Benefits Administration User Guide

For Insurance Coordinators

Health Insurance and Optional Insurance

Personnel Cabinet
Department of Employee Insurance

TEAM KENTUCKY PERSONNEL CABINET | Department of Employee Insurance

KHRIS
Connecting the Commonwealth

Updated March 31, 2023

This Benefits Administration User Guide is to assist Non-Commonwealth Paid Insurance Coordinators (ICs) with the administration of health and optional insurance plans.

If needed, we will publish updates to this User Guide quarterly, according to changes in processing.

Please use the following matrix for processing:

Actions to be completed by IC	Actions to be uploaded via the online tool
❑ New Hire Enrollment	❑ Cross-Reference Payment Options
❑ Employee Demographic Updates/Changes	❑ Transfers
❑ Terminations	❑ Qualifying Events
❑ Health Benefit Enrollment Reporting	❑ Begin/End Leave Without Pay
❑ Plan Change History Report	❑ Dependent Demographic Data Changes
❑ Insurance Plan Cost Report	❑ All Reinstatement in Employment
❑ Life Conversion and Portability Letter(s)	❑ Statement of Health (SOH) – OIB only
❑ Smoker Status Report	❑ Leave Without Pay (LWOP) w/premium-OIB only
❑ Health Post Tax Participant's Report	❑ All Cancellation of Coverage Requests-OIB only

Note: All applications/documentation to the Department of Employee Insurance (DEI) Enrollment Information Branch (EIB) should be uploaded using the online upload tool and all Optional Insurance Branch (OIB) applications/documentation should be mailed.

Please send questions and/or suggestions for improvements to this User Guide to:

Department of Employee Insurance
Enrollment Information Branch Manager
502-564-1085
501 High Street, 2nd Floor
Frankfort, KY 40601

Department of Employee Insurance
Optional Insurance Branch Manager
502-564-4774
501 High Street, 2nd Floor
Frankfort, KY 40601

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All names and other identifying information are fictitious and created specifically for this document.

This section is to provide you with a guide to your everyday responsibilities as an IC. For you to assist your employees, it is important that you have knowledge of the insurance plans offered, an understanding of how the plans work, know the eligibility requirements and be familiar with the forms used as listed at KEHP and OIB.

As a representative of an agency that participates in benefits offered by DEI, an IC is responsible for the following actions:

1. Complete all online, webinar and in person training conducted by the Department of Employee Insurance (DEI).

    a. New IC Training:

        i. KHRIS Access Training – includes modules on the Health Insurance Portability and Accountability Act (HIPAA) and an overview of KHRIS. You must first complete the KHRIS Access Request Form to gain access to these training modules.

        ii. New IC Training – an in-person training held at the State Office Building in Frankfort. This training provides hands on experience processing in KHRIS for enrollment, demographic changes, billing, and more. Please contact DEI at 888-581-8834 to enroll.

    b. Open Enrollment Training – gives you up to date benefit related information for the upcoming plan year.

    c. Yearly iStep Training that includes HIPAA – similar to the HIPAA training you took to gain access to KHRIS and is required yearly to maintain KHRIS access.

    d. Various webinars from DEI and our vendors. Training information is located on the "Resources for Insurance Coordinators, HRG's and Billing Liaisons" page.

2. Provide new employee(s) with:

    a. Current health insurance, waiver, and Flexible Spending Account (FSA) information and application(s). Information on all health-related benefits is located on the KEHP website.

    b. Current optional insurance coverage information and application. Information on all optional insurance benefits is located on the OIB website.

    c. Information on enrollment requirements
        i. For example, the 35-day new hire deadline, the “First day/Second month” rule, the cross-reference payment option, and how to elect benefits using KHRIS Employee Self-Service (ESS).

    d. Information on qualifying events and deadlines
        i. How to fill out, sign and submit forms to DEI and OIB
        ii. What supporting documentation is required
        iii. What and when verification documentation is required
        iv. Deadlines for signature dates

    e. Information on COBRA
        i. COBRA rates are on the KEHP website.

    f. Open Enrollment information regarding dates, requirements, and any benefit/premium changes.

3. Process employee enrollment, termination, demographic changes/updates in KHRIS in a timely manner. This includes new employees who do not turn in an application or complete benefits enrollment within 35 days of hire.

4. Provide DEI with updates on the Enrollment Change Form for employee transfers, begin/end military leave, begin/end LWOP, retirement, death, cross-reference payment option elections, and qualifying events in a timely manner. New website for ICs/HRGs to submit applications, Exceptions, and supporting documentation to DEI: https://apps.personnel.ky.gov/DEIFormUpload. Log in using your KHRIS user id and password. Once you log in: select the applicable upload option. NOTE: Life insurance should not be uploaded on this site.

5. Manage monthly bills by reconciling, processing, and releasing the life, dental, vision and health premiums, administrative fees, flexible benefits and health reimbursements within Biller Direct if your duties include Billing Liaison.

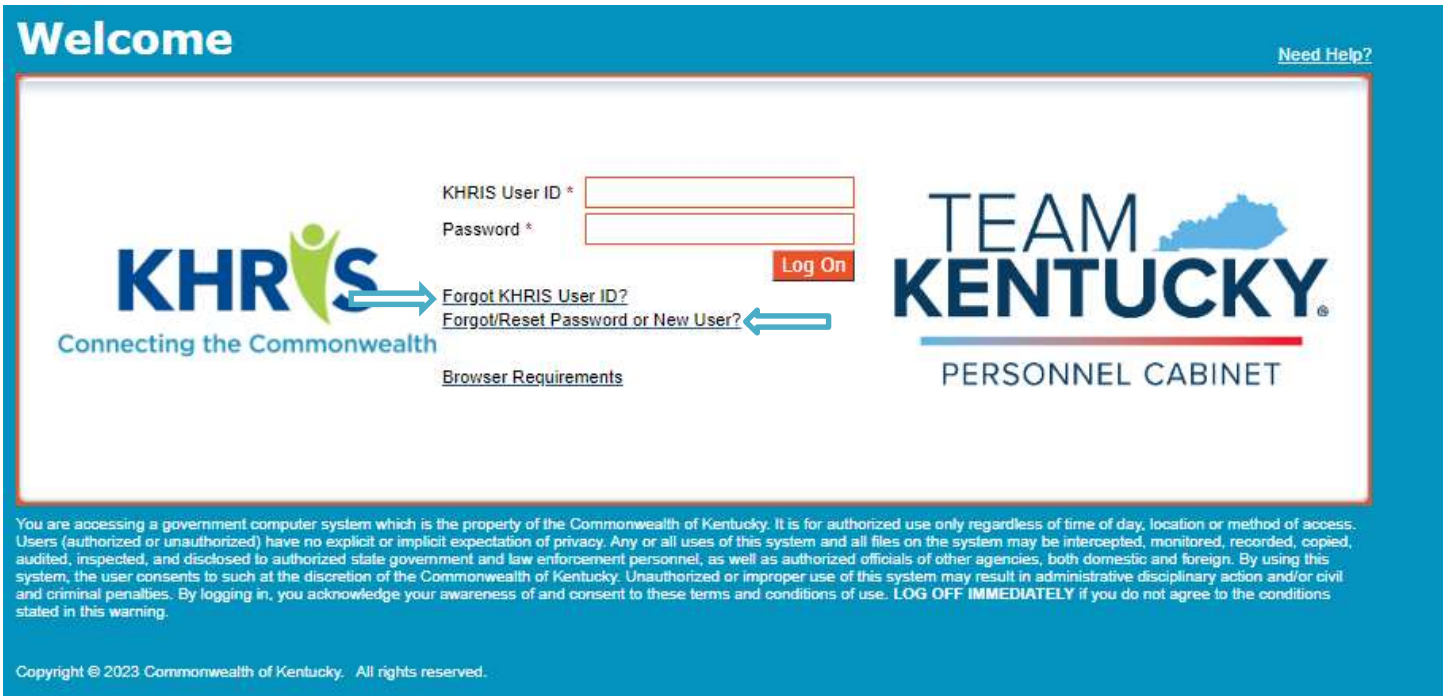
6. Counsel employees on health and optional insurance and provide resources for additional information such as website addresses, benefits selection guides and customer service numbers for KEHP and vendors.

7. Be familiar with and use the KEHP Administration Manual, Group Life Insurance Certificate Booklet, and this User Guide to complete your responsibilities.

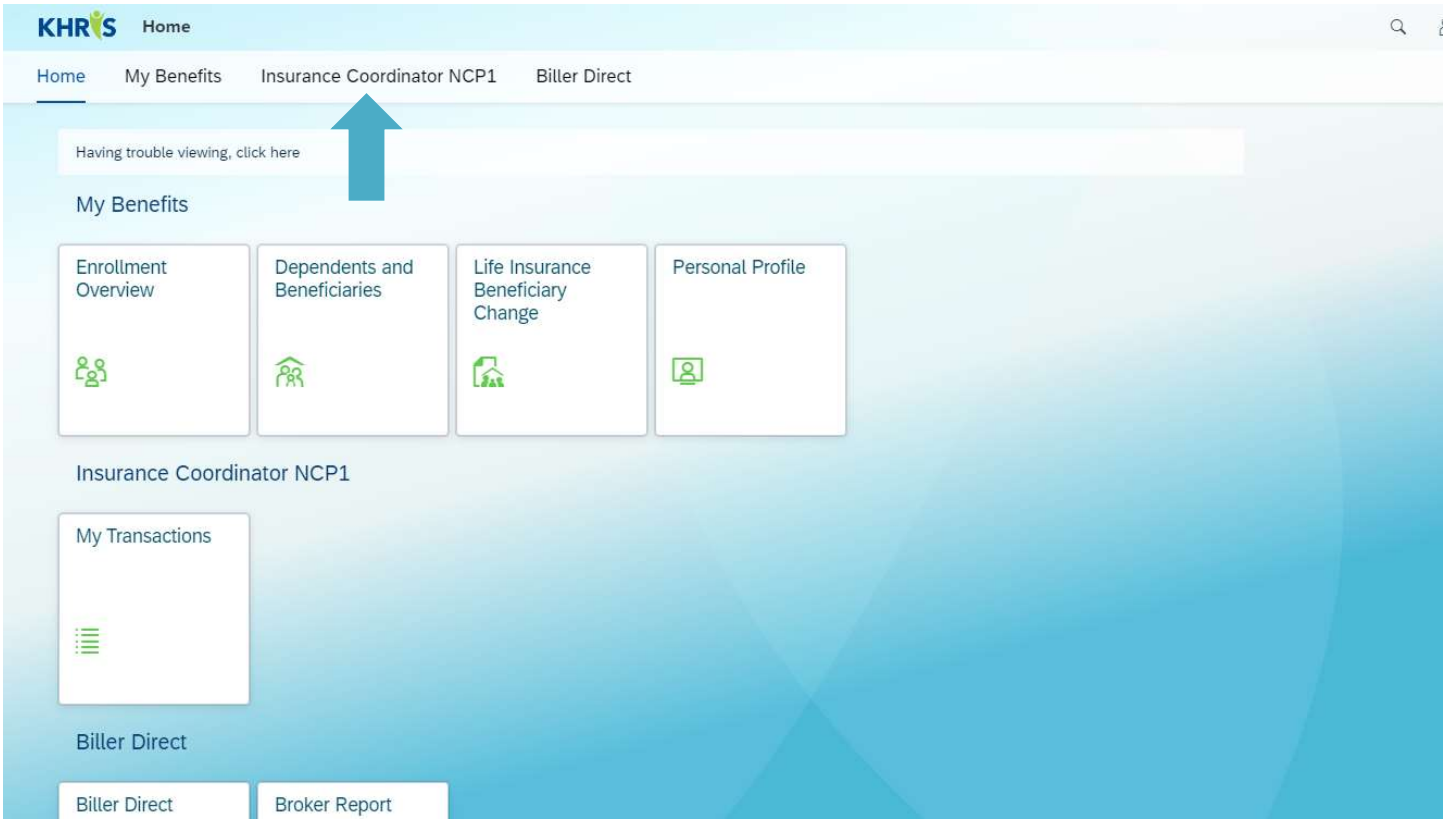
LOGGING INTO KHRIS

Log into KHRIS.

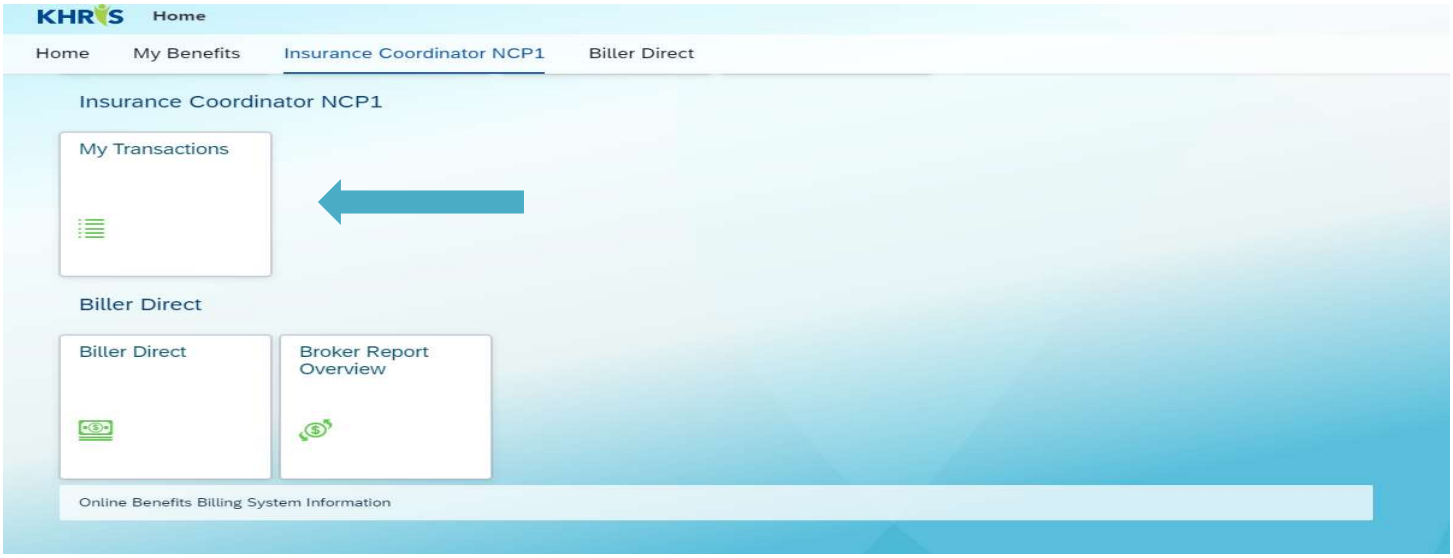
To login, please use your own KHRIS User ID and Password. New/First time users should click on the “Forgot/Reset Password or New User?” link to create a password. Also, please notice the “Forgot KHRIS User ID” link. Those who have already accessed their KHRIS account but have forgotten or misplaced their User ID can use this link.



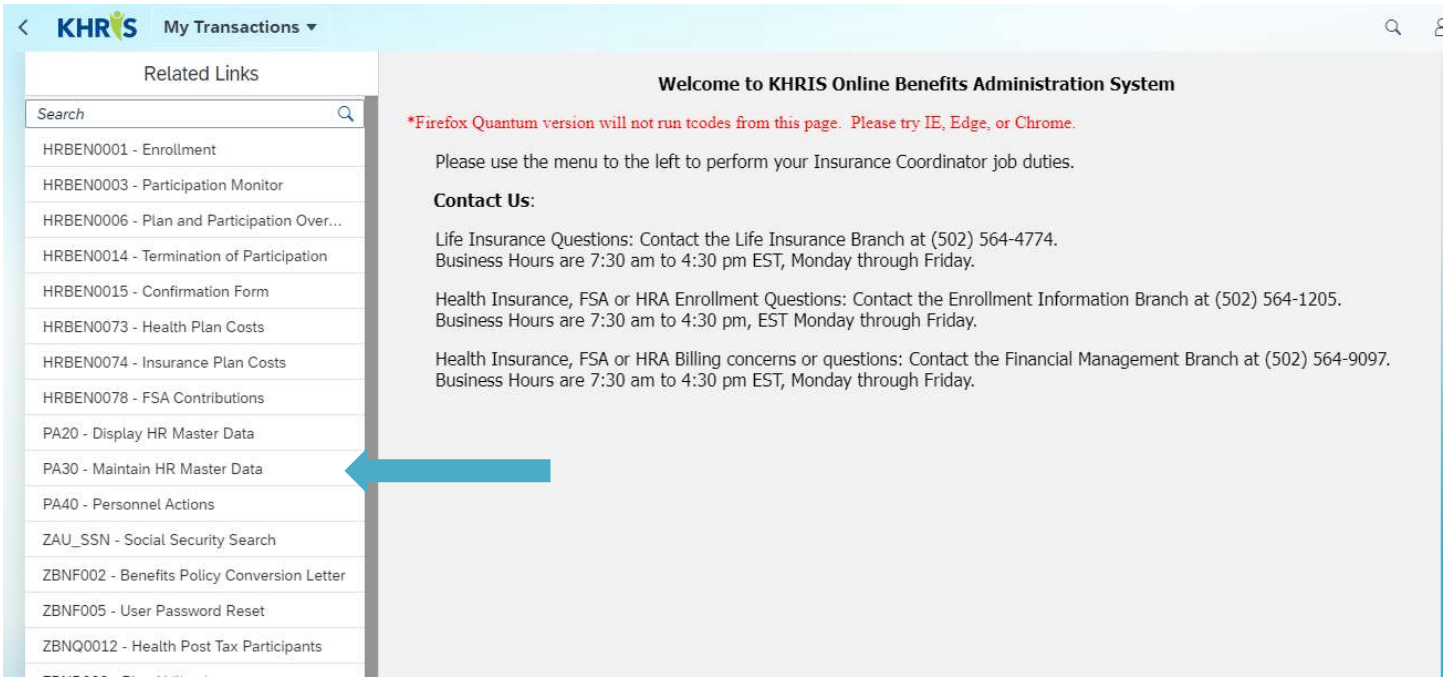
After you have logged into KHRIS using your KHRIS User ID and password, select the “Insurance Coordinator NCP1” tab.



Then select My Transactions.



Please choose the appropriate transaction from the list on the left to begin processing, displaying screens or running reports.

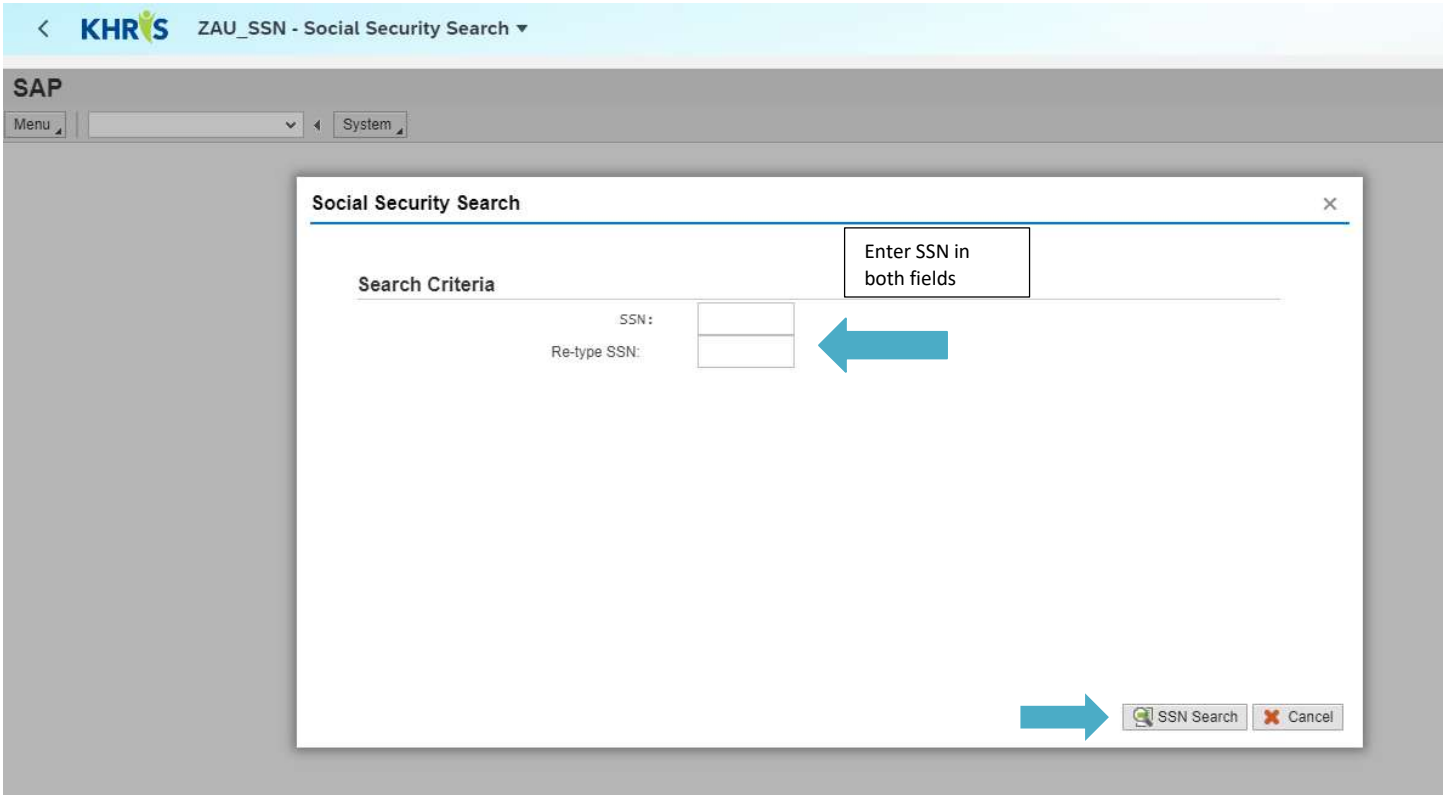


ENROLLING A NEW HIRE

A new hire for this process is a newly hired employee never covered under KEHP as a planholder or dependent. The new hire is not a returning retiree, transfer from another agency who participates with KEHP, dependent (spouse/child) covered by KEHP, or participating in a “new” cross-reference payment option (a newly hired employee who wants to begin a cross-reference payment option with their spouse). Applications for anyone who is not a newly hired employee should be forwarded to EIB and OIB for processing.

Step 1: Social Security Search

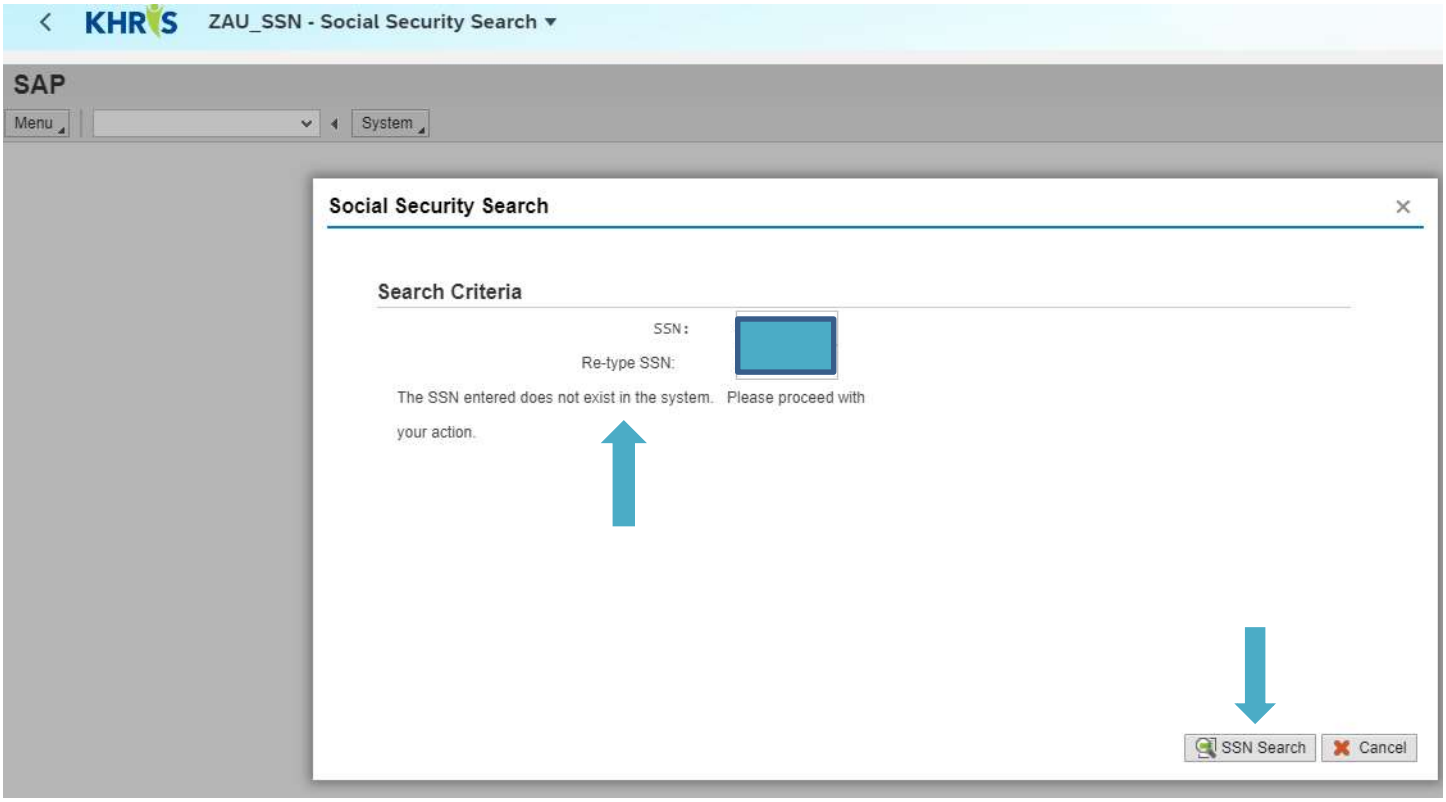
Select Transaction ZAU_SSN Social Security Search from the menu on the left of your screen. Enter new hire’s SSN in both search fields. Click “SSN Search”. If the name is not found, click “Cancel” to proceed to next step.



Step 1 continued: SSN Search

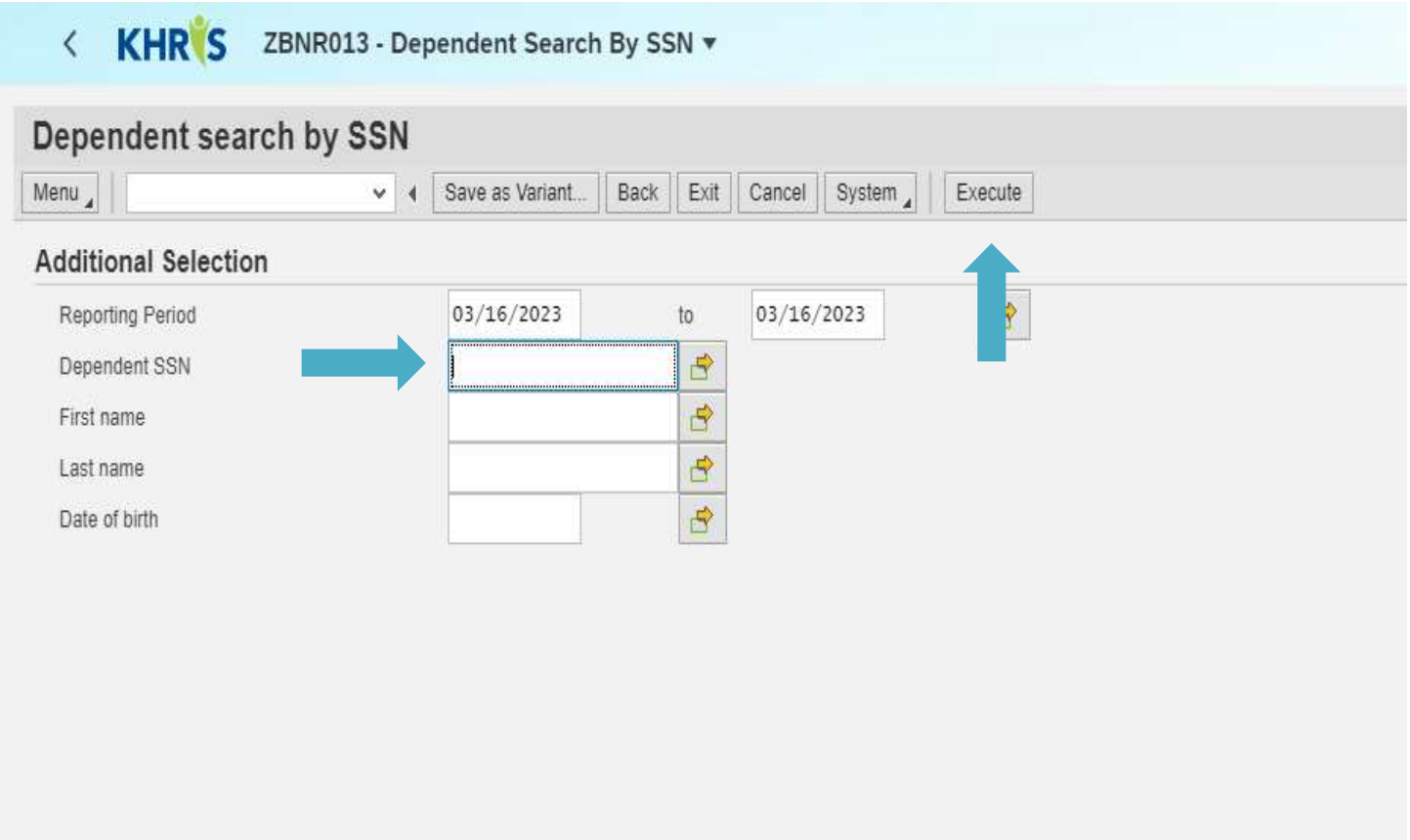
If the SSN you entered matches the SSN of an employee who is already a planholder in KHRIS, then you see that this employee already exists. Please send all applications to EIB and OIB for which you get this result.

If KHRIS does not find a match for the new employee's SSN, you will see the following message, and you can proceed to the next step.



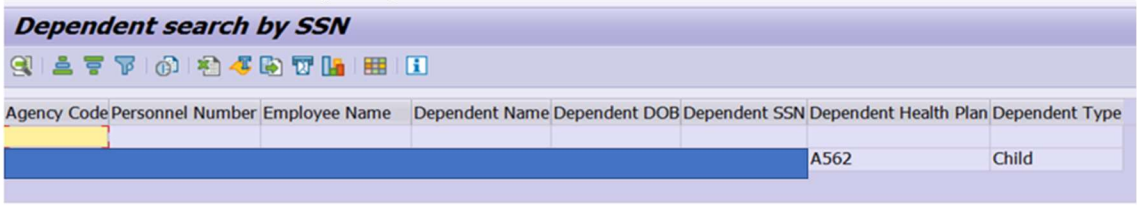
Step 2: Dependent SSN Search

Select “ZBNR013-Dependent Search By SSN” from your list of transactions. **Do not** change the reporting period dates. In the “Dependent SSN” field, enter the new employee’s SSN, then select “Execute”.



Step 2 continued: Dependent SSN Search

If the SSN you entered matches the SSN of an employee who is already a dependent in KHRIS, then you will get a message telling you that this employee already exists. Please send all applications to EIB and OIB for which you get this result.

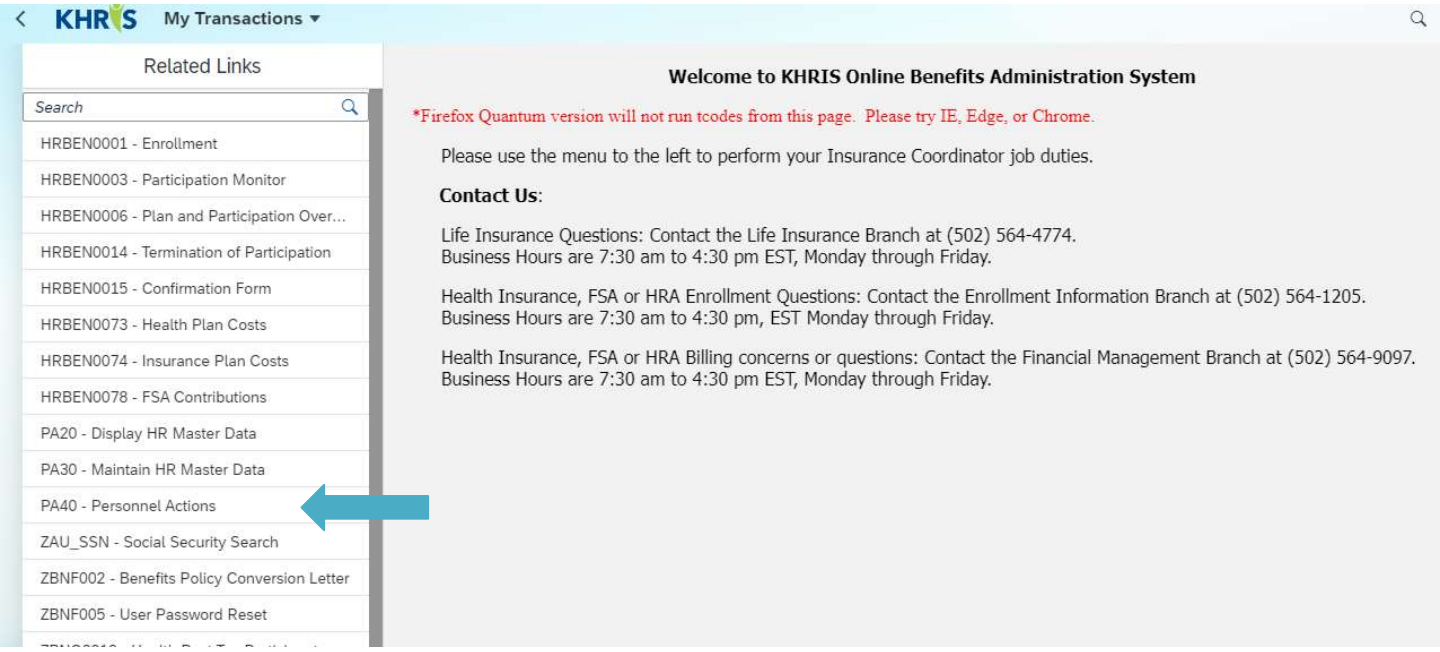


If KHRIS does not find a match for the new employee's SSN, you will see the following message, and you can proceed to the next step.

Note: It is very important that you perform both SSN searches prior to beginning Step 3. You will encounter errors later in your processing steps if you do not.

Step 3: Personnel Actions

After both SSN searches are performed and no matches were found, select " < " at the top of your screen and then select "PA 40 Personnel Actions", from the Transactions Menu on the left.

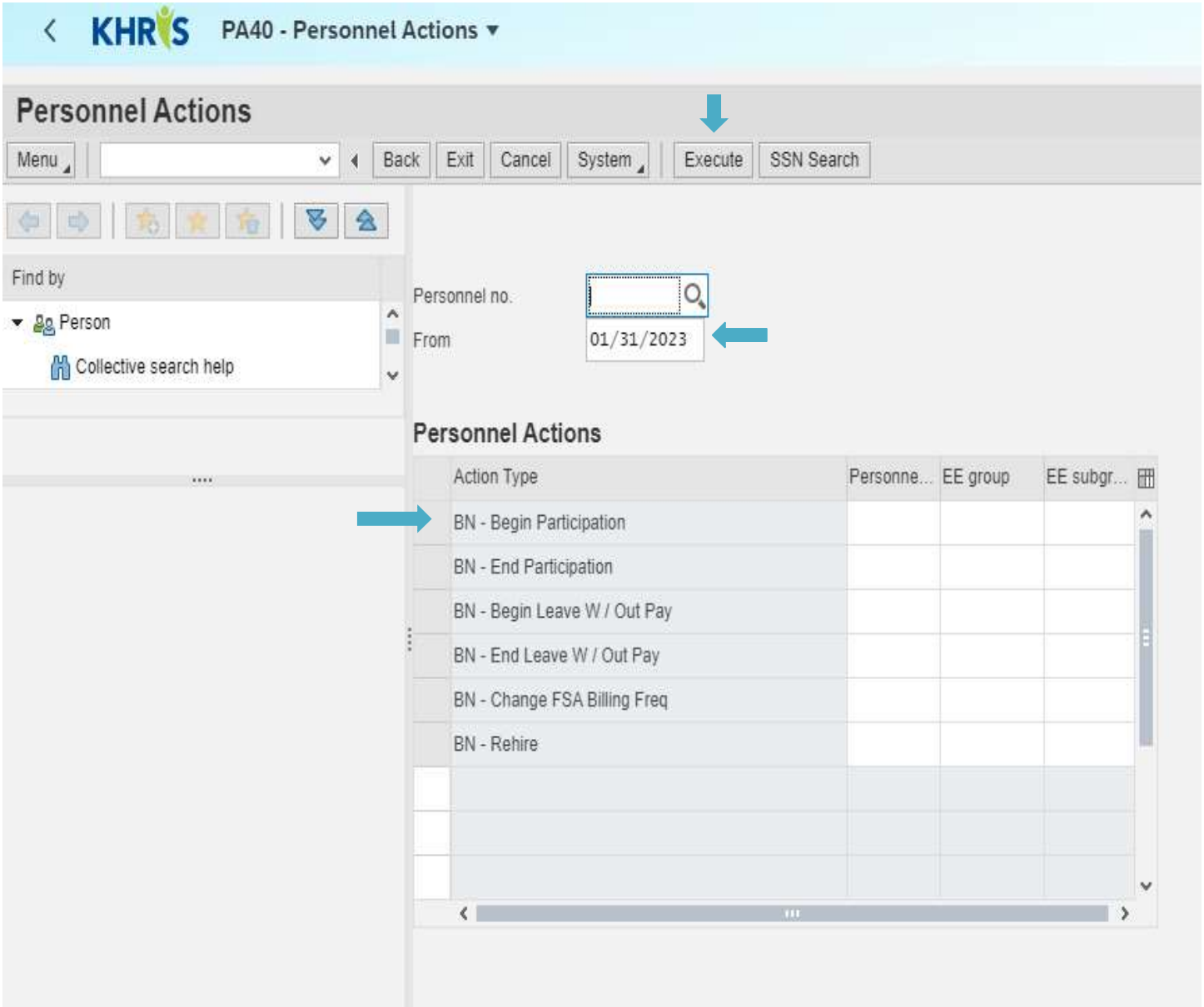


Step 3 continued: Personnel Actions

In the “From” field, enter the employee’s date of hire.

In Personnel Actions box, click “Begin Participation” to highlight.

Click “Execute”.



Step 3 continued: Personnel Actions

Click on the “Reason for Action” field, (drop down box will appear) choose (01) New Employee

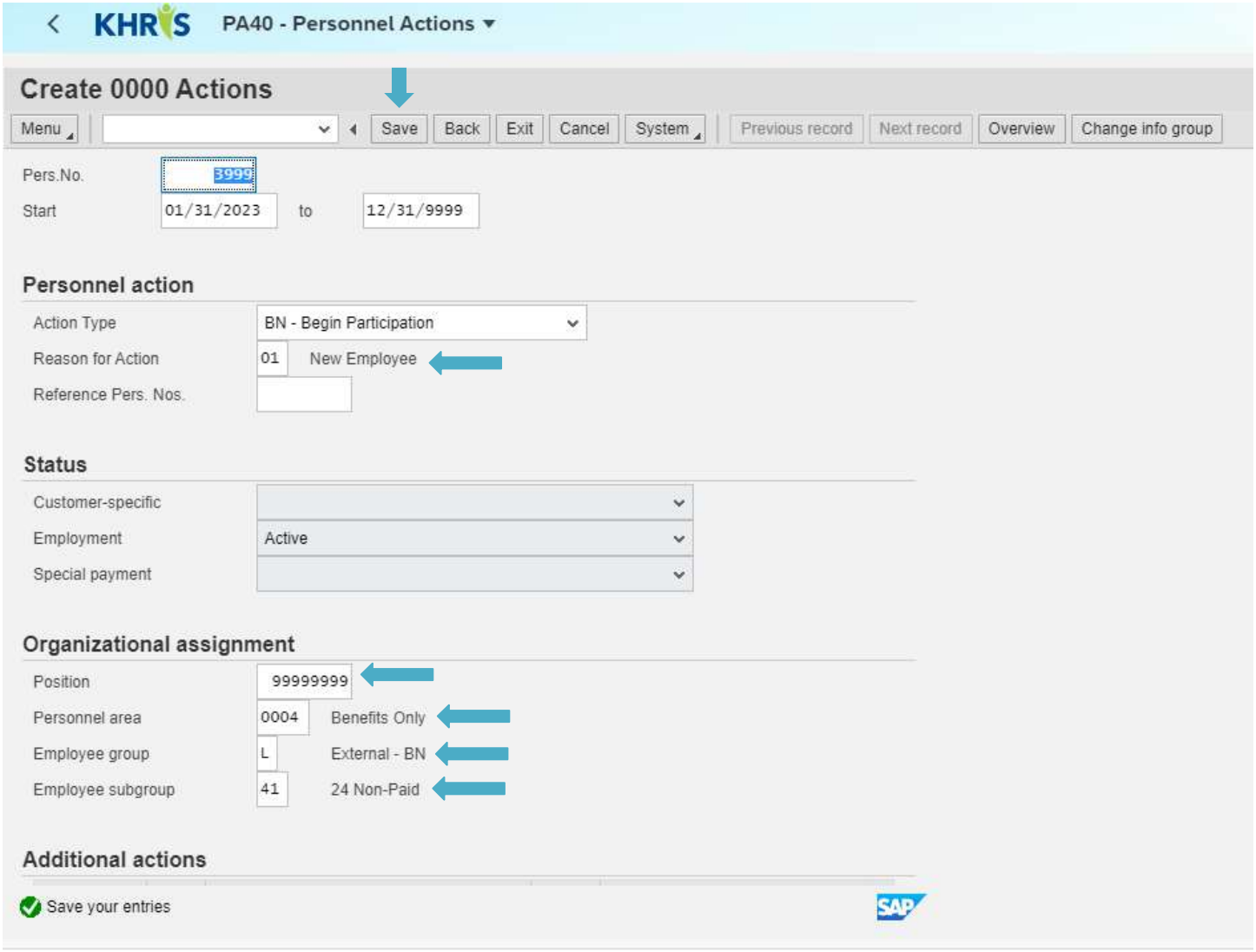
In the “Position” field enter 99999999 (always)

In the “Personnel area” field enter 0004 -Benefits Only

In the “Employee group” field enter L -External BN

In the “Employee subgroup” enter 41 -24 Non-paid

Click “Save”



Step 3 continued: Personnel Actions

In the “Cost Ctr” field enter Agency’s cost center number (this is specific to your Agency; 9+subarea+company number)

In the “Sub Area” field (use drop down box for type of Agency) enter Agency type (i.e. school board, health dept, etc.)

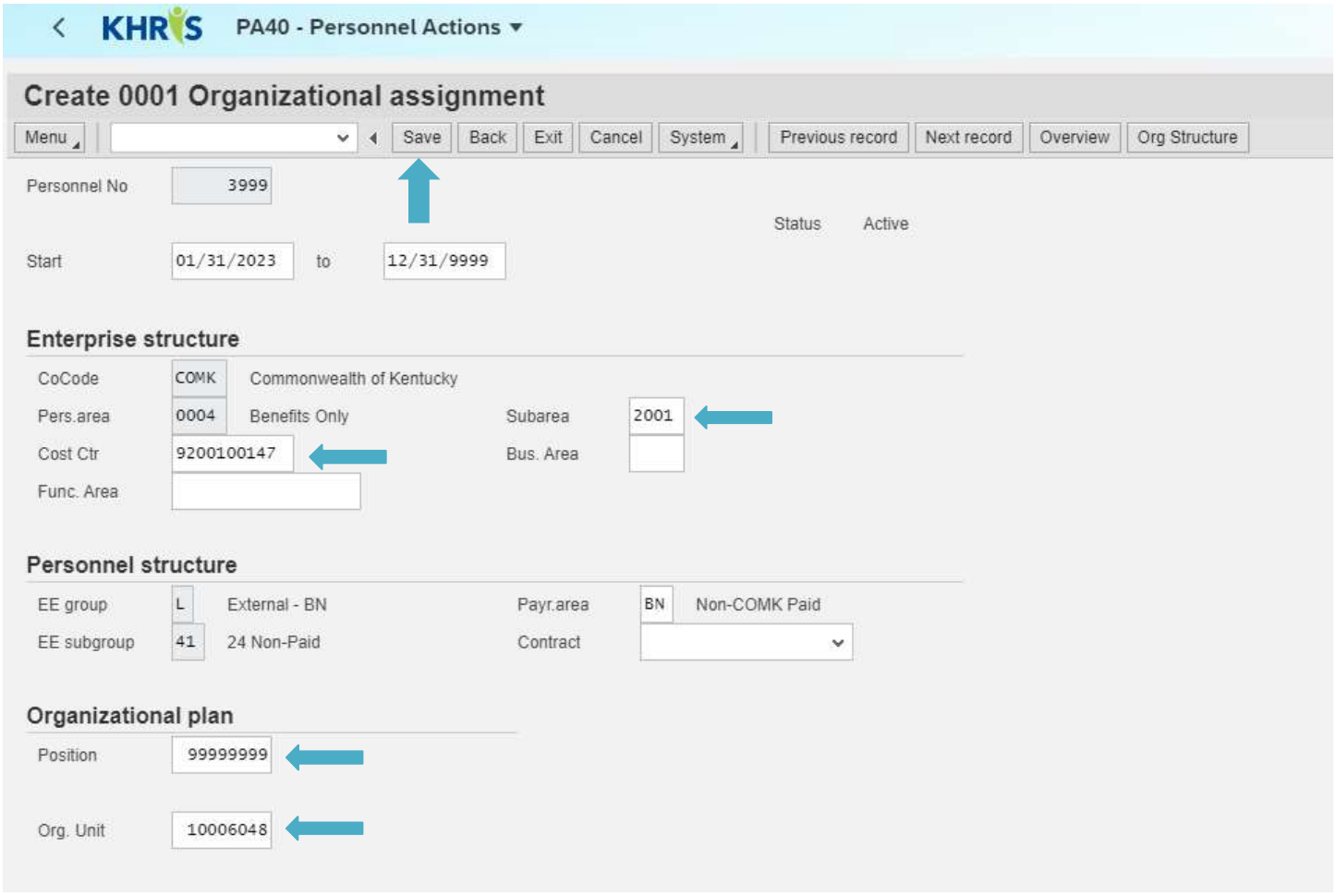
In the “Position” field enter 99999999 (always)

In the “Org. Unit” field enter Agency’s organizational unit number (this is specific to your Agency; use drop down box to search for org unit by searching org unit short text)

Click “Save”

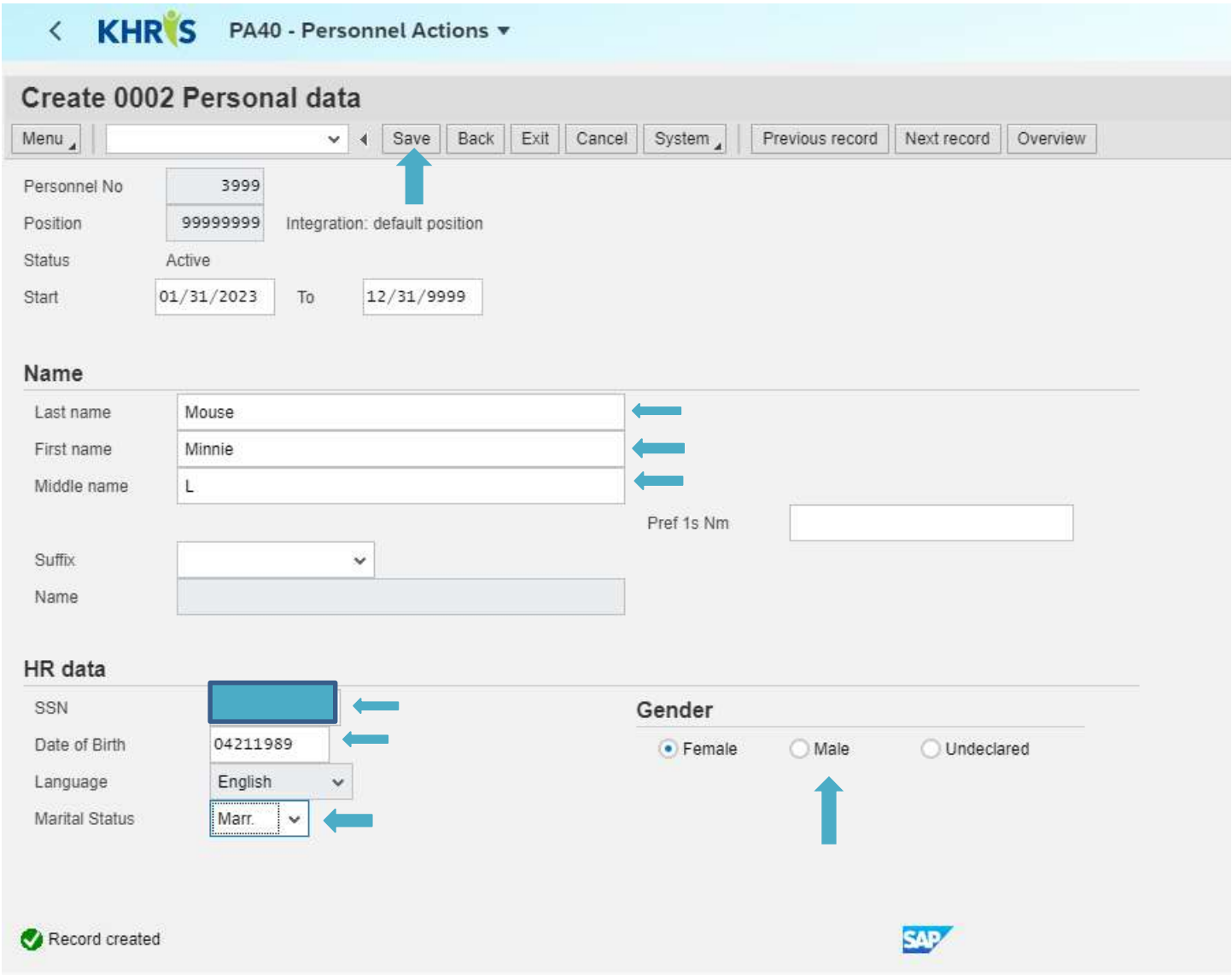
You may need to Click “Enter” to acknowledge the message at the bottom of screen that reads “Enter data for payroll past (retroactive accounting)”

Note: This will be the first screen to show the newly generated KHRIS Personnel Number. Now would be a good time to write down for future use.



Step 3 continued: Personnel Action

Enter Employee's Name (last, first and middle initial), SSN, Date of Birth, Gender/Sex and Marital Status
Click "Save"



Note: Do not forget to include middle initial and suffix (Jr., Sr., III, and IV), if this information is provided on their application.

Step 3 continued: Personnel Actions

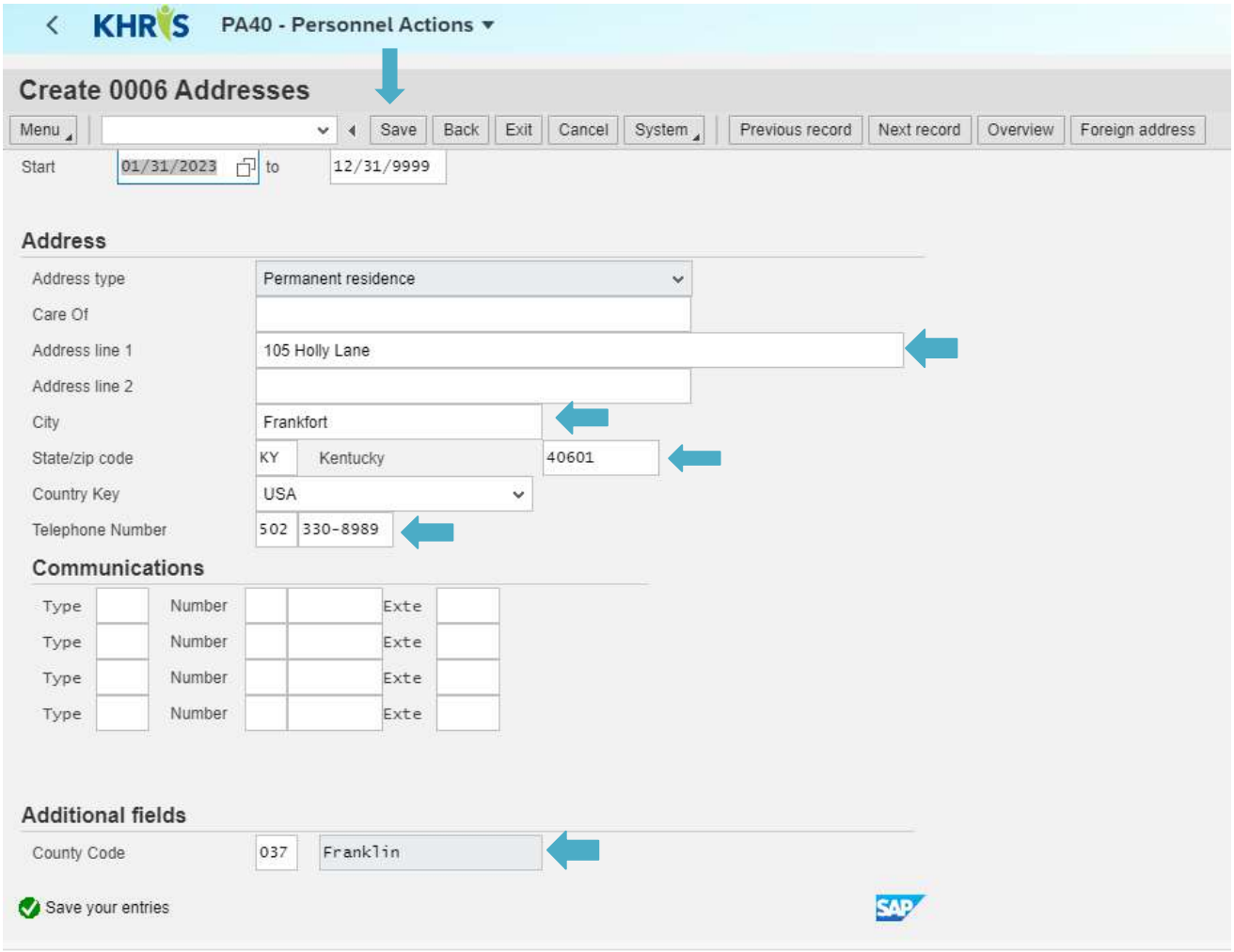
Enter Address (If employee has a P.O. Box, enter it in “Address line 1”)

Enter Telephone Number

Use the Communications section if Employee wants to list additional telephone numbers (use drop down menu for type)

In the “County Code” field select Employee’s home county (use drop down menu)

Click “Save”

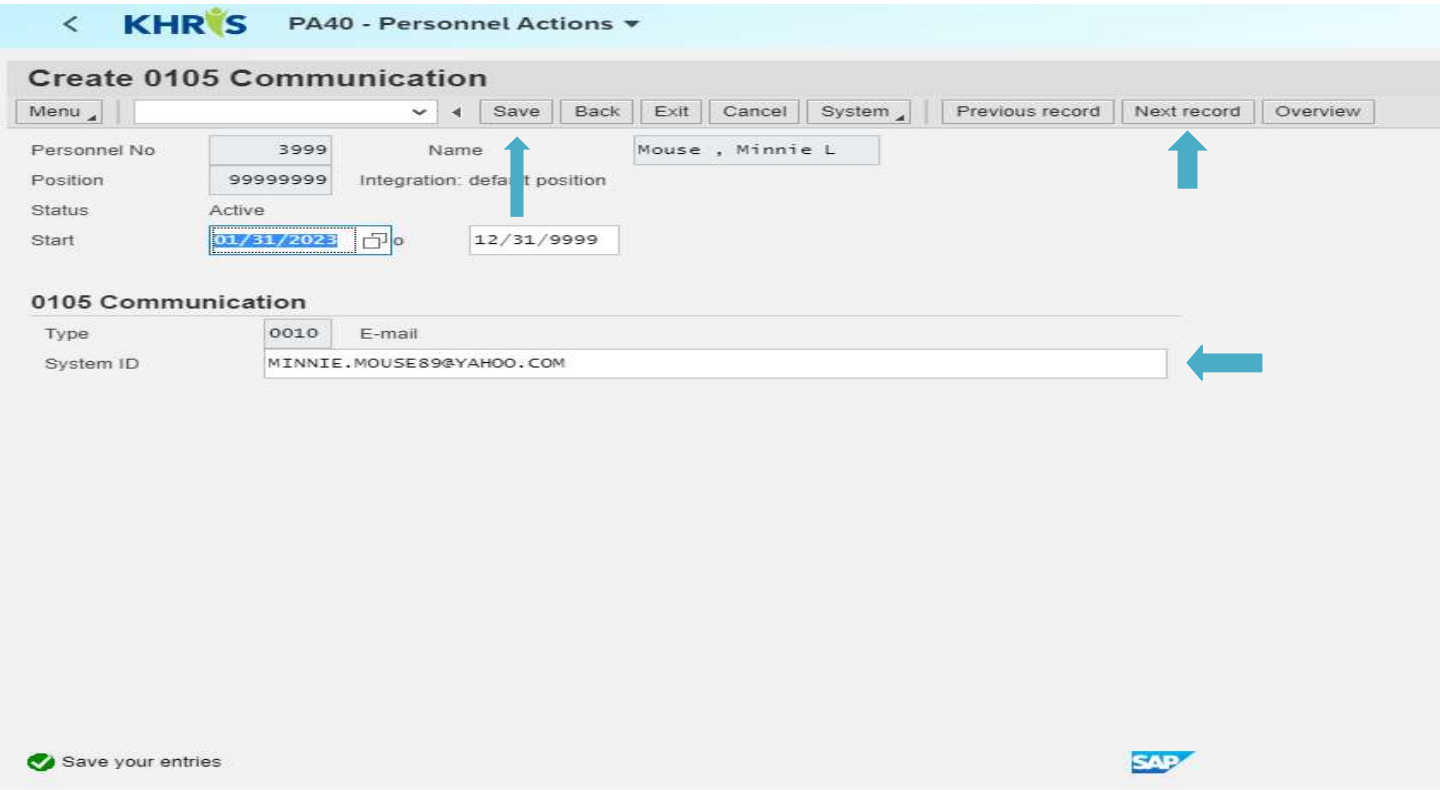


Note: If you get a zip code error, please use the USPS.com website to determine the correct zip code. You can also use Google.com to search for the correct county of residence.

Step 3 continued: Personnel Actions

In the “System ID” field, enter Employee’s email address.

Click “Save”



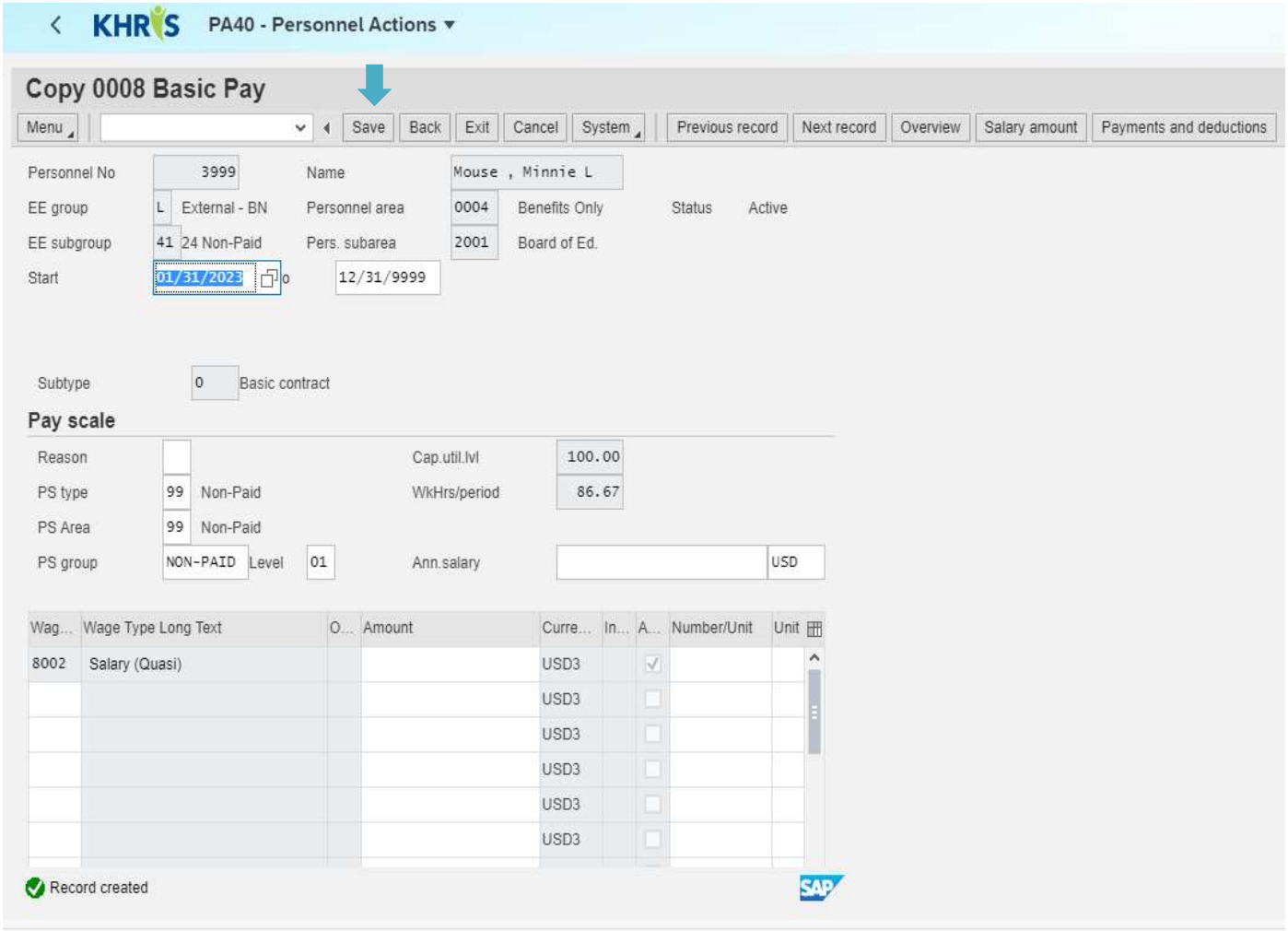
Note: Employee should use the email (preferably work email) that they want to receive health and optional benefit information. If employee does not yet have, or did not supply their email address, select “Next record” to move to the next screen.

Step 3 continued: Personnel Actions

Click “Save”

Click “Enter” to acknowledge message at bottom of screen

Click “Enter”



Step 3 continued: Personnel Actions

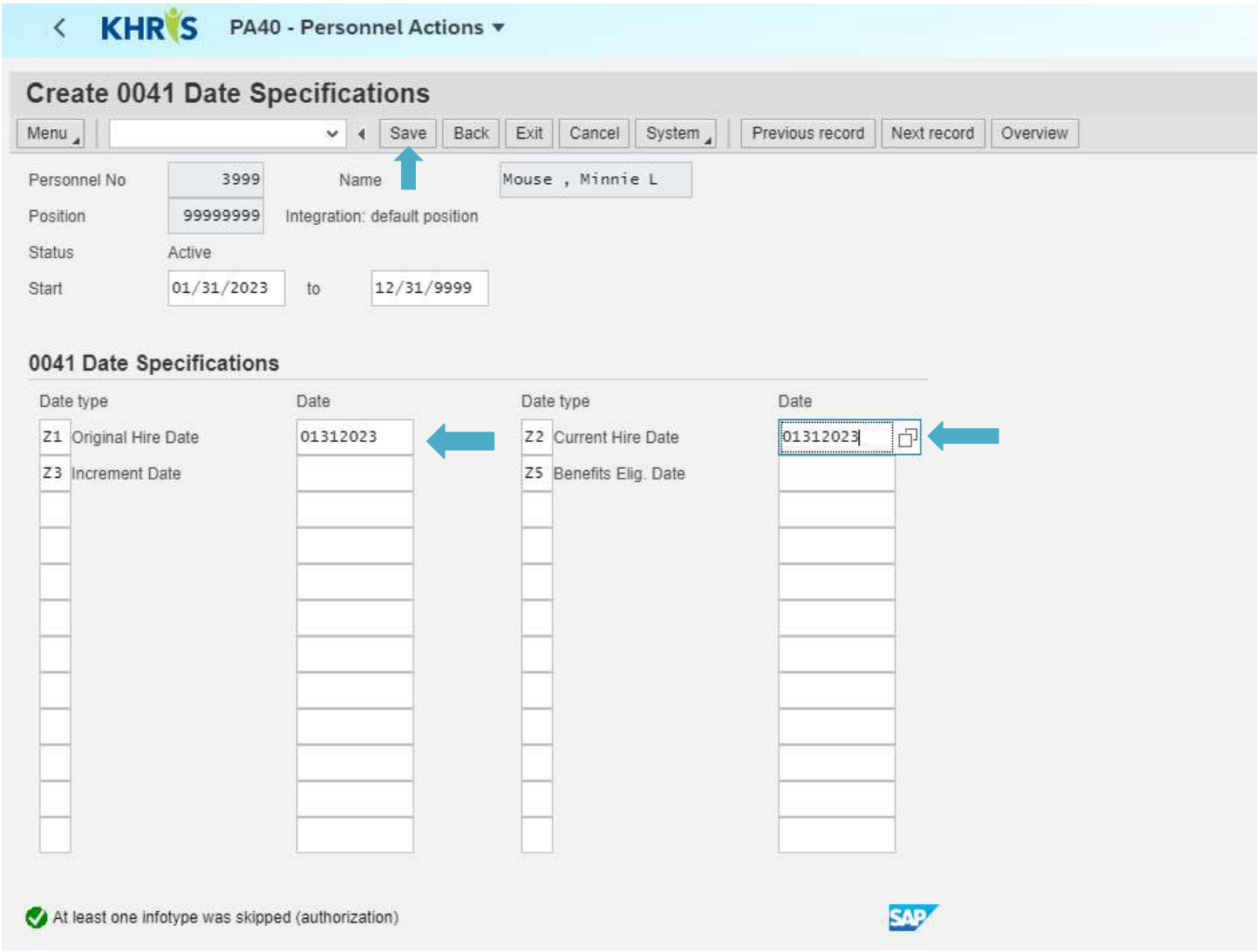
Enter *Original Hire Date (Z1)

Enter Current Hire Date (Z2)

Click “Save”

Click “Enter”

Click “Enter” to acknowledge message at bottom of screen



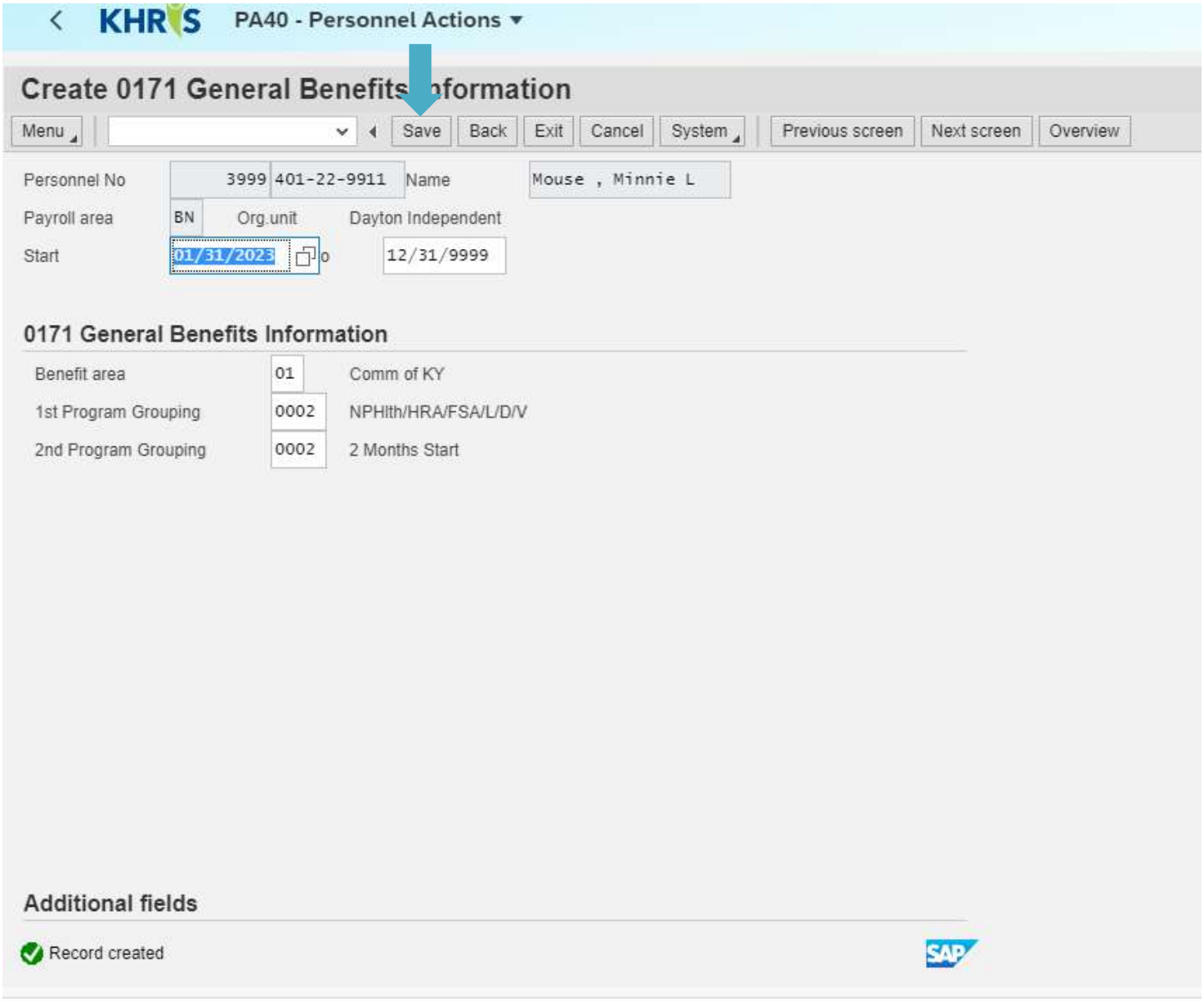
* Original Hire Date will be the same as the Current Hire Date

Note: Benefit eligibility date and increment date does not need to be entered. KHRIS will automatically calculate the Benefit Eligibility date for you. You can verify the accuracy of the date by using the “First day/Second month” rule.

Step 3 continued: Personnel Actions

No information is to be entered on this screen, (applications for dual employee's, hazardous duty retirees, and cross-references are processed by EIB) **but** verify the information is correct.

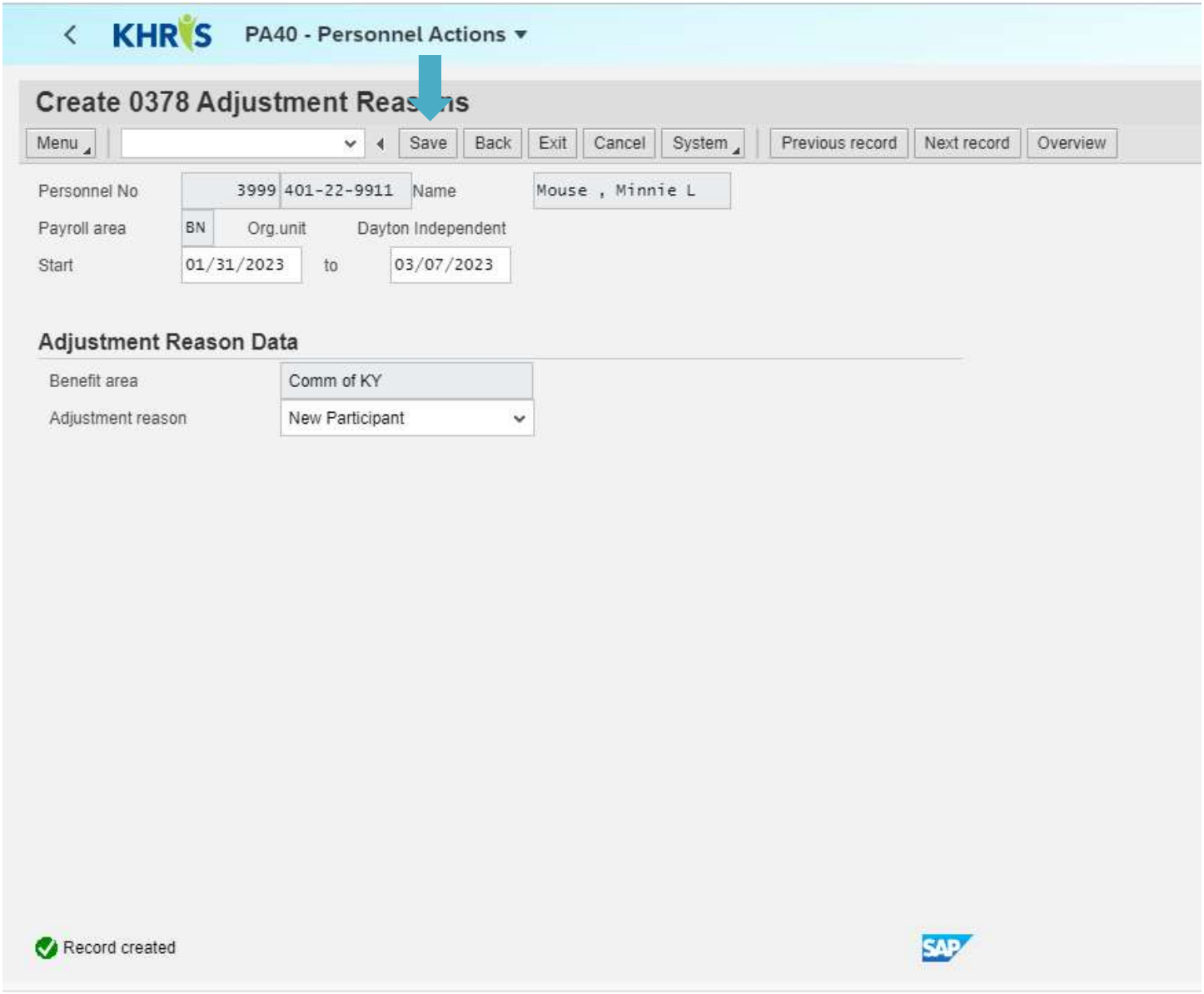
Click "Save"



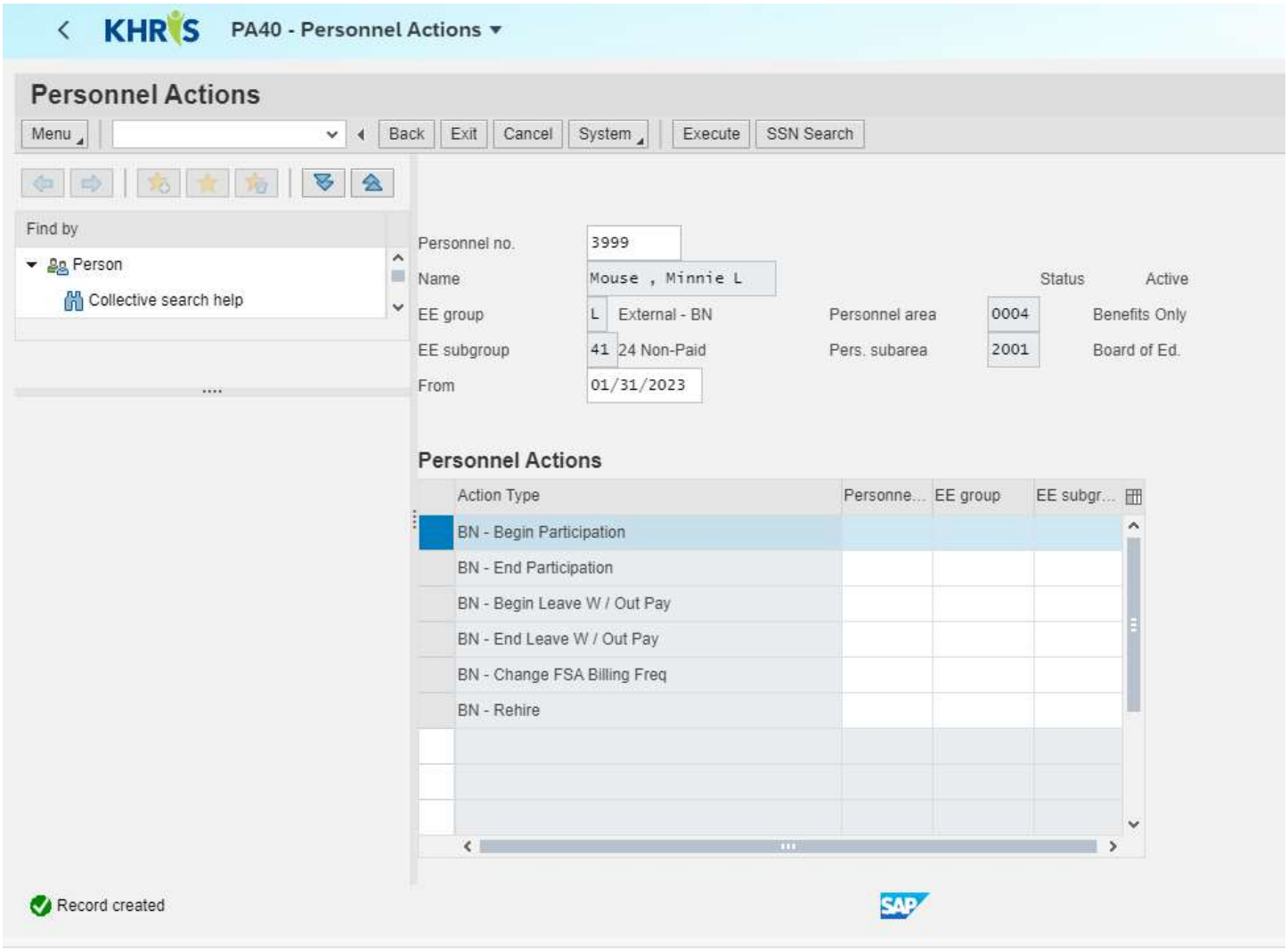
Step 3 continued: Personnel Actions

No information is entered on this screen. View the dates to make sure that the “to” date is 35 days from hire date.

Click “Save”



You will know that this step is complete once KHRIS brings you back to the PA40 home page as shown below.



Step 4: Creating Dependent and Beneficiary records

This step is to be completed using Transaction PA30 under Benefits tab to add Dependents, Beneficiaries, and/or smoking status.

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead, you must type in the command box /nPA40 and once complete then type in /nPA30 and then /nHRBEN0001 to go from screen to screen.

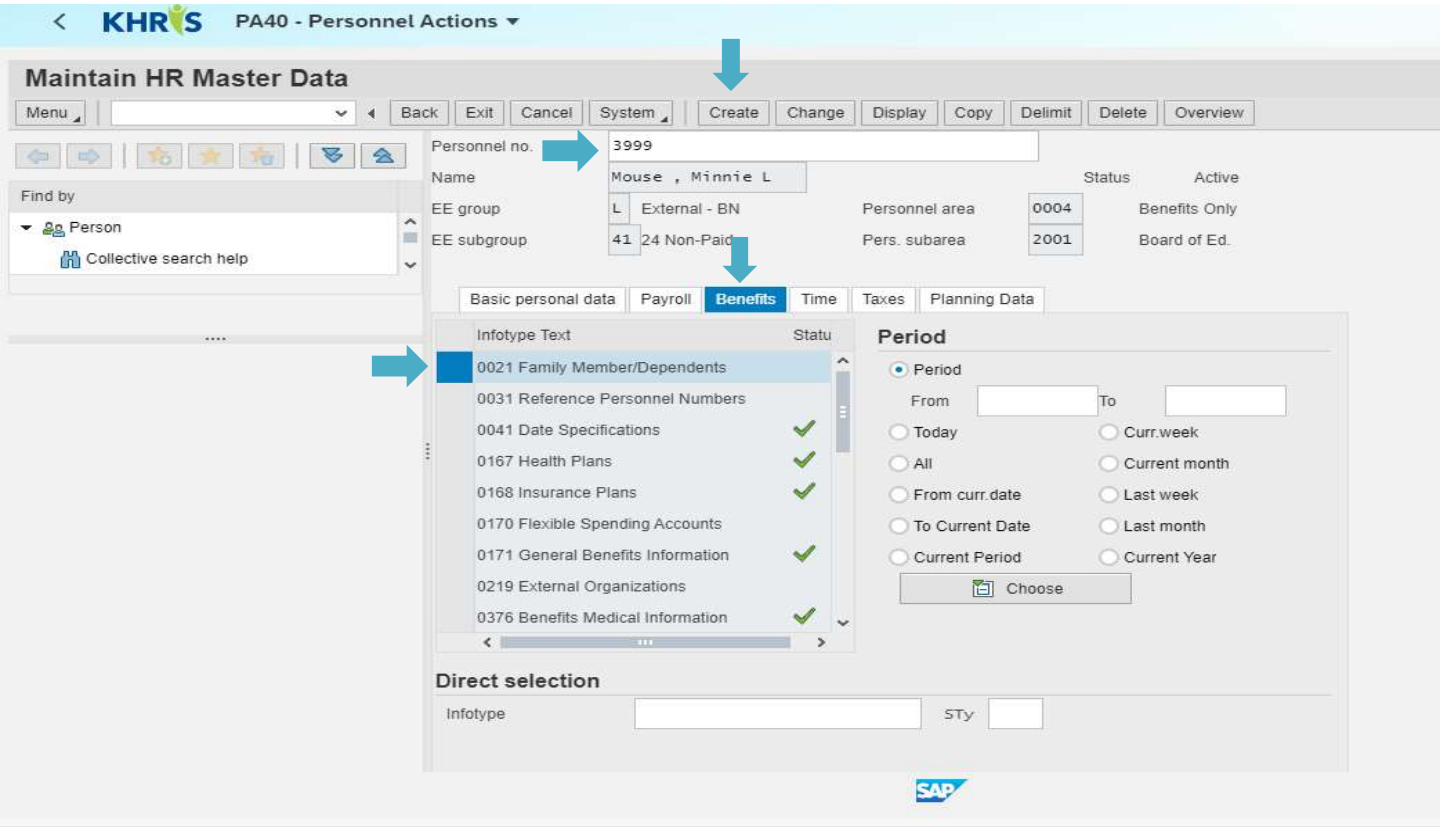
Bring up the employee's record by entering their Personnel number (created in Step 3) into the "Personnel no." field

Hit enter on your keyboard

Click on the "Benefits" tab

Click Infotype 0021 "Family Members/Dependents" to highlight the line

Click "Create"

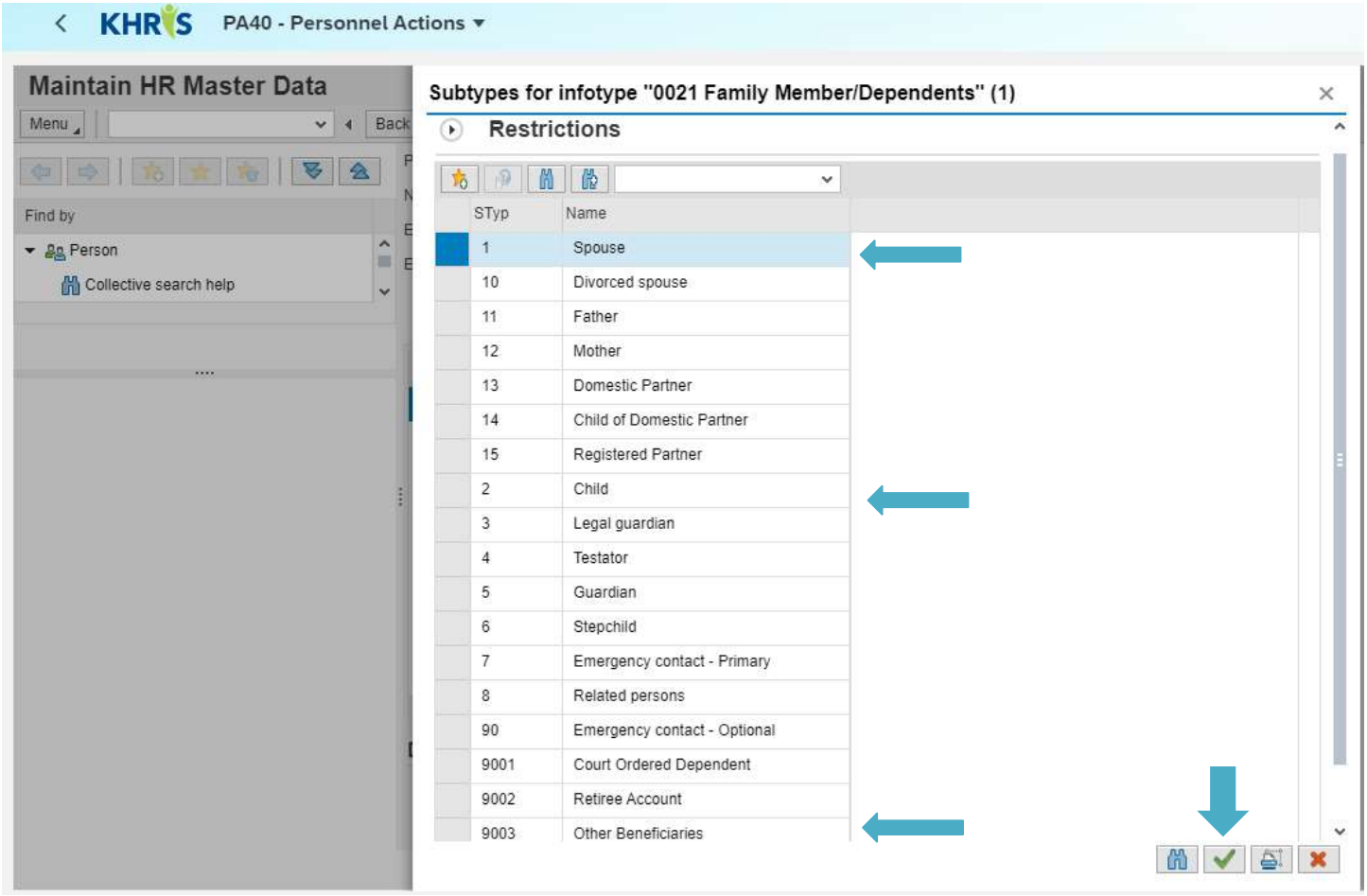


Note: If you did not write down the Personnel Number in Step 3, you can search for the member using their SSN or first and last name by clicking on the icon to the right of the "Personnel no." field

Step 4 continued: Creating Dependent and Beneficiary records

Select the appropriate category for the dependent/beneficiary record you are creating. You should only use “Spouse”, “Child” or “Other Beneficiary” (for Life Insurance only). KHRIS will not recognize any other category in this list for KEHP purposes.

Click the category twice, or click once, then click the ✓



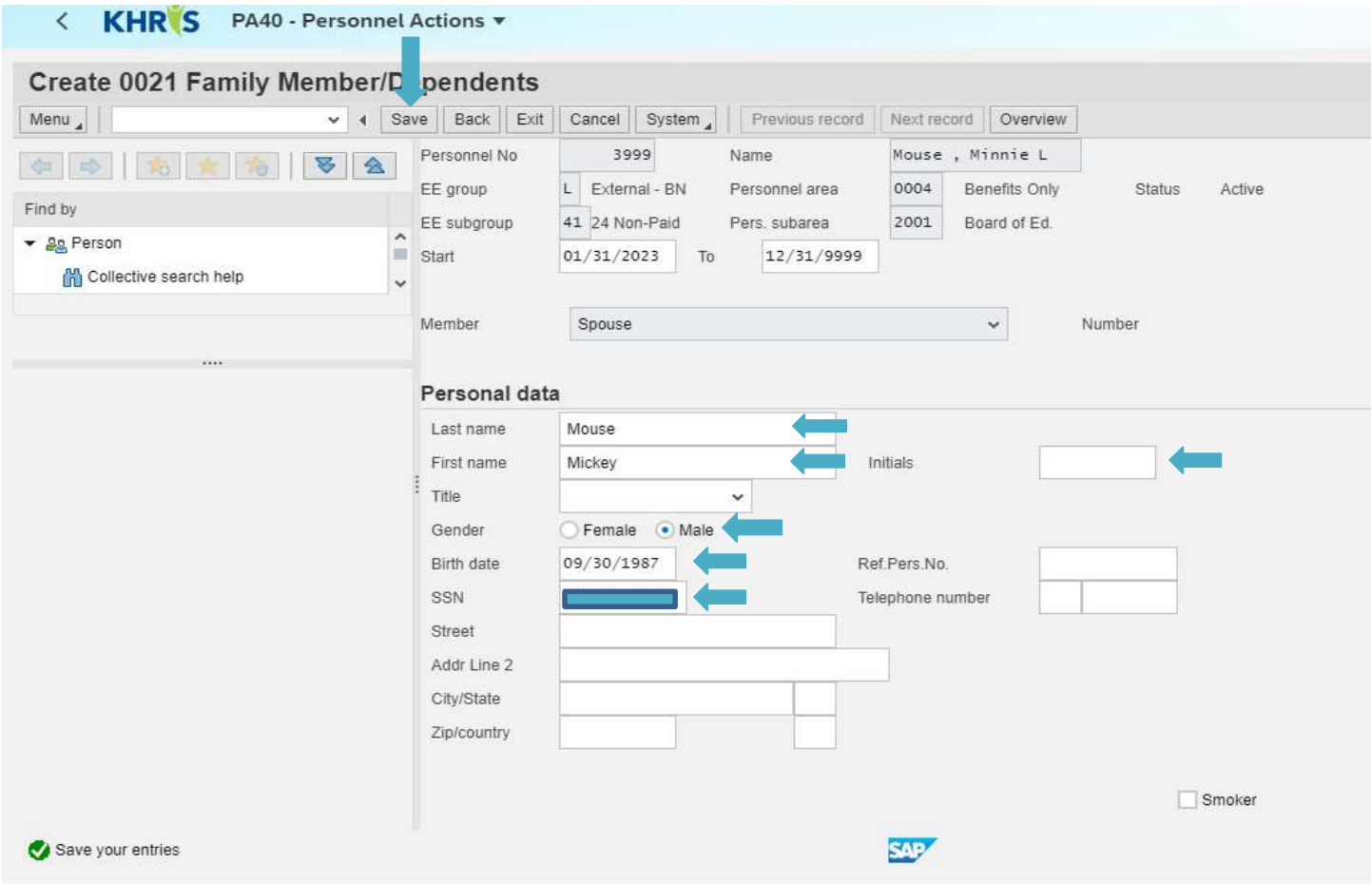
Step 4 continued: Creating Dependent and Beneficiary records

Enter the hire date in the “Start” date field (12/31/9999 will already be entered in the “To” field)

Enter first and last name, middle initial and title (Jr., Sr., III, and IV), gender/sex, date of birth and SSN

Hit enter on your keyboard (to make sure there are no errors)

Click “Save”



<u>Repeat the steps above to create additional dependent records</u>.

Note: If employee is selecting “single” coverage, this step is not needed. BUT DO continue with this step to add Beneficiaries for Life Insurance plan(s). (The same screens used to add dependents for the health, dental, and vision plans would be used to add beneficiary information for the Life Insurance plan.) If employee is adding an External Organization, i.e., charitable organization as a Beneficiary, see page 28 for instructions.

If the employee is selecting Waiver w/HRA, you will add their dependents here.

If the employee has a disabled dependent, you can still process the application. HOWEVER, do not add the disabled dependent to the plan. The application must be forwarded to the attention of Kim Collins in EIB to enroll the disabled dependent. The disabled dependent’s information should not be entered.

Step 4 continued: Creating an External Organization as Beneficiary record

Note: This process is used if an employee wants to have an External Organization (i.e., trust fund, charitable organization) without designating dependents/others as a Beneficiary for life insurance benefits.

This step is to be completed using Transaction PA30 under Benefits tab to add Dependents, Beneficiaries, and/or smoking status.

Bring up Transaction PA 30 from the menu on the left

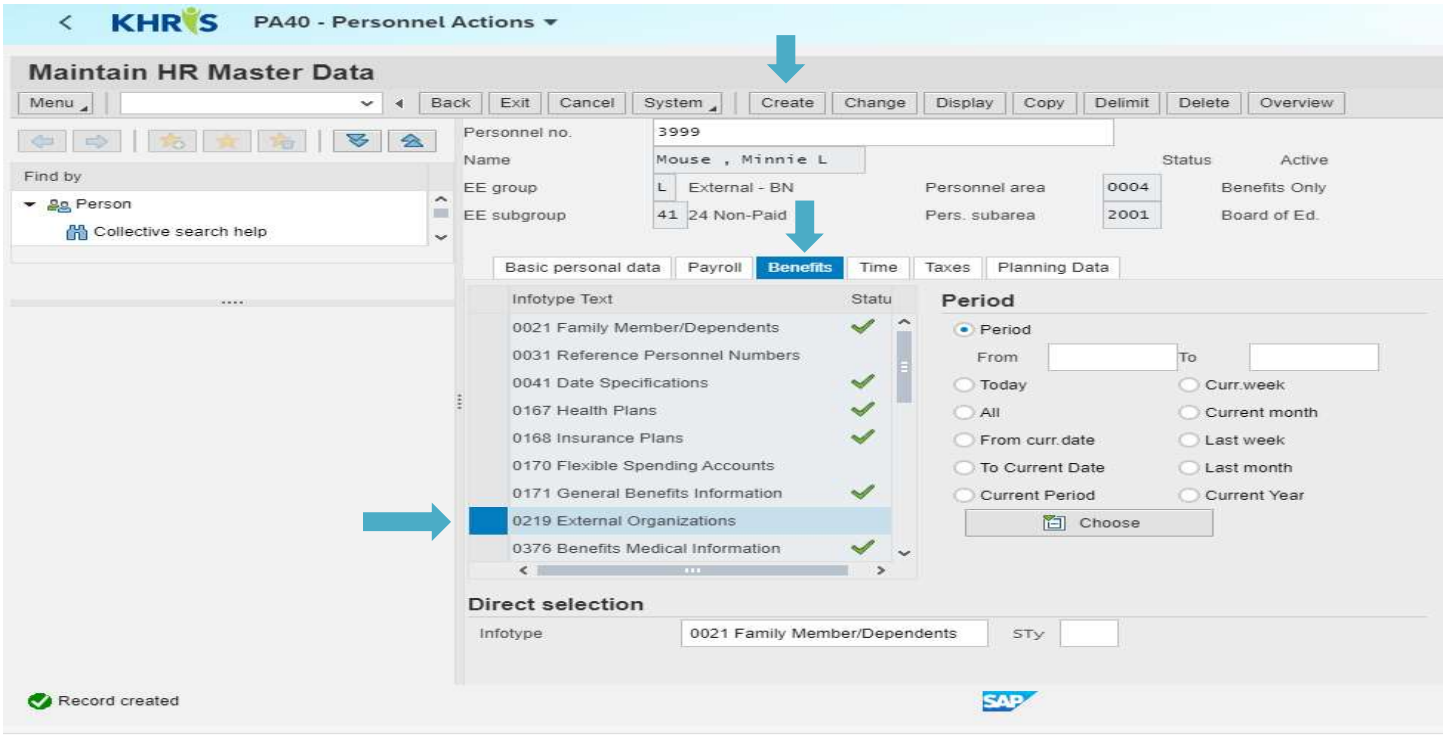
Bring up the employee's record by entering their Personnel number (created in Step 3) into the "Personnel no." field

Hit enter on your keyboard

Click on the "Benefits" tab

Select Infotype "0219 External Organizations"

Click "Create"



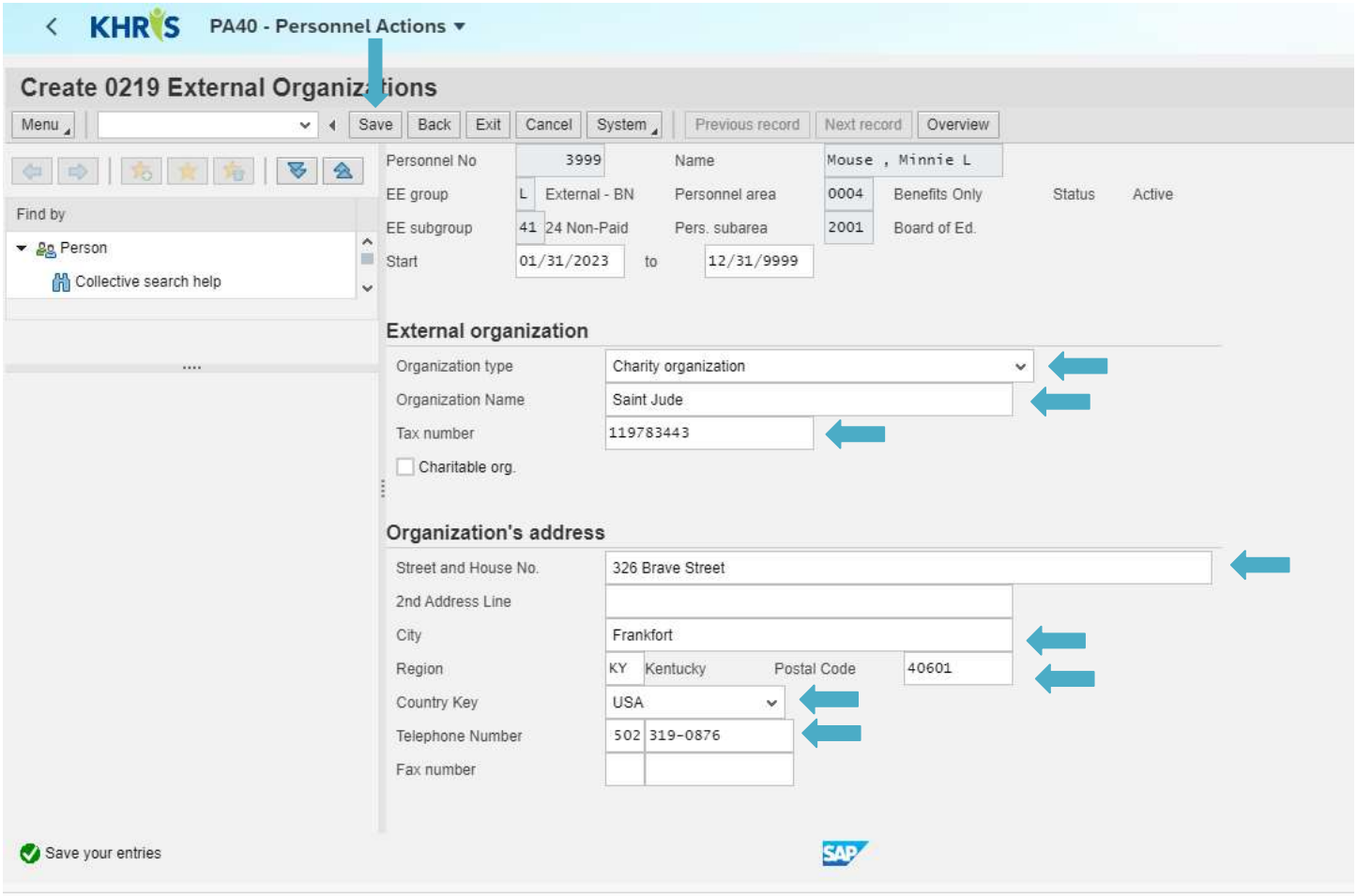
Step 4 continued: Creating an External Organization as Beneficiary record

In “Start” date field, enter employee’s signature date (from application)

In the “External organization” box, (use the drop-down menu) select either Charity Organization or Trust Fund

Enter the name, tax ID, address, and phone number for the organization. You must have the tax ID for the organization, or you will not be able to select it as a beneficiary in later steps

Click “Save”



Note: Use the drop-down box for the “Country Key” field. Select USA. **Do this prior to selecting the Region/State.**

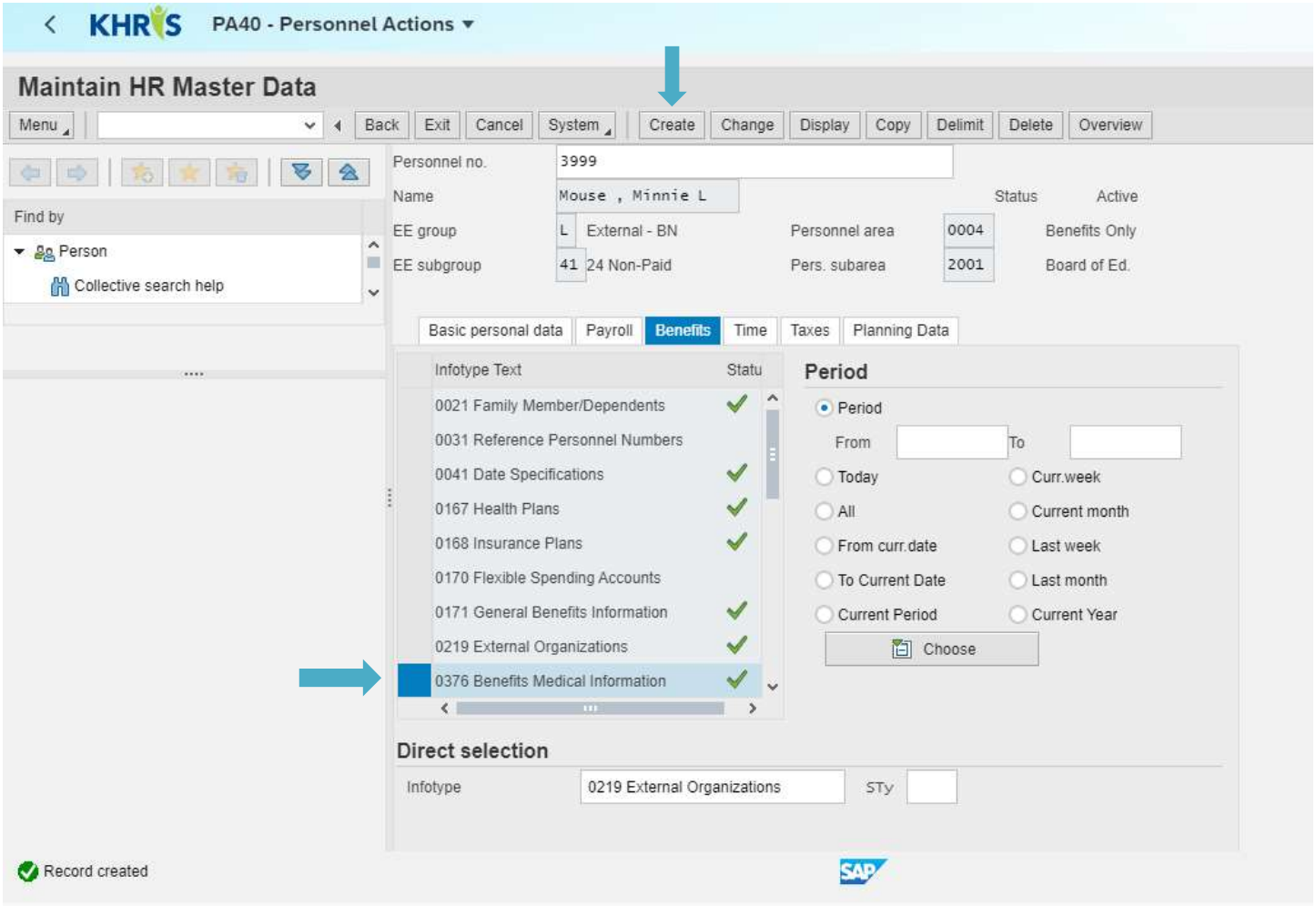
Step 5: Adding Tobacco Use Status

After creating dependent/beneficiary records, you must indicate whether the member is a tobacco user by completing the following step while still in Transaction PA 30.

Click “Benefits tab”

Select Infotype “0376 Benefits Medical information”

Click “Create”

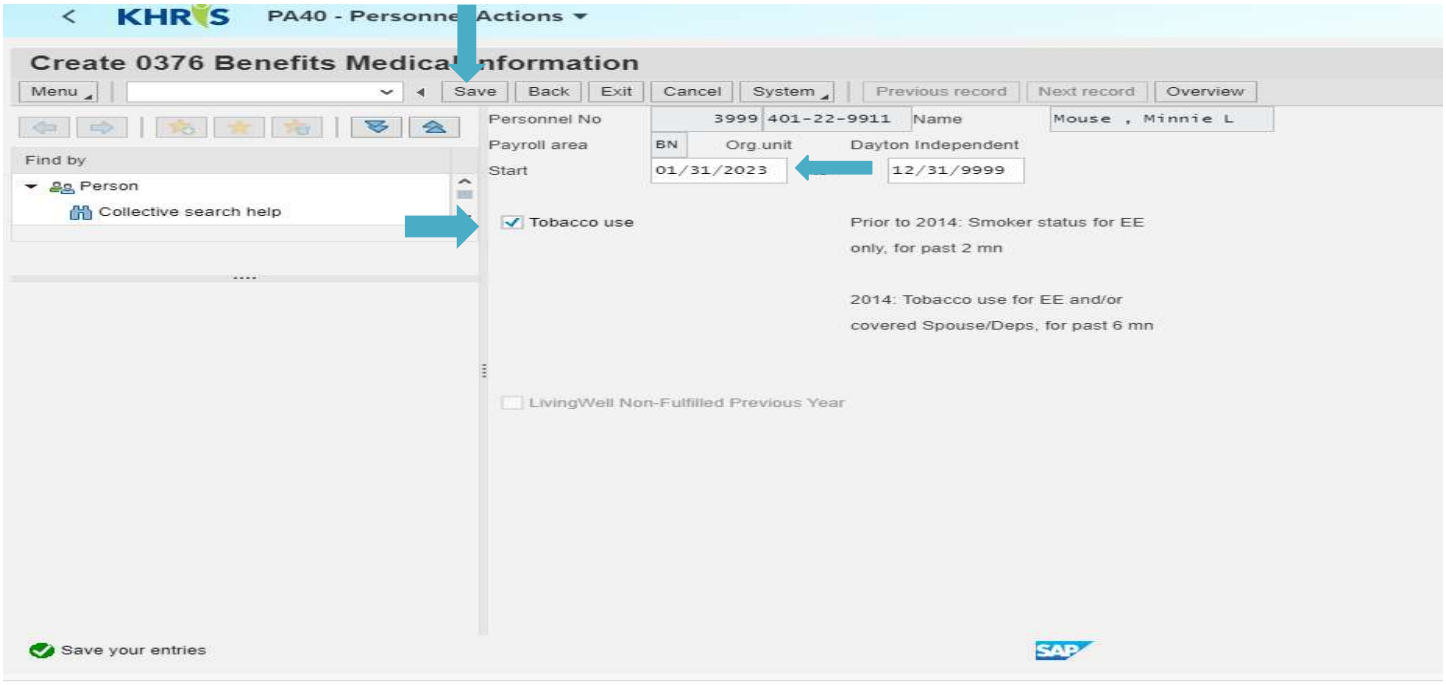


Step 5 continued: Adding Tobacco Use Status

Change “Start Date” to hire date

Put a ✓ in the “Tobacco Use” box if the member is a tobacco user. Leave box empty if they are not a tobacco user

Click “Save”



Note: This step only needs to be completed for tobacco users.

STOP HERE if you are entering an application on behalf of a new employee who **HAS NOT** turned in their application within 35 days of their hire date. They must be enrolled in the Default plan, designated by KEHP. If a new employee fails to turn in an application, **they MUST still be entered** into KHRIS. By stopping at this step, you will have created a record for the member and assigned them a default health plan and a basic life Insurance plan. Make sure to advise your new employees of this policy so that they can expect health premiums to be deducted from their paychecks.

If application is signed within 35 days, please continue on to the next step.

Step 6: HRBEN0001-Enrollment

Bring up Transaction HRBEN0001 – Enrollment

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead, you must type in the command box /nPA40 and once complete then type in /nPA30 and then /nHRBEN0001 to go from screen to screen.

In the "Personnel No" field, enter employee's Personnel Number (assigned to employee during the PA 40 step). If you did not write it down, you can enter the employee's SSN in the "ID Number" field.

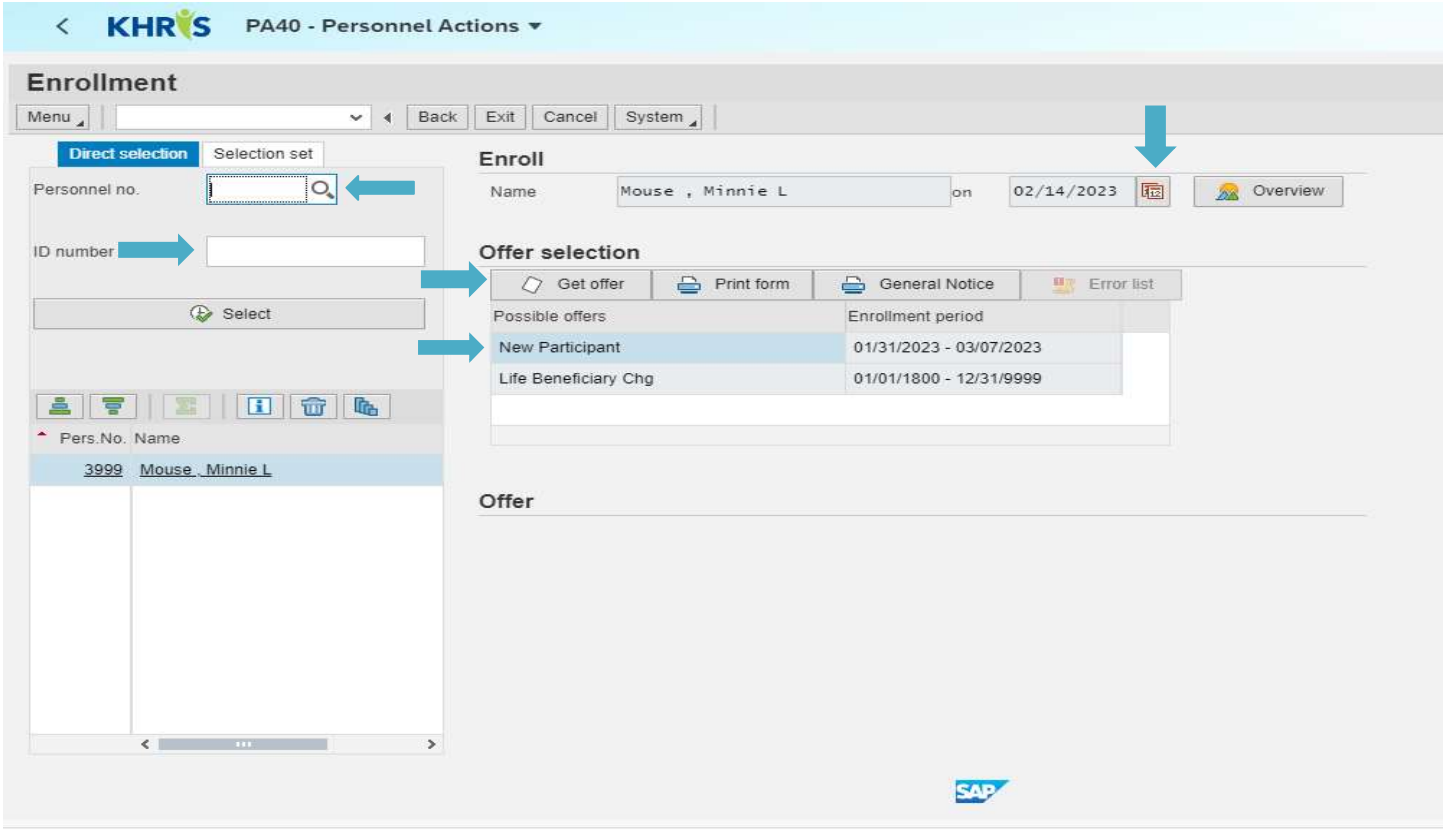
Select "Calendar" by clicking on the calendar icon to the far right of the field, enter Signature Date on employee's application. (If signature date precedes the hire date, **THEN** use the hire date in this field).

Click Green Check Mark

Click "Select"

Highlight New Participant (may already be highlighted)

Click "Get Offer"



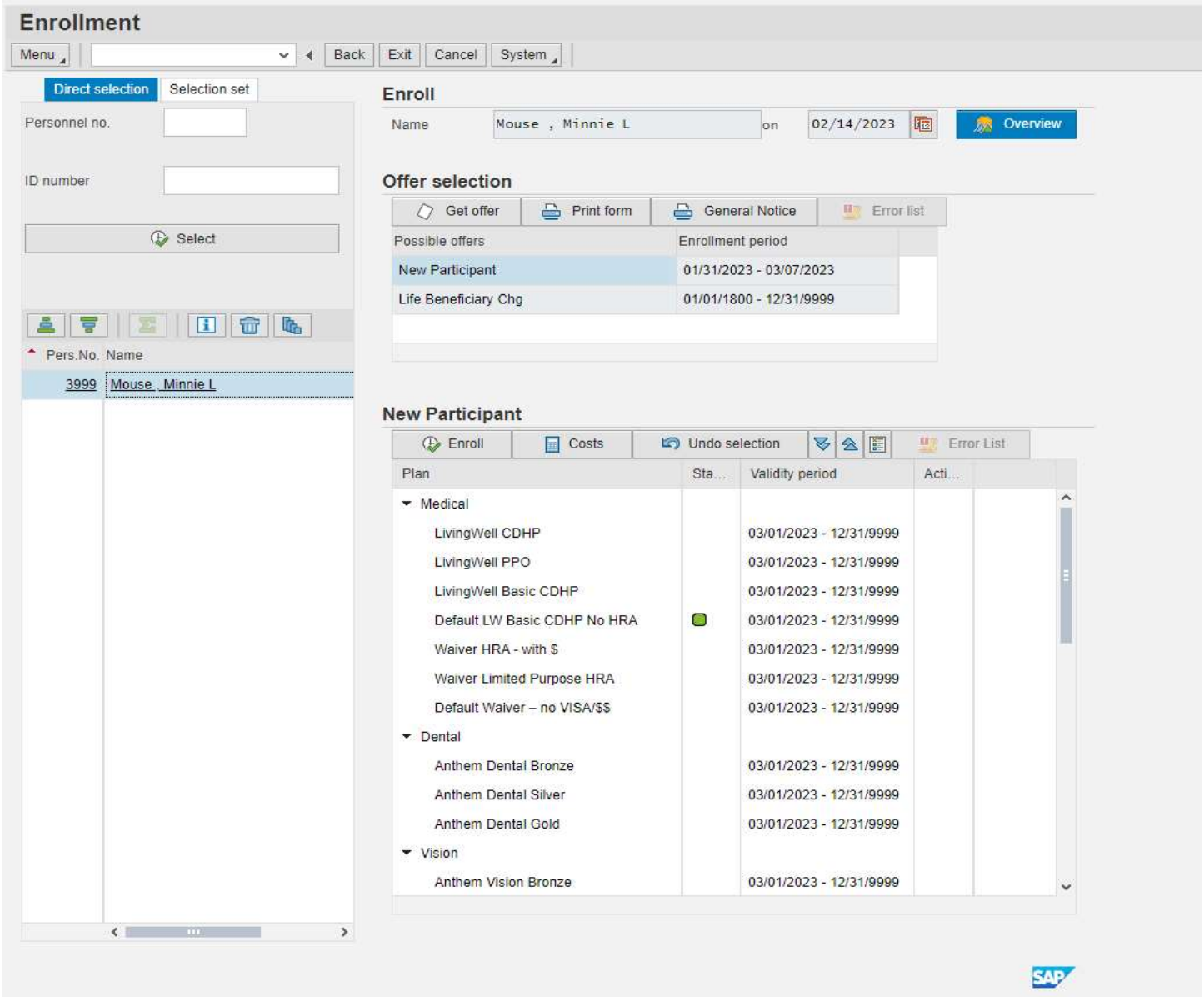
Note: HRBEN0001 uses the signature date entered to validate that the employee signed his/her application within the allotted 35-day period. If the signature date is outside of the 35-day period, the HRBEN0001 transaction will not allow you to enroll the employee for benefits. If application is signed outside of the 35 days of hire, please submit an exception form along with an enrollment/change form to the Member Services Branch in DEI and the life application to OIB to process.

Step 6 continued: HRBEN0001-Enrollment

Click on the health insurance plan chosen on application to select it

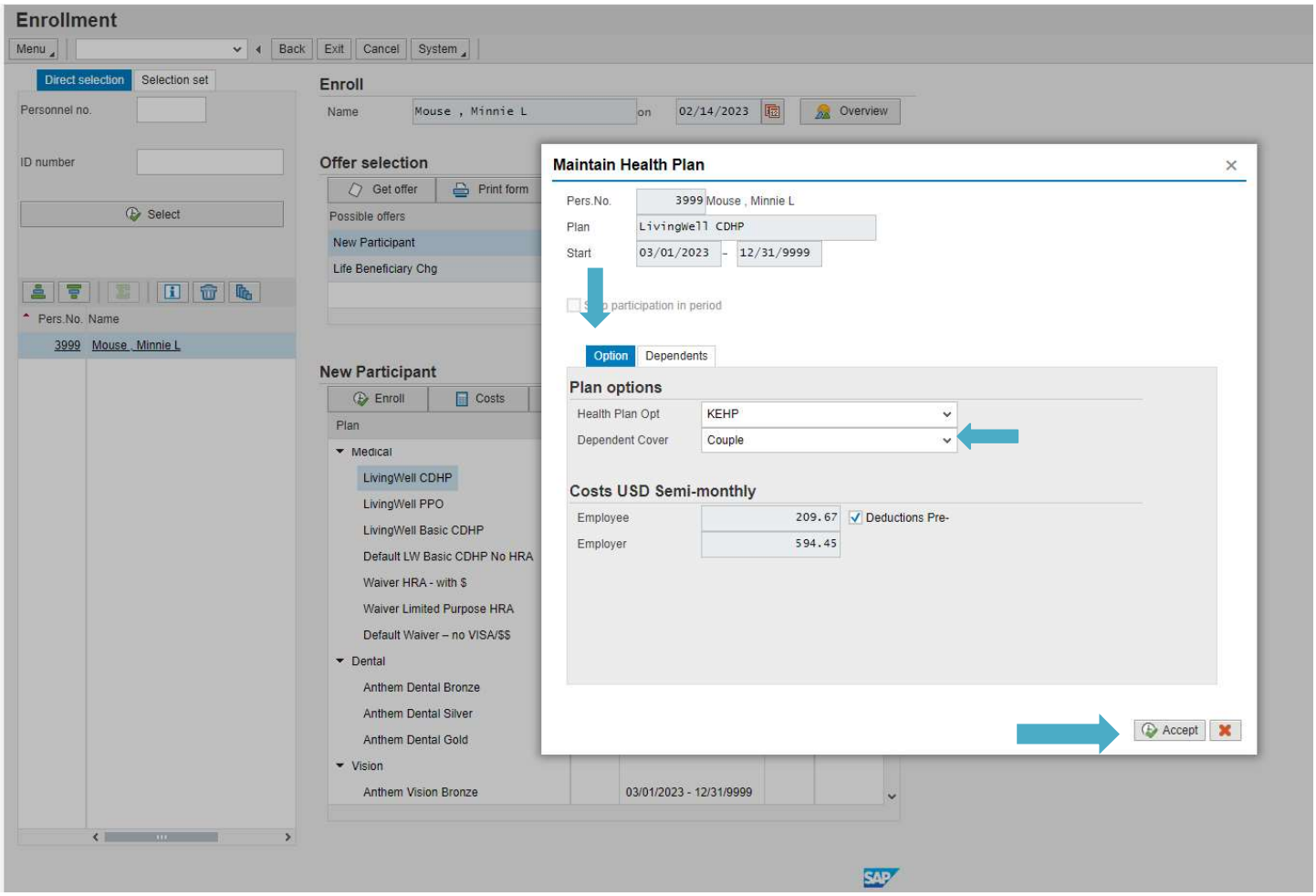
NOTE: If you do not see all four health insurance plans and all three waiver options, an error has occurred somewhere in one of the steps. Please call EIB for assistance at 888-581-8834, option 4.

*Health Departments will only see the "Default Waiver – no VISA/$$" option.



Step 6 continued: HRBEN0001-Enrollment
Select appropriate plan level (Parent Plus if only adding children to plan, Couple if only adding spouse, Family if adding children and spouse.).

If member is not adding dependents and chose a single plan, just click “Accept”



Note: Dependents must be added if the member selects the Waiver General Purpose HRA using these same steps.

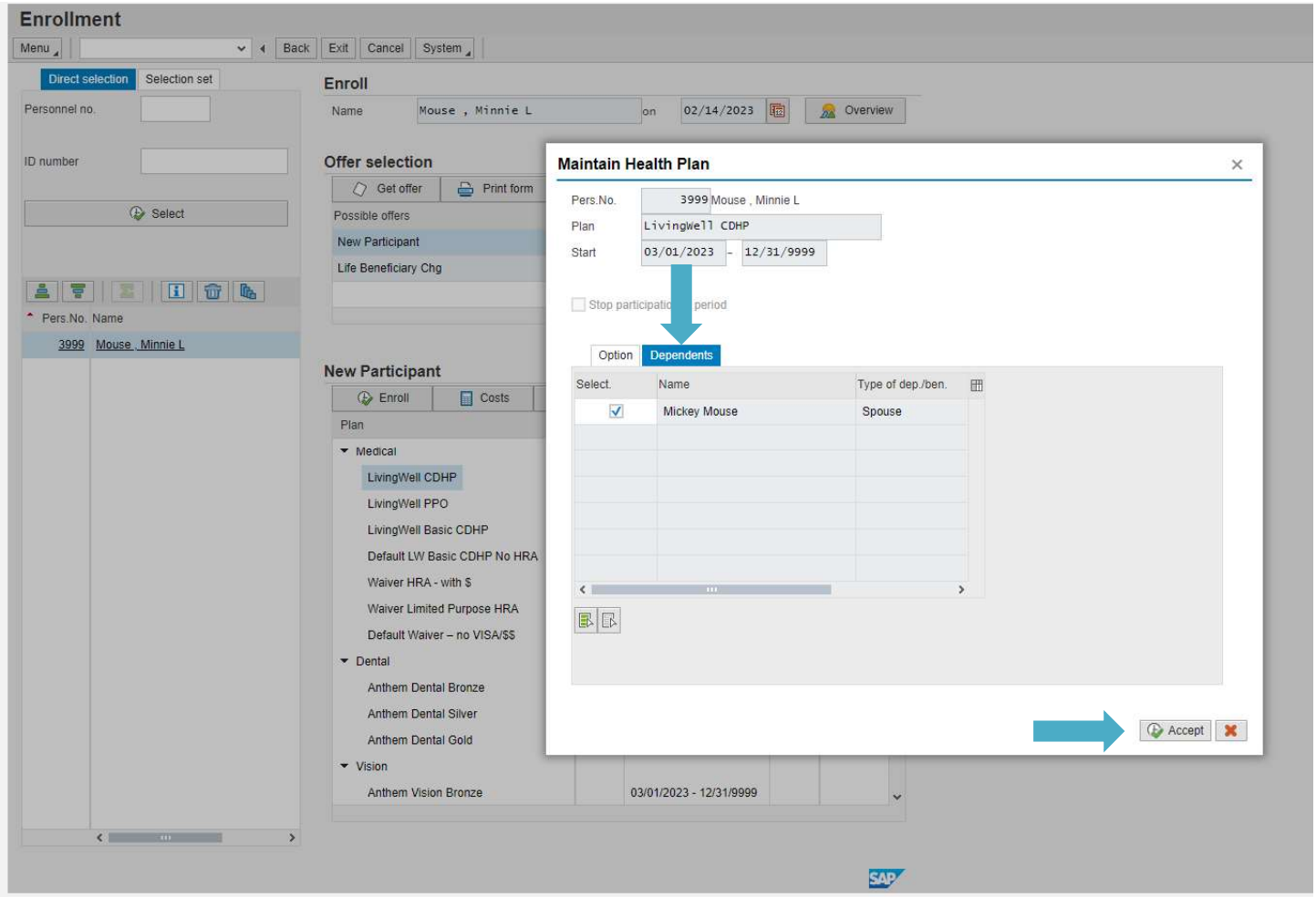
Step 6 continued: HRBEN0001-Enrollment

Click on the “Dependent” tab to see a list of eligible dependents

This is the step where dependents are added to the plan.

Place a ✓ in the box beside the name of each dependent listed on the application to be covered by health insurance

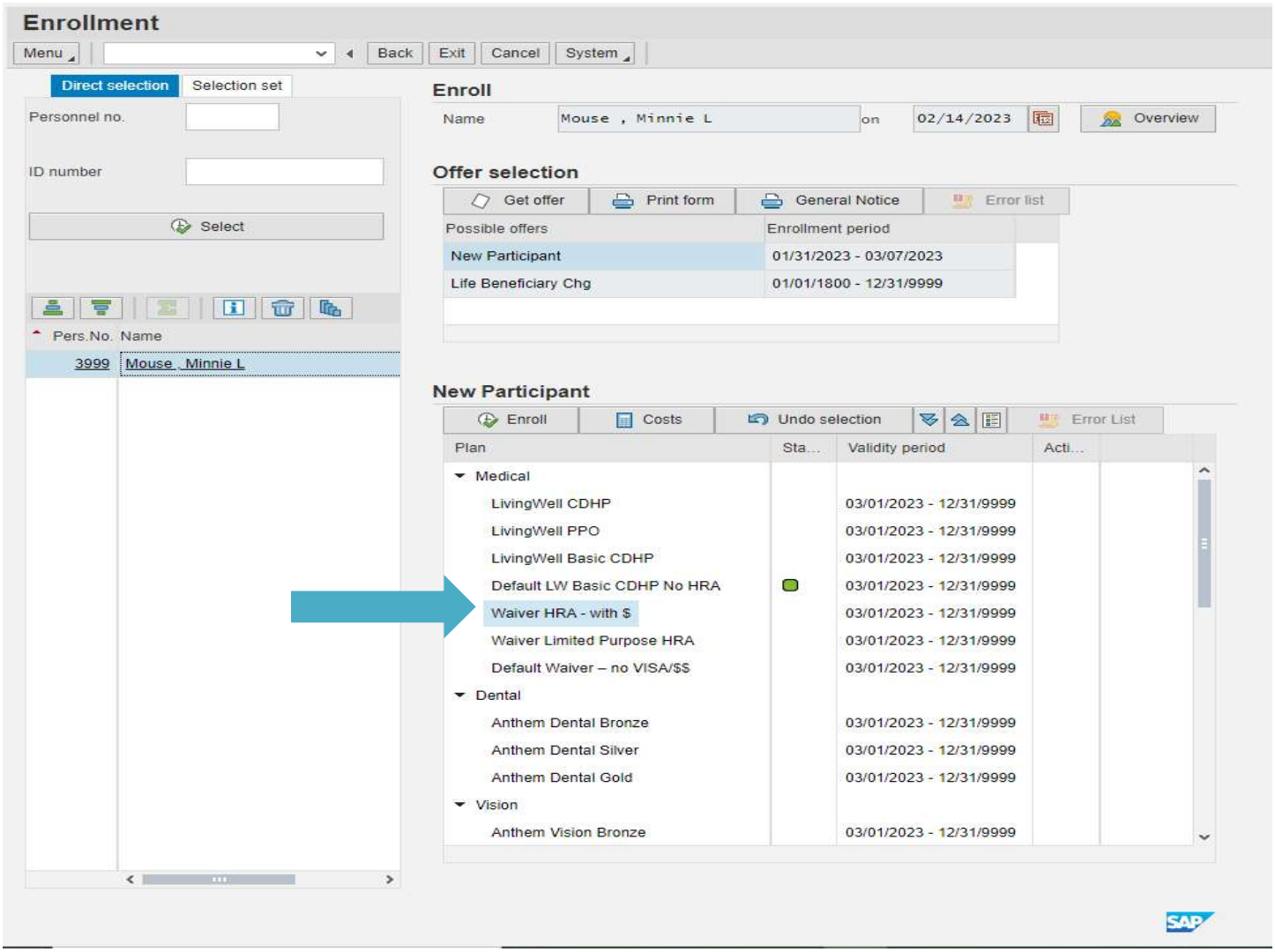
Click “Accept” when done



Step 6 continued: HRBEN0001-Enrollment

Follow these steps if member is electing Waiver General Purpose HRA.

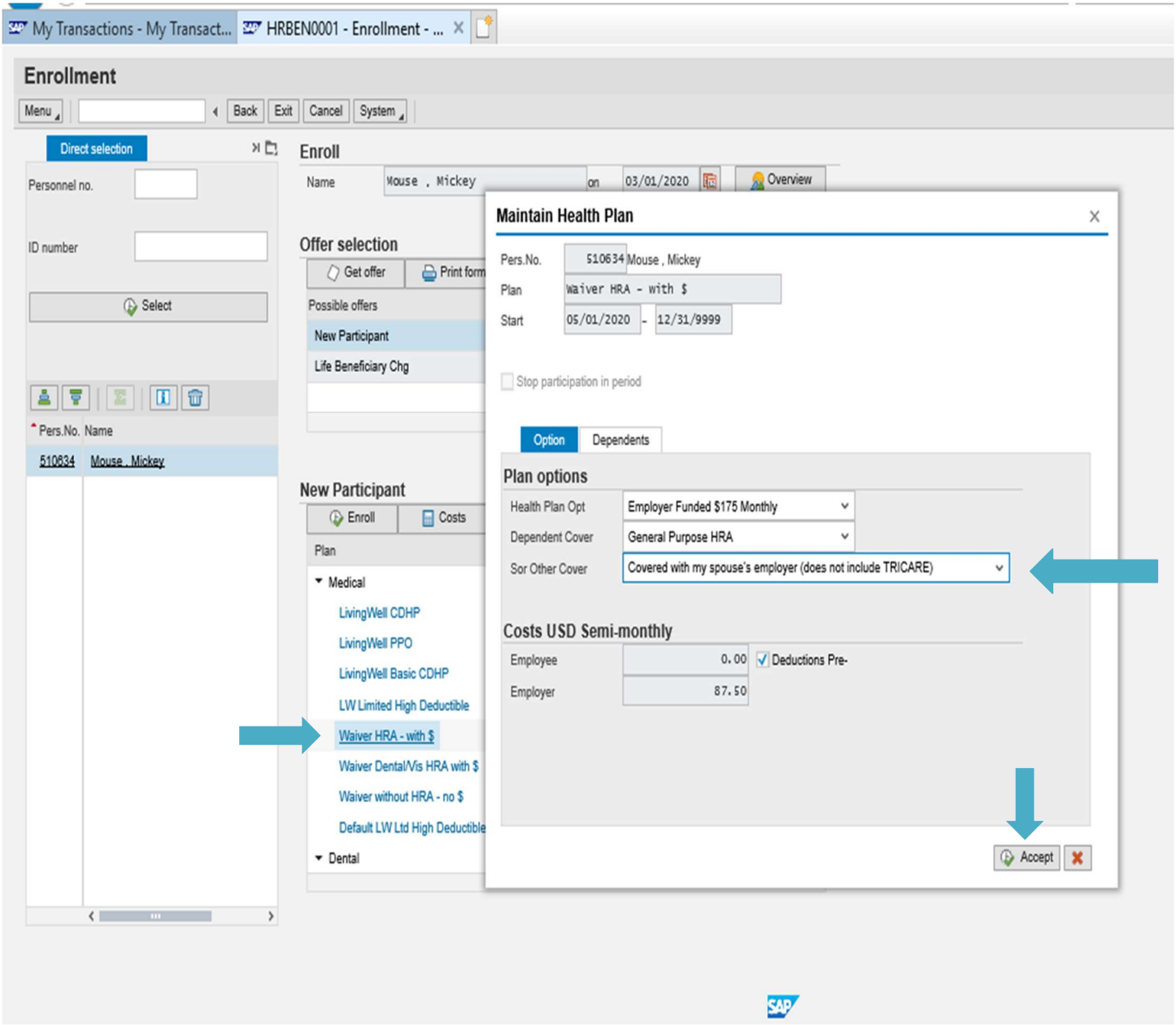
Click on Waiver HRA – with $.



Next select “Source of other Coverage” from drop down.

If member is not electing to add any dependents, please select Accept.

If member is electing to add dependents, please continue to next step.

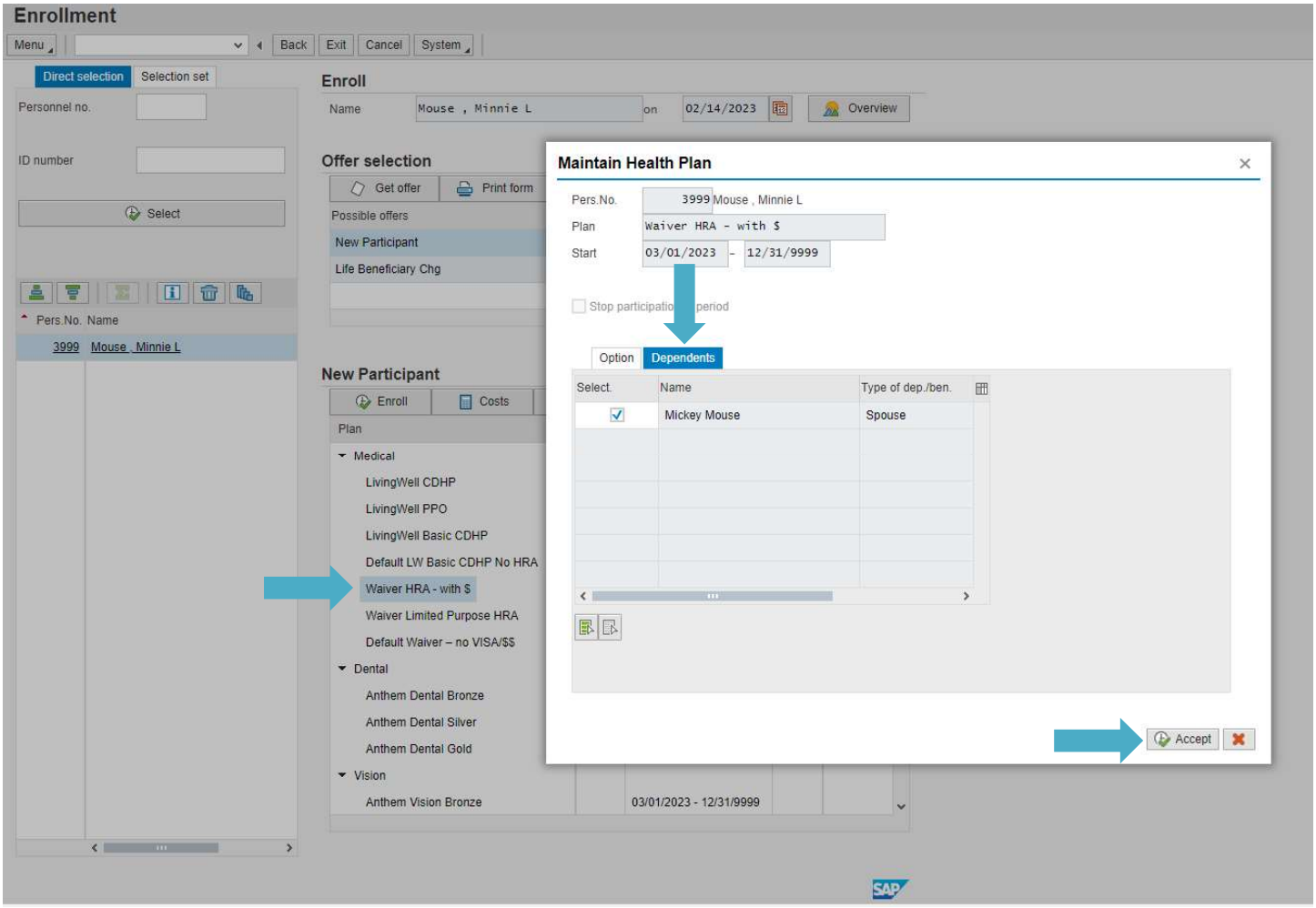

My Transactions - My Transact...
HRBEN0001 - Enrollment - ...
Enrollment
Menu
Back
Exit
Cancel
System
Direct selection
Personnel no.
ID number
Select
Pers.No.
Name
510634
Mouse , Mickey
Enroll
Name
Mouse , Mickey
on
03/01/2020
Overview
Offer selection
Get offer
Print form
Possible offers
New Participant
Life Beneficiary Chg
New Participant
Enroll
Costs
Plan
Medical
LivingWell CDHP
LivingWell PPO
LivingWell Basic CDHP
LW Limited High Deductible
Waiver HRA - with $
Waiver Dental/Vis HRA with $
Waiver without HRA - no $
Default LW Ltd High Deductible
Dental
Maintain Health Plan
Pers.No.
510634
Mouse , Mickey
Plan
Waiver HRA - with $
Start
05/01/2020
-
12/31/9999
Stop participation in period
Option
Dependents
Plan options
Health Plan Opt
Employer Funded $175 Monthly
Dependent Cover
General Purpose HRA
Sor Other Cover
Covered with my spouse's employer (does not include TRICARE)
Costs USD Semi-monthly
Employee
0.00
Deductions Pre-
Employer
87.50
Accept

Step 6 continued: HRBEN0001-Enrollment
Click on the “Dependent” tab to see a list of eligible dependents

This is the step where dependents are added to the plan.

Place a ✓ in the box beside the name of each dependent listed on the application to be covered by health insurance

Click “Accept” when done

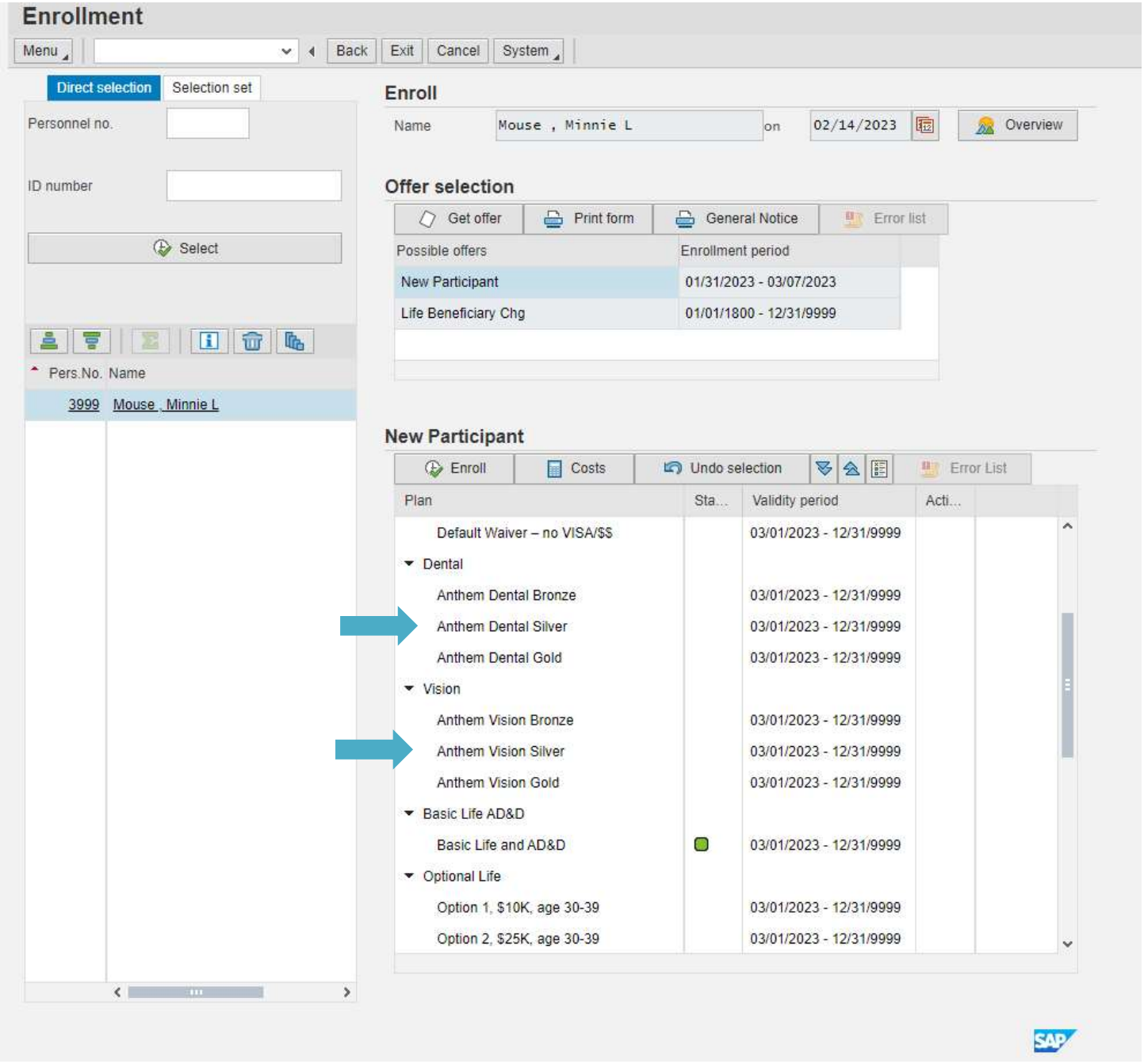


Step 6 continued: HRBEN0001-Enrollment

To enroll member in Optional Dental or Vision Plans (if applicable), continue on the same screen.

Select the “Dental or Vision” plan member elected to enroll in.

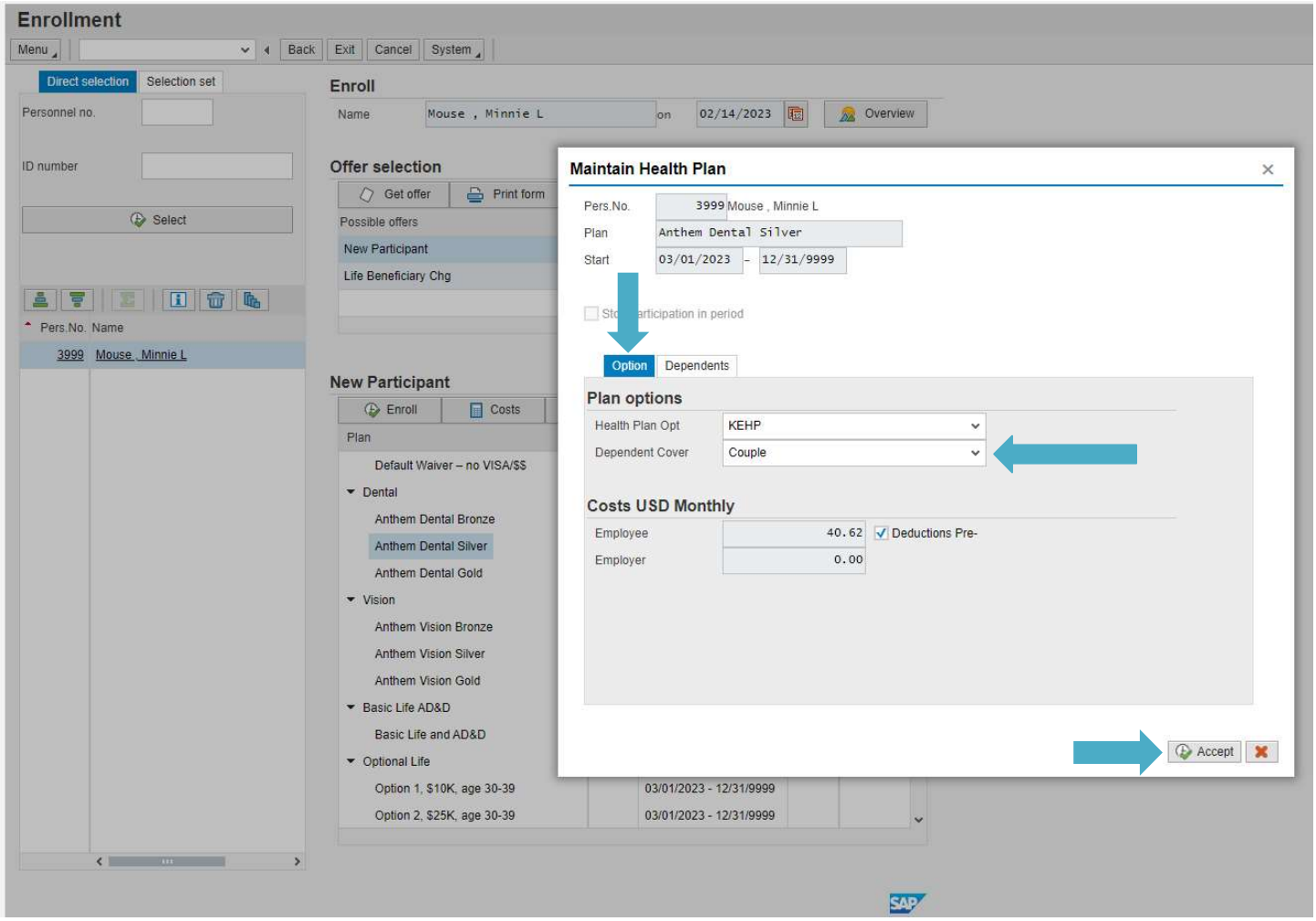
NOTE: If you do not see any dental or vision plans, an error has occurred somewhere in one of the steps. Please call OIB for assistance at 888-581-8834, option 5.



Step 6 continued: HRBEN0001-Enrollment

Select appropriate plan level (Parent Plus if only adding children to plan, Couple if only adding spouse, Family if adding children and spouse.).

If member is not adding dependents and chose a single plan, just click “Accept”

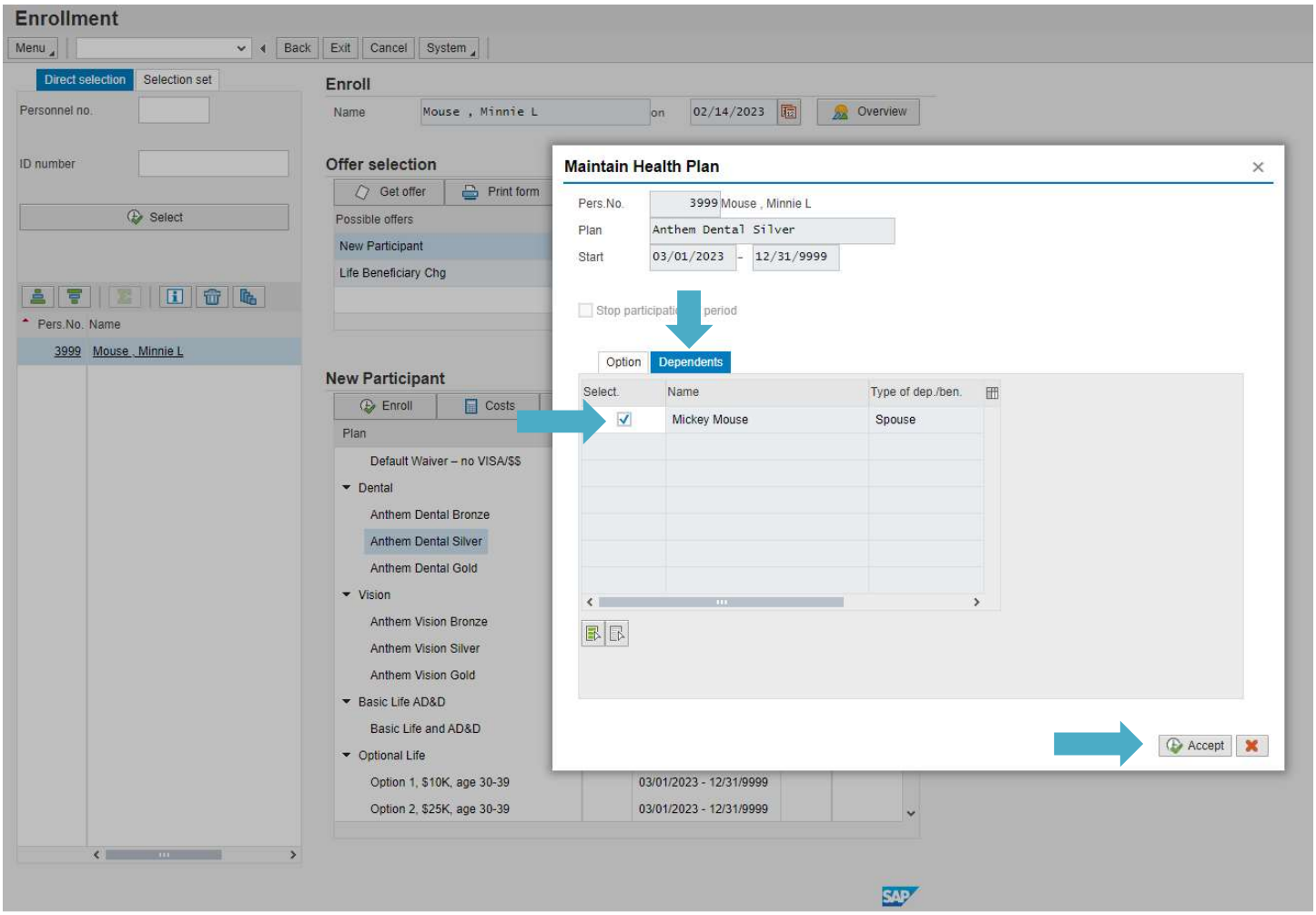


Step 6 continued: HRBEN0001-Enrollment
Click on the “Dependent” tab to see a list of eligible dependents

This is the step where dependents are added to the plan.

Place a ✓ in the box beside the name of each dependent listed on the application to be covered by health insurance

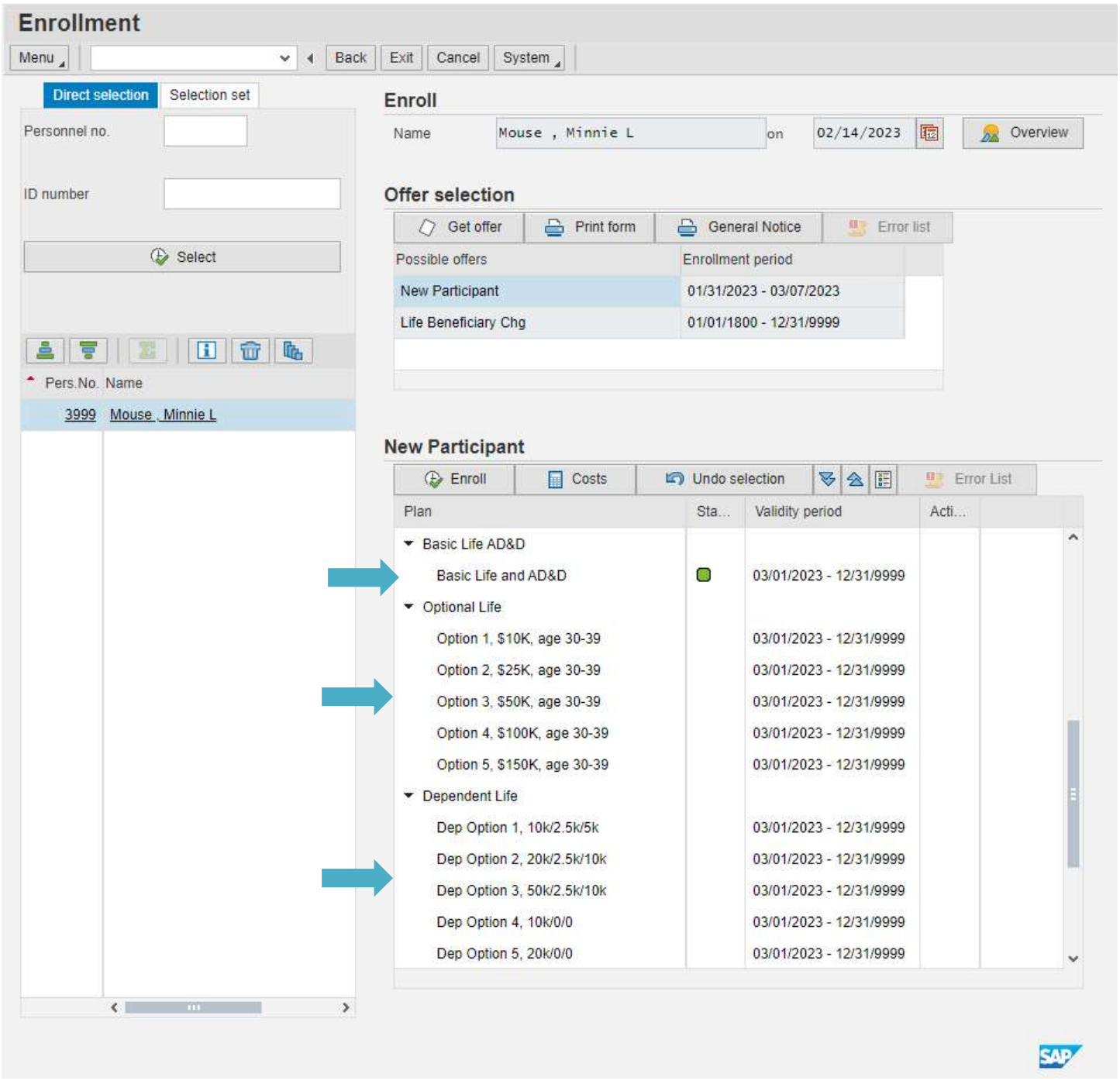
Click “Accept” when done



Step 6 continued: HRBEN0001-Enrollment

To enroll beneficiaries in the Life Insurance Basic AD&D and/or Optional (if applicable), continue on same screen

Select “Basic Life AD&D” (or any of the Optional Life plans the member choses to enroll in)



NOTE: Basic Life and AD&D is an automatic enrollment for every new employee. However, beneficiaries are not automatically selected. Please follow these instructions to select beneficiaries.

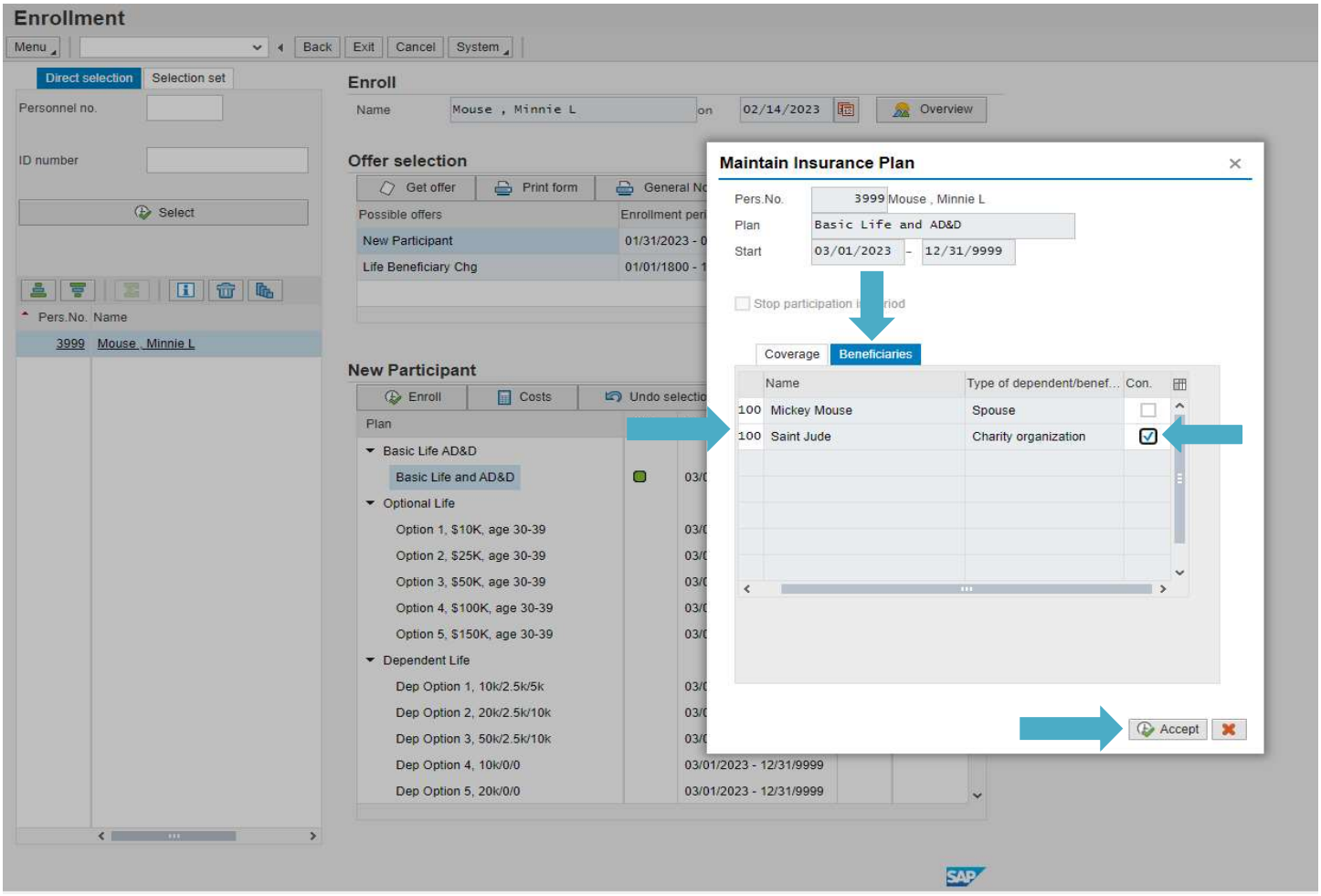
Step 6 continued: HRBEN0001-Enrollment

Click the “Beneficiaries” tab

Assign percentages for the Primary beneficiaries

Place ✓ next to Contingent beneficiaries

Select “Accept”



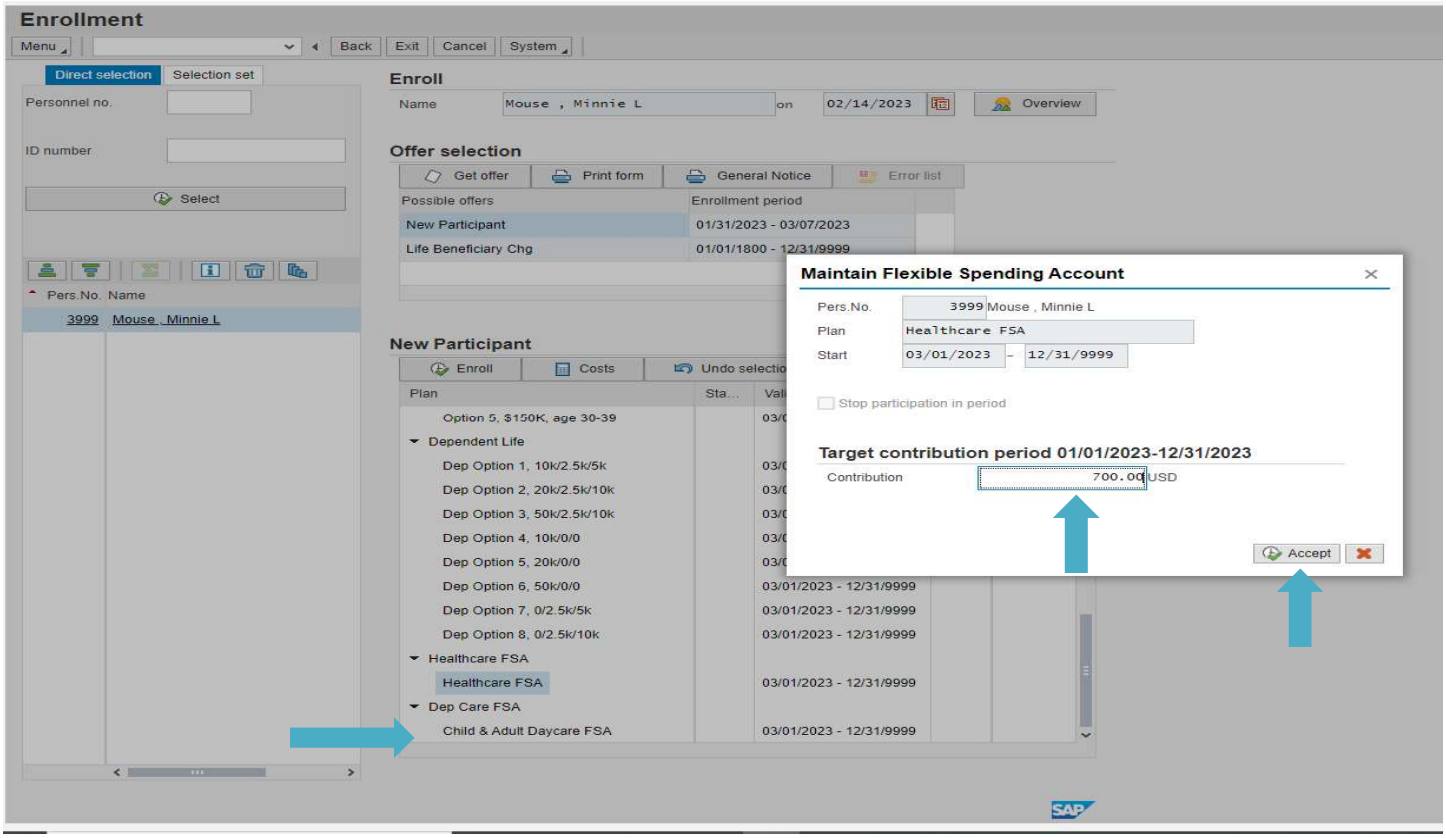
Note: Percentages for both Primary and Contingent beneficiaries must equal 100%. You do not have to enter beneficiaries for dependent coverage member may elect due to the member is automatically the beneficiary.

Step 6 continued: HRBEN0001-Enrollment

To enroll in Flexible Spending Accounts (both healthcare and dependent care) select “Healthcare FSA or Child and Adult Daycare FSA” Only do this step if **the member has filled out an FSA application**. If not, proceed to the next step

In the “Contribution” field, enter the full **annual** amount selected by the employee

Click “Accept”

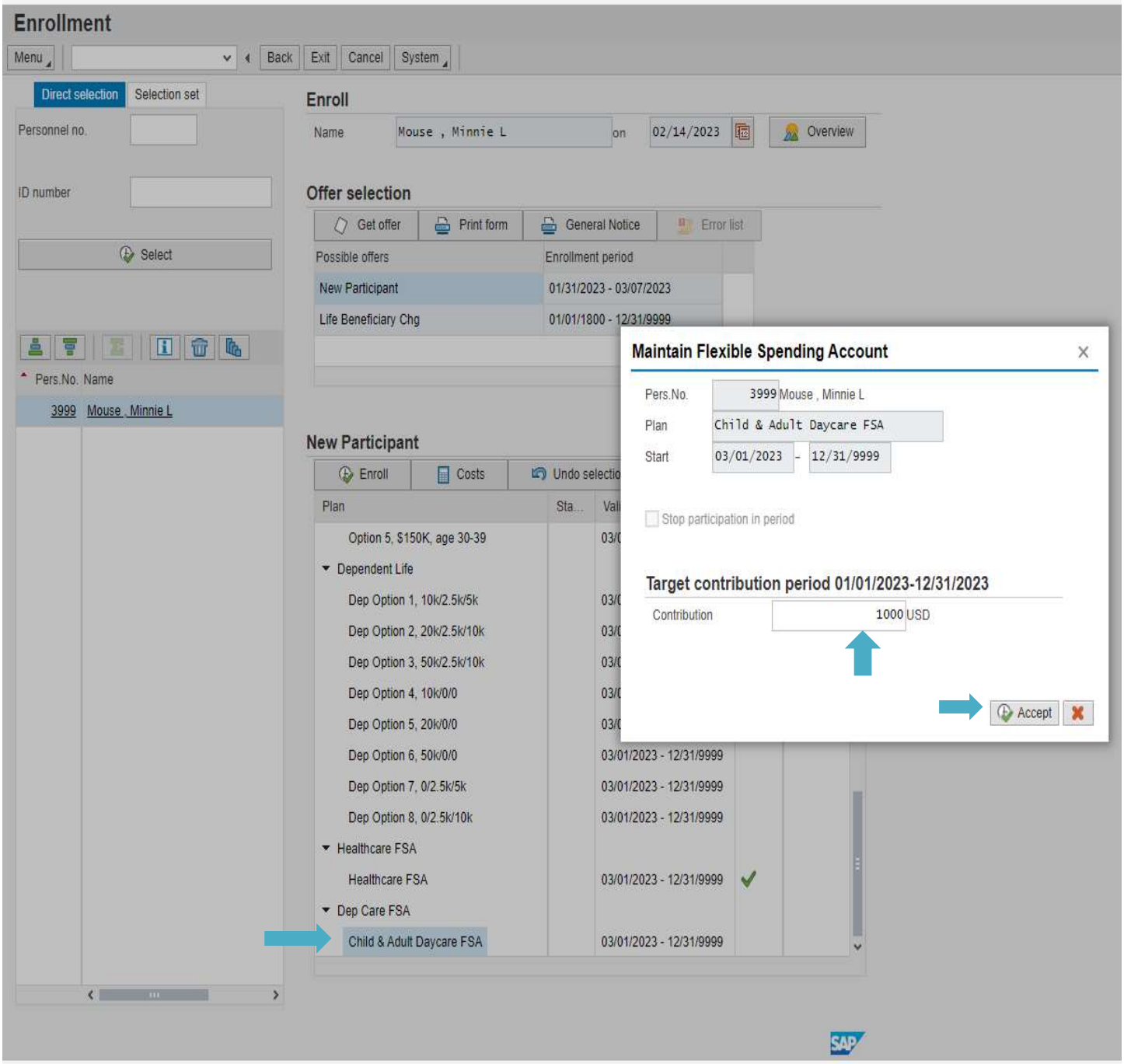


NOTE: The annual amount of the FSA contribution pertains to one calendar year. The FSA plan will end on December 31. Divide the annual contribution amount by the number of paychecks left in the year. This will be the member’s per-paycheck amount. In addition, KHRIS may change the contribution amount that you input by rounding down a few cents. This is just a mathematical adjustment made by KHRIS to ensure the members contributions are divided equally among his remaining paychecks for the year.

*Health Departments do not complete this step to enroll their employees in FSA benefits.

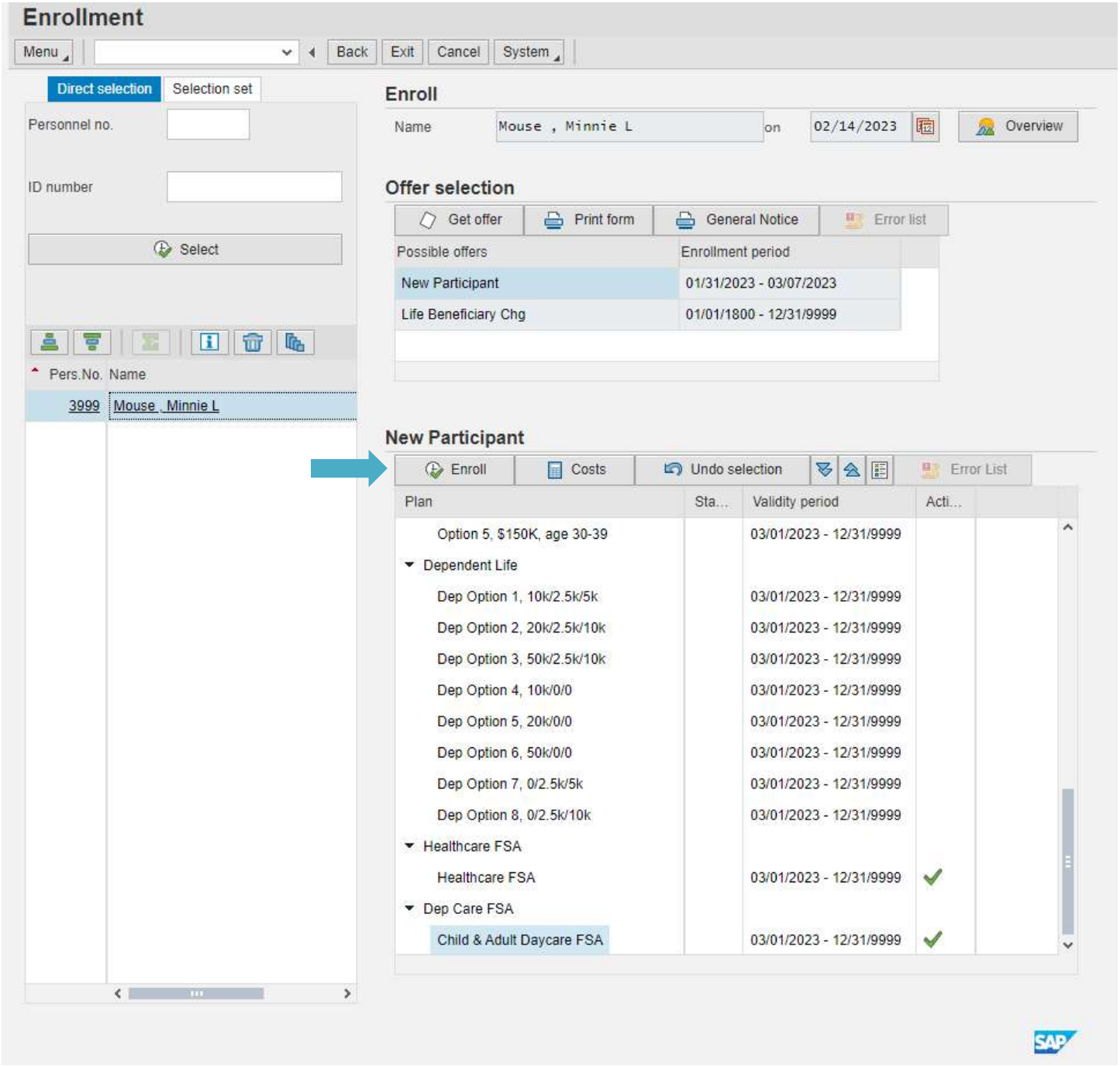
Step 6 continued: HRBEN0001-Enrollment

Screens for Child and Adult Daycare FSA are identical to screens for Healthcare FSA



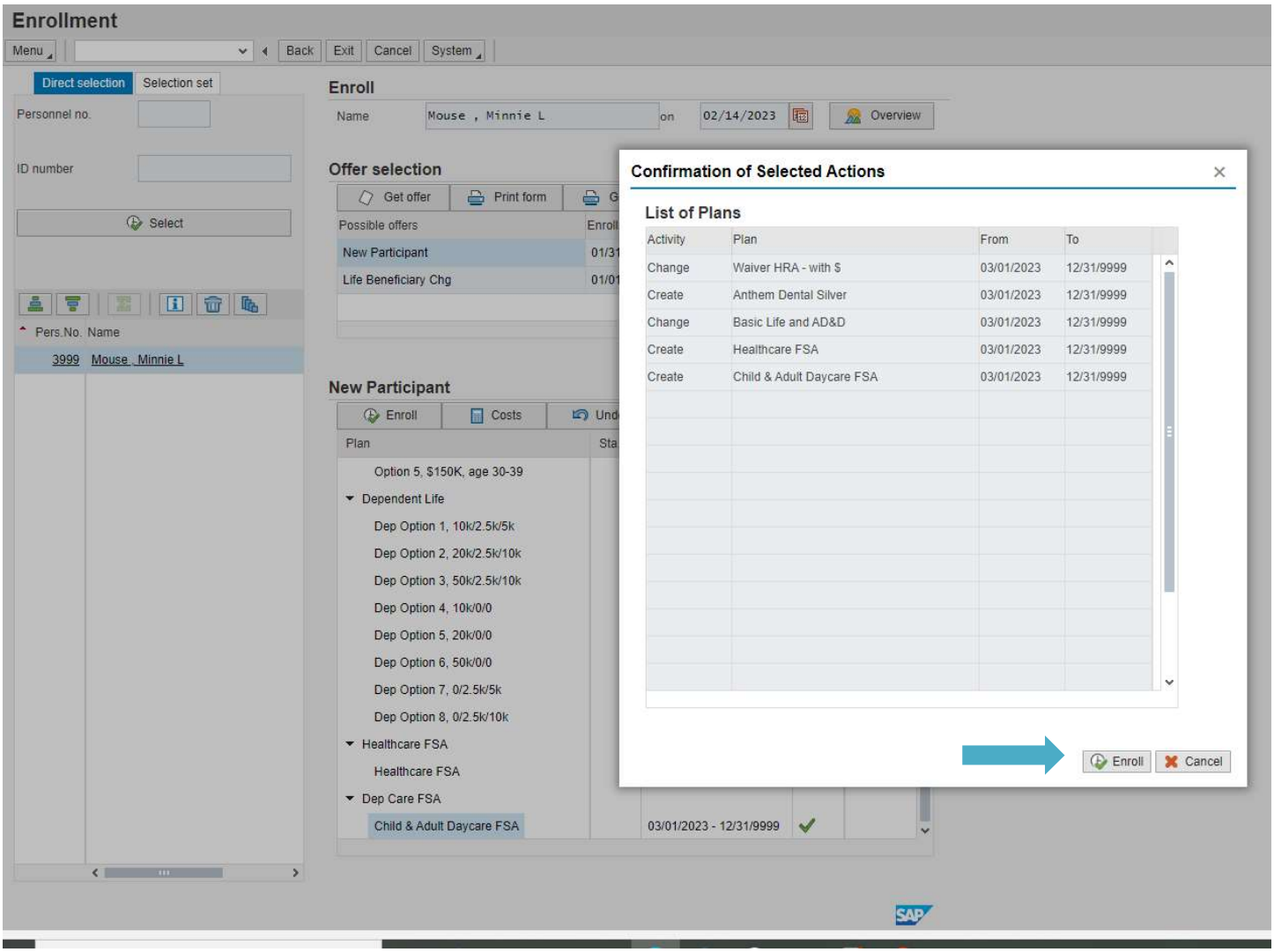
Step 6 continued: HRBEN0001-Enrollment

Select “Enroll”



Step 6 continued: HRBEN0001-Enrollment

Select “Enroll” again when the “Confirmation of Selected Actions” window pops up.



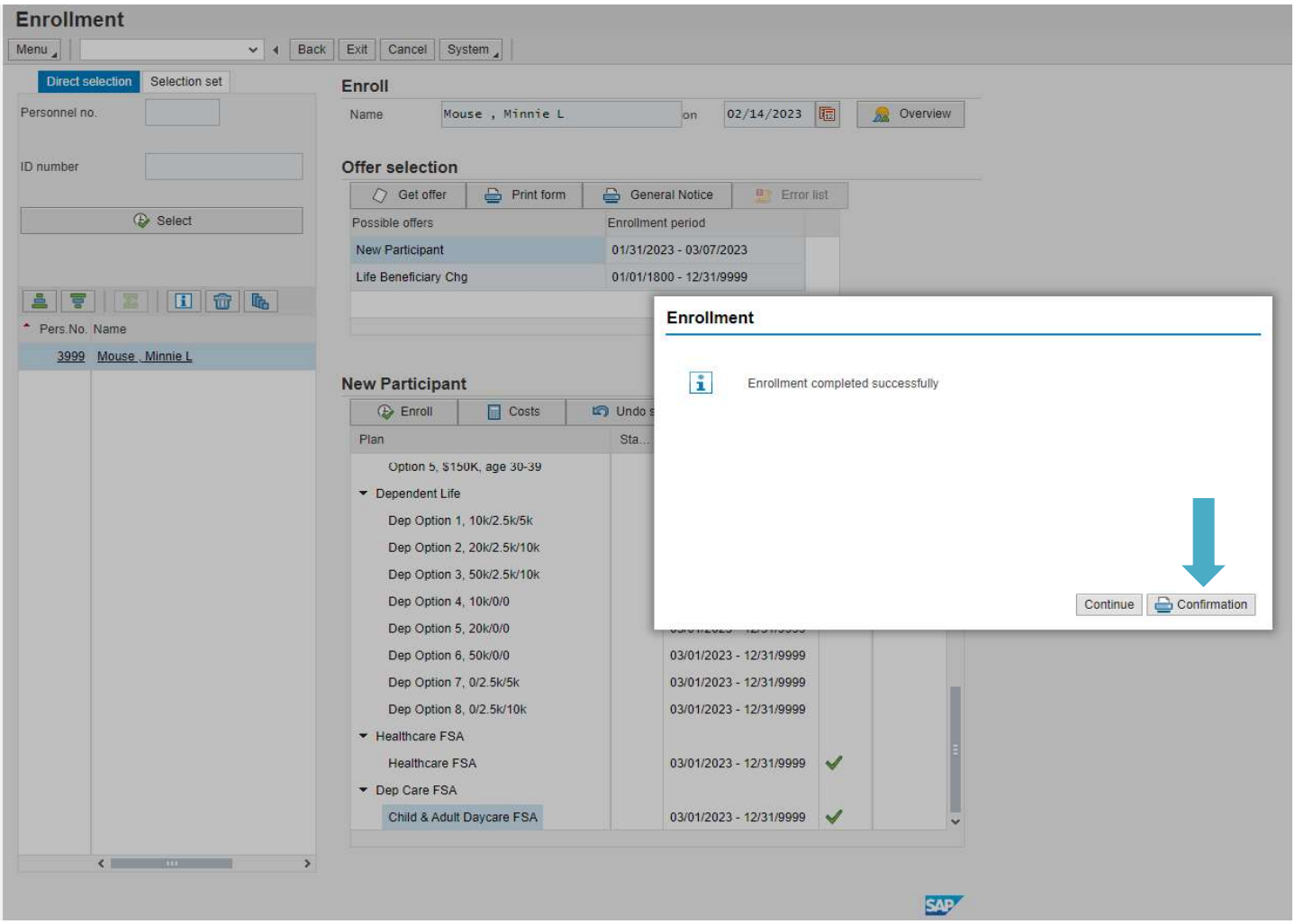
NOTE: Verify that all benefit elections (health, dental, vision, life, FSA) that the member wants to enroll in are in this list.

Step 6 continued: HRBEN0001-Enrollment

You will receive acknowledgement “Enrollment completed successfully”

Select “Confirmation” to print off a confirmation sheet for your records, or to give to your new employee.

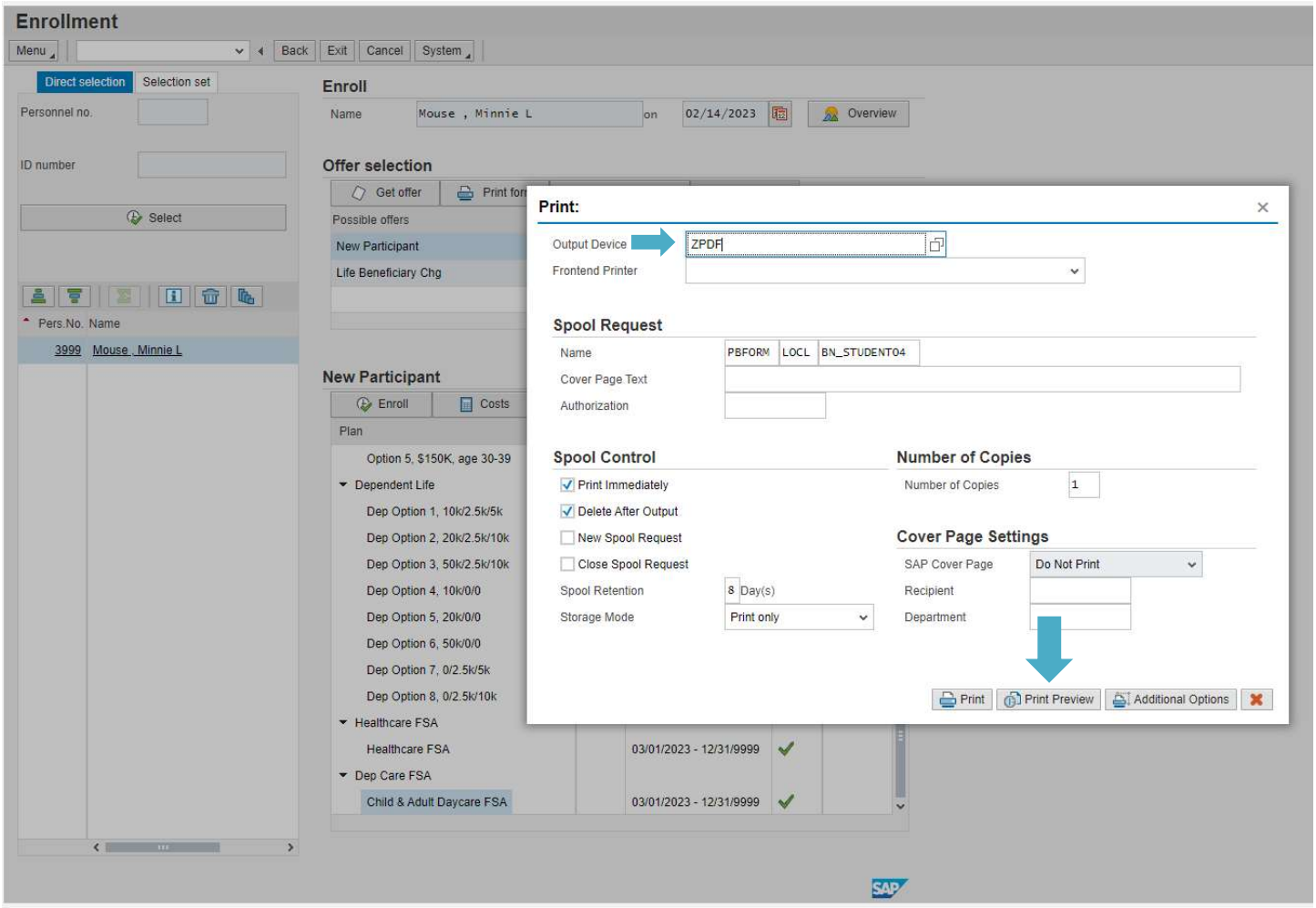
Select “Continue” if you wish not to print a confirmation



Step 6 continued: HRBEN0001-Enrollment

Change “Output Device” to ZPDF

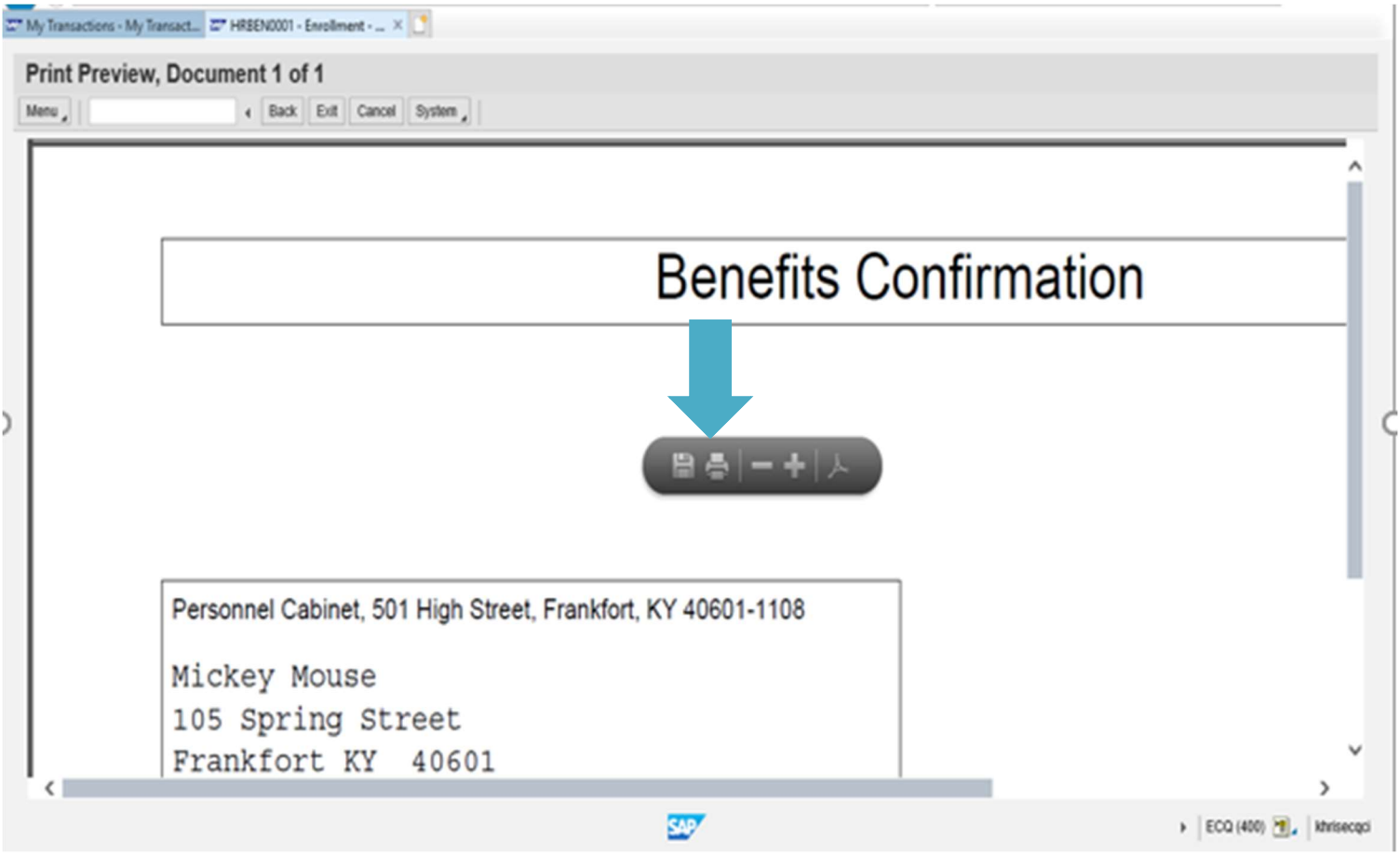
Click “Print Preview”



NOTE: You must click “Print Preview”, and view the confirmation sheet, first. **You cannot print from this screen.**

Step 6 continued: HRBEN0001-Enrollment

Once you see the Confirmation Sheet, click on the Printer icon to print the document.



NOTE: This screen uses Adobe Acrobat Reader. If you do not have this program downloaded on your computer, this screen will not show. Go to get.Adobe.com to download and install the free program.

Employee Demographic Updates/Corrections

This transaction will allow you to correct and/or update employee demographic data such as names, gender, social security number, birthday, marital status, and address. Any corrections for dependents must be sent to the Enrollment Information Branch.

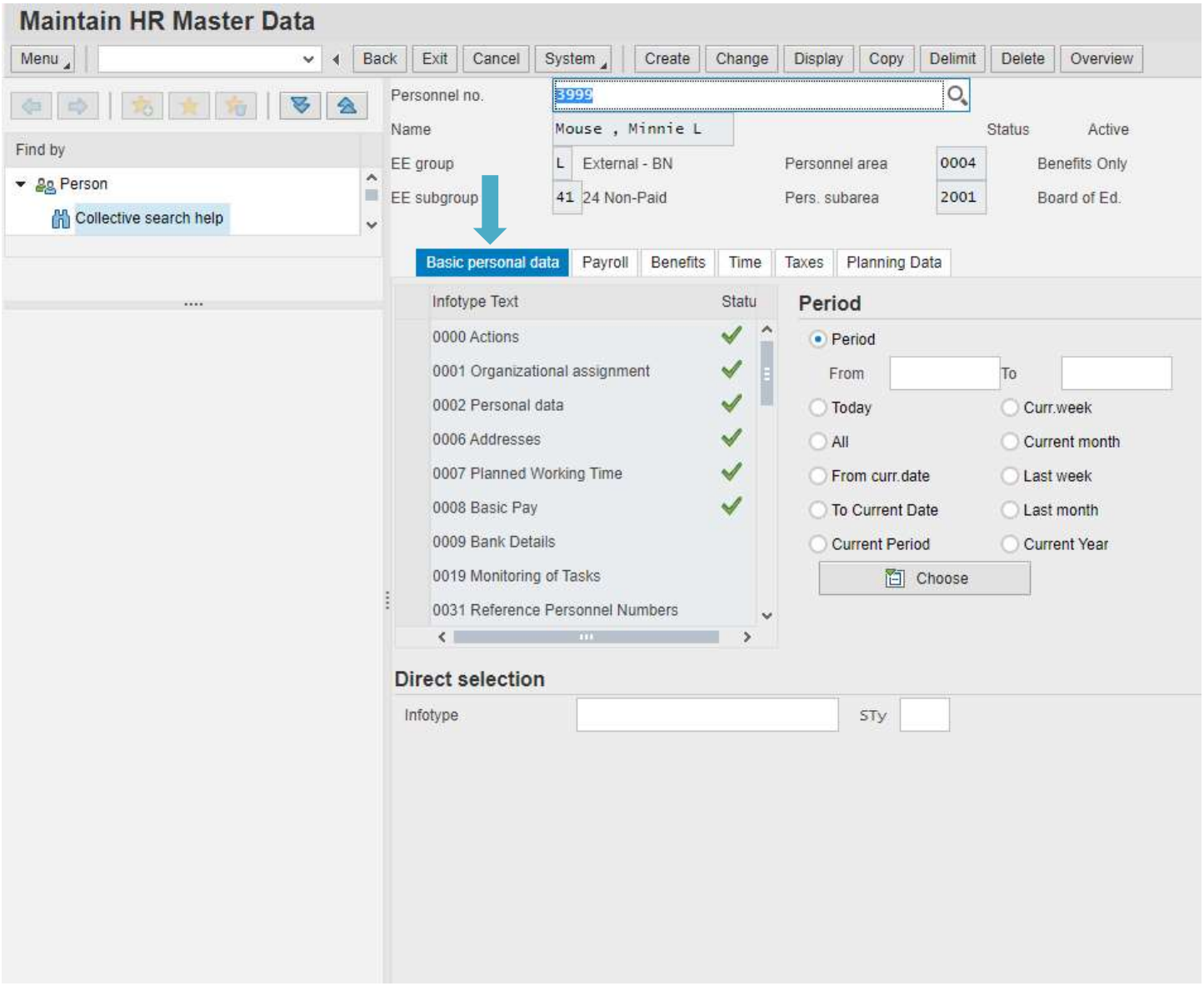
Step 1: PA 30 Maintain HR Master Data

This step is to be completed

In the “Personnel No.” field, enter Employee’s Personnel Number or use the search options to find it.

Click “Enter” to bring up the employee’s record

Select “Basic personal data” tab

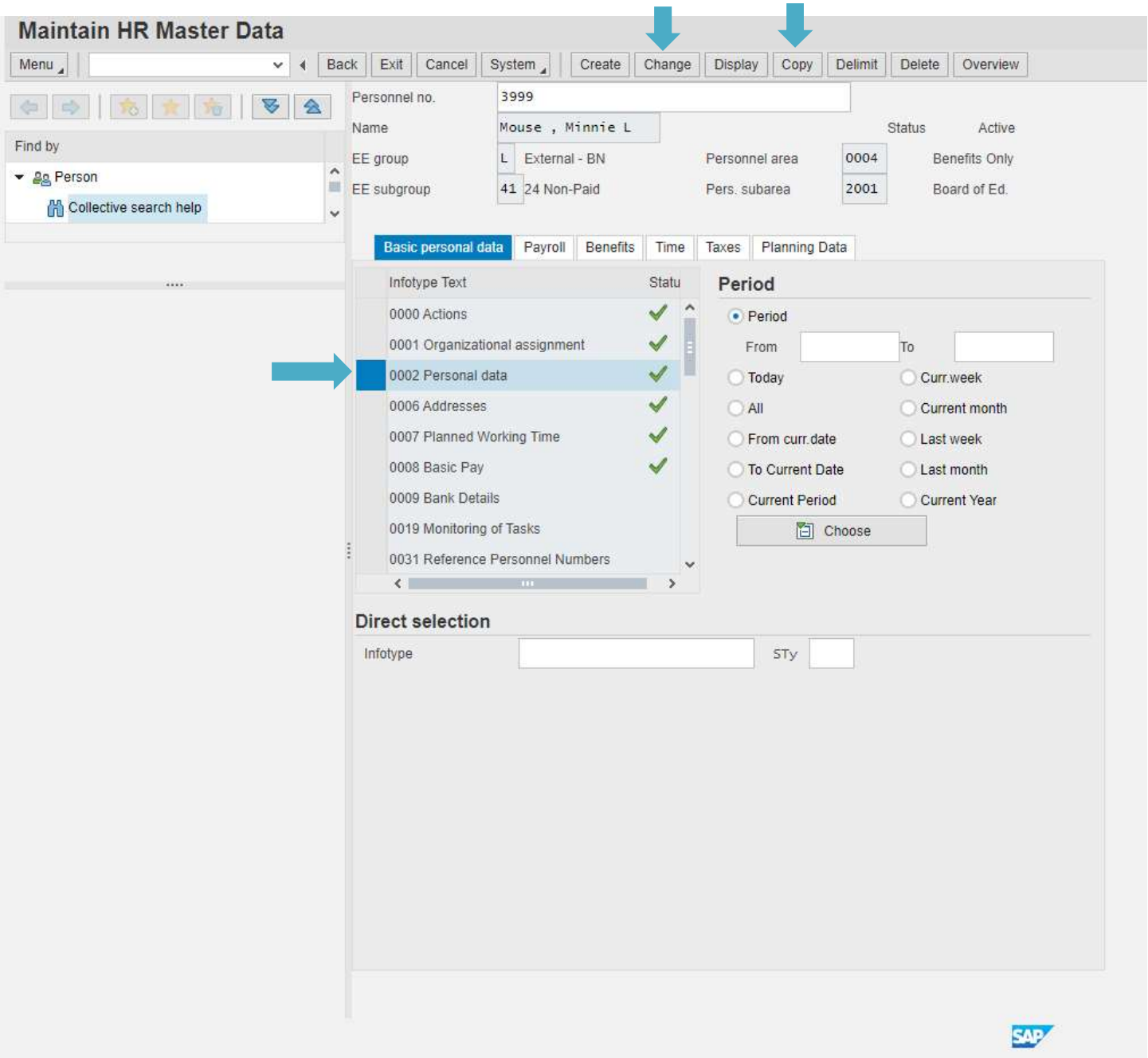


Step 1 continued: PA 30 Maintain HR Master Data

Select Infotype “0002 Personal Data” (highlight)

Click “Change” -if you are correcting an error

Click “Copy” -if you are updating information



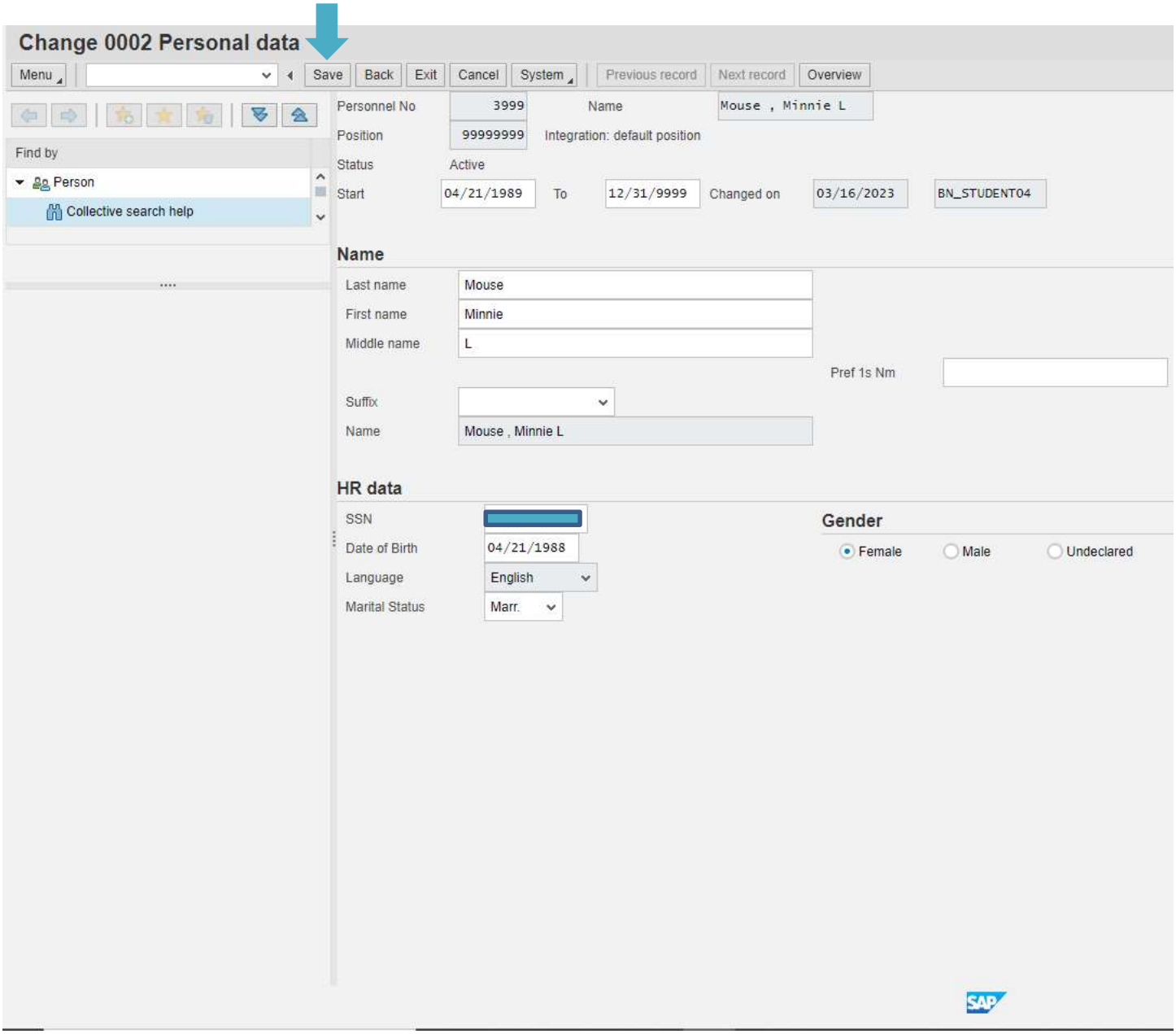
NOTE: Only chose “Change” if you are correcting data that has been wrong since the employee’s initial entry into KHRIS. If you are updating a name due to a name change, make sure the employee has a new social security card, marriage certificate or court order reflecting the name change. If you are correcting information and clicked “Change”, do not change the “Start Date”. If you are updating the information and clicked “Copy”, enter today’s date in the “Start Date” field. Update any applicable demographic data.

Step 1 continued: PA 30 Maintain HR Master Data

Change/Update all applicable data (name, date of birth, marital status, etc.)

In this instance, the employee's date of birth was **corrected**, so the **"Change"** function was used.

Click "Save"



Step 1 continued: PA 30 Maintain HR Master Data

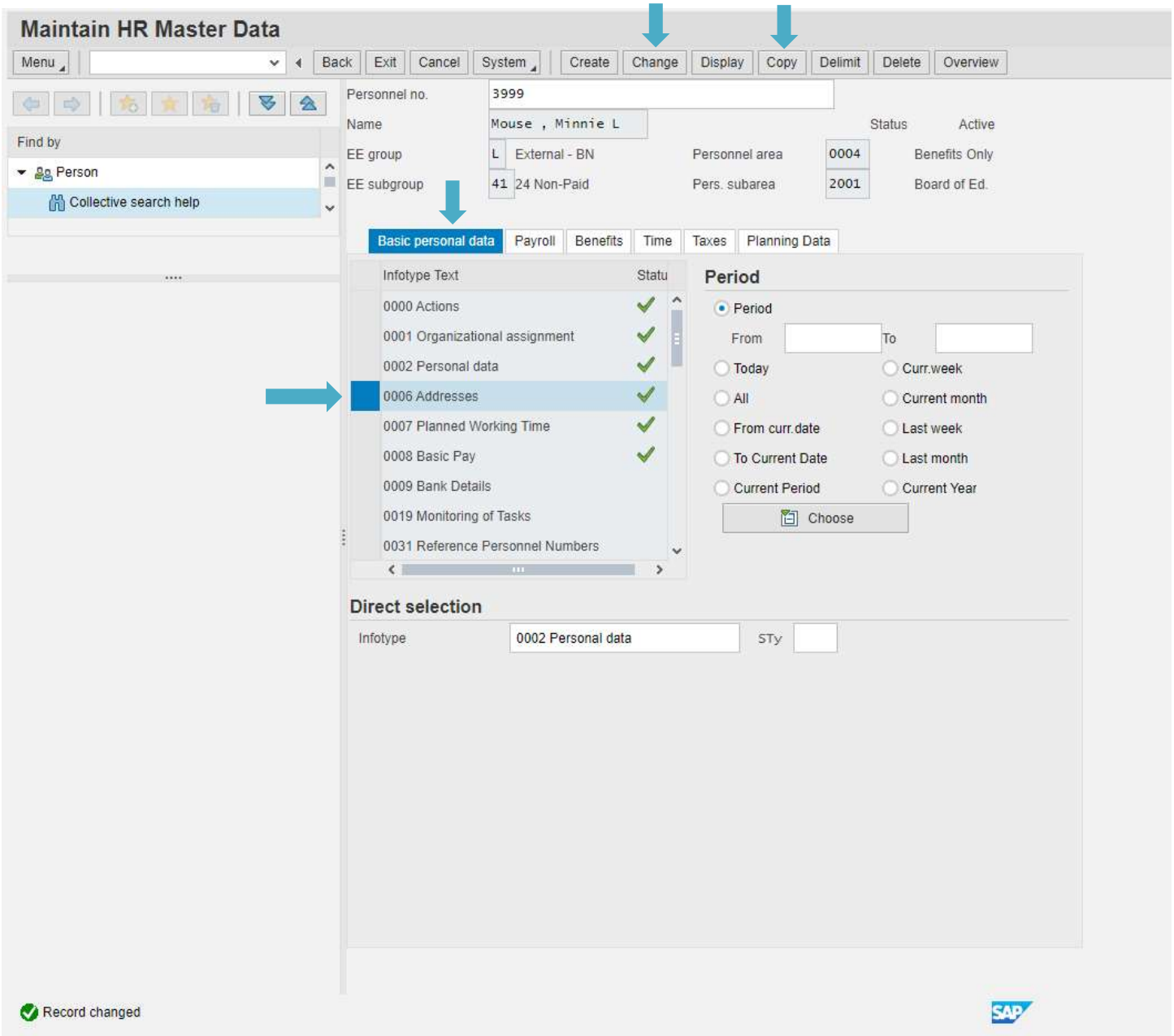
For address changes/updates, select Infotype “0006 Addresses” (also under the “Basic Personal Data” tab)

Click “Change” -if you are correcting an error – do not change the start date

Click “Copy” -if you are updating information – change start date to today’s date

In this example we will use copy.

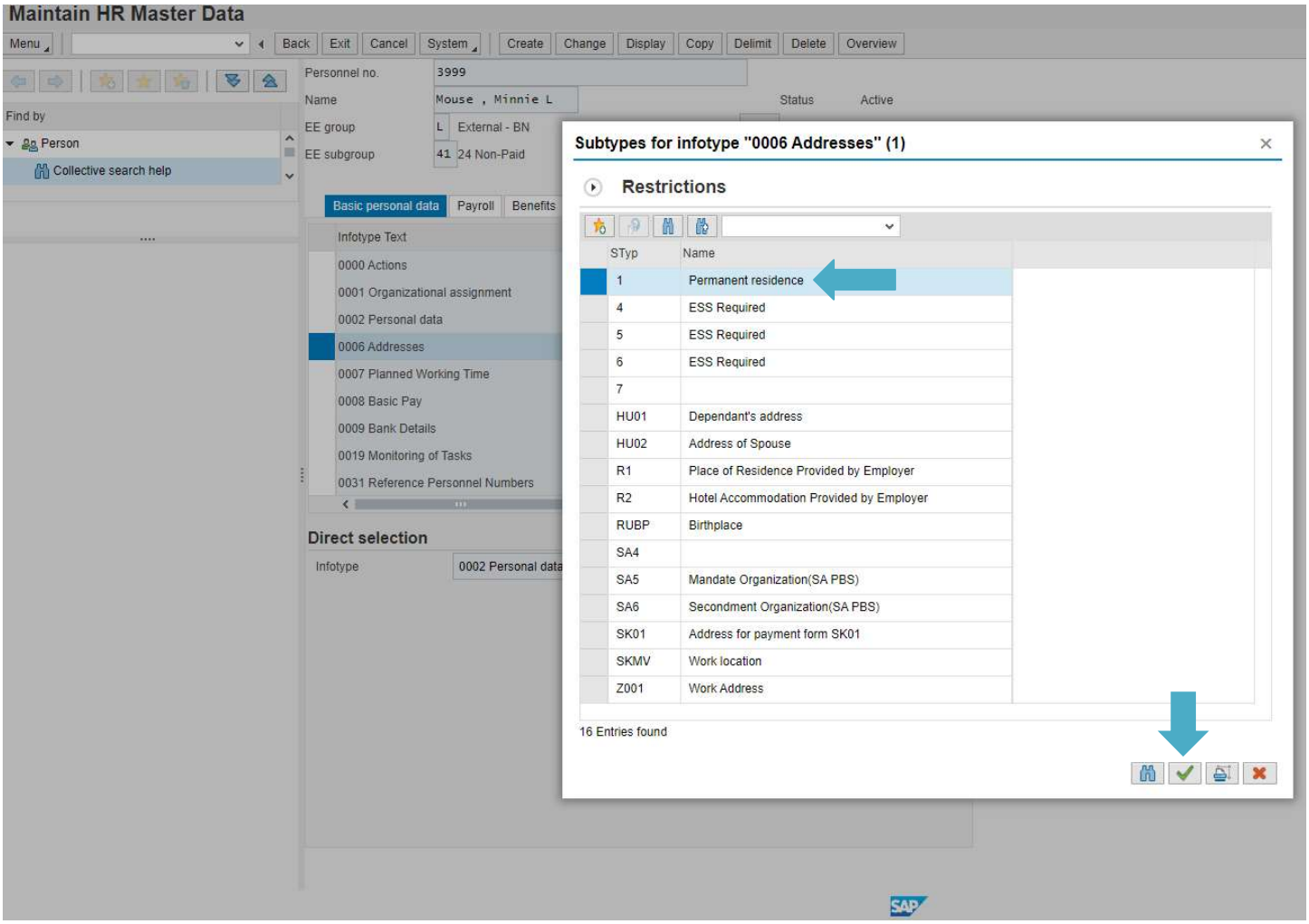
Highlight Addresses and then select copy.



Step 1 continued: PA 30 Maintain HR Master Data

In the “Subtypes for Infotype “0006 Addressess” window, select “Permanent residence”

Either click twice, or click once then click ✓



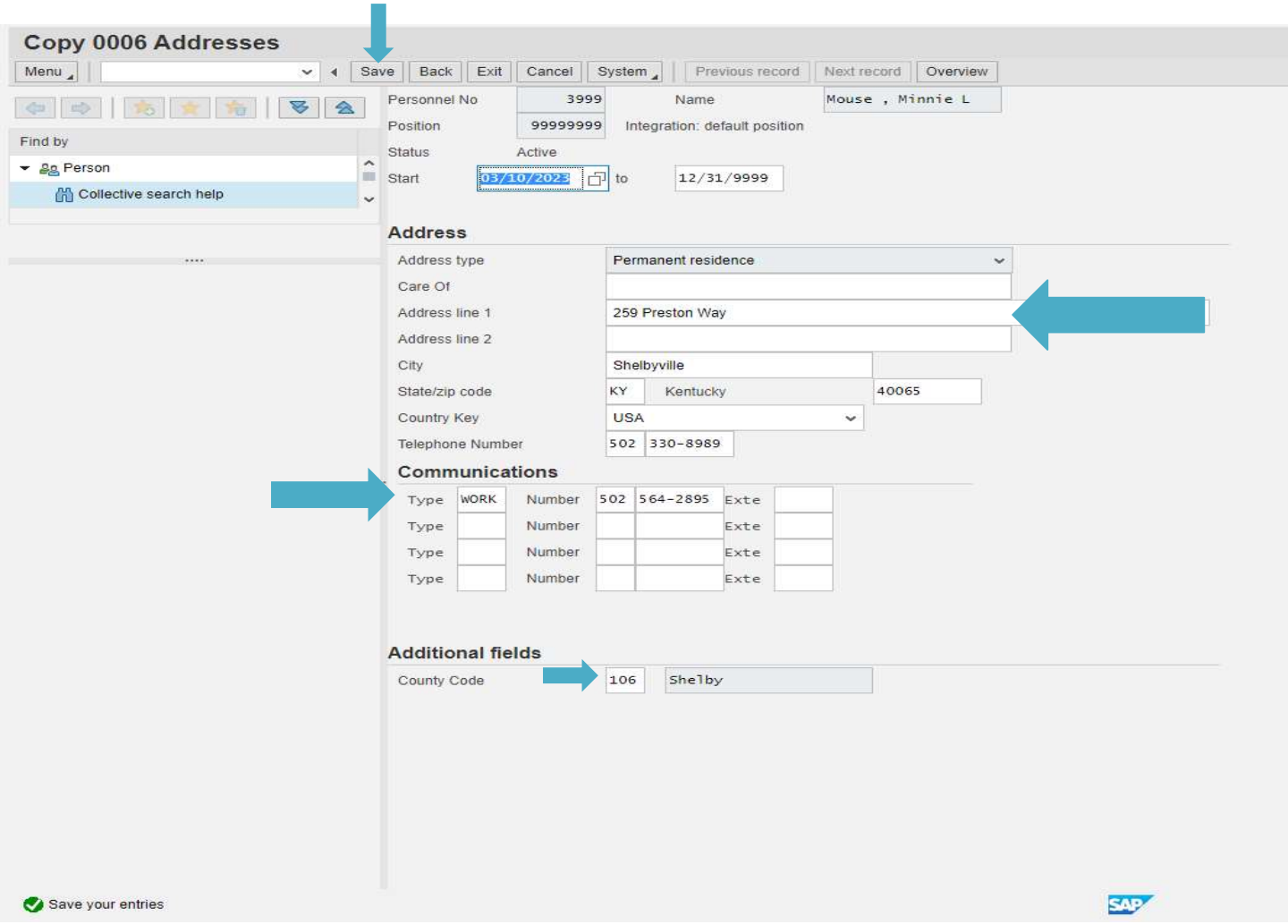
Step 1 continued: PA 30 Maintain HR Master Data

In this example, we used the "Copy" function to update new address information. Make sure that the city, zip code and county code all match. You will get an error if they do not.

Update all pertinent address information

Hit "Enter" on your keyboard to check for errors. **If you get a zip code or county code error, please use the USPS.com website to determine the correct zip code. You can also use Google.com to search for the correct county of residence.**

Click "Save"



NOTE: If there was not a telephone number already listed, you can enter it during this transaction. The first telephone number listed should be the primary phone number. If employee has multiple numbers to enter, use the "Communications" area to enter multiple numbers. Use the drop-down menu next to "Type" field to select option (work, cell, other, etc.). If applicable, enter extension for work numbers. Repeat this step if needed to add additional phone numbers.

PROCESS COMPLETE

Terminating Benefit Participation

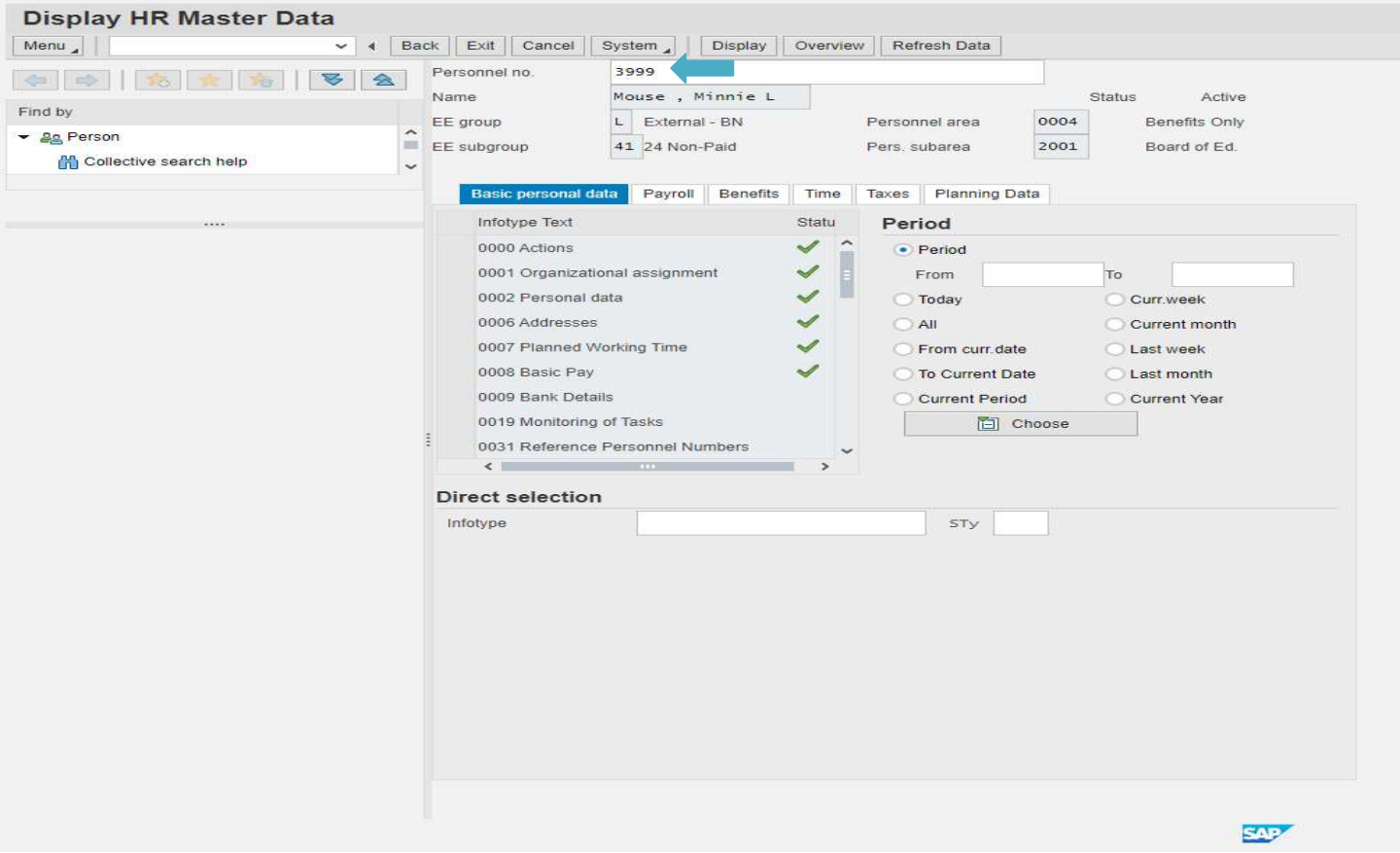
State Boards of Education should utilize MUNIS to enter a termination or should follow the steps below to enter the termination through KHRIS.

Step 1: Verify Plan Information

Bring up Transaction PA20 under “My Transactions”

In the “Personnel No.” field, enter employee’s Personnel Number, or use the search options to find it

Hit “Enter” on your keyboard to bring up the employee’s record



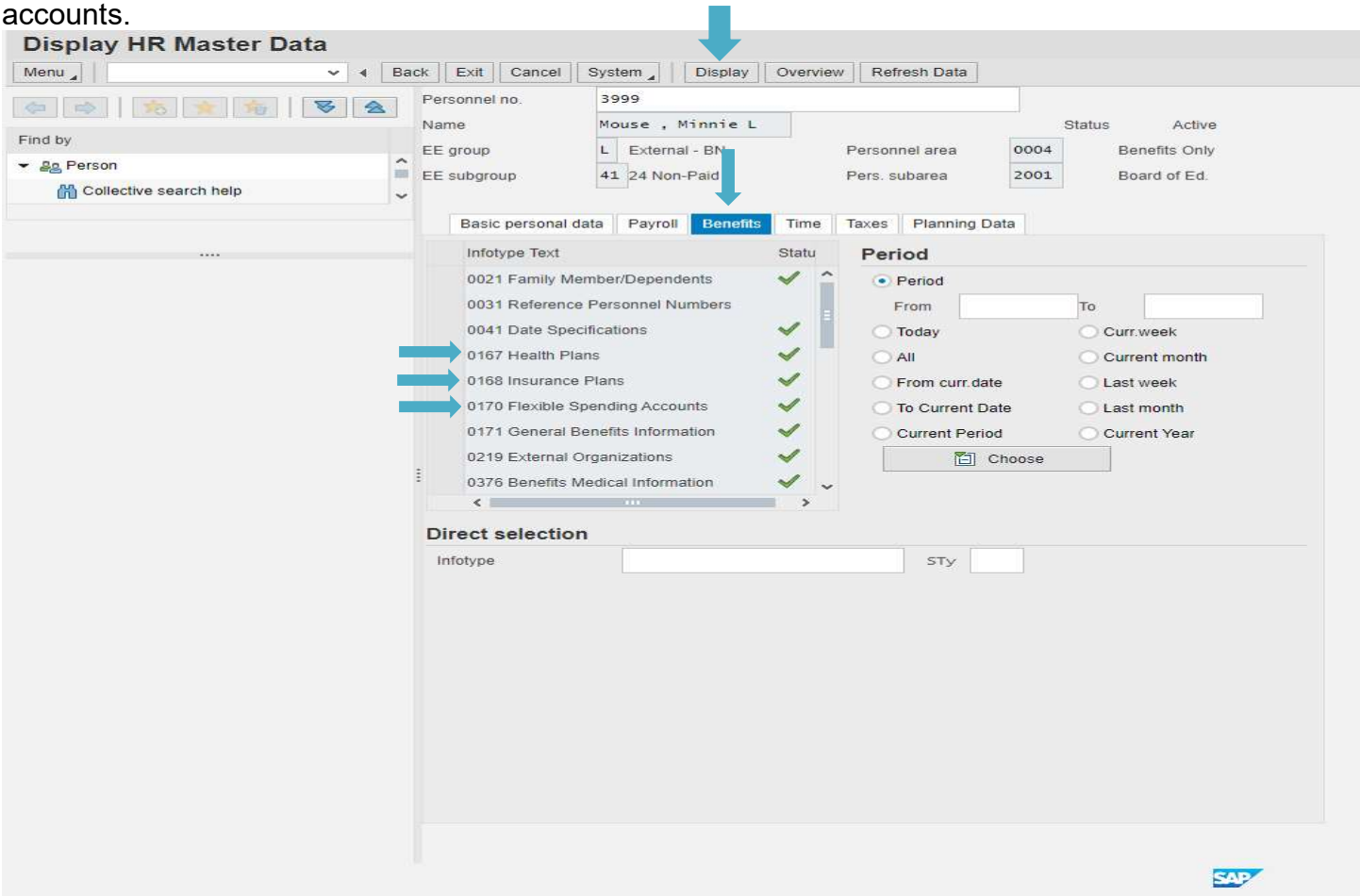
Step 1 continued: Verify Plan Information

Select the “Benefits” Tab

Click on “0167 Health Plans”, and then click “Display” to view health, dental, and vision insurance plans information. Make sure the plan has not been terminated, that there is no future dated termination, and that this is not a Cross-Reference plan (if it is, **DO NOT TERM**. Send to EIB instead)

Click on “0168 Insurance Plans”, and then click “Display” to check the life insurance plan

Click on “0170 Flexible Spending Accounts”, and then click “Display” to check flexible spending accounts.

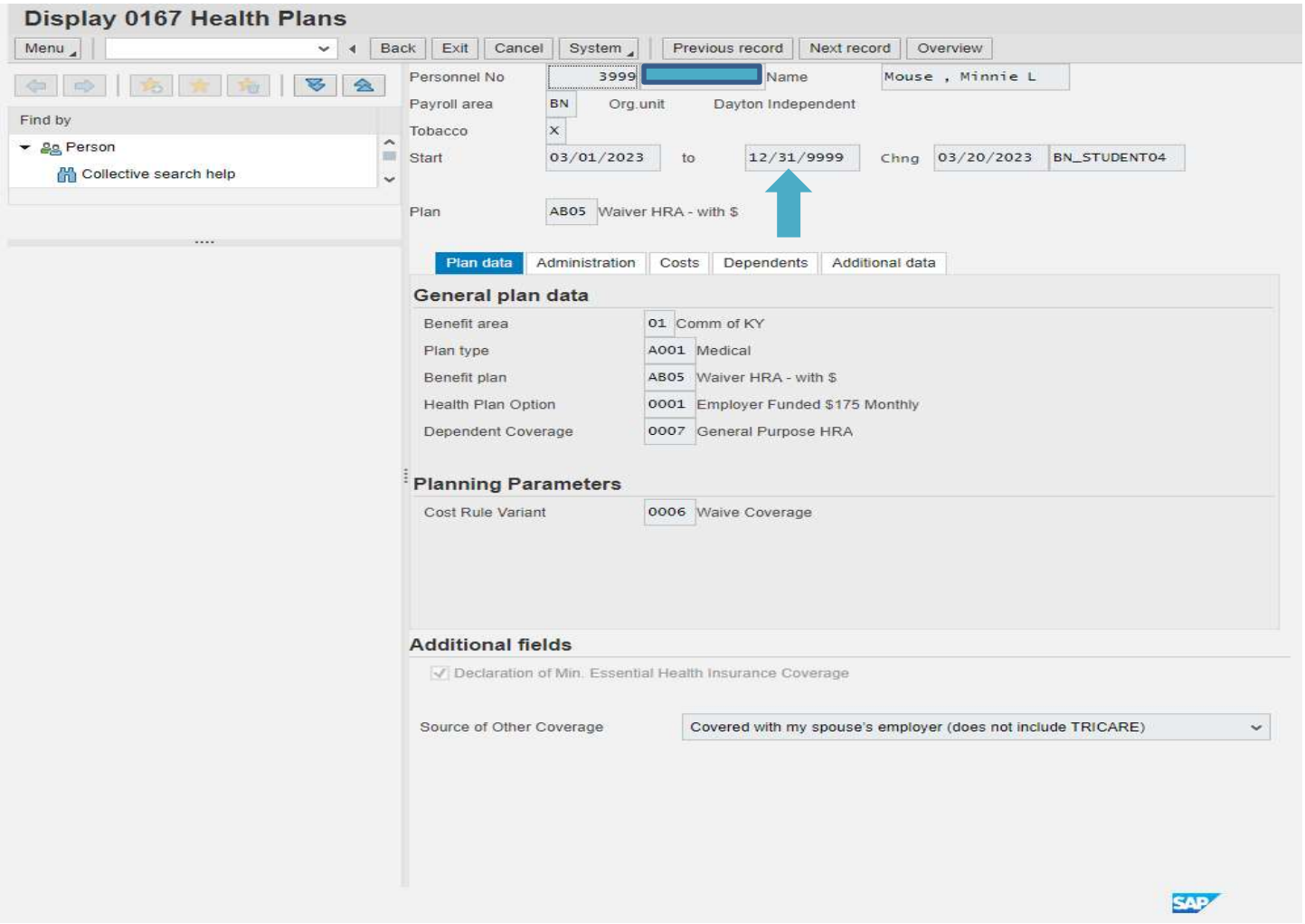


Note: Complete the above steps to make sure you have the correct Personnel No. and to verify that the health plan, dental plan vision plan life plan(s) and FSA(s) have not been terminated. If the plan has been terminated and all information (dates) are correct, then nothing needs to be done. **DO NOT TERM** if health plan is in the Cross-Reference payment option. Please forward to the EIB for processing.

Step 1 continued: Verify Plan Information

In this example using Infotype 0167 Health Plans, this health plan has not been terminated yet, nor is there a future term date (as indicated by the 12/31/9999 in the “to” date. That means this plan is still active. If it were termed, you would see a plan termination date in the “to” field). This is not a cross-reference plan (or you would see “Prime” or “Sec” at the end of the benefit plan. Ex: Default LivingWell Basic CDHP Prime, Default LivingWell Basic CHDP Sec.). You will also view dental and vision plans using Infotype 0167 Health Plans.

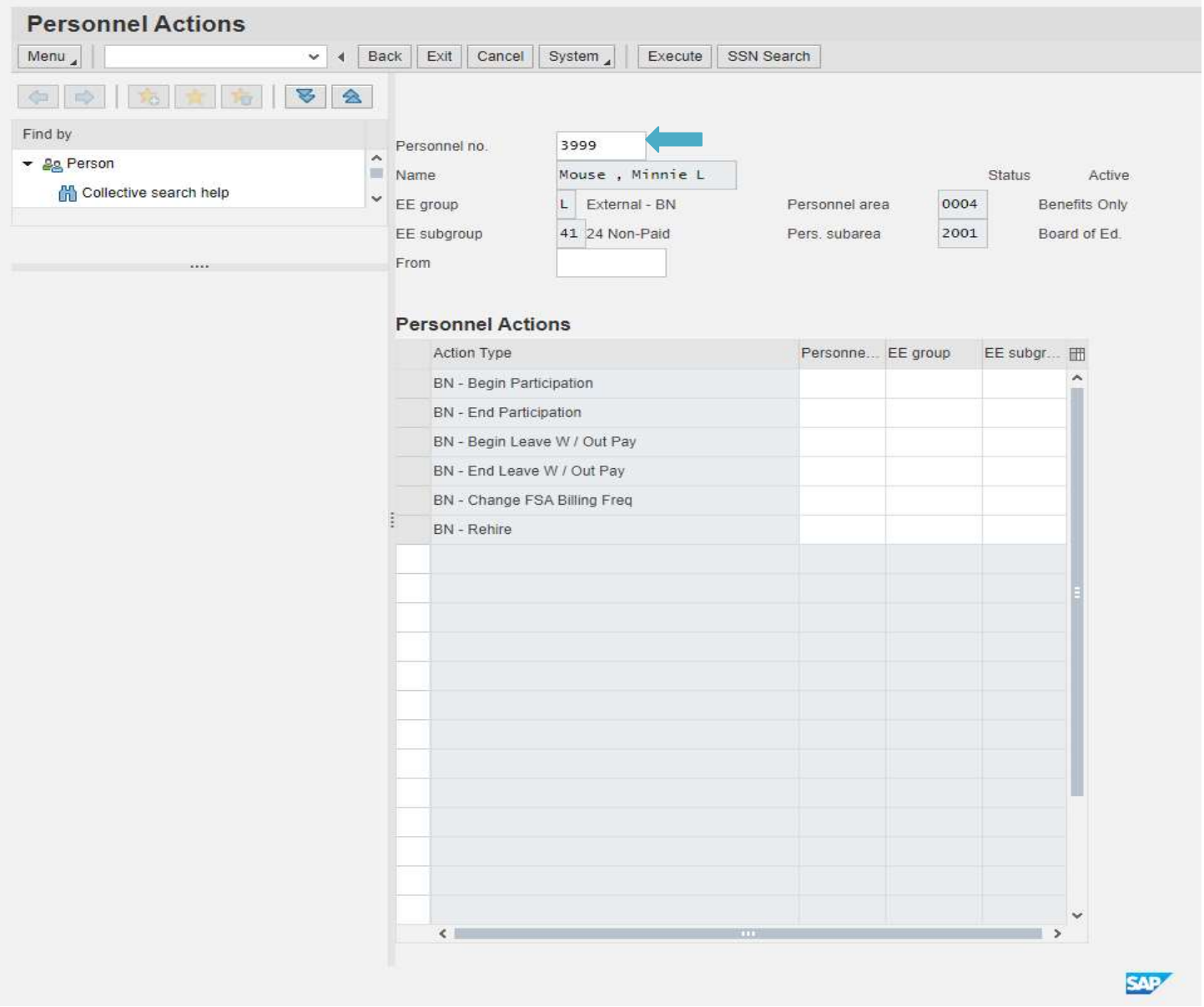
You can now check the Life insurance plan(s) in Infotype 0168 and the FSA contribution(s) in Infotype 0170. If you know the member has no FSA(s), you can go to the next step



Step 2: PA 40 End Participation/Benefit Eligibility

Once you check plans in PA20, you must NOT click on the < and not the Home button. Instead you must type in the command box /nPA40.

If your employee's record does not automatically pull up, enter their Personnel Number in the "Personnel No." field, and then hit "Enter" on your keyboard

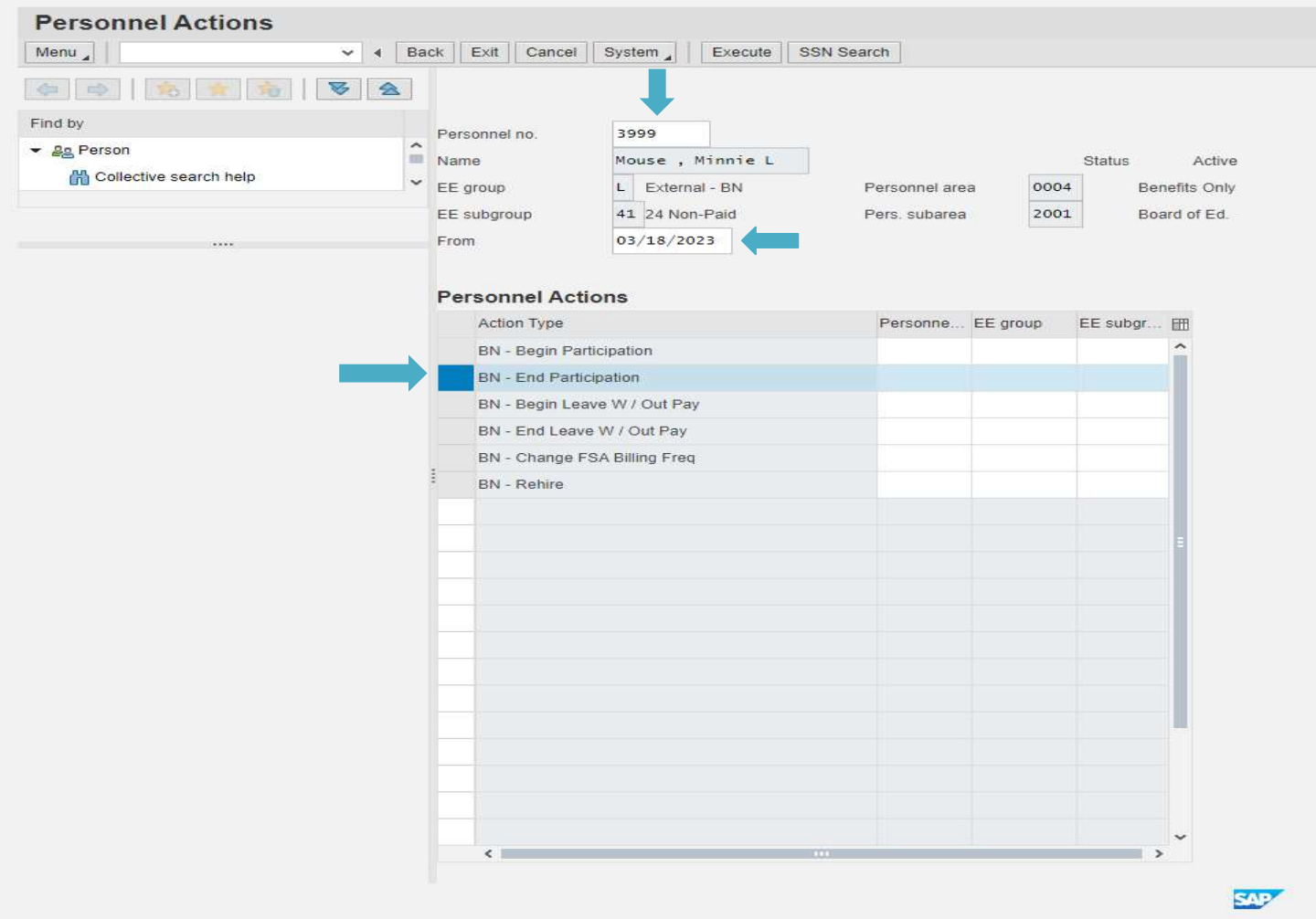


Step 2 continued: PA 40 Ending Participation/Benefit Eligibility

In the “From” field enter the day **AFTER** the employee’s last day of work (i.e., if employee’s last day of work is 03/15/2023; you will enter 03/16/2023)

Select “End Participation”

Click “Execute”

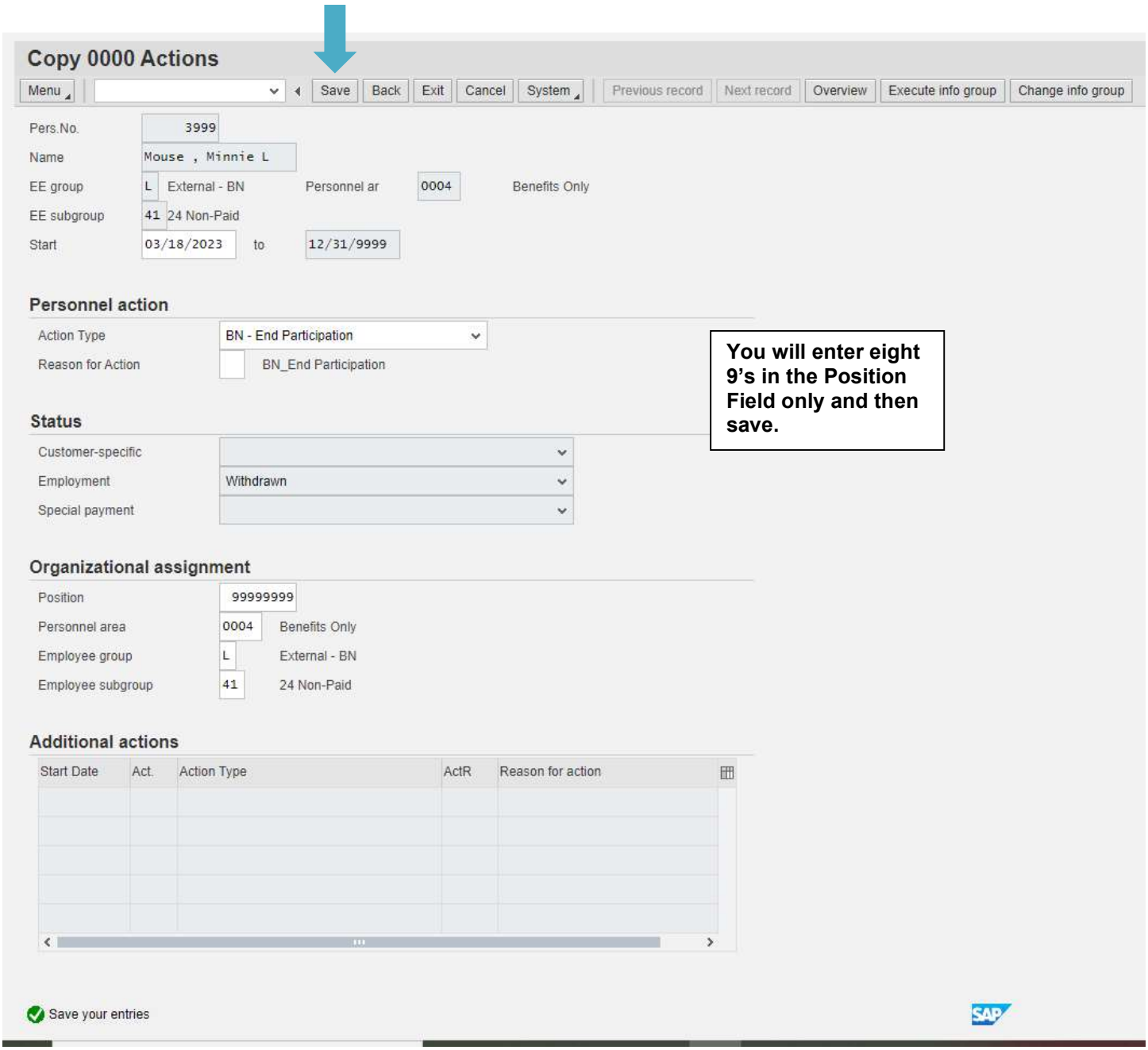


Step 3: PA 40 Personnel Actions

At this screen, you will **ONLY** enter 99999999 in the Position Field. The day AFTER last day worked will populate in the "Start" field.

Hit "Enter" on your keyboard to make sure there are no errors

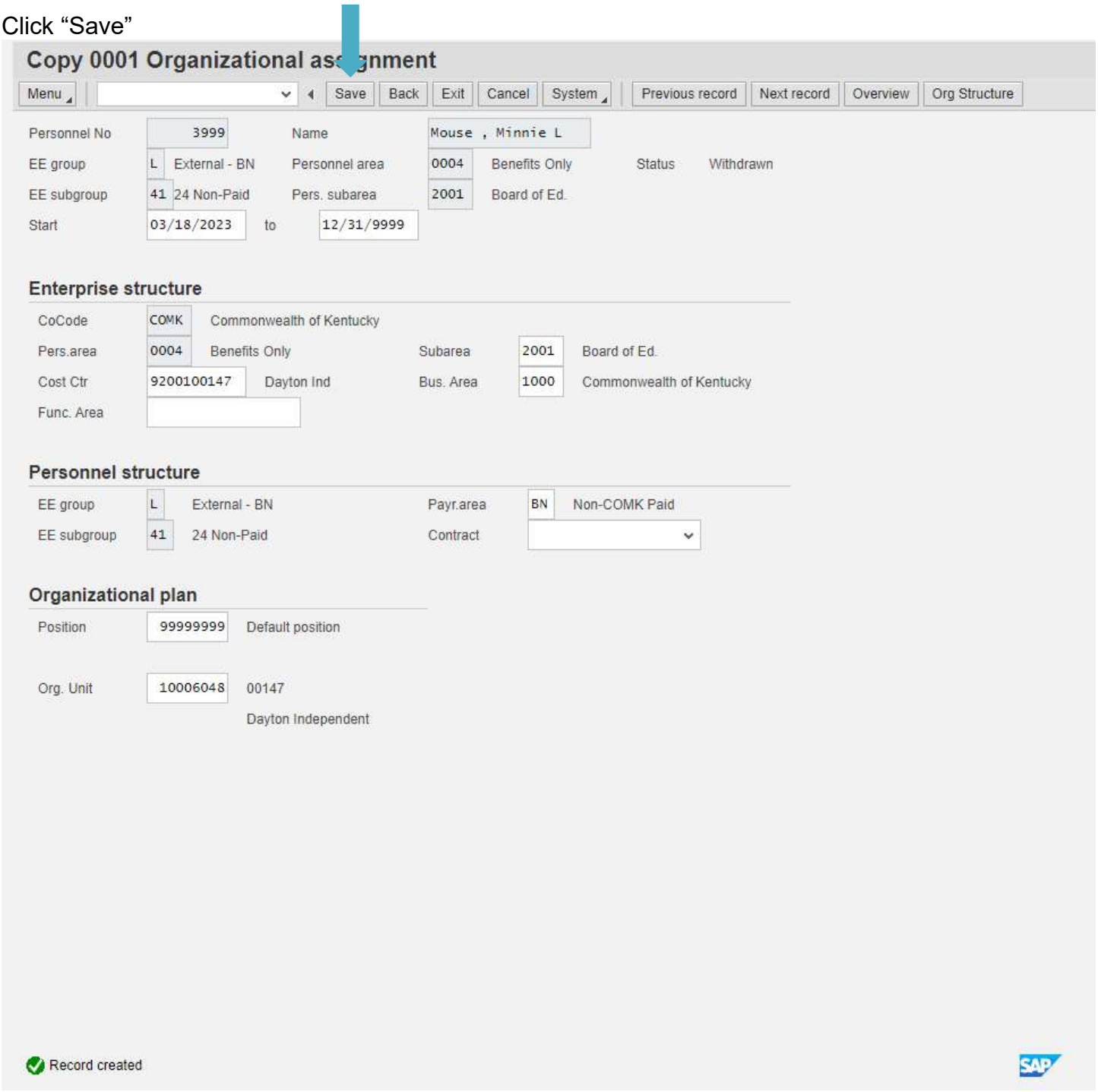
Click "Save"



Step 3 continued: PA 40 Personnel Actions
At this screen, you will **NOT** enter any information. The day AFTER last day worked will automatically populate in the "Start" field.

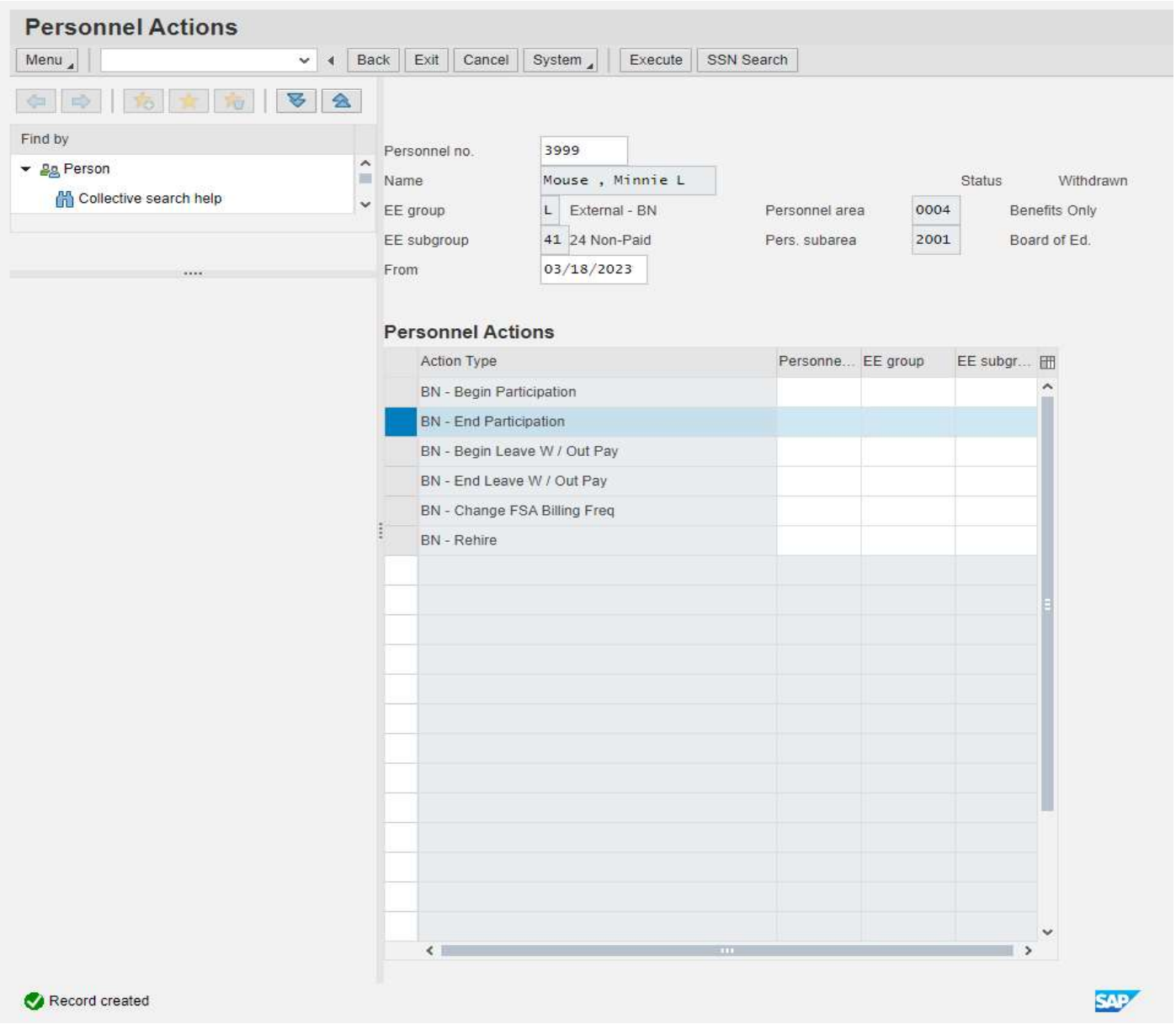
Hit "Enter" on your keyboard to make sure there are no errors

Click "Save"



Step 3 continued: PA 40 Personnel Actions

When you have completed this step, the system will return you to the first screen you started with.



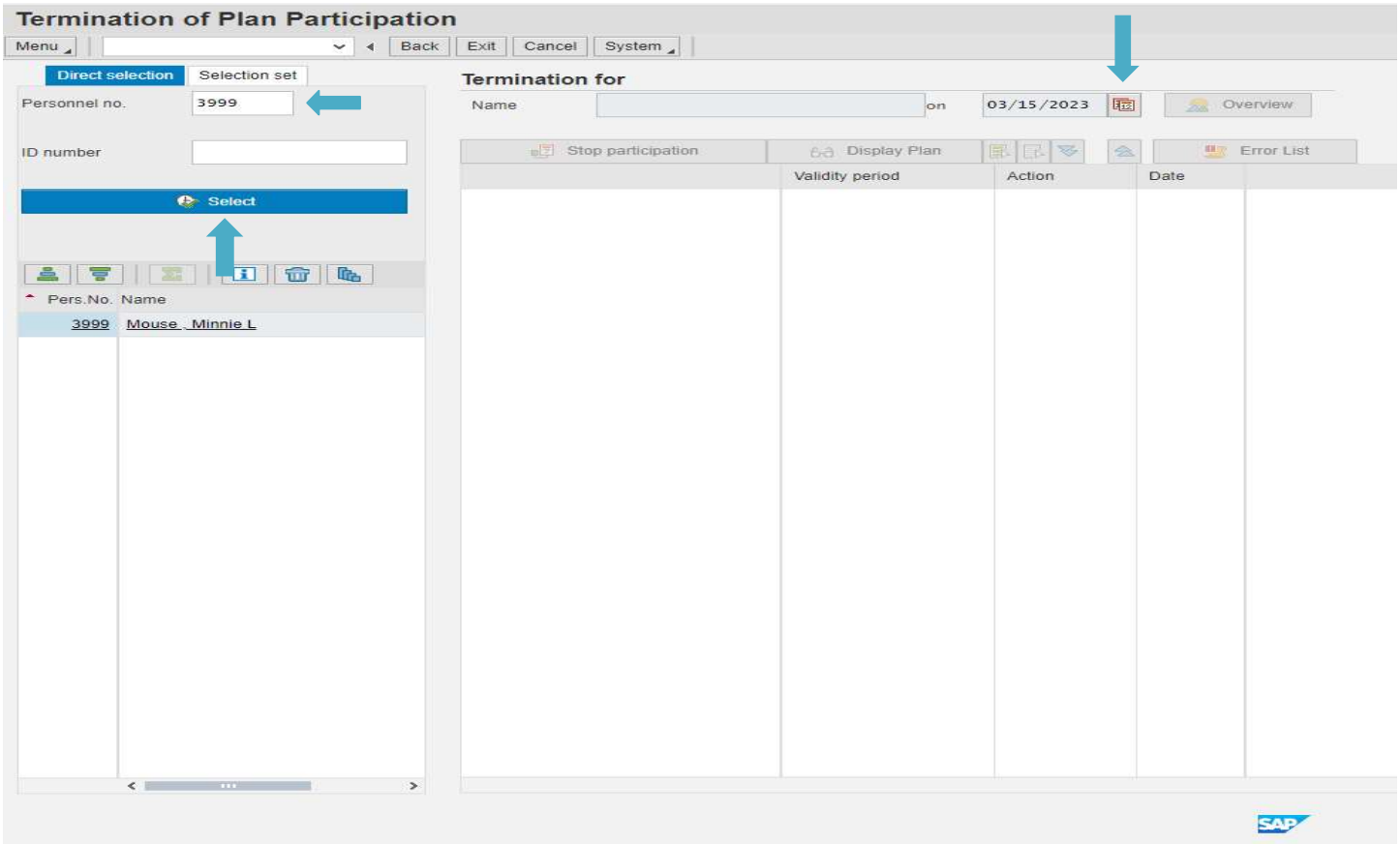
Step 4: HRBEN0014 Termination of Participation

Don't hit the < or the home button. Once you complete the PA40 action, you must NOT click on the < and not the Home button. If you click on either it locks the PERNR up. Instead, you must type in the command box /nHRBEN0014 to go from screen to screen.

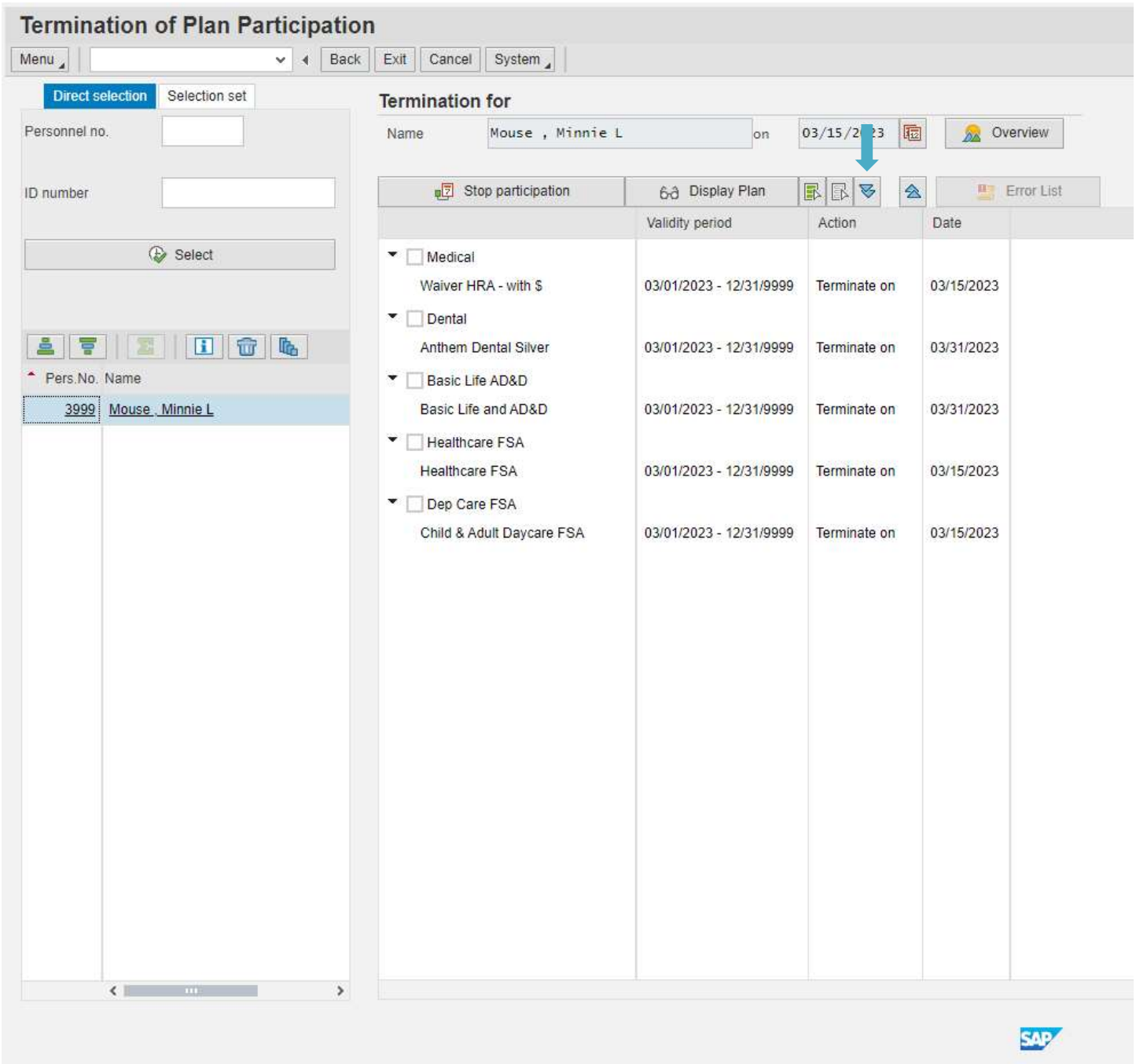
Enter employee's Personnel Number in the "Personnel No." field.

Go to the calendar selection and enter last day worked (i.e., last day of work is 03/15/2023)

Click "Select"

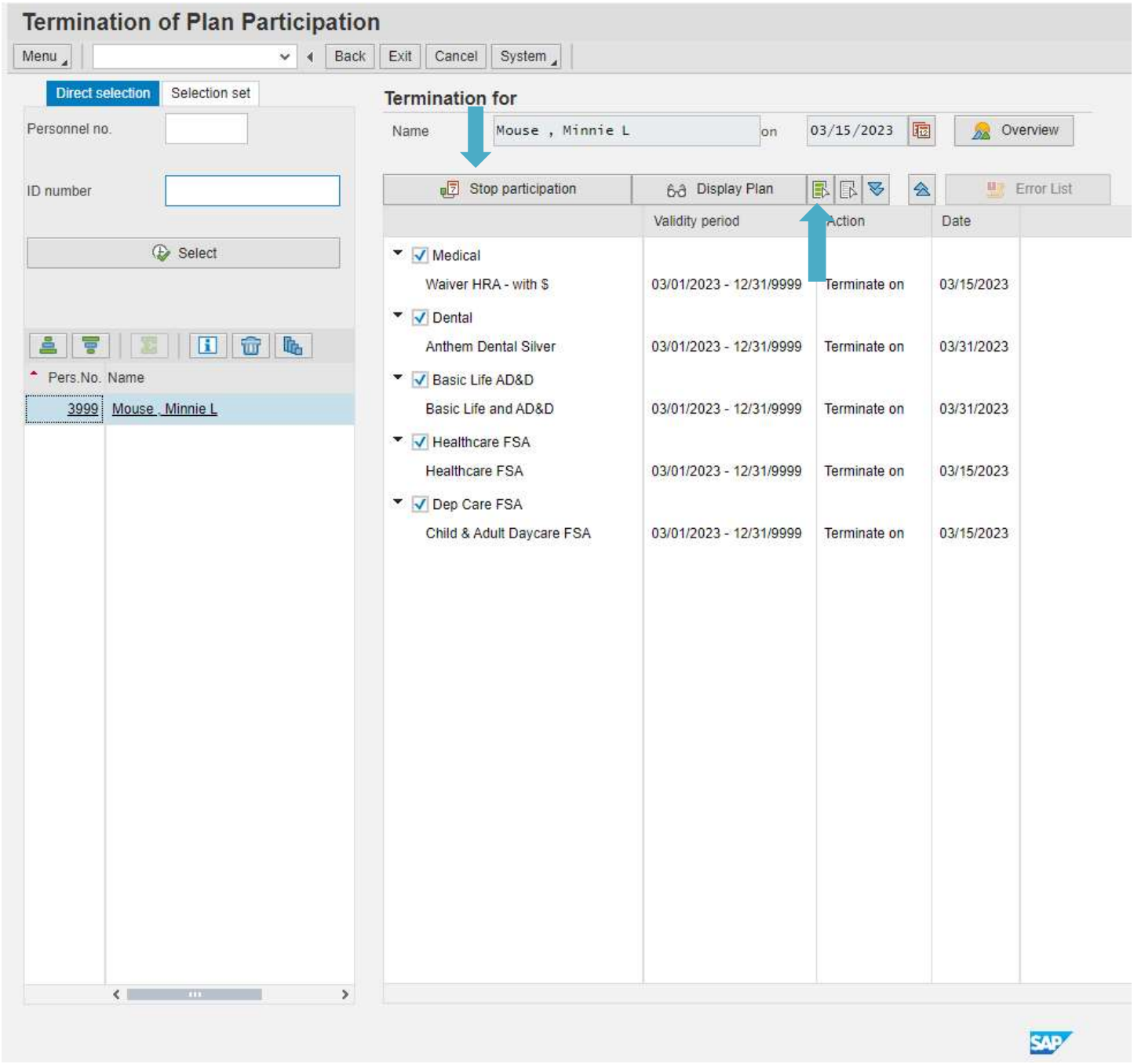


Click on “Expand” – This will allow the date information to be seen to make sure termination dates are correct

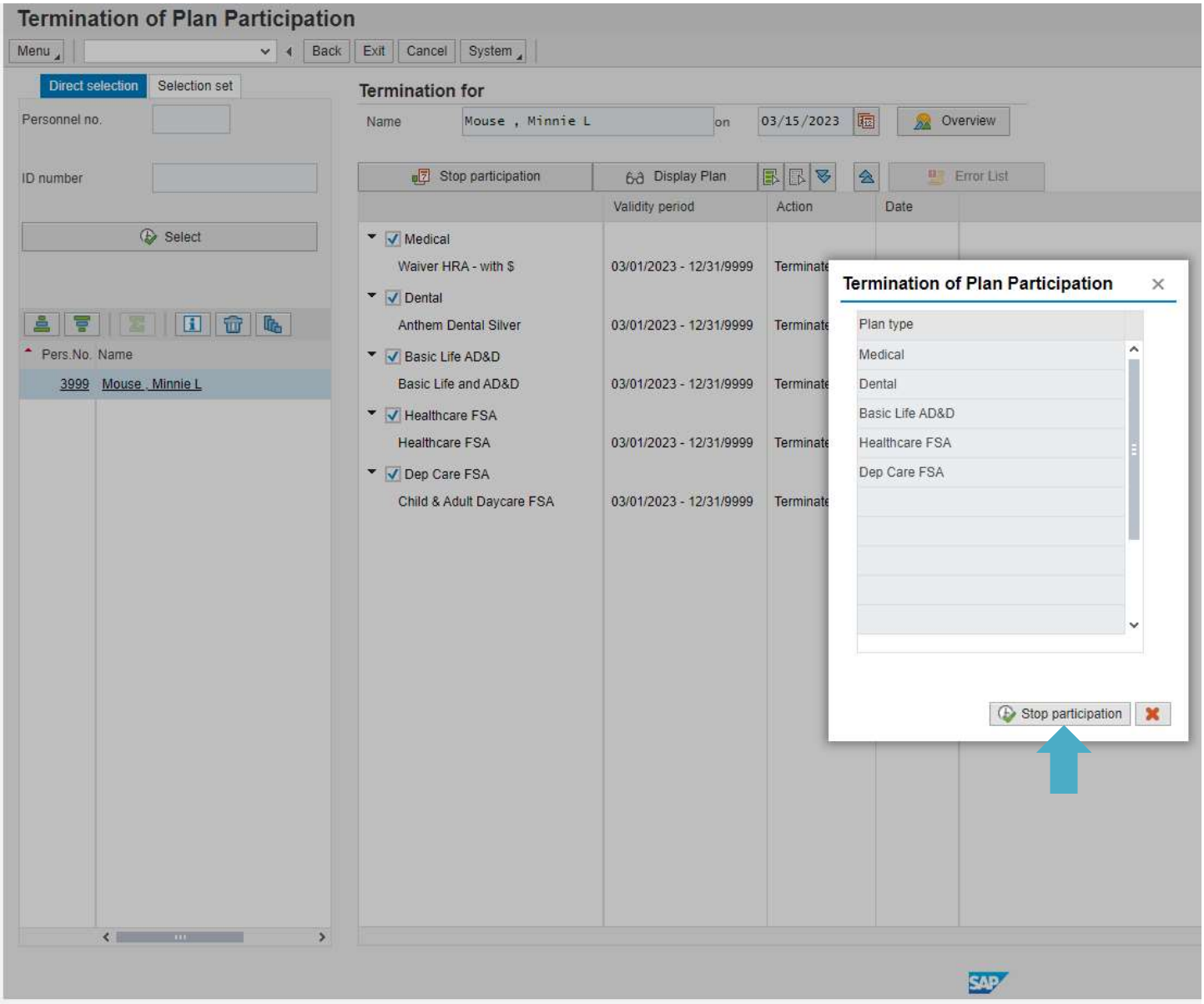


Click “Select all” this will select all health, dental, vision and life plans for termination.

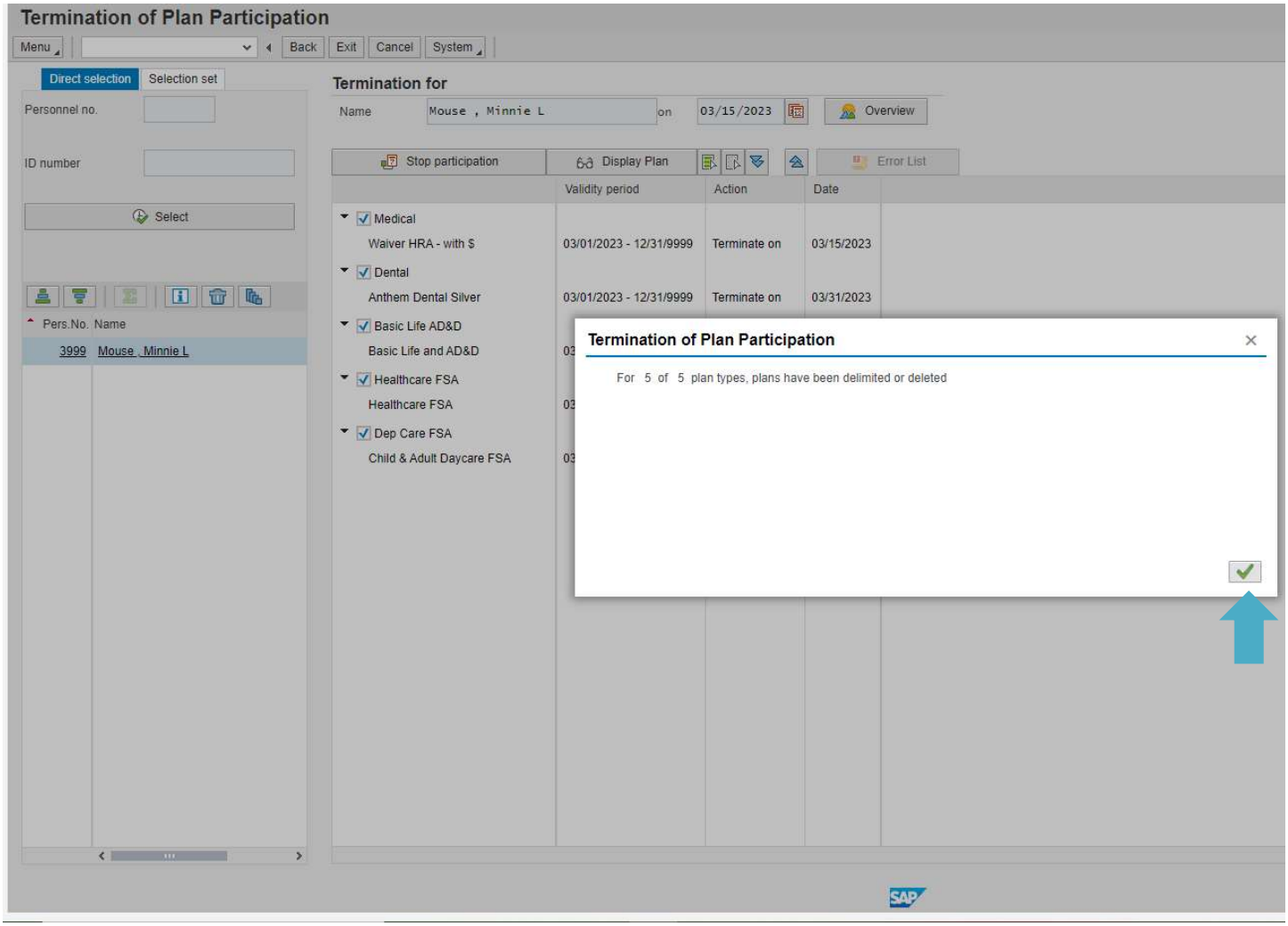
Click “Stop Participation”



Select “Stop participation”



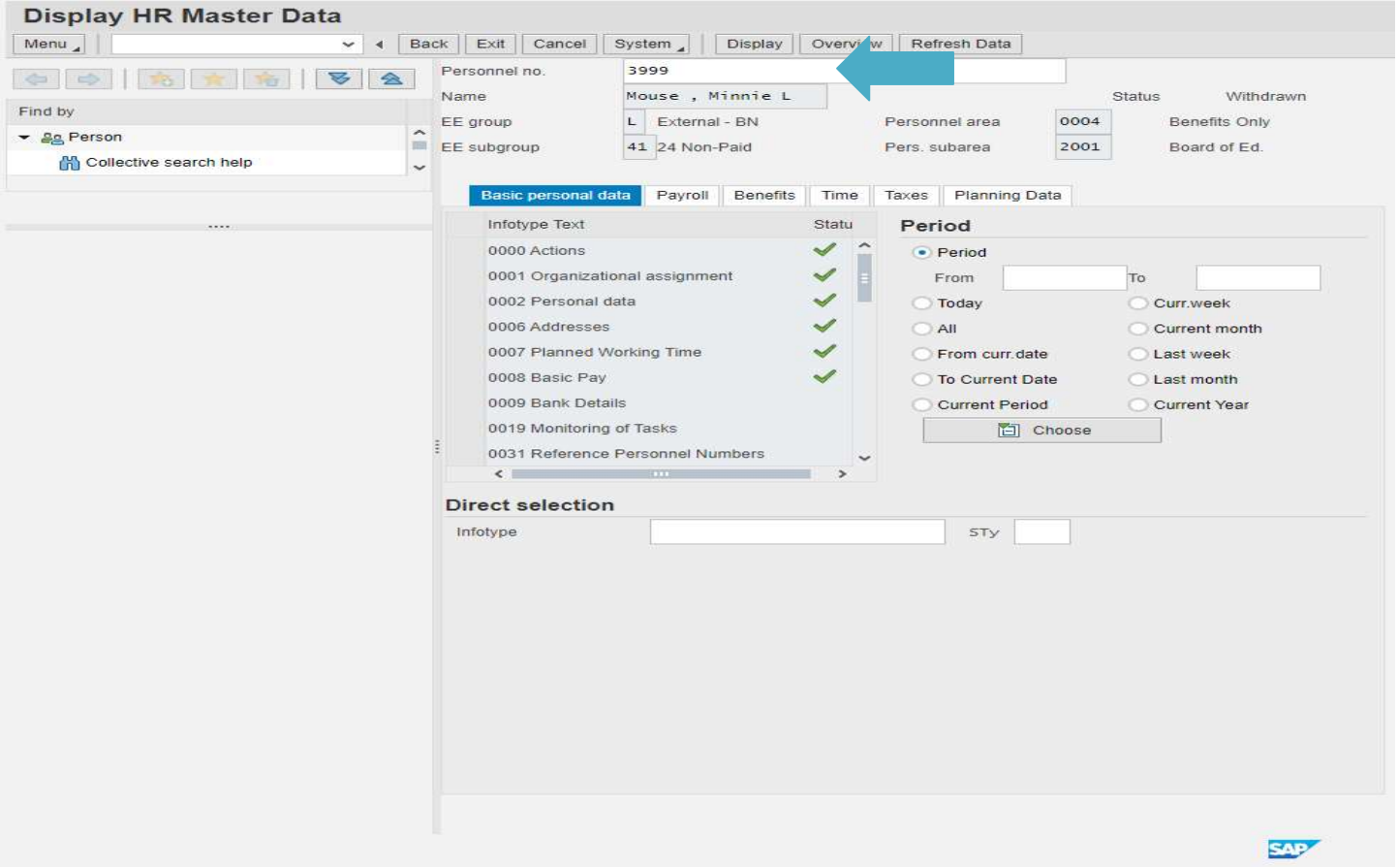
Click ✓


Termination of Plan Participation
Menu
Back
Exit
Cancel
System
Direct selection
Selection set
Personnel no.
ID number
Select
Pers.No.
Name
3999
Mouse , Minnie L
Termination for
Name
Mouse , Minnie L
on
03/15/2023
Overview
Stop participation
Display Plan
Error List
Validity period
Action
Date
Medical
Waiver HRA - with $
03/01/2023 - 12/31/9999
Terminate on
03/15/2023
Dental
Anthem Dental Silver
03/01/2023 - 12/31/9999
Terminate on
03/31/2023
Basic Life AD&D
Basic Life and AD&D
Healthcare FSA
Healthcare FSA
Dep Care FSA
Child & Adult Daycare FSA
Termination of Plan Participation
For 5 of 5 plan types, plans have been delimited or deleted

To verify that health plan, dental plan, vision plan, life plans and flexible spending accounts have been terminated; type in the command box /npa20.

In the Personnel No. field enter Employee's Personnel No.

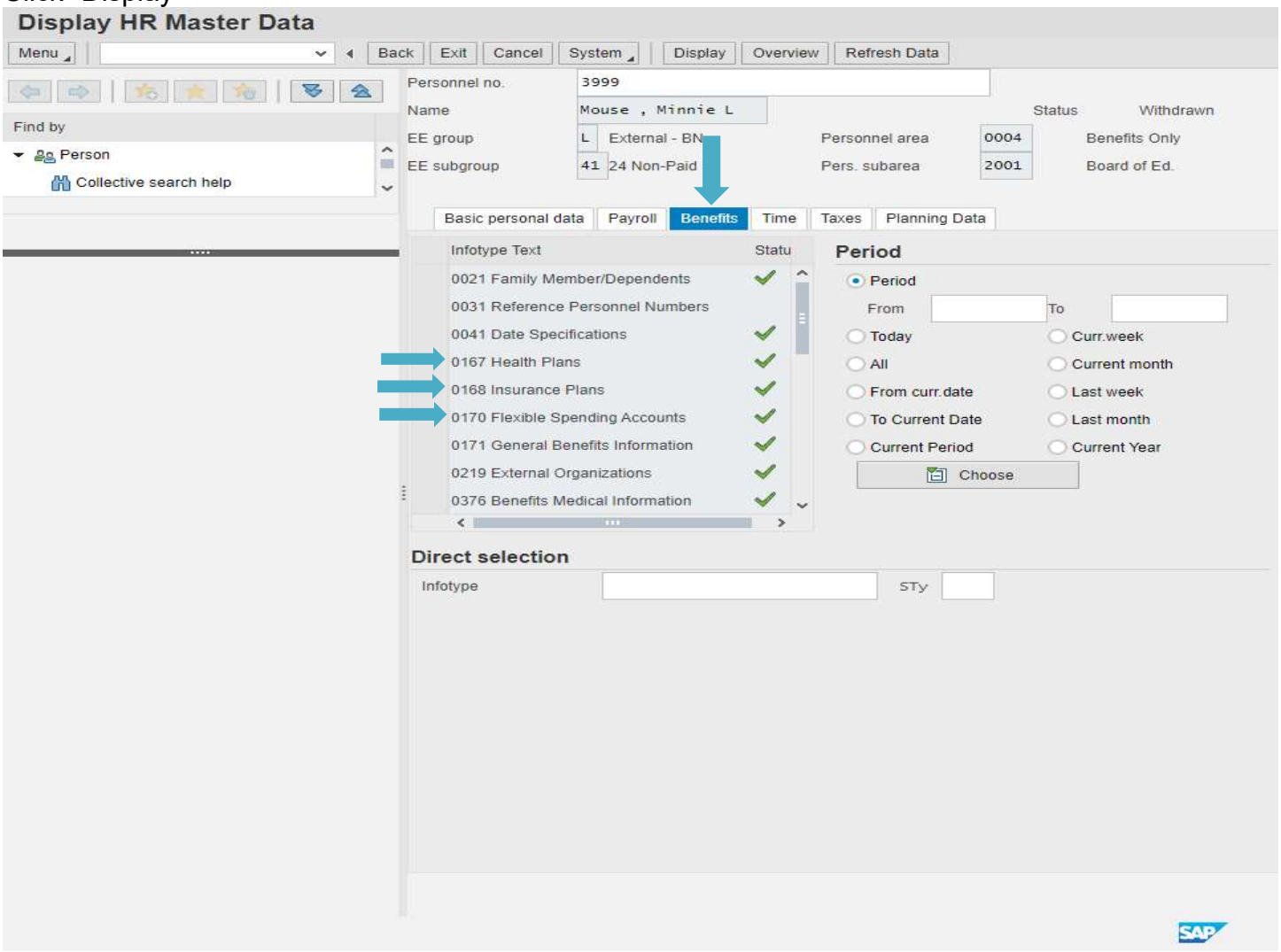
Click "Enter" on keyboard



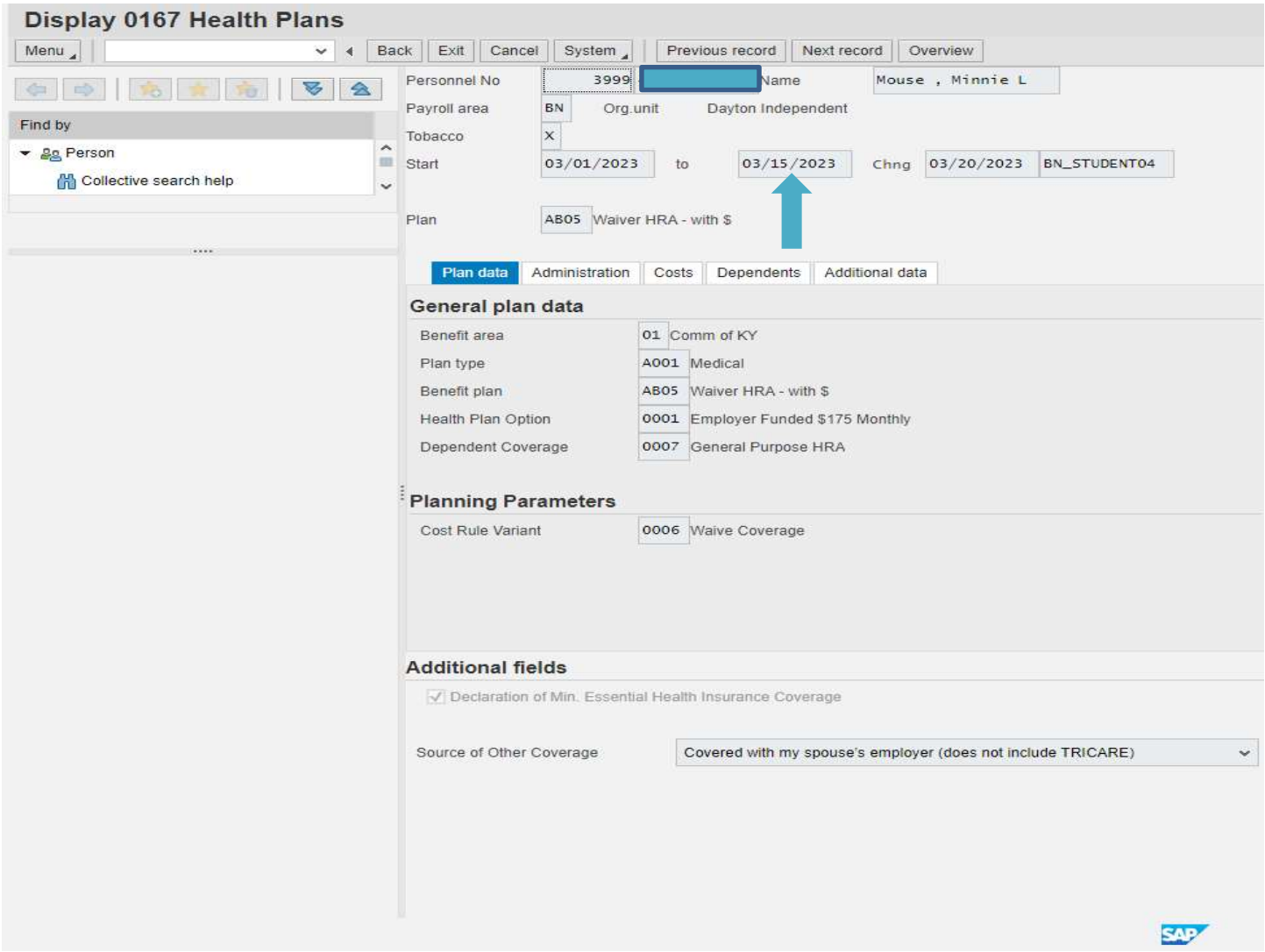
Select the “Benefits” tab

Click on “0167 Health Plans” then after checking the health, dental, and vision plan click on “168 Insurance Plans” to check the life insurance plan, and then if applicable, click on “0170 Flexible Spending Accounts” to check any of the flexible spending plans

Click “Display”



The “To” date will be the last date of coverage (termination)



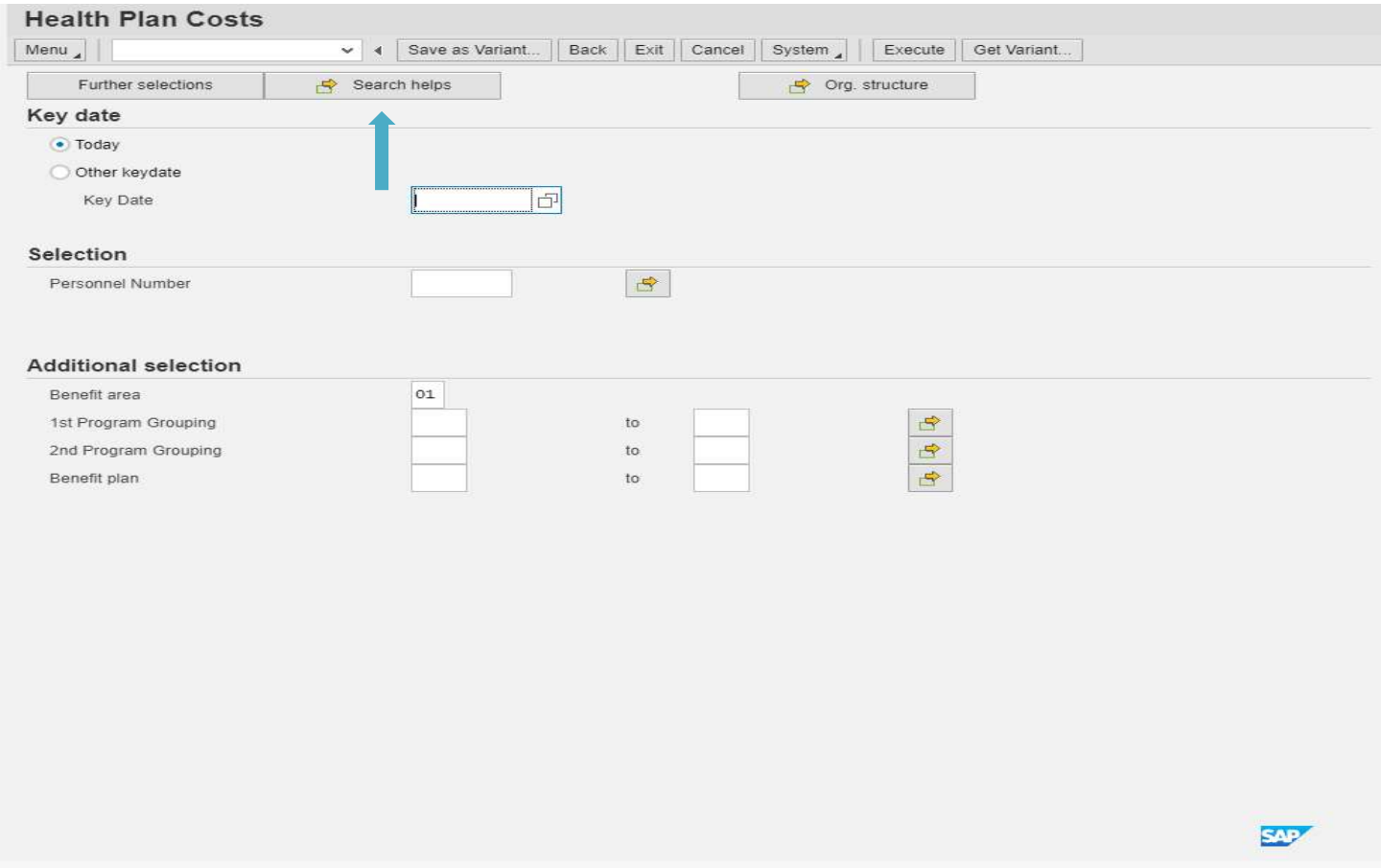
Transaction is complete

Health Benefit Enrollment Reporting

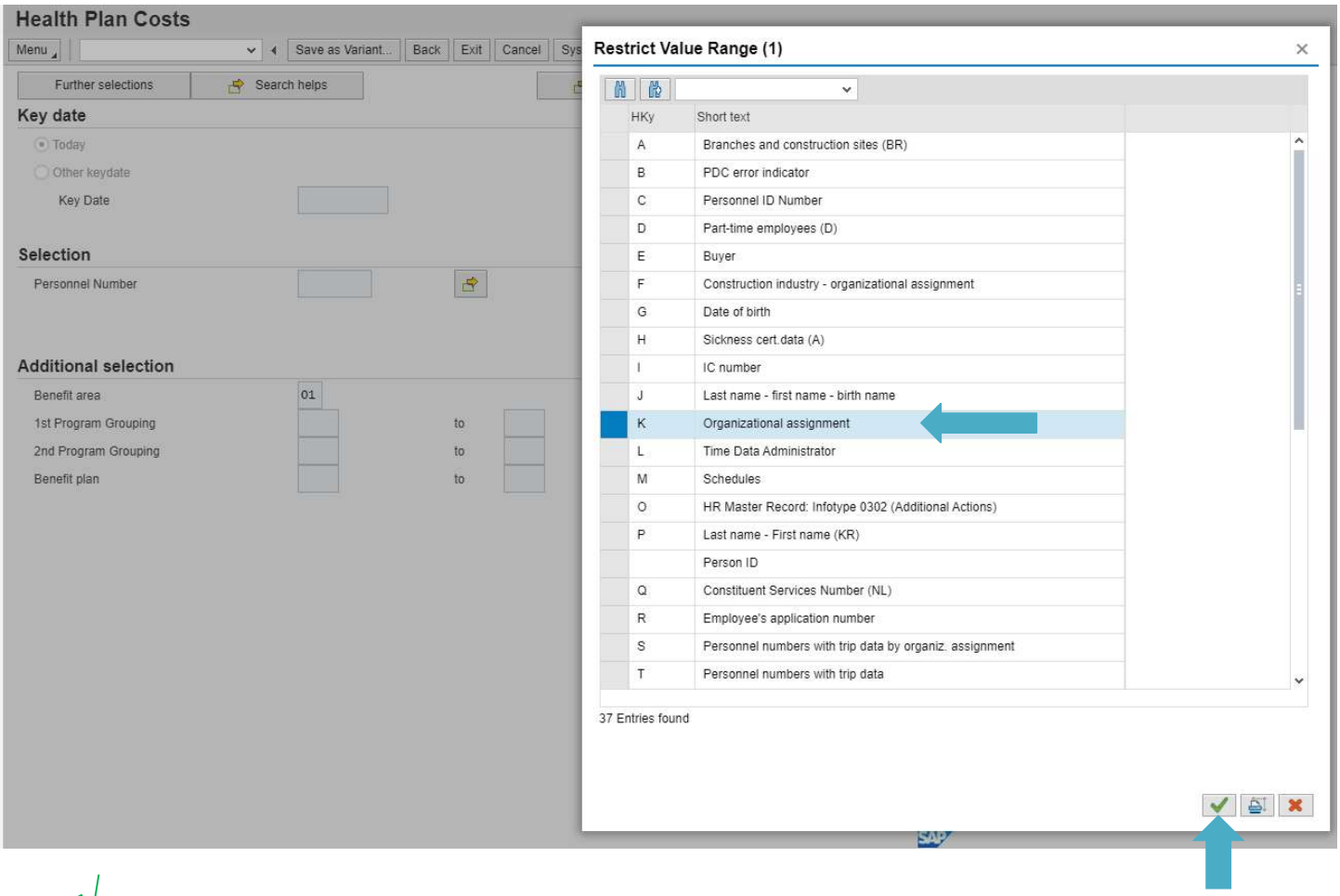
Step 1: Select HRBEN0073 Health Plan Costs (select from My Transactions Menu)

Note: This report can be used to gather current or future health, dental, and vision plan enrollment information. The report should be ran in the morning or late afternoon when there are fewer users in the KHRIS system.

Click “Search helps” tab

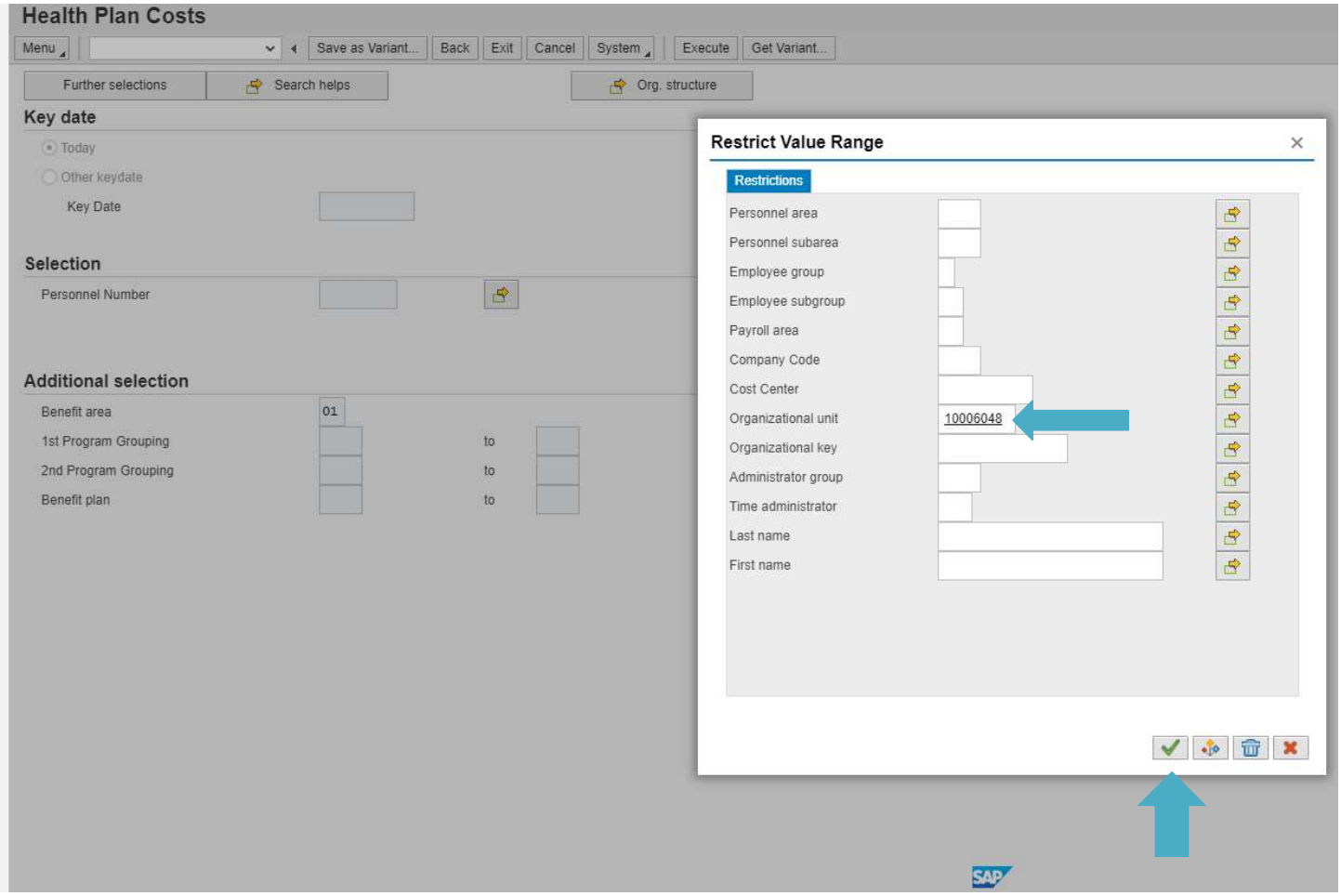


Select “K –Organizational Assignment”



Click √

Enter **your** Agency's "Organizational Unit Number" in the Organizational Unit field (drop down menu can be used to select your org unit number)



Click √

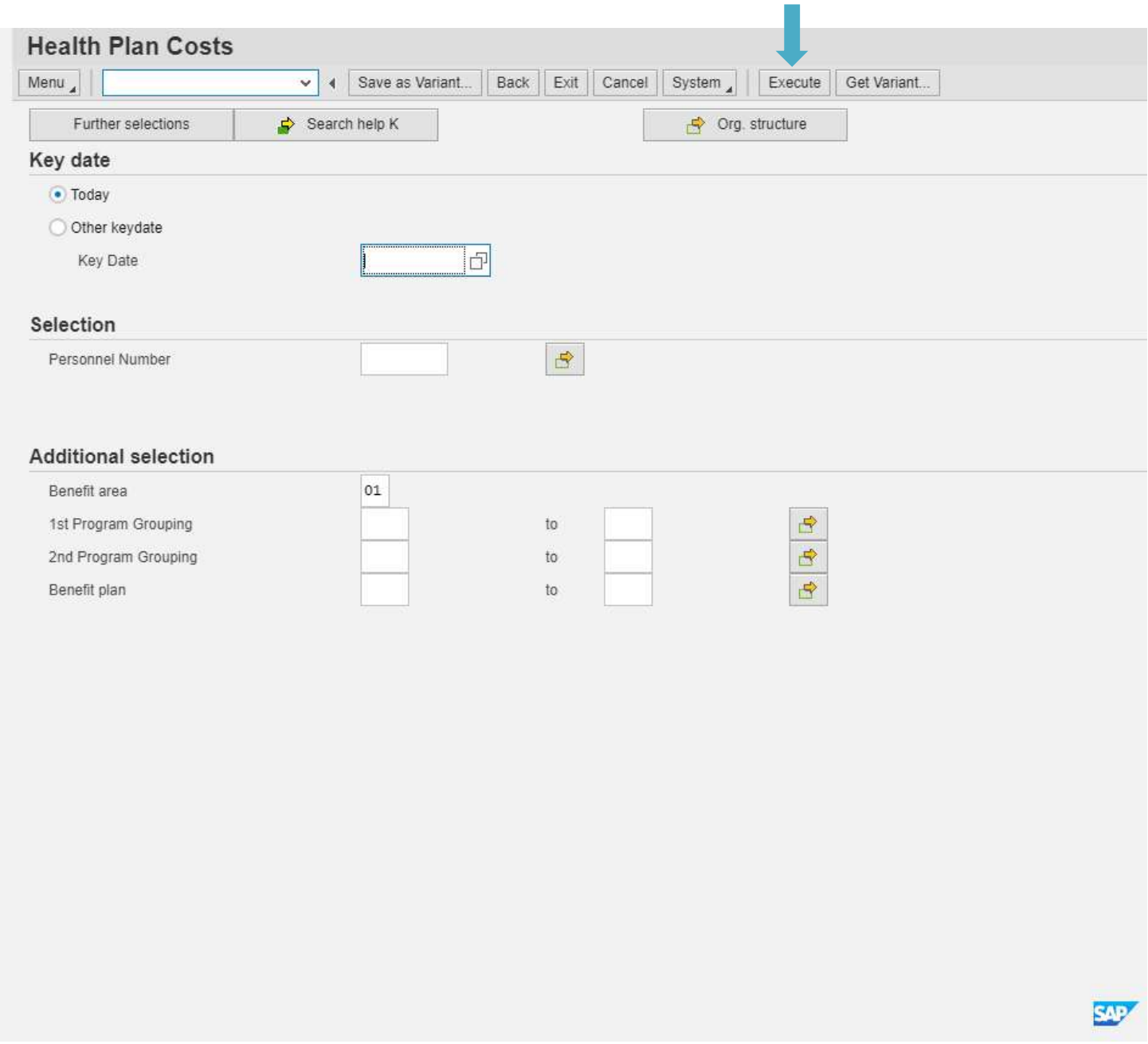
Note: This will take you back to the Health Plan Costs screen. After you enter your Agency's Organizational number, the "Search help" field will change to "Search help K". This indicates that the report generated will only pertain to your Agency.

To run a report on **current elections**, under the Key date box, select “Today”

Use other key date to select next plan year, example 01/01/2020.

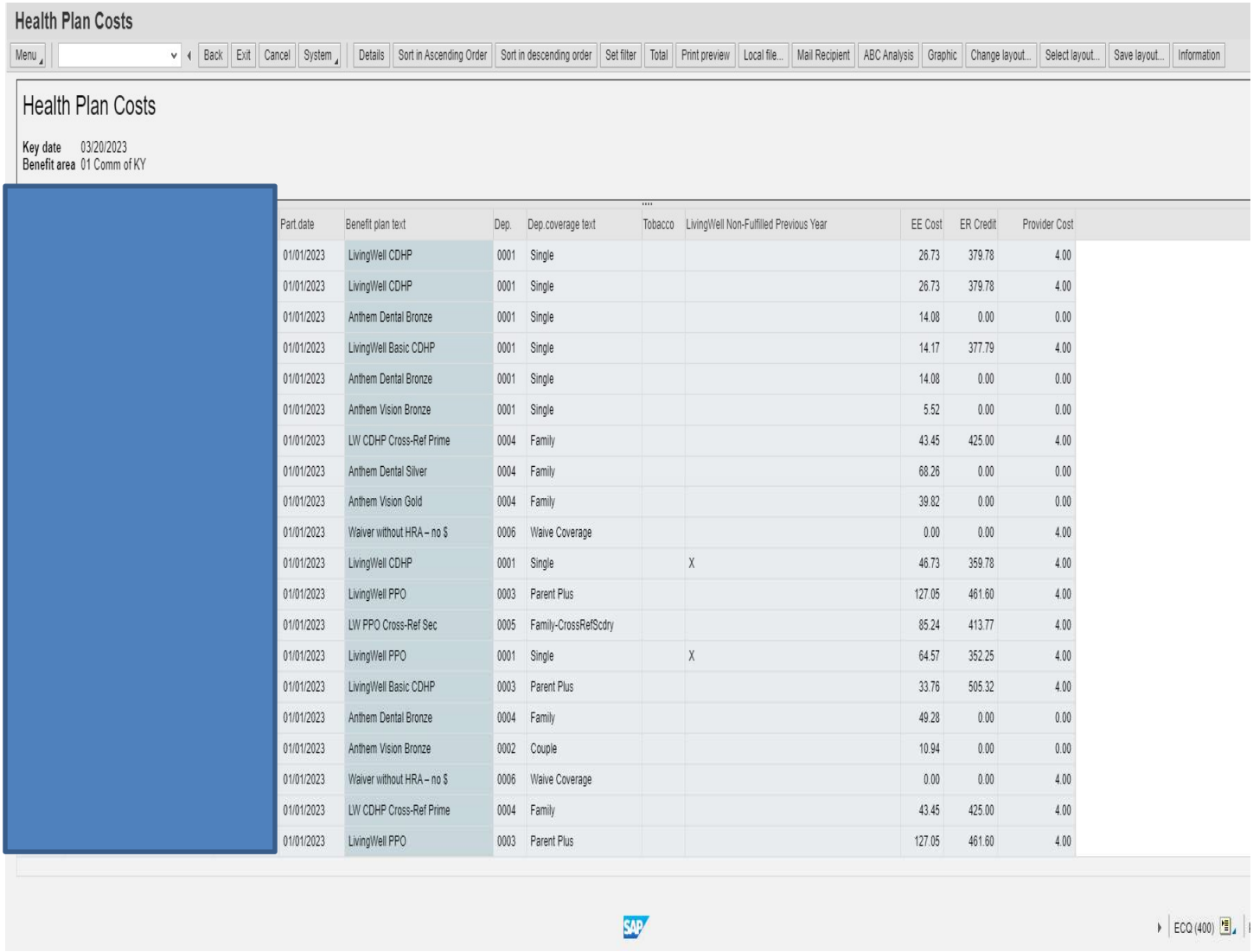
Note: Only use personnel number field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees. For future dates, select other key date and enter the date (ex. 01/01/2020).

Click “Execute”



Note: If a Benefits Error Message pops up, click the check mark to continue. In addition, you can run this report on one employee by entering their KHRIS Personnel Number in the "Personnel Number" field prior to clicking on the "Execute" button.

Once the report generates, you can export it to Excel



Part.date	Benefit plan text	Dep.	Dep.coverage text	Tobacco	LivingWell Non-Fulfilled Previous Year	EE Cost	ER Credit	Provider Cost
01/01/2023	LivingWell CDHP	0001	Single			26.73	379.78	4.00
01/01/2023	LivingWell CDHP	0001	Single			26.73	379.78	4.00
01/01/2023	Anthem Dental Bronze	0001	Single			14.08	0.00	0.00
01/01/2023	LivingWell Basic CDHP	0001	Single			14.17	377.79	4.00
01/01/2023	Anthem Dental Bronze	0001	Single			14.08	0.00	0.00
01/01/2023	Anthem Vision Bronze	0001	Single			5.52	0.00	0.00
01/01/2023	LW CDHP Cross-Ref Prime	0004	Family			43.45	425.00	4.00
01/01/2023	Anthem Dental Silver	0004	Family			68.26	0.00	0.00
01/01/2023	Anthem Vision Gold	0004	Family			39.82	0.00	0.00
01/01/2023	Waiver without HRA – no $	0006	Waive Coverage			0.00	0.00	4.00
01/01/2023	LivingWell CDHP	0001	Single		X	46.73	359.78	4.00
01/01/2023	LivingWell PPO	0003	Parent Plus			127.05	461.60	4.00
01/01/2023	LW PPO Cross-Ref Sec	0005	Family-CrossRefScdry			85.24	413.77	4.00
01/01/2023	LivingWell PPO	0001	Single		X	64.57	352.25	4.00
01/01/2023	LivingWell Basic CDHP	0003	Parent Plus			33.76	505.32	4.00
01/01/2023	Anthem Dental Bronze	0004	Family			49.28	0.00	0.00
01/01/2023	Anthem Vision Bronze	0002	Couple			10.94	0.00	0.00
01/01/2023	Waiver without HRA – no $	0006	Waive Coverage			0.00	0.00	4.00
01/01/2023	LW CDHP Cross-Ref Prime	0004	Family			43.45	425.00	4.00
01/01/2023	LivingWell PPO	0003	Parent Plus			127.05	461.60	4.00

Click Menu

Click List

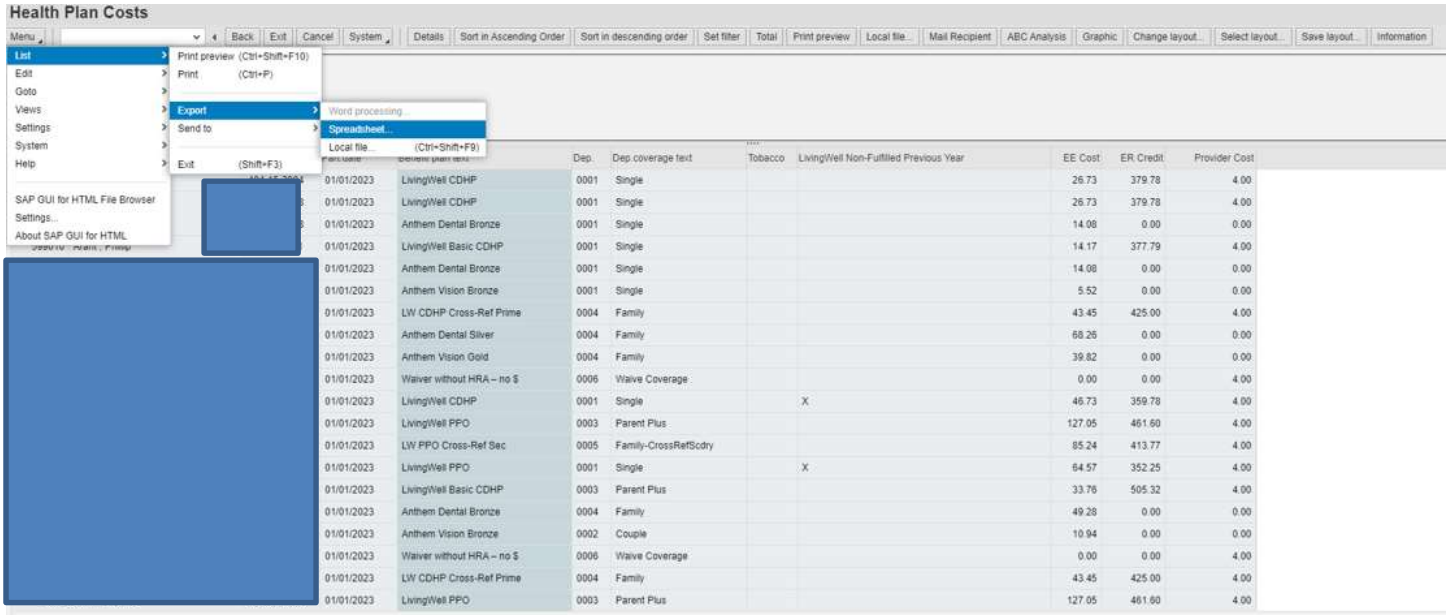
Click Export

Click Spreadsheet

Select where you want to save the file (example desktop)

Enter a file name

Click Save



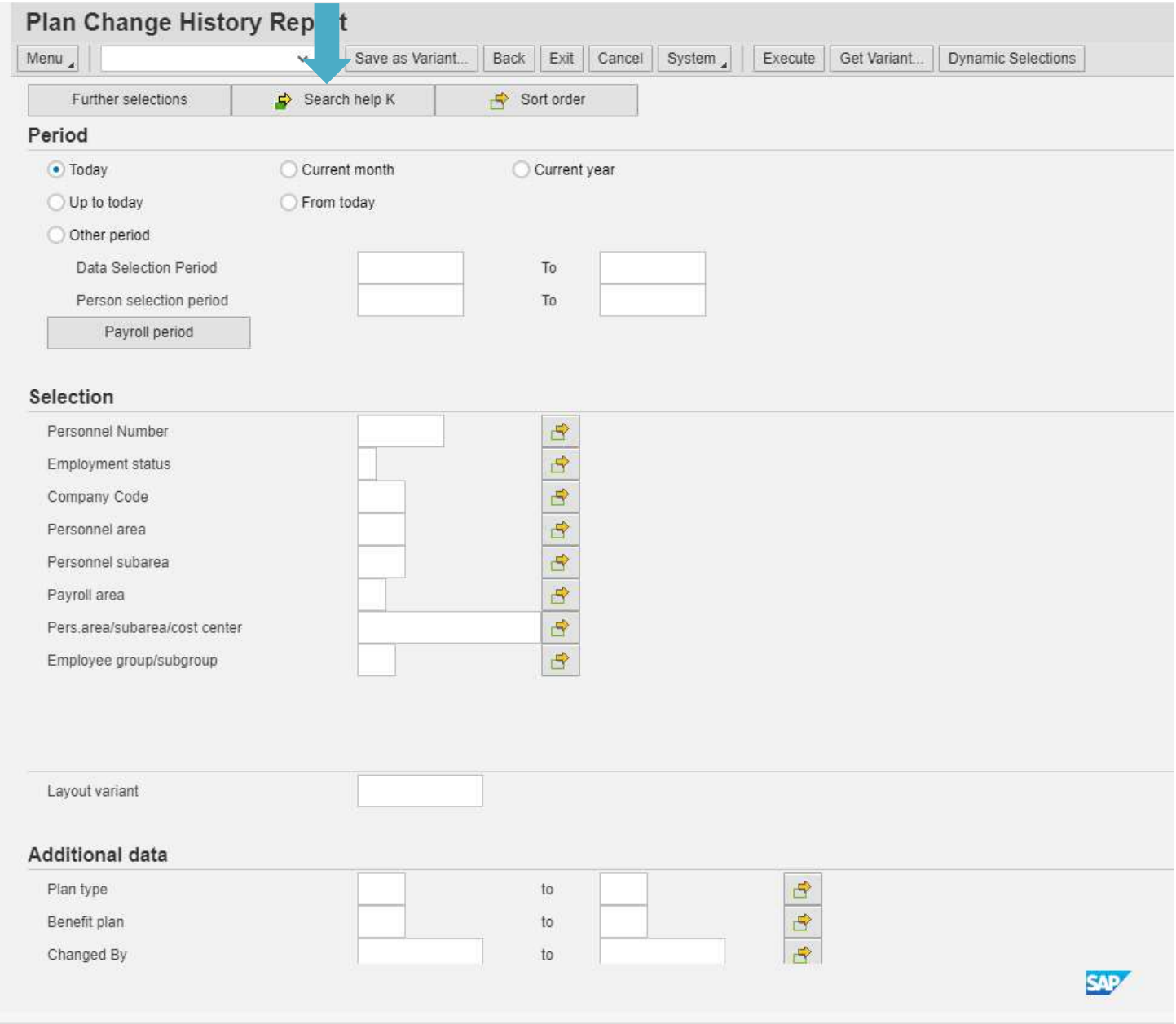
Transaction Complete

Plan Change History Report

This report allows you to see changes made to your agency's population (changed made by you, another agency IC or EIB) based on several criteria. As with other reporting in KHRIS, running during non-peak times (early morning or evenings) will help with getting results without timing out of the system.

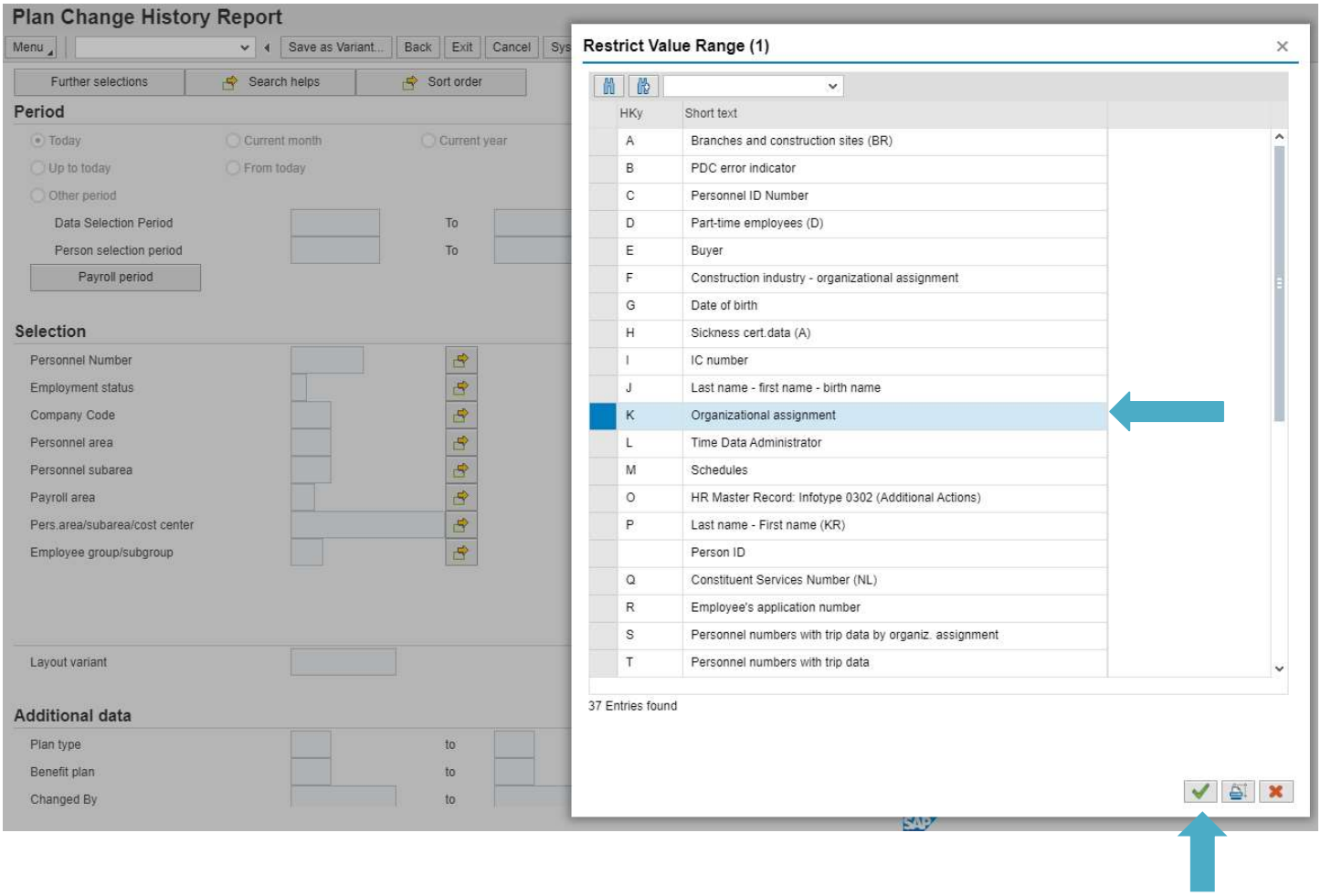
Step 1: Select ZBNR006 Plan Change History (select from menu on left)

Click "Search helps" tab

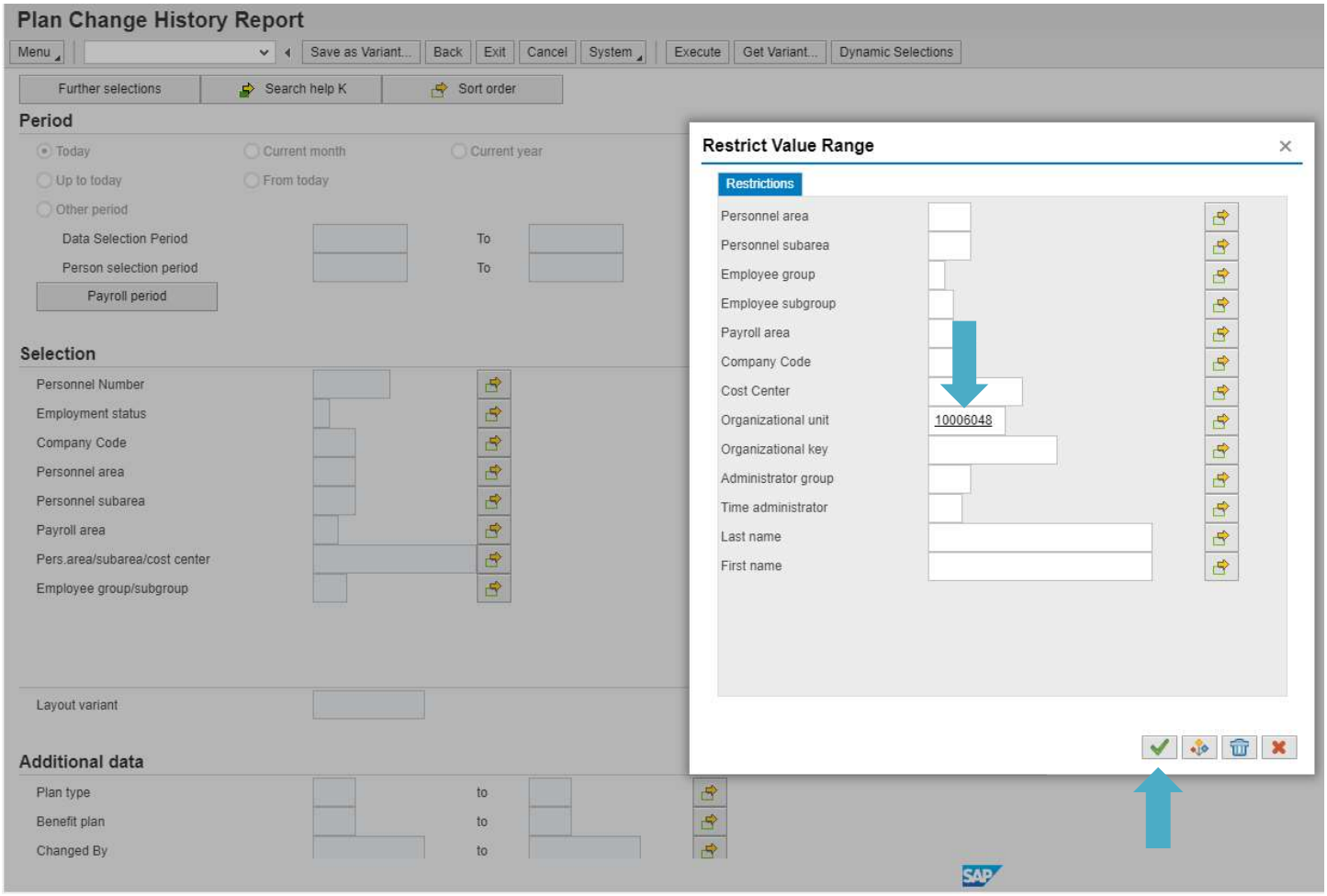


Select “K – Organizational Assignment”

Click √



Enter **your** Agency's "Organizational Unit Number in the Organizational Unit field



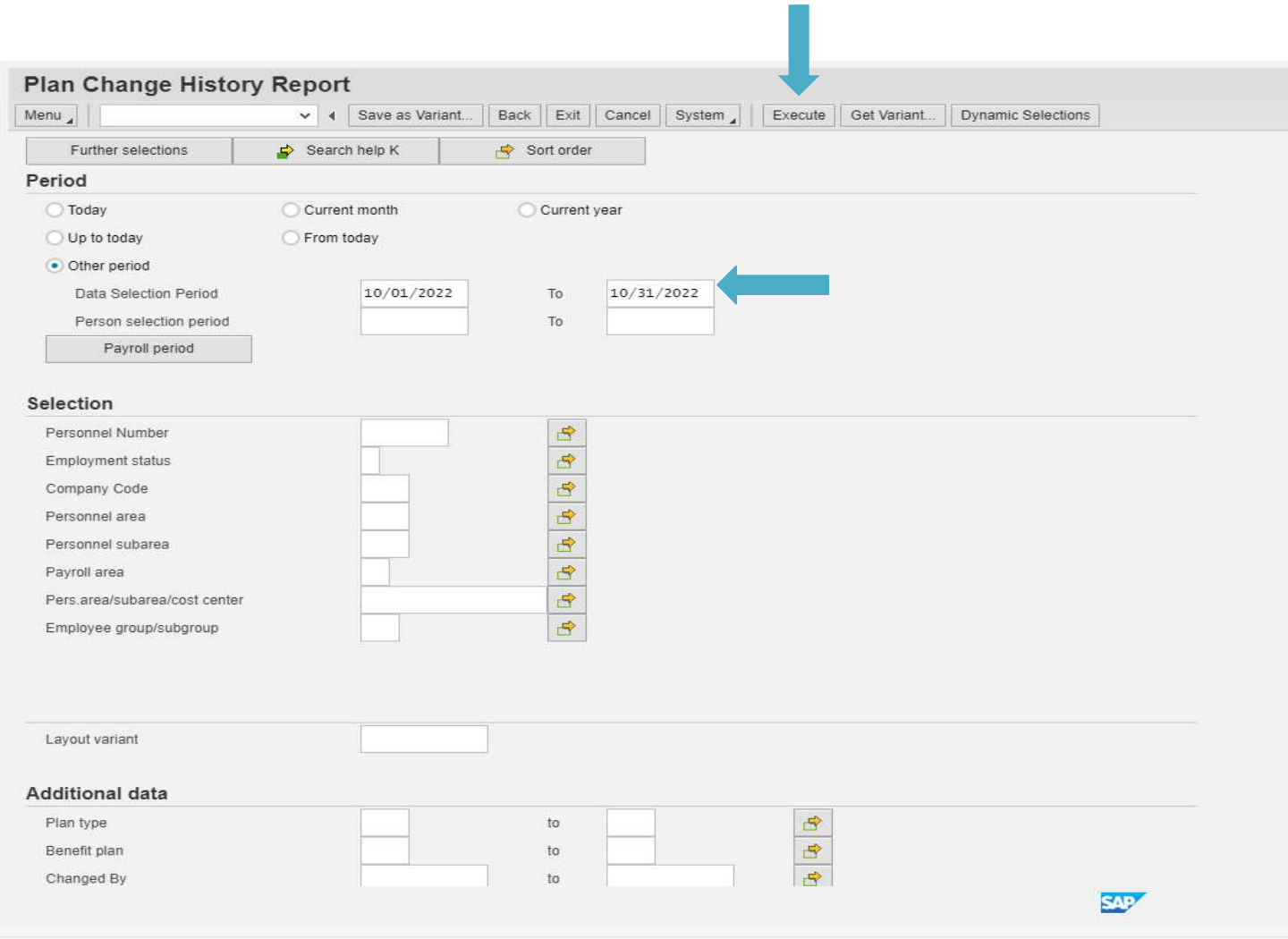
Click √

Note: This will take you back to the Plan Change History Report screen. After the Agency's Organizational number has been entered, the "Search helps" field will change to "Search helps K". This indicates that the report generated will only pertain to your Agency.

You can run the report based on different periods. These periods indicate the effective date of the change. You can choose any of the radio buttons.

If you want to see changes for a certain period, you need to click “Other Period”.

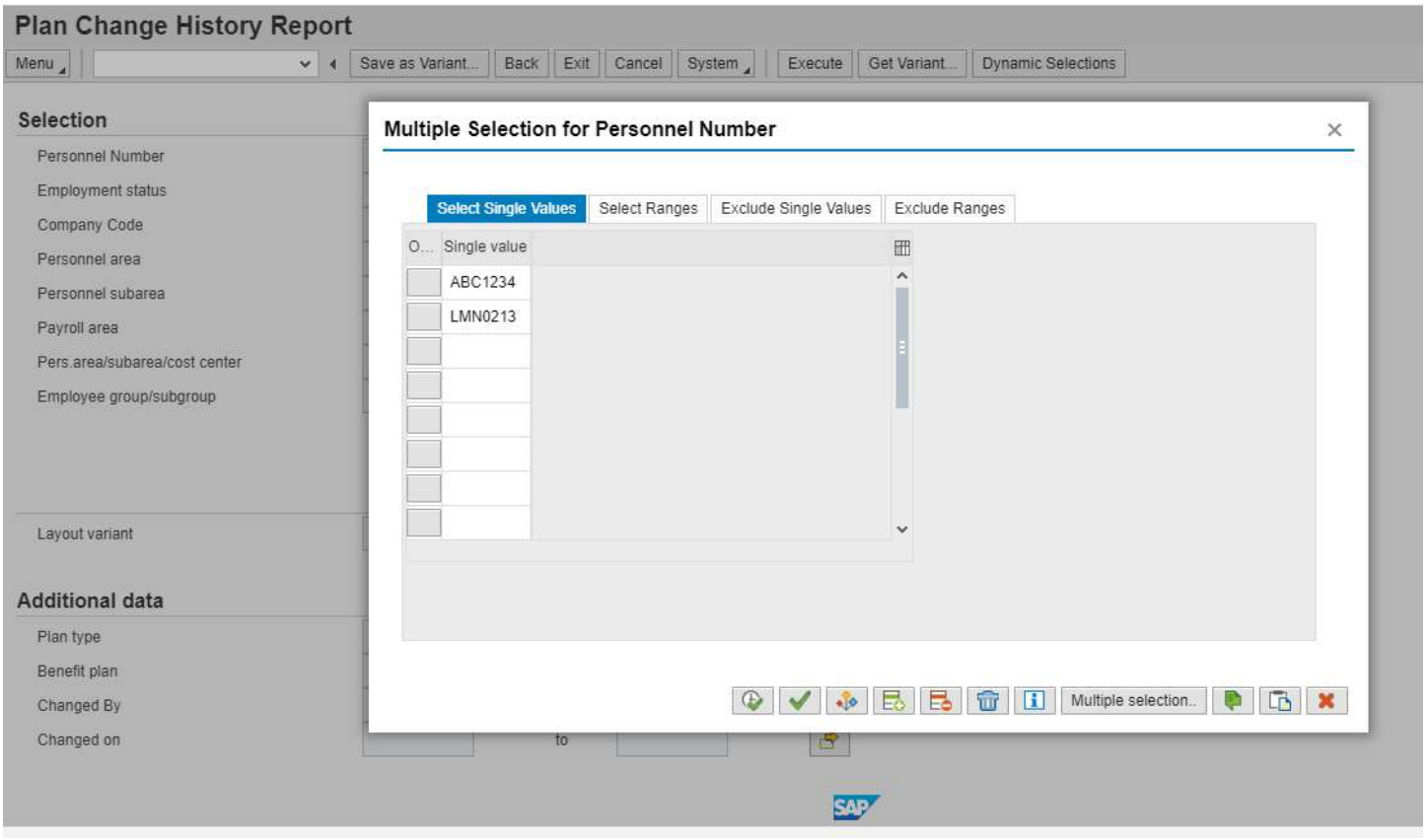
In the “Data Selection Period” boxes enter the period you want to show on your report.



You can also run this for one day by using the same day in both boxes.

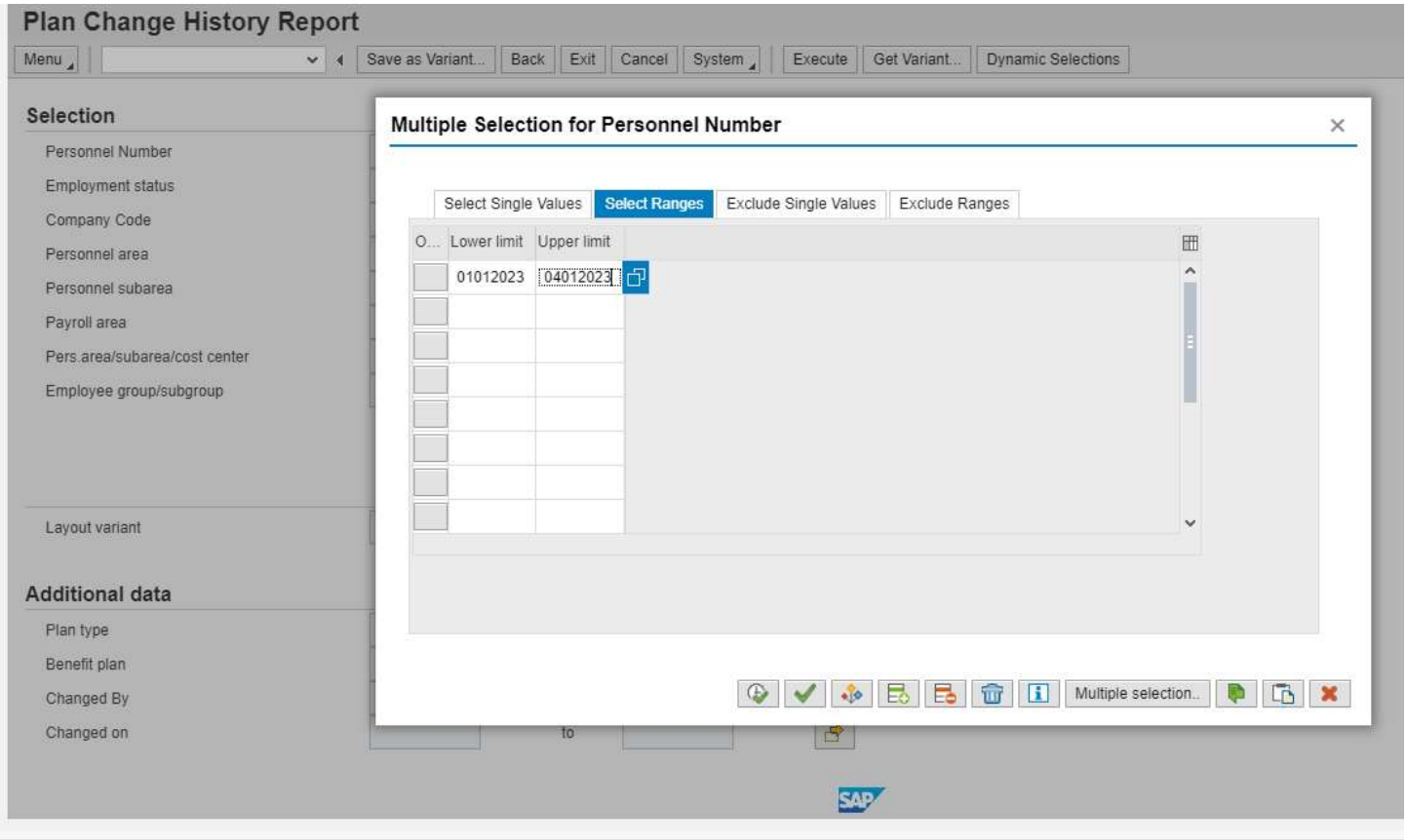
Once you have chosen a period you can click “Execute”

“Changed By Data” can be used by entering a specific USER ID ABC1234, if you want to see more than one user (if there are multiple ICs that do entry at your agency) Click on the Multiple Selection (**Note:** This shows when you put your “mouse” on top of the yellow arrow in the Additional data box. Click yellow arrow by “Changed By”)



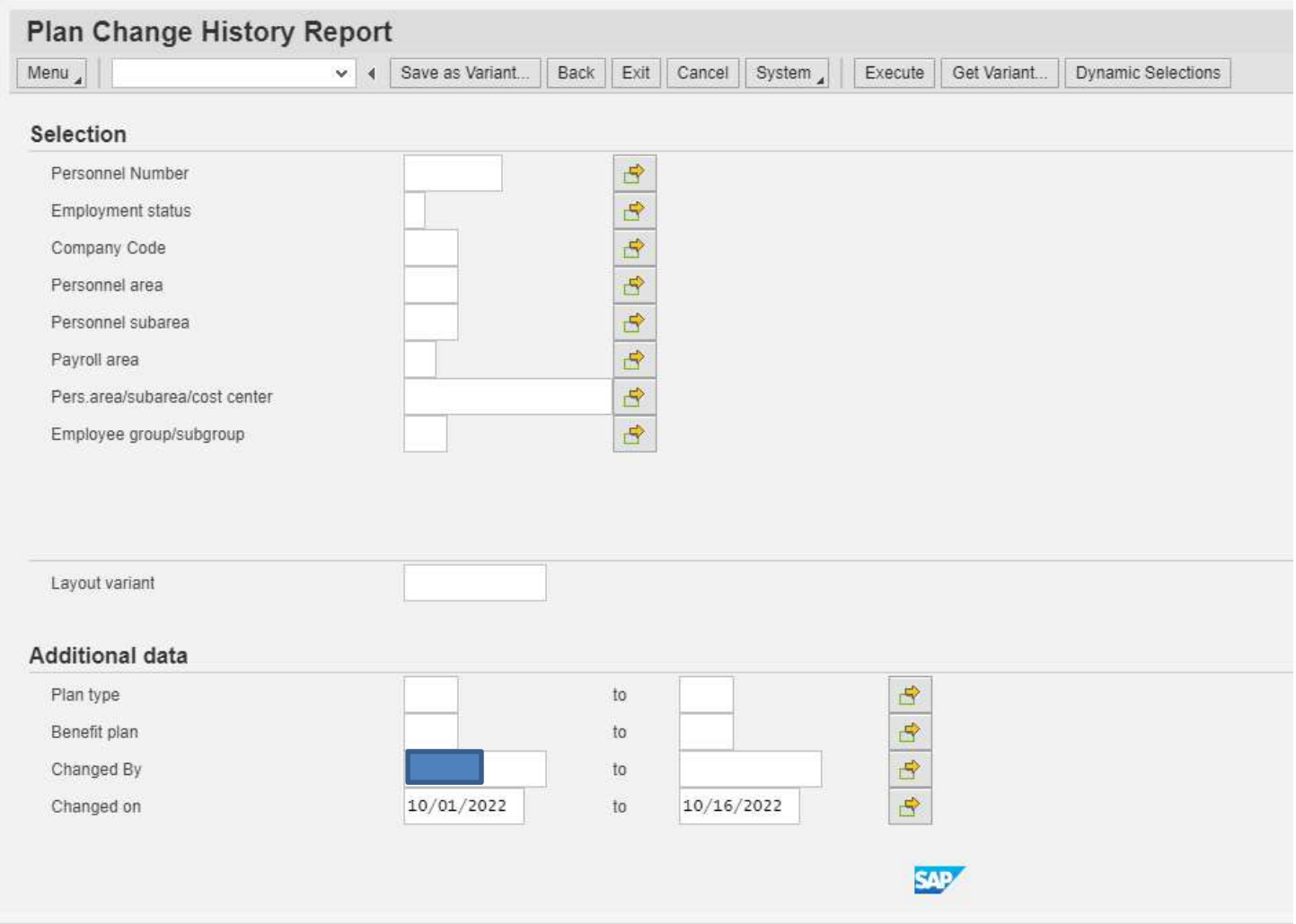
If you want to see changes made by any users leave this field blank. If you want to see changes made due to a file upload, enter BATCH_BN in the “Changed By” field

Use “Changed on” dates to capture changes processed within a particular date range. For example, if you want to see changes processed in KHRIS in from January 1, 2023, through March 2023, use, 01/01/2023 in the first data box and 04/01/2023 in the second data box. You can also use the “Multiple Selection” choice to choose specific dates or multiple ranges.



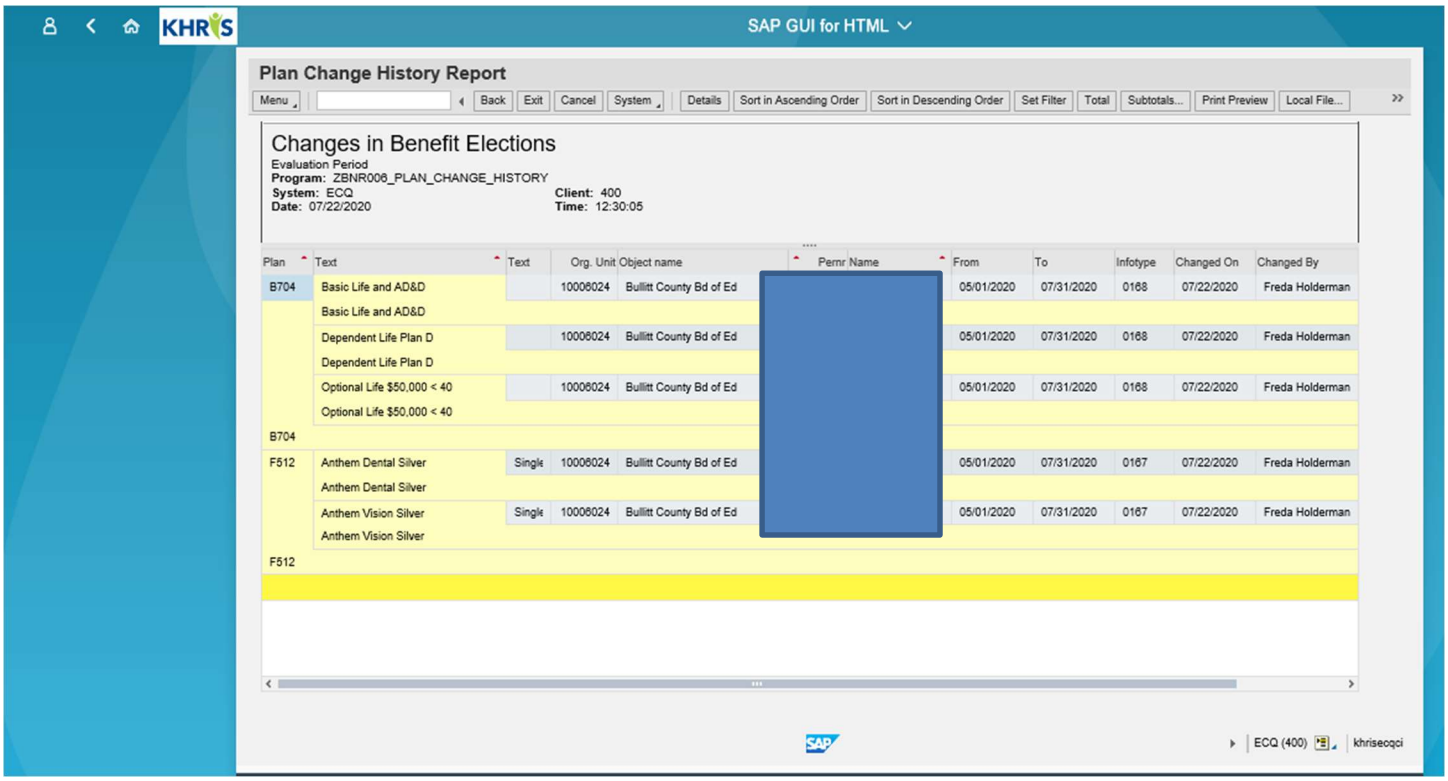
If you want to see changes made on any date, leave these boxes blank. However, it is advisable to use at least one-selection criteria. Running the report without any defined criteria will take extended amounts of time and may cause you to time out. The more you define criteria the more specific your report will be.

As an example, this report is asking for changes made by a particular user between 10/01/2022 and 10/16/2022.



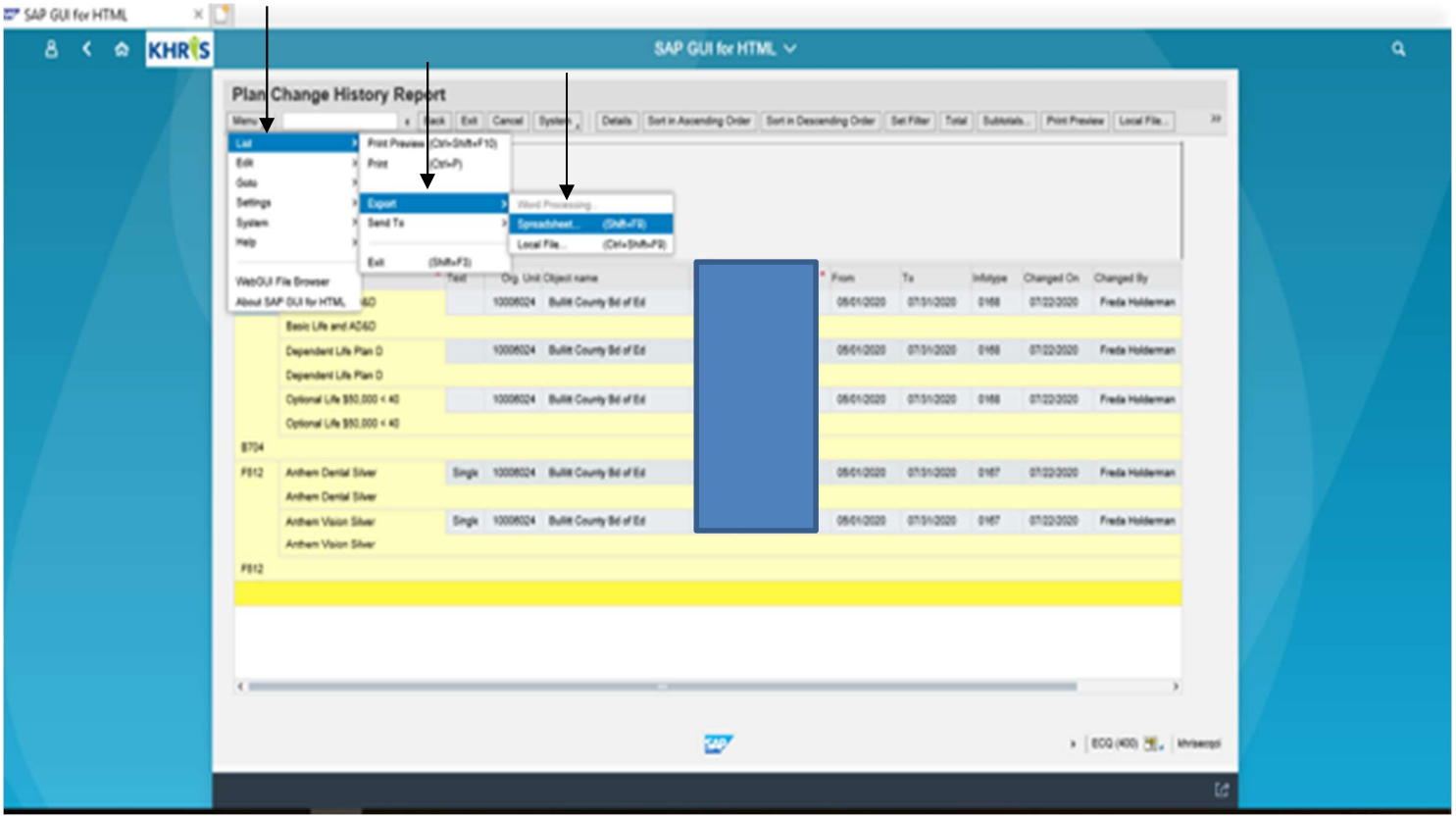
After the criteria you want to report on is entered, click “Execute”.

The report generated will look like this:



You can download this to an excel spreadsheet

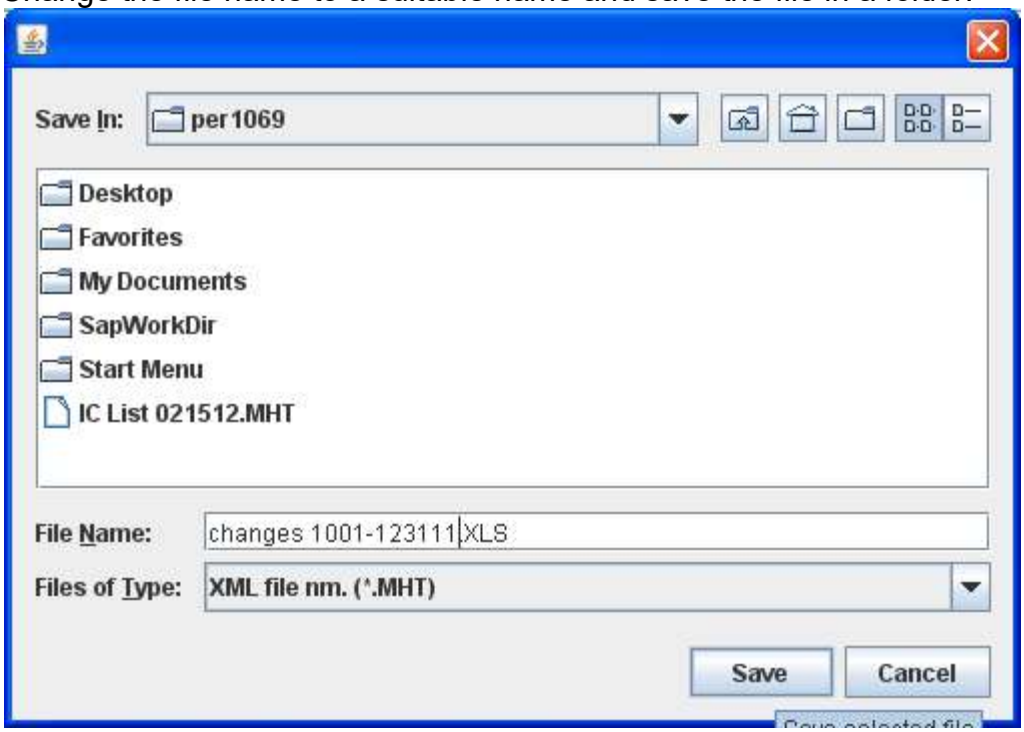
To export to a spreadsheet click “Menu” tab then click, “List, Export, Spreadsheet”



Click √

The report will automatically generate to an Excel Spreadsheet and should be in the bottom left corner of the screen. You can open it and then save the file in a folder.

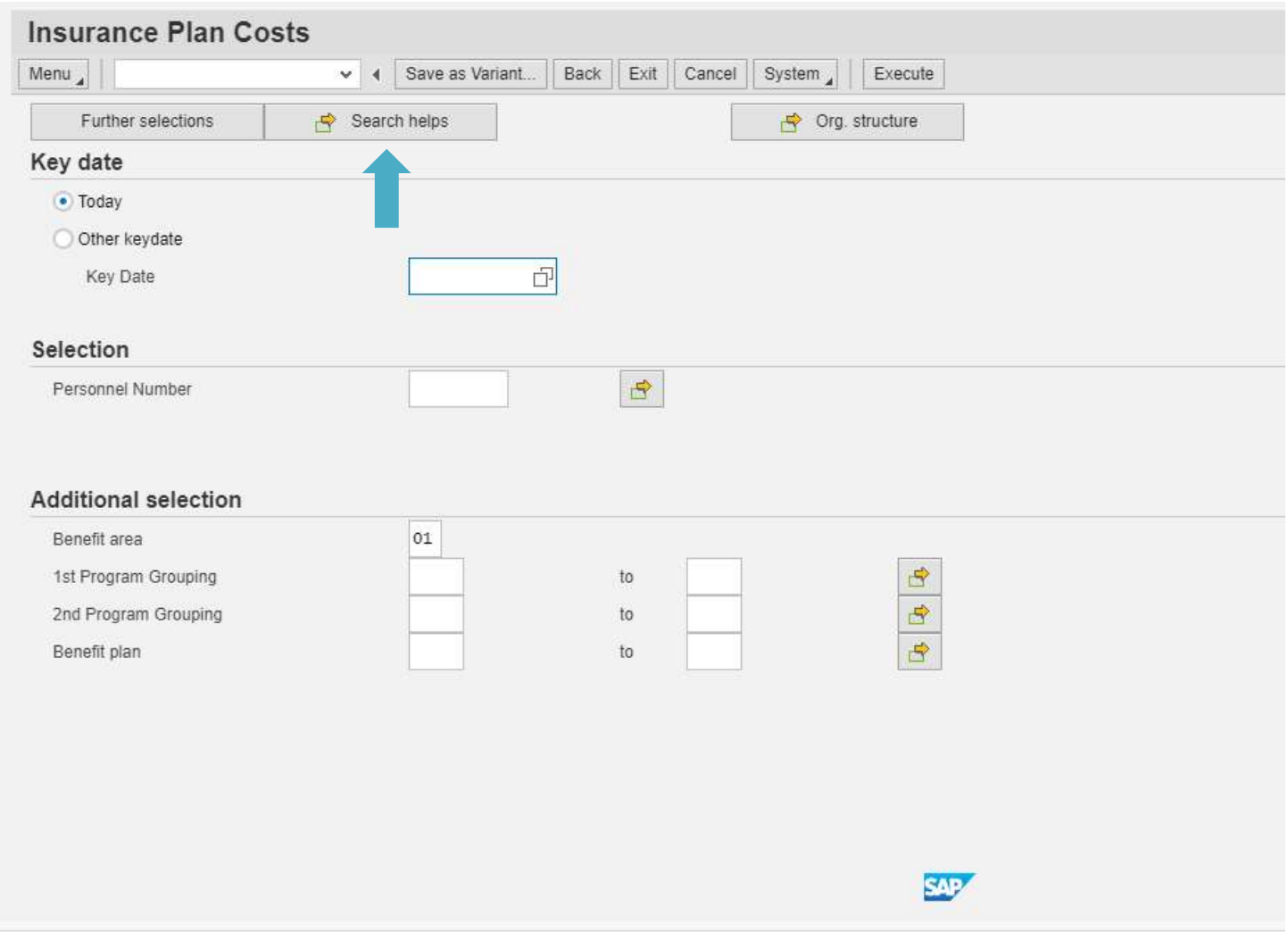
Change the file name to a suitable name and save the file in a folder.



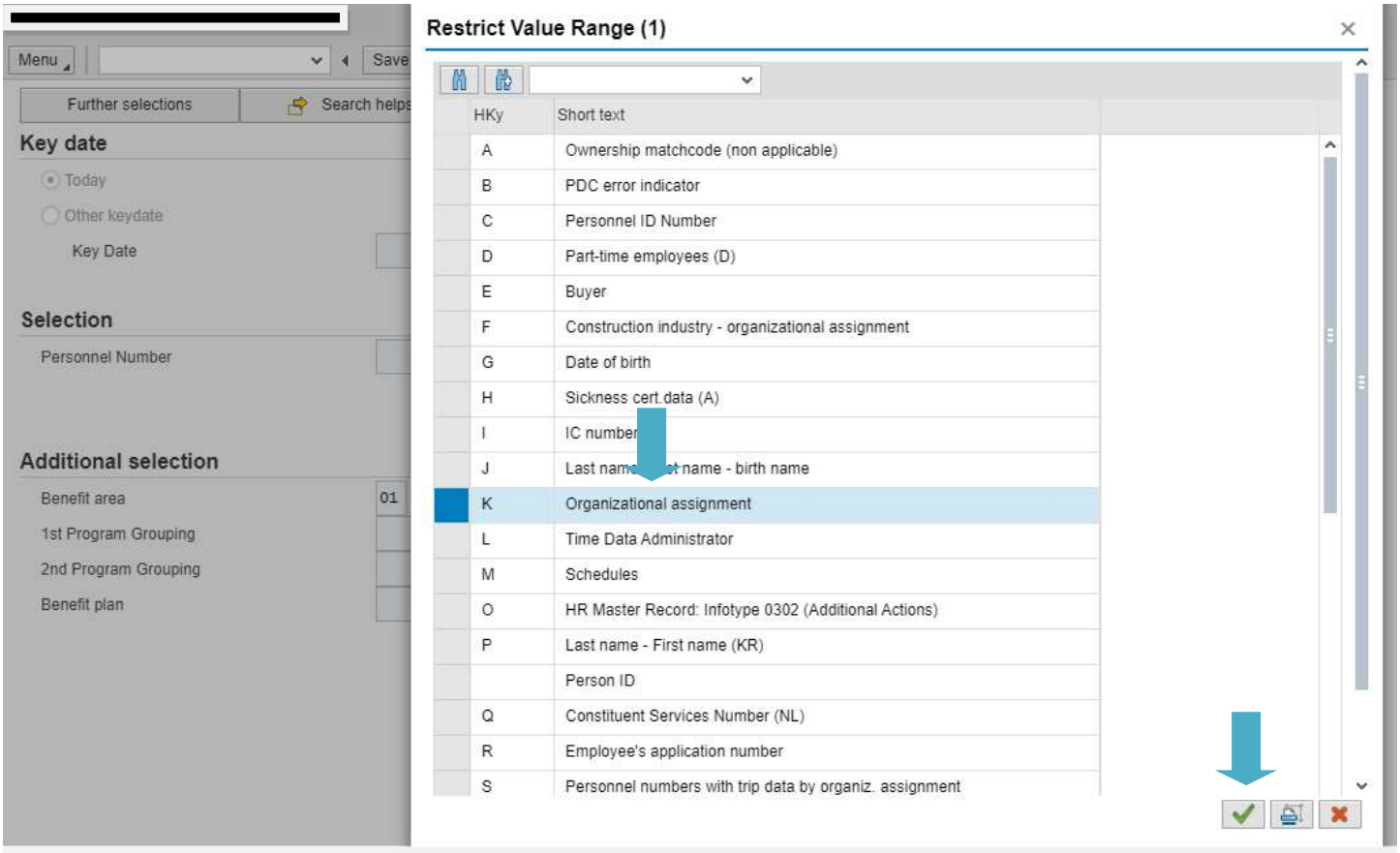
Step 1: Select HRBEN0074 Insurance Plan Costs (select from menu on left)

Note: This report can be used to review or to make sure Employees are enrolled in the correct plans. The report should be ran in the morning or late afternoon when there are fewer users in the KHRIS system.

Click “Search helps” tab

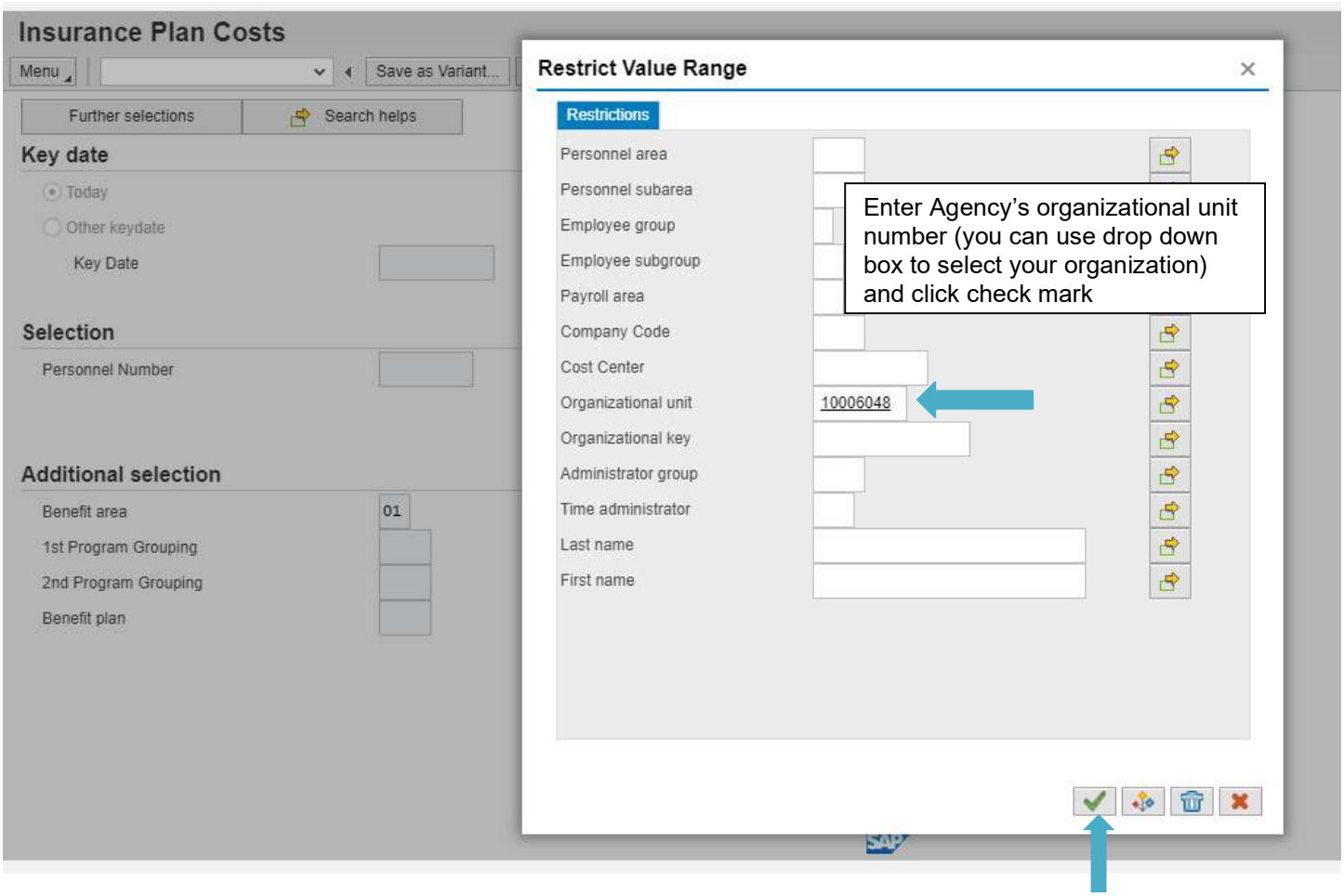


Select “K –Organizational Assignment”



Click √

Enter **your** Agency's "Organizational Unit Number" in the Organizational Unit field



Click √

Note: This will take you back to the Insurance Plans Costs screen. After you enter your Agency's Organizational number, the "Search help" field will change to "Search help K". This indicates that the report generated and will only pertain to your Agency.

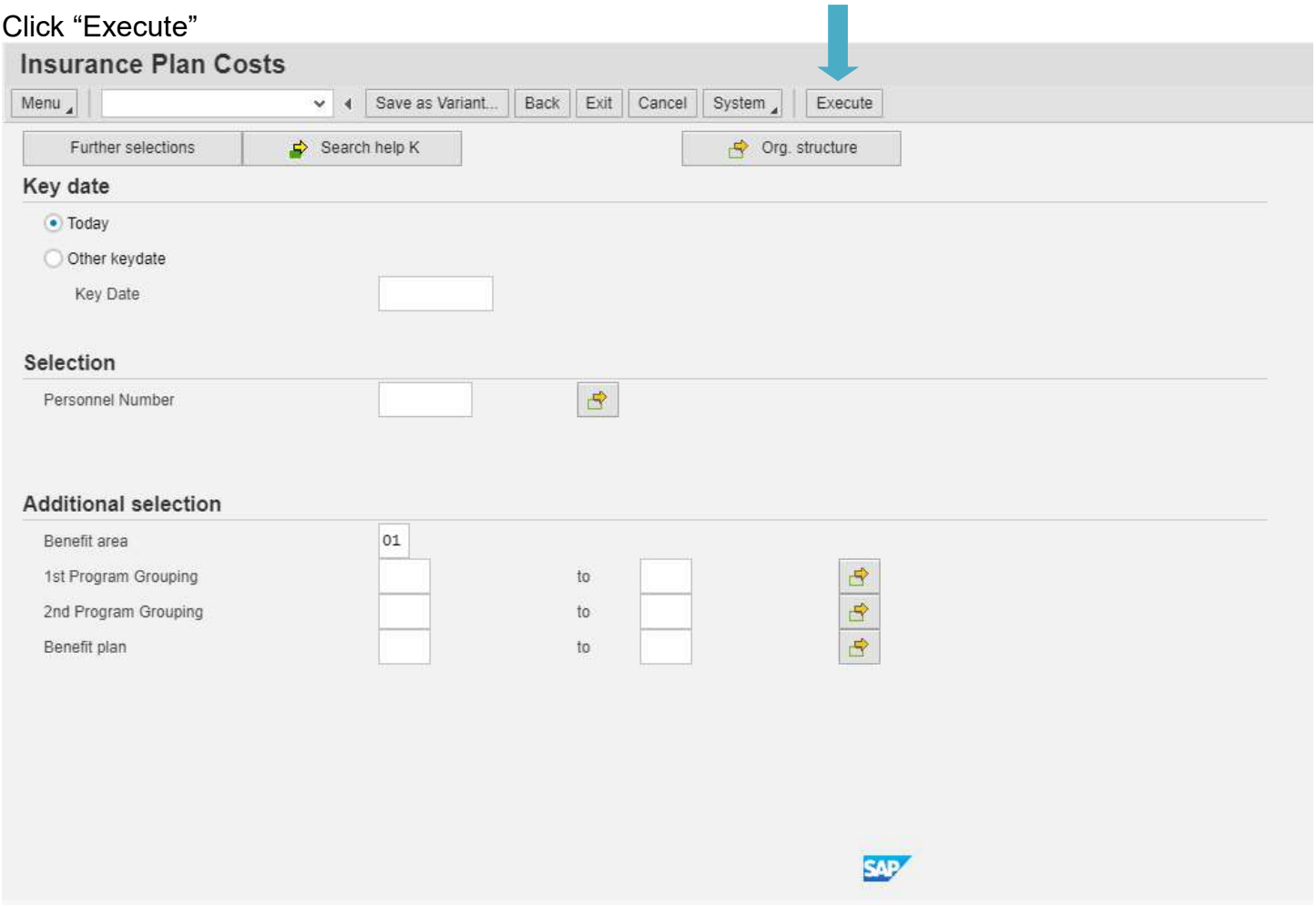
To run a report on **current elections**, under the Key date box, select “Today’

To run a report for **future elections**, under the “Key date field, select “Other key date”

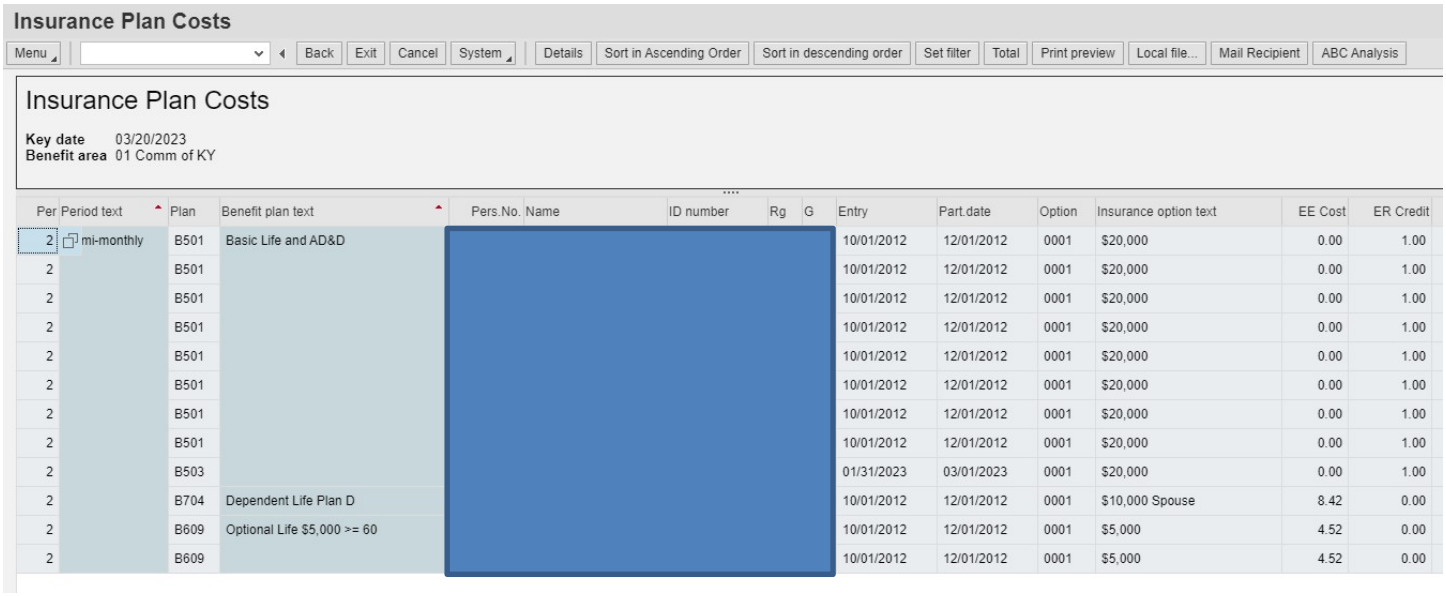
Enter the date for which you are gathering election data in the “Key date” field

Note: Only use the “Personnel number” field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees.

Click “Execute”



Note: This is what the generated report should look like. If you scroll down, you will find Optional and Dependent coverage information with the proper plans and premiums.

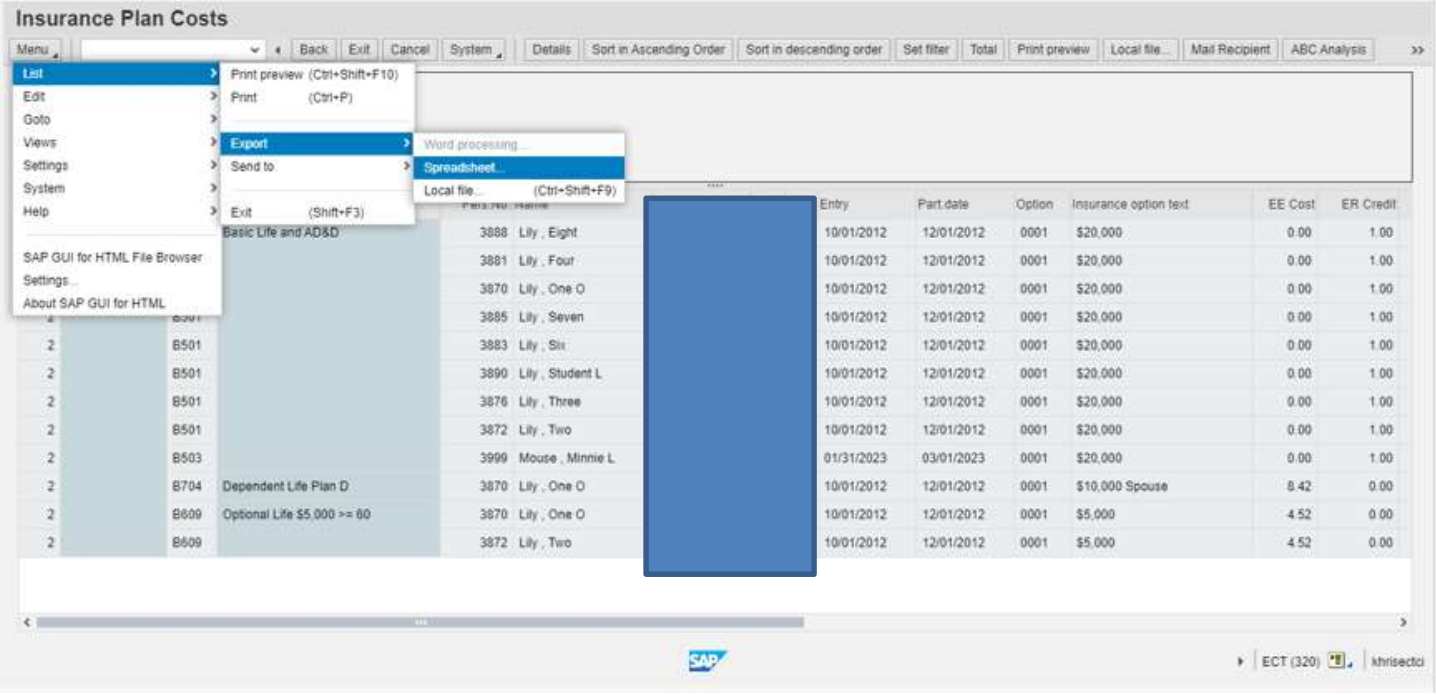


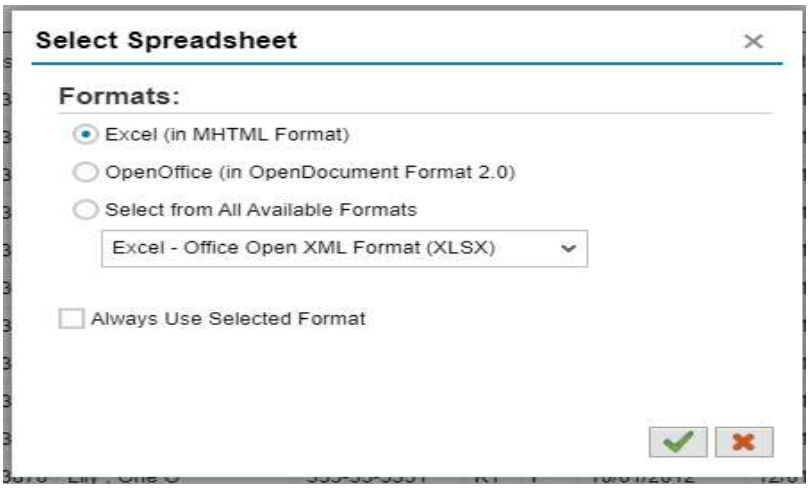
Per	Period text	Plan	Benefit plan text	Pers.No.	Name	ID number	Rg	G	Entry	Part.date	Option	Insurance option text	EE Cost	ER Credit
2	mi-monthly	B501	Basic Life and AD&D						10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B501							10/01/2012	12/01/2012	0001	$20,000	0.00	1.00
2		B503							01/31/2023	03/01/2023	0001	$20,000	0.00	1.00
2		B704	Dependent Life Plan D						10/01/2012	12/01/2012	0001	$10,000 Spouse	8.42	0.00
2		B609	Optional Life $5,000 >= 60						10/01/2012	12/01/2012	0001	$5,000	4.52	0.00
2		B609							10/01/2012	12/01/2012	0001	$5,000	4.52	0.00

The columns that will be **useful** are: Benefit Plan Text (Plan types: Basic, Optional and Dependent); Pers. No.; Name; ID Number (Social Security Number); G (Gender); Entry; Part.date (Participation Date); Insurance Option Text (Coverage Volume); EE Cost; ER Credit; Ins. Coverage; and Birth date.

If you wish to print the report you will need to export to Excel.

To Export to Excel
Click Menu
List
Export
Spreadsheet





Excel (InMHTML Formats)

Click √

Transaction Complete

Life Insurance Conversion and Portability Letter

Step 1: Go to our webpage [Pages – Life Insurance (ky.gov)]

Step 2: Click on MetLife Conversion and Portability Letter and complete with employee's information

(Date of Notice)

(Employee)
(Address)
(City, State, Zip Code)

Re: Group Life Insurance Conversion and Portability Options
Termination Date of Employment:
Life Insurance Plan End Date:

Dear (Name of Employee):

You are receiving this letter to inform you of your Conversion and Portability options for the State Paid Life Insurance coverage you were provided as an employee of the Commonwealth of Kentucky.

The life insurance policy you had can be continued after your employment has terminated provided required premiums are current. You can convert your Group Life insurance benefits to an individual whole life policy. The conversion applies to the free basic coverage and/or any optional Life Insurance policies you may have had with the Commonwealth. No evidence of insurability will be required to convert your life insurance coverage to an individual whole life policy. Portability or porting allows employees and dependents to continue their Group Life insurance and Accidental Death and Dismemberment (AD&D) insurance under a separate group policy. Medical questions (Statement of Health) must be completed to apply for Preferred Life Rates (lower) or increase the amount of life insurance you previously had under your former employer's plan.

You must request to convert or port your coverage within 31 days from the termination of your insurance. The policy with the Commonwealth provided you with a term life insurance policy at group rates. The conversion and portability policy rates are often higher than group rates because these rates are based on your age at the time employment ends.

To speak with a MetLife representative who can provide general information about portability, call 888-252-3607. To reach the Transition Solutions Call Center who can assign you to a Barnum Advisor and provide more detailed Conversion or Portability information, call 877-275-6387. Reference group number 235782. Both options require the employer

Step 3: Next print a copy of the MetLife Portability v. Conversion Brochure

You know that life insurance is a **critical part of your overall benefits plan** — that's why you chose to enroll in the Group Life insurance program offered by your employer. As you leave your employment, you have **options** to continue your current Group Life coverage and **maintain this important protection** for you and your family.

Now you have **important decisions to make** about continuing your Group Life insurance benefits. There are **two options** under which you can continue your coverage — **Portability** and **Conversion.** This brochure is designed to answer the most common questions about each option and give you a side-by-side comparison, so you can choose the option that best meets your needs.

Is there anything else I need to know?

To continue your life coverage benefits, you will receive a notice after your group life benefits end which includes coverage amounts and eligibility dates.

If you wish to increase your coverage amount or add spouse or child coverage, the non-underwritten policy available through the Conversion process may not meet your needs. An individually underwritten policy may be more cost-effective and provide additional benefits, such as the ability to elect waiver of premium, accidental death benefit and/or a children's term rider, that are not available with a Conversion policy. You may apply for a medically underwritten life insurance policy simultaneously with your application for the Conversion policy. Underwritten policies are subject to underwriting requirements, so you may have to provide medical information. If you apply for both the Conversion policy and an underwritten policy and are approved for the underwritten policy, then you can choose the underwritten policy. If you are not approved for the underwritten policy, then the Conversion policy will be issued and become effective on the 32nd day after your group coverage ends.

Portability or porting is an optional feature chosen by your former employer. It allows you and your dependents to continue their Group Term Life and Accidental Death and Dismemberment (AD&D) insurance under a separate policy. Once enrolled, MetLife will mail you a portable certificate and your initial bill. Instructions on how to set up the monthly Electronic Funds Transfer (EFT) can be found on the back of your bill. If you apply for Portability, preferred portable rates are available for you and your spouse or domestic partner with Evidence of Insurability (EOI). Portable coverage is effective on the 32nd day after group coverage ends.

What if I still have questions?

Helping you make the best decision for you and your family's needs is important to us.

To speak with a MetLife representative who can answer your questions about Portability, call: **1-888-252-3607.**

We want to help you understand conversion and other options available to you. We have arranged for specially-trained third party financial professionals to help explain your options, if you choose, since MetLife cannot provide you with individual guidance. If you have any questions, you can arrange a meeting with a specially-trained third party financial professional by calling **1-877-275-6387** Monday-Friday 9:00 a.m. to 6:00 p.m. (ET).

Metropolitan Life Insurance Company | 200 Park Avenue | New York, NY 10166

MetLife

Understanding your options

Portability and Conversion

MetLife

Navigating life together

Step 4: Mail completed letter and copy of the Brochure to employee

***Please complete the employer portions of the conversion and portability application before providing to the employee, if the employee is interested in either options.**

***Employees may call Transition Solutions (877) 275-6387, to discuss both options after applications have been completed and submitted to MetLife.**

*** The employee has 31 days after the termination of benefits to covert/port their life insurance.**

Transaction Complete