

Automated Mid-Year OAB Benefits Conversion - Functional Considerations for Technical Success

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Agenda

- Introduction
- Background
- Conversion process/scenario
- Functional contributions
- Q & A

- Ask questions at any time

Introduction – AOB Conversion

- Purpose
 - Help people understand
 - Present proven conversion process
 - Good team work
 - Strong process
 - Ensure effective conversion
 - Benefit continuity
 - Timely and cost-effective
 - Support long-term system usage

Background – OAB Features

- Declarative central definition-active dictionary
- Life Event driven – detect & manage
- Employee self-service
- Record and action certification requirements
- Integration with Oracle products:
 - HR
 - Payroll
- Date Tracking

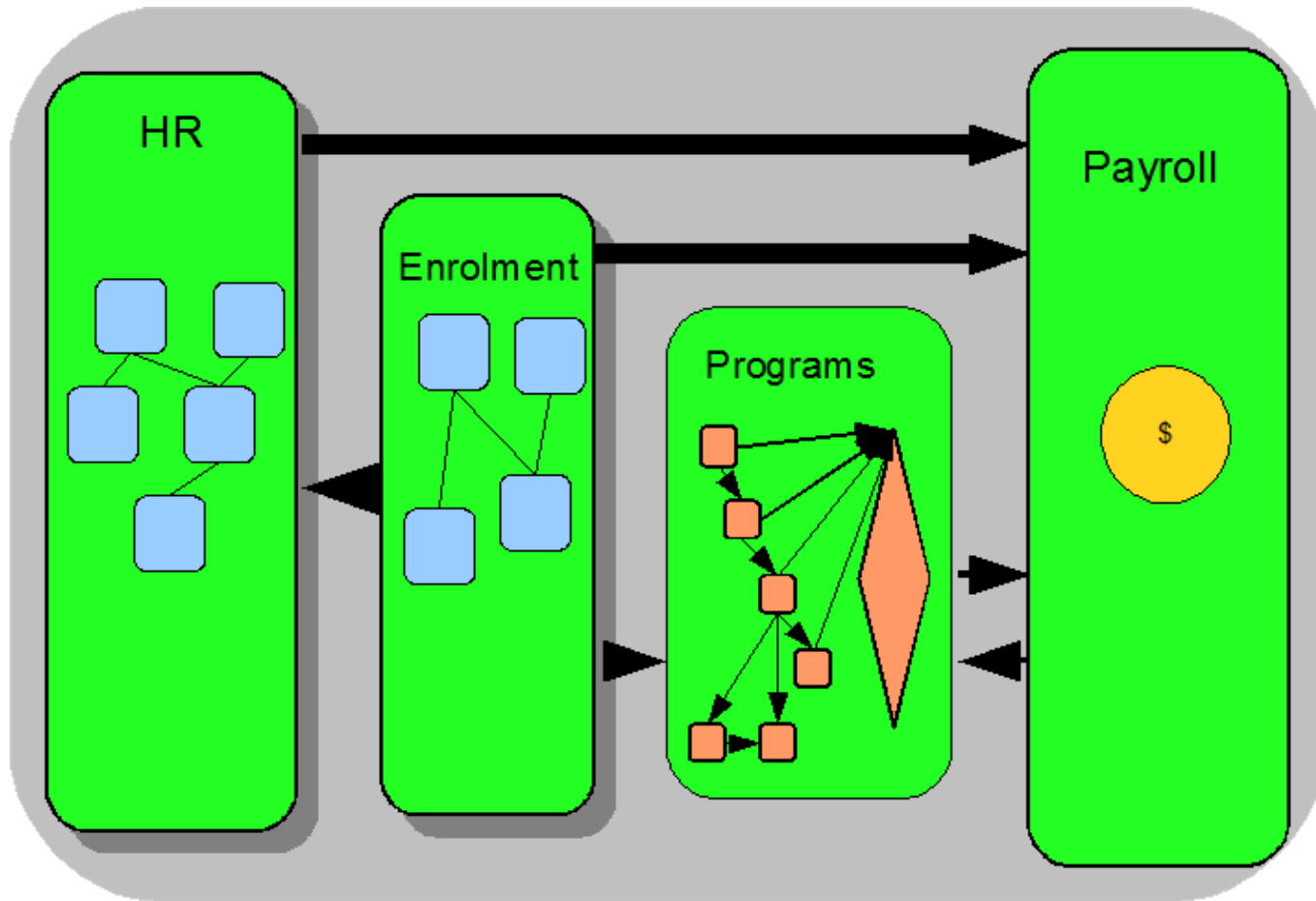
Conversion Success ??

- Factors:
 - Historical data
 - Availability
 - Ongoing need
 - Data quality effort
 - EBS modules
 - Current
 - Future
 - Benefit and Fiscal years
 - Program complexity
 - Number of EE's
- Goals:
 - Benefit Continuity
 - enrolments
 - enrolment details
 - financial implications
 - Timely and cost-effective
 - Support post-cut-over processing

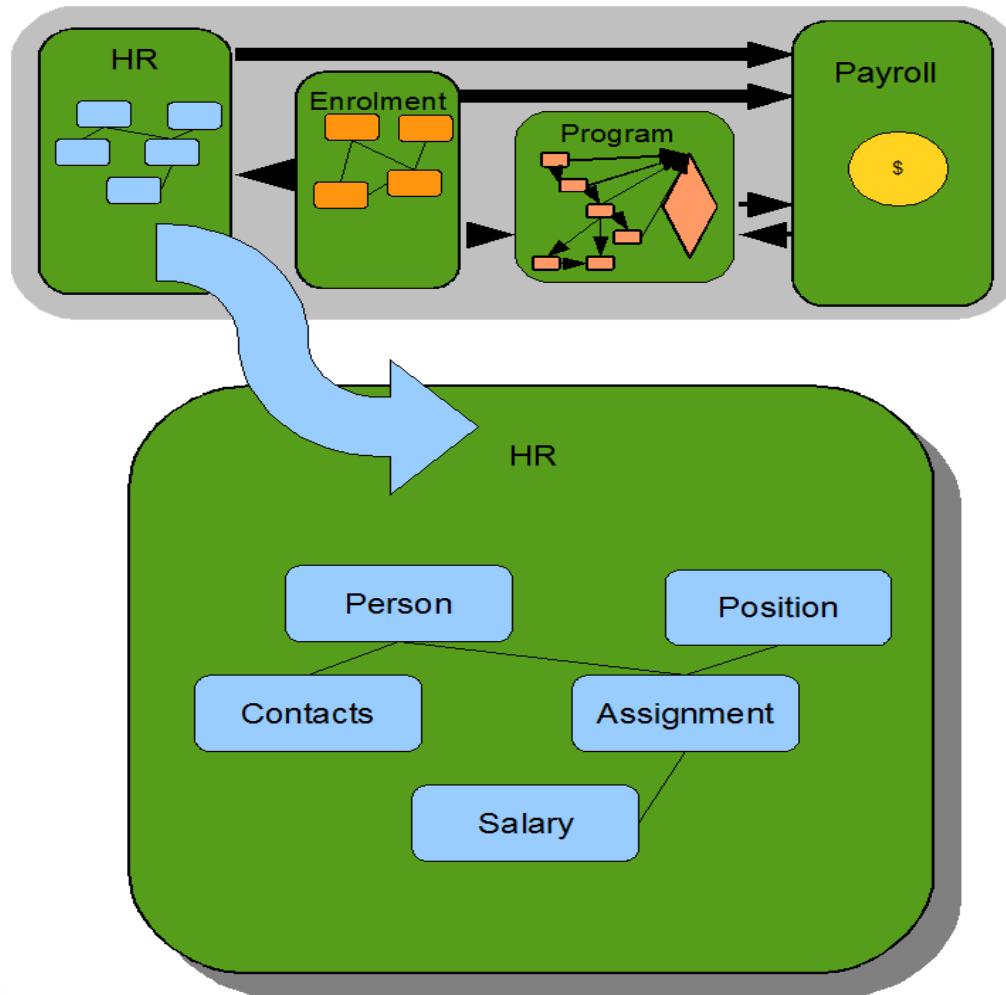
Conversion Timing

- First Choice:
 - Benefit year start
- Second Choice:
 - Mid benefit year

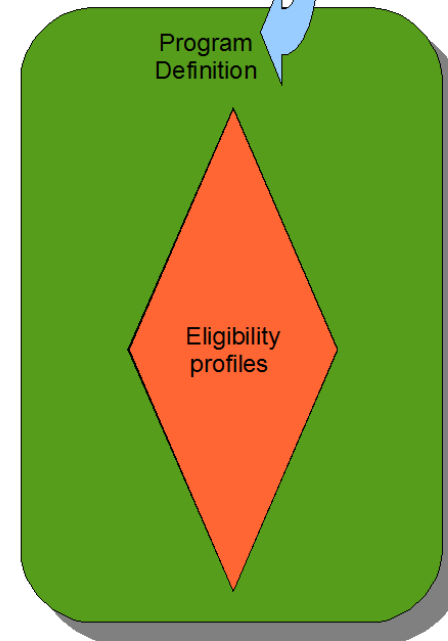
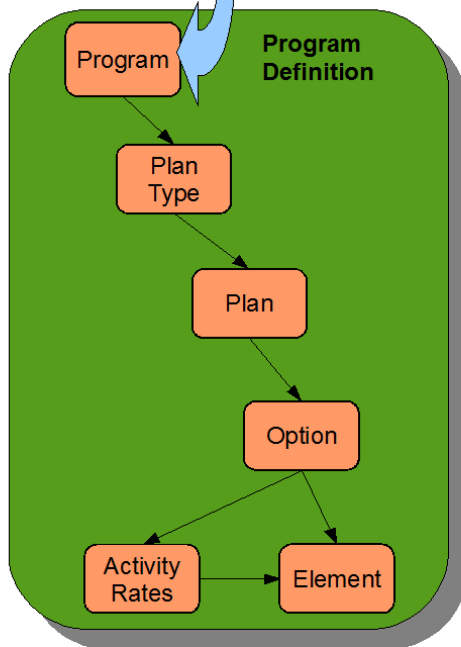
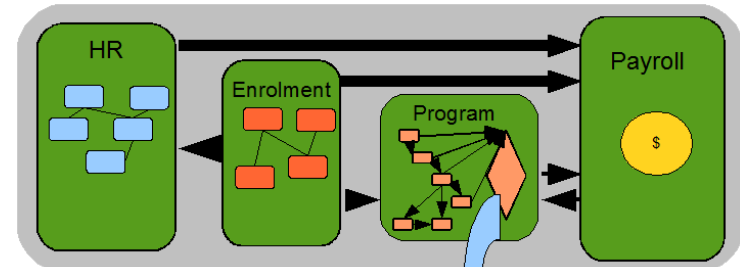
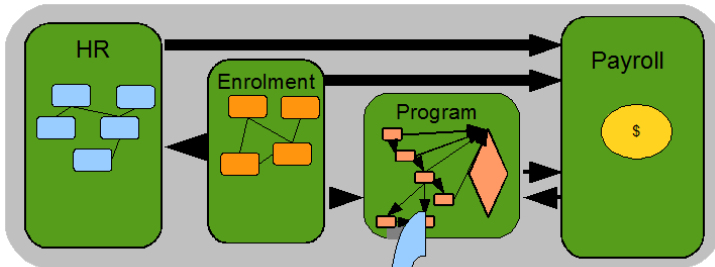
OAB Data Overview



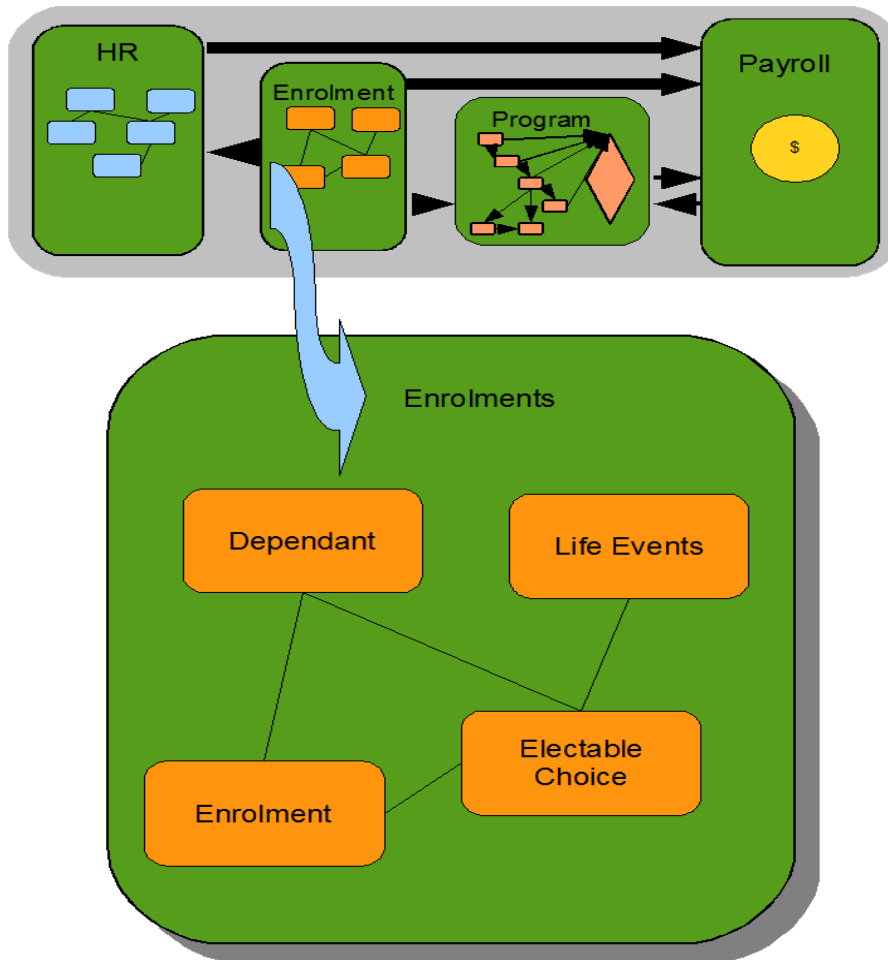
Core HR Data



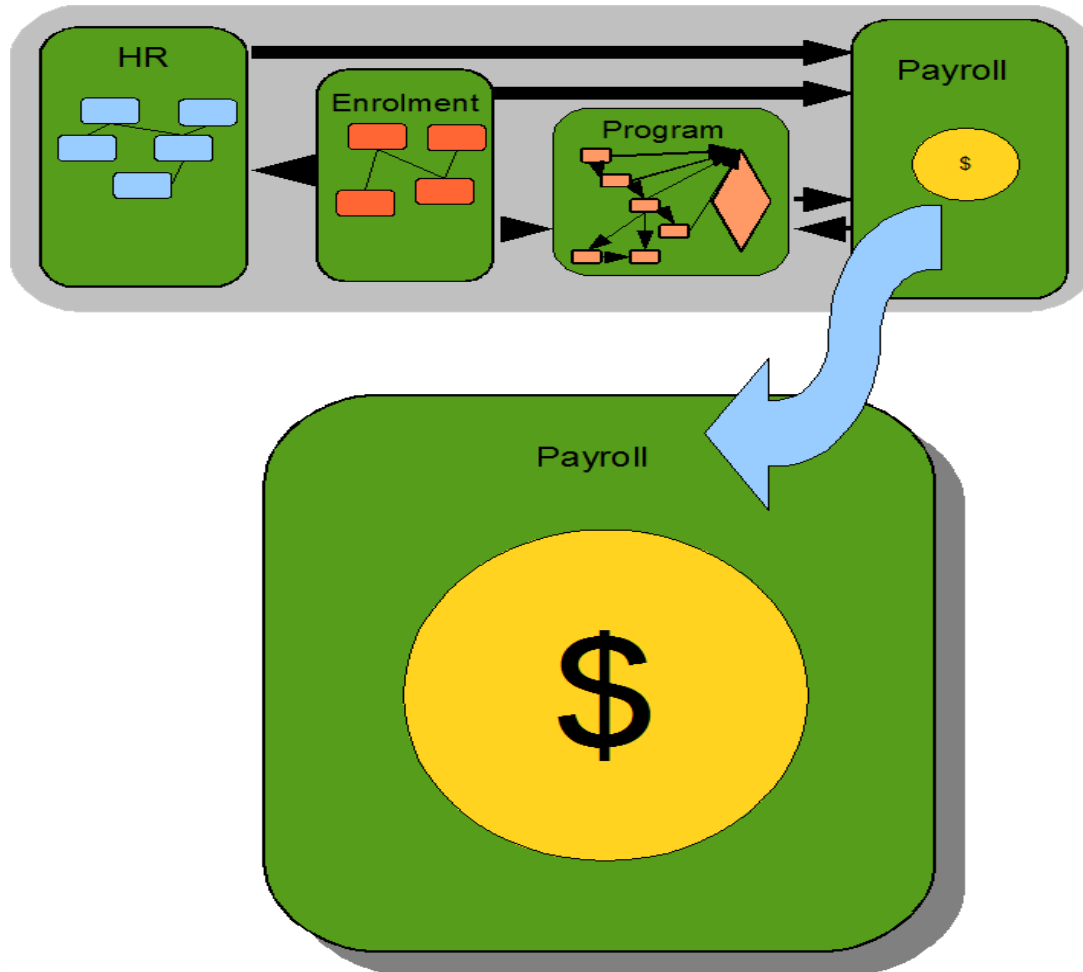
Program Data



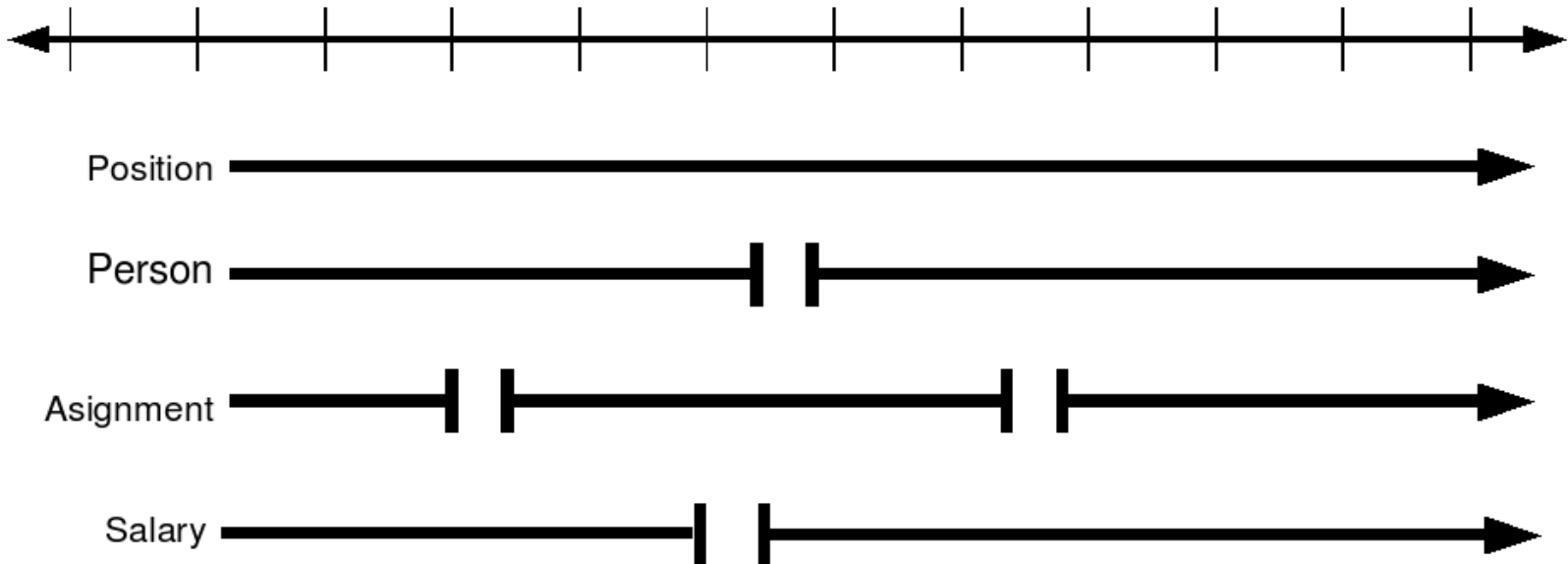
Enrolments



Payroll



Date Tracking



OAB Set Up Overview

- Functional
 - Define Programs
 - Define Life Events
 - What and When
 - How behave
 - Component “basic” behaviour
 - Eligibility rules & their use
 - Integration with Payroll
- Technical
 - Fast Formulas

Conversion Methods

- See Metalink Doc 365034.1
- Manual
- HRMS Workbench
- Custom Coding

Individual's Conversion: Overview

- Establish potential life event
- “Initiate” life event
- Make individual enrolments
 - Employee
 - Dependents
- Validate enrolments
- Close life event

Conversion Strategy: Run-and-refine

- Multiple iterative runs
- Life event back-out functionality
- Full data ASAP
- Error capture and triage
- Issue resolution:
 - Data
 - Source cleansing
 - Source extract
 - Pre-req. conversion
 - Setup
 - OAB
 - Payroll
 - OAB / Payroll integration
 - Conversion code
 - Special case handling

Example Benefit Program

- Flex Credit Based
- Elements:
 - Extended health & dental
 - Optional Life
 - Savings Plans
 - HSA
- Characteristics
 - Employee configurable
 - Life-event based
 - Lock-in restrictions
 - Certification requirements
 - Unused credit payout

Note About Dates: Definitions

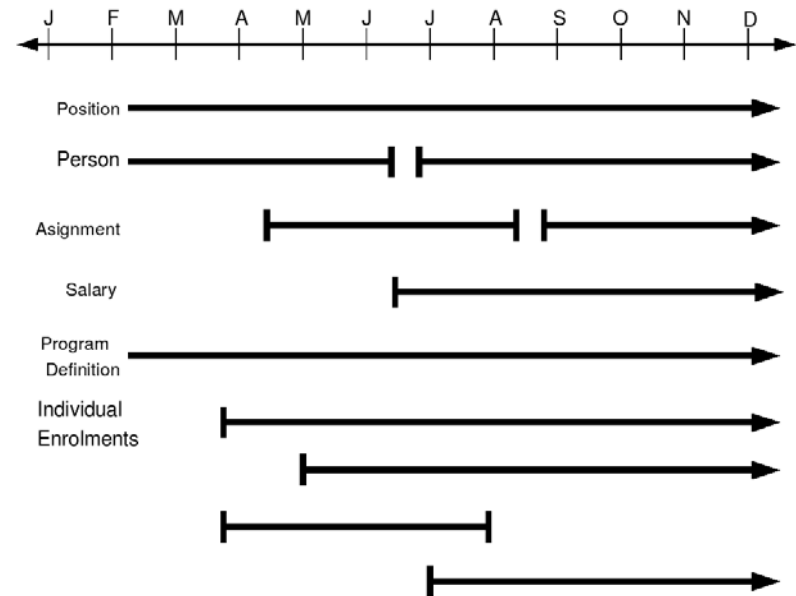
- Effective Start Date
- Enrolment Start Date
- Original Enrolment Date

Conversion Program - Summary

- Extract/load source data
- For each EE:
 - “open” life event
 - Process enrolment
 - Process certifications
 - Validate
 - Log results
- For each successful EE:
 - For each dependent
 - Retrieve electable choices
 - Enrol per choice profile
 - Log results
- Produce Completion Reports

Date Tracking Issues

- Program Setup
- Life Event
- Key Dates:
 - BY Start: May 1
 - Cut Over: Jan 1
 - EE Viable: Jun 10
 - Earliest Enrol: Mar 15



Other Functional Areas

- Default Enrolment Processing
- *Program Component Mappings*
- *Opt Out Processing*
- *Value Transformations*
- *Electable Choice Issues*
- *Lock-in Date Management*
- *Certification Processing*

Summary

Questions & Answers

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