health Plan
2
AdHoc Report
Payroll Deduction Report
3
AdHoc Report
EE Enroll by Plan & Coverage
4
AdHoc Report
Enroll w/Premium & Capitation Fee
Request Check
End
Issue Check
Receive Payment

BA0806 – Terminate Portal Accounts


SPS
Start
1
Did EE
Terminate?
No
Yes
2
Is EE Eligible
for COBRA?
Yes
No
3
Has EE
Elected
COBRA?
Yes
No
4
Did EE End
COBRA?
Yes
No
5
Did COBRA
Expire?
No
Yes
End
6
Terminate Benefit
Portal Account

BA0807 – Retro Processing


SPS
Start
1 An Event is Entered into the System
2 Is EFFDT < Today's Date?
No
Yes
3 Record the Receivable that is the Result of the Event
9 Create Deduction File for CPB
A
4 Determine the Total Retro $ Amount Due
5 Determine the # of Benefit Periods if $50 per Benefit Period
6 N Periods Remain in Benefit Year?
Yes
No
8 Record the Receivable that is the Result of the Event
7 Determine the Retro $ Per Benefit Period Remaining
CPB
A
10 Load Deduction Detail
11 Produce Payroll
12 Employee Pay Check/Advice

The receivable shall be recorded by benefit period and include:

1. The EE portion of the premium
2. The State subsidy portion of the premium
3. The imputed income portion of the premium
4. The coverage effective dates for the premium

Ideally, this file will contain:

1. The EE portion of the premium
2. The State subsidy portion of the premium
3. The imputed income portion of the premium
4. The Retro portion of the premium
5. The Prorated portion of the premium

The receivable shall be recorded by benefit period and include:

1. The EE portion of the premium
2. The State subsidy portion of the premium
3. The imputed income portion of the premium
4. The Retro portion of the premium
5. The coverage effective dates for the premium

Total Retro $ Amount/$50 = N Periods

Total Retro $ Amount/Benefit Periods Remaining = Retro $ Per Period

The check/advice shows the benefit deduction detail (premium, susidy, retro, proation).