HR-080-010: Publishing Compliance Notices

As OGI, I want to:

1. To be able to annually publish compliance notices on the LUMA portal (so employees have access to notifications)
2. To be able to input a link to the OGI website (For employees to reference benefit information)

As the Employee, I want to:

1. To be able to access compliance notices in relation to benefits
2. To be able to find OGI contact information
3. To have a link to the Knowledgebase

HR-080-020: Maintain Eligibility

As OGI/PERSI, I want to:

1. Define eligibility rules within LUMA (To ensure appropriate enrollment for employees)
2. Identify, create, and maintain different groups (To know which benefit plan is used)
3. To generate reports for different eligible groups (To validate the setup and monitor changes within groups)
4. Create and maintain plan offerings, rate tables (cost rules), and vendors (To ensure info is up to date)
5. To define dependents, beneficiaries, and dependent employee relationships in the system to appropriately apply benefits
6. Verify that LUMA is applying appropriate premiums/deductions and coverage based on age and salary

As SCO, I want to:

1. To create/generate reports for different eligible groups to complete agency requests for information
2. To provide input for eligibility requirements to setup and maintain the system

As an Employee, I want to:

1. Be offered all benefits plan that are applicable to me (Health and Welfare, and Retirement so I can choose the appropriate choice)
2. Receive notification when my supplemental life premium changes due to age or salary increase

As an Agency, I want to:

1. To create/generate reports for different eligible groups to complete requests for information

HR-080-030: Manage Group Insurance Enrollment

As Employee, I want to:

1. To be able to make benefit elections based on my eligibility (To enroll in my benefits)
2. Review personal profile and update dependents and beneficiaries to make changes

3. Receive notifications about open enrollment periods and benefit changes to make decisions about my benefit elections
4. View the knowledgebase for benefit information
5. Know who to contact with questions so they can be answered
6. Receive confirmation of my benefit elections and view my ongoing benefit elections
7. To be upload necessary info/documentation to make life insurance elections
8. Receive notifications about eligibility requirements that might affect my enrollment status to make benefit decisions
9. Enroll for supplemental life and initiate the process with EOI to gain approval for this coverage
10. Notified when my benefits applications are approved/transmitted (specific to the supplemental life)
11. Notified that my application was submitted successfully for confirmation
12. Have payroll deductions setup based on my elections
13. Print any enrollment forms to have a record or the spousal beneficiary acknowledgement to process the benefit

As OGI, I want to:

1. Send notifications about eligibility requirements that might affect employee enrollment status to notify employees
2. To be able to override over age dependent enrollment based on eligibility to comply with contractual provisions
3. Review and approve all late supplemental life applications to establish the coverage
4. Print any enrollment forms to assist in process benefits if necessary
5. Utilize IPA to calculate missed premium payments and process the collection as a one-time adjustment to avoid manual intervention

As Non-SCO Agency HR, I want to:

1. View and release applications completed by my employees to be included in the data file transmitted to the vendor
2. Receive plan elections/payroll deduction rates to setup premium deductions in their own payroll system

As Agency HR, I want to:

1. Be able to view beneficiary information for life insurance to assist employees/beneficiaries with collecting benefits

<u>HR-080-040: Manage Enrollment Changes</u>

As Employee, I want to:

1. To be able to make benefit election changes based on eligibility and qualified life events (To enroll/update benefit elections)
2. Review personal profile and update dependents and beneficiaries to make changes
3. Receive notifications about open enrollment periods and benefit changes to make decisions about my benefit elections

4. View the knowledgebase for benefit information
5. Know who to contact with questions so they can be answered
6. Receive confirmation of my benefit elections and view my ongoing benefit elections
7. To be upload necessary info/documentation to make life insurance elections
8. Receive notifications about eligibility requirements that might affect my enrollment status to make benefit decisions
9. Notified when my benefits applications are approved/transmitted (specific to the supplemental life)
10. Notified that my application was submitted successfully for confirmation
11. Have payroll deductions setup based on my elections
12. Be notified when benefit adjustments are being made to my pay

As OGI, I want to:

1. To be able to make enrollment changes on behalf of employees to comply with DEV or QMSO
2. Review and approve/deny all benefit changes to ensure compliance with contractual provisions or IRS regulations

As Non-SCO Agency HR, I want to:

1. View and release applications completed by my employees to be included in the data file transmitted to the vendor
2. Receive plan elections/payroll deduction rates to setup premium deductions in their own payroll system

As Agency, I want to:

1. View benefit premium adjustments for employee pay to answer employee questions

<u>**HR-080-050: Manage Retirement Plans**</u>

As PERSI Vendor, I want to:

1. To receive a transmittal file to update my system with the employee's elections
2.

As LUMA, I want to:

1. Receive enrollment information for voluntary benefits to establish payroll deductions associated with those elections

As Vendor, I want to:

1. Receive the enrollment files from LUMA to setup retirement accounts

As Agency HR, I want to:

1. Input the enrollment for the ORP election based on the employee's selection to establish the statutorily required plan

As Employee, I want to:

1. Select my ORP vendor for the statutorily required plan to complete enrollment
2. Be offered all benefits plan that are applicable to me (So I can choose the appropriate choice)
3. Be able to reference the knowledgebase that includes information about voluntary benefits (employee need to contact vendors directly to enroll)
4. See that my deductions are being accurately taken
5. Receive a notification when a new deduction is setup for me
6. Know who to contact for additional information, potentially in the knowledgebase
7. Change the percent/flat out of my contribution to the PERSI choice plan

HR-080-060: Affordable Care Act

As SCO, I want to:

1. Setup and maintain affordable care act requirements
2. Create, distribute, and file year-end reporting
3. Create annual measurement reports

As an Employee, I want to:

1. Be sent an offer of insurance and acknowledge it
2. Want my premium to reflect the appropriate rate table for my tier status
3. Be sent a notification if my premium changes based on my tier status

As OGI, I want to:

1. Review reports with insurance eligibility changes

As Agency HR, I want to:

1. Review reports with insurance eligibility changes
2. Be notified of any offer of insurance to my employees
3. Update my employee's tier status to be accordingly based off ACA reporting (would like to automate if possible)

HR-080-070: Process Benefits Termination

As SCO, I want to:

1. Have payroll update the deductions on benefits based on separation date
2. Utilize IPA to calculate applicable refunds and process those refunds to avoid manual intervention

As Agency HR, I want to:

1. Input a separation date for an employee to stop their deductions

As OGI, I want to:

1. Create the rule behind benefit eligibility based on separation date and separation reason
2. Send a communication to separated employees about benefits termination to the email on file

As Employee, I want to:

1. Know who to contact with questions
2. Have access to LUMA
3. Receive a communication about benefits termination to the email on file

HR-080-080: Data Transmission to External Vendors (e.g., PERSI)

As OGI, I want to:

1. Have the system send enrollment information to carriers either nightly or weekly
2. Have the system send deduction registers to carrier with each payroll
3. Have the system send an address and name updates file with recent changes weekly
4. Have the system send a termination report on a weekly basis with recent terminations