



Sage HRMS Learning Series

Processing an Open Enrollment in Sage ESS



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Sage HRMS Training Classes

Sage HRMS Learning Series

This learning session uses concepts contained in the following training class on Sage University:

HRMS – Sage Employee Self Service (ESS) Benefits Enrollment: From Start to Finish

Learn how to navigate an Open Enrollment using the Benefits Enrollment module from Employee Self Service. By attending this virtual, instructor-led course, you will be able to prepare for your Open Enrollment by updating the Benefit Plan information in Sage HRMS, ensure the information is correct, and then build the Open Enrollment correctly in the Employee Self Service Benefits Enrollment module!

This course is a must have for anyone who will be running an Open Enrollment and has the Benefits Enrollment module!

After completing this course, you will be able to:

- Identify Sage HRMS Benefit setup changes
- Process the steps to accurately set up Benefits
- Run the Duplicate Key report to eliminate potential errors
- Select Benefit Plans for ESS Benefits Enrollment
- Identify the steps for setting up an Open Enrollment from the Election Codes to defining the Open Enrollment parameters
- Recognize Life Events and how to use them
- Set up and approve Life Events
- Identify Life Event and Benefit Plan changes
- Follow the process for managing Rate Tables for the new year
- Run an Open Enrollment
- Run Benefits Enrollment Reports
- Identify the different report elements

Upcoming Sessions:

SEP **Session Details**

29 Tue, Sep 29, 2020 9:30 AM - Wed, Sep 30, 2020 5:00 PM EDT
Register by Sat, Sep 26, 2020 9:30 AM EDT
Sage HRMS Virtual Classroom, Sage HRMS Online Scheduled Events, Sage North America - Sage HRMS, Sage North America

English (US)

OCT **Session Details**

22 Thu, Oct 22, 2020 9:30 AM - Fri, Oct 23, 2020 5:00 PM EDT
Register by Mon, Oct 19, 2020 9:30 AM EDT
Sage HRMS Virtual Classroom, Sage HRMS Online Scheduled Events, Sage North America - Sage HRMS, Sage North America

English (US)

Sage University

To find training and register for training courses, visit [Sage University](https://www.sageu.com) at www.sageu.com. If you have Gold Support, you are entitled to 50% off Sage HRMS instructor-led training and Sage HRMS Any-time learning (ATLs) are free. If you register for an instructor-led training class, use code **HRMSResource** to receive 10% off. If you have Gold Support, this is in addition to the 50% discount.

To enroll in a course, go to <https://sageu/hrms> and log on. If you do not have a log on, you will need to [create one](#). For registration assistance call Sage University Help Desk at 1-855-724-3864 or email SageUniversity@sage.com.

Session Objectives

In this session the presenter will:

- Add an open enrollment period
- Process an enrollment
- Send enrollment notifications
- Approve enrollment
- Update enrollment
- Review reports related to open enrollment

Sage HRMS Benefits Enrollment Setup Checklist

Complete each of the following steps to ensure the Benefits Open Enrollment processes and updates your Sage HRMS solution correctly.

1. Run the Duplicate Key Report from ESS System Maintenance
2. Correct the duplicate key entries
3. Determine the plans “Effective From” and “To” dates
4. Add Plans for Future Enrollment
5. Copy or Create New Rate Tables for the New Plans
6. Select Benefit Plans to be used in Open Enrollment
7. Set ESS System Settings
8. Assign Benefits Administrators
9. Setup Election Codes
10. Setup Benefit Plan Groups
11. Setup Benefit Plan Elections and Coverage Options
12. Setup Benefit Enrollment Questions
13. Define Benefit Plan Eligibility Criteria
14. Define the Open Enrollment Period
15. Verify Benefit Plans Calculate Correctly

Define an Open Enrollment Period

The Open Enrollment page is where you define the criteria for the Open Enrollment period. This criteria includes the open enrollment’s description, the start and end dates, the date on which the new benefit elections will be effective (i.e. the start of the plan year), and the status of employees who will be eligible to enroll during this period. If you have already begun an Open Enrollment period, you are also able to modify it here, as long as the end date has not been reached for the Open Enrollment.

Select Administrator > Benefit Setup > Open Enrollment

A list displays with each enrollment period already set up, including information pertaining to the employers that have access to the Enrollment Period, its duration, and its status.

Status	Definition
Not Started	<p>This status is assigned when you add a new open enrollment period with a Begin Date in the future. In this status, you can edit any set up item or delete the entire open enrollment period.</p>
In Progress	<p>The status changes to “In Progress” at 12:01am on the Begin Date of the open enrollment period. At this time, ESS sends a message to the Message Center and an email to employees (when enabled) indicating the start of the Open Enrollment period. In addition, the Open Enrollment menu option becomes available to employees who are eligible to participate in the Open Enrollment period.</p> <p>While the status is “In Progress,” you cannot delete the enrollment period; however, you can edit the Open Enrollment.</p>
Closed	<p>The status changes to “Closed” after the Open Enrollment period has been reached and passed.</p> <p>At this time, employees are not able to make enrollment selections or changes. You cannot delete a closed period.</p>
Updated	<p>The status changes to “Updated” when the Benefits Administrator has successfully updated a closed open enrollment period, sending data changes to your Sage HRMS solution. From this point forward, enrollment records for this open enrollment are able to be viewed only.</p> <p>You cannot delete an Open Enrollment with a status of “Updated.”</p>

Verify Benefit Plans Calculate Correctly

As you set up benefit plans, Open Enrollment, and Life Events, you can use the Benefit Calculator to test a benefit plan's current calculations for an eligible employee.

If you have also set the plan up in your Sage HRMS solution for Open Enrollment, you can also test the employee's Open Enrollment calculations. The result of the calculation displays the plan amounts for a specific employee in a specific plan.

Select Administrator > Benefit Setup > Benefit Calculator

Sage Benefits Enrollment: Processing

Process Open Enrollment

The purpose of this process is to review and verify the employees who will be able to participate in open enrollment period. When we have done this, ESS creates an enrollment record for each eligible employee so they will receive an announcement of the open enrollment period in their Message Center.

Do not process an Open Enrollment until you have finished all steps necessary to set up an Open Enrollment period for all of the benefits you wish to include in the Open Enrollment.

From the Administrator menu, select Benefit Updates > Process Enrollment

Send Open Enrollment

Run this process to notify employees when their enrollment information is either invalid or incomplete. This process not only informs employees if their enrollments are not valid, but also gives you the opportunity to tell them how to correct their enrollments. When the process finishes sending notifications and optional e-mails, the system sends a notification and optional e-mail to the benefit administrator who ran the process. This message includes the name of the enrollment period, the person who ran the process, when the enrollment notifications were sent, and the number of employees notified. The process automatically sends a notification to the employee's Message Center and also sends the employee e-mail notification if this feature is enabled.

Navigate to Administrator > Benefit Updates > Enrollment Notification

Approve Open Enrollment

The Approve Open Enrollment process is used by the Benefits Administrator to approve or reject the employee's enrollment submissions and to send notification of approval or rejection to the employees.

Before the Benefits Administrator approves the Open Enrollment, they should review the employees' benefit election details, noting any exceptions they need to address, and use the Enrollment and Enrollment Exceptions reports for assistance.

- This process enables you to verify employees have begun their enrollment and their submitted enrollments are correct and complete.
- As long as the open enrollment period is still In Progress, you can run this approval process as many times as necessary to make sure all employees' enrollments are approved.
- You can also use the Enrollment Exceptions Report and the Enrollment Report to see the employees' enrollment statuses and which employees' enrollments have exceptions that need to be corrected.
- Before you begin approving enrollments, you need to have already processed the open enrollments for the enrollment period.
- The Approve Open Enrollment process can be used to approve Open Enrollments on an individual basis, or you are able to use the “Approve All” button to approve all employee Open Enrollments.

Auto Approve Enrollment

The Auto Approve Enrollment page provides you the ability to approve open enrollment status for all eligible employees without having to manually approve each employee separately on the Approve Enrollment page.

Select System Administrator > Benefit Updates > Auto Approve Enrollment

Update Enrollment

Once the Update Enrollment process is run, Benefits Enrollment copies the Open Enrollment plan rate and amount changes to the matching current benefit plans in Sage HRMS. The system also updates the employee's benefit plan additions/changes, and expires plans for which the employee is no longer enrolled using the Plan Year Effective Date as defined in the Open Enrollment period setup.

After the user runs the Sage Update Benefits Process and the new benefit plan amounts calculate, changes to current plans and employee plans are marked with the current Plan Year Effective Date.

- The system date must be greater than the Open Enrollment Period end date in order for the Update process to run.
- The update process updates all employee Open Enrollment Records where the status is “Approved.”
- The validations routine runs at the start of the Update and if there are approved records that do not pass validation, the process stops and generates an error message.
- When an enrollment record is rejected during the Update Benefits process, it is not processed and not included in the Open Enrollment update process.



Depending on the number of employees included in the Open Enrollment and the environment ESS is installed, the Update Enrollment process may take some time to complete. Do not exit out of this process until it 100% complete. Exiting this process early may cause incorrect or incomplete data to populate your Sage HRMS solution.


Update Benefits

After updating your open enrollment, the Update Benefits process is the next process to be run to complete the ESS Update Open Enrollment process. This process updates employees benefit plans in your Sage HRMS solution. Running the Update Benefits process performs the necessary calculations pertaining to benefit premiums and coverage, and to complete your open enrollment.

From within Sage HRMS solution, select Employees > Processes > Update Benefits

Congratulations! You have successfully completed your Open Enrollment process.

Links and additional information

Topic	URL	Additional Information
Sage City – HRMS Forum	https://www.sagecity.com/support_communities/sage_hrms/f	Ask product questions Share tips and tricks with Sage peers, partners, and pros
Sage City Global Resources	https://www.sagecity.com/global-resources	New page in Sage City for Online Support Resources. Explore Sage University, register for the free webinars, access our training forum, view documentation, read product news and alerts, chat with a support representative and more!
Questions and Answers relating to Sage HRMS Learning Series	https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms--training	This link will take you directly to the Sage HRMS – Training forum on Sage City
Sage University	https://www.sageu.com/hrms	Log on Training and certification View training by subject Create a Profile Test your knowledge View training schedule
Sage University Help Desk		Telephone: 1-855-724-3864 Email: SageUniversity@sage.com
Discount code	HRMSresource	10% off when registering for Sage HRMS instructor-led training
Register or access on demand recording for Sage HRMS Learning Series	https://get.sage.com/HRMSLearningSeries	
Grad Cap icon in Sage HRMS		A link to Sage University to browse for training on the related area in Sage HRMS