View Employee Event Detail

Concept

Use this procedure to view a detailed account of the benefit plan and election options that are processed by Benefits Administration for a selected participant.

The data for this component are updated as a participant moves through each phase of the Open Enrollment or Event Maintenance process. Updates occur each time the BAS process runs. You can view this information at any time.
## Navigation

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<td>4.</td>
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## Procedure

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<td>5.</td>
<td>Enter the desired information into the <strong>EmpID</strong> field.</td>
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<td>6.</td>
<td>Click the <strong>Search</strong> button.</td>
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<td>7.</td>
<td>Click an entry in the <strong>Event Date</strong> column.</td>
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### Step 8

- **Action**

   The Participant page enables you to view event, eligibility, and processing information about an employee.

   - **Event Information** group box displays the event's **ID** (event ID), **Status** (event status), **Class** (event class), **Source** (event source), **Date** (event date), **Effseq** (event effective sequence), and **Priority** (event priority).

   The system displays a **Status** code that indicates whether the participant event is **Open for Processing**, **Closed for Processing**, or **Void**.

   If the event originated from (or is associated with) a Job, Union code, or Address (state or postal code) change, it will display effective sequence (**Effseq**) here.

   - **Priority** field determines the order of processing for events that occur for the same benefit record number on the same event date, but which have different event classes.

   The system will display the **Source** of the event: whether it was triggered by a change to an employee's address, union code, or job information, a passive event, or the insertion of a manual event.

   When the system selects the **Multi-Activity Indicator** check box, it means that this participant event is the result of a situation where the system located multiple activity records from BAS Activity table that had the same benefit record number, event date, and event class and merged them into a single participant event.

### Step 9

- **Action**

   The **Eligibility Information** group box displays information the system uses for determining eligibility for the event.

   - **Empl Red#** is the employment record number of the address, job, and union code records used for eligibility.

   If the event is associated with an action that may make the employee eligible for COBRA coverage, the system will display that action code in **COBRA Action** field.

   If the event originated from (or is associated with) an **Address** (state or postal code) change, the system will display the **Effdt** (effective date) and identifies the **Effseq** (effective sequence) of that event (or set of events).

   If the event originated from (or is associated with) a **Job**, or Union code, the system will display the **Effdt** (effective date) and identifies the **Effseq** (effective sequence) of that event (or set of events).
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| 10.  | The **Processing Information** group box displays information about the current processing status of this participant event. **Benefit Program**: Displays the Benefit Program for which the employee is eligible **Process Status**: Displays the event processing status  
   - **Assigned**: event successfully assigned to Schedule and is ready for next step in processing  
   - **Assigned Error**: event was not successfully assigned to a Schedule and/or Benefit Program (i.e. eligible for 2 Ben Programs)  
   - **Assigned None**: event not assigned to Schedule and/or Benefit Program  
   - **Prepared**: Event is ready for printing of enrollment form and/or data entry  
   - **Prep Error**: event encountered error while preparing options  
   - **Prep None**: based on event rules, the event did not prepare any options  
   - **Notified**: Enrollment form has been printed OR employee has accessed Self-Service Benefits Enrollment  
   - **Entered**: Data Entry has been done OR changes have been submitted via Self-Service Benefits Enrollment.  
   - **Election Error**: Error message generated while processing data entry (i.e. Proof Required)  
   - **Finalized - Prep None**: event successfully finalized without any options prepared or processed  
   - **Finalized - Prog None**: event did not have any options to prepare using eligibility rules  
   - **Finalized - Enrolled**: event successfully finalized and changes are reflected in employees' benefit tables  
   - **Status Date**: displays date of processing status  
   - **Process Indicator**:  
   - **Election Source**: None (no elections entered), Online (elections entered via Election Entry) or Web (elections entered via Self-Service)  
   - **Excess Credit**: not used by UMS  
   - **Option Notify**: date enrollment was printed OR date employee accessed Self-Service  
   - **Election Rcvd**: date elections entered  
   - **Confirm Notify**: date confirmation statement was printed  
   - **Finalize/Apply Defaults**: checked if event was processed with defaults applied |
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<td>11.</td>
<td>The system will select the <strong>Address Eligibility Changed</strong> check box if there was a change, insertion, or deletion to address (State and Postal Code). The system will select the <strong>MultiJob Eligibility Changed</strong> check box if there was a change, insertion, or deletion to the multiple job indicators. The system will select the <strong>Job Eligibility Changed</strong> check box if there was a change, insertion, or deletion to the job information. If the event was processed out of sequence because a retroactively entered event preceded it, the system will select the <strong>Event Out of Sequence</strong> check box. If the event was disconnected because the event triggered one or more of the HR records used for eligibility were deleted, the system will select the <strong>Event Disconnected</strong> check box. If the <strong>Available through Self Service</strong> check box is selected, that means that the participant can enter their elections for the option processing results of this event through PeopleSoft eBenefits application.</td>
</tr>
<tr>
<td>12.</td>
<td>The <strong>Eligibility Source</strong> group box shows the source of eligibility data that was used when the event was last processed. The first line is always the effective date of the ADDRESSES table that contributed address data to the eligibility processing. The remaining rows show each job that may have contributed eligibility information and the <strong>Pri Job</strong> (primary job), <strong>Incl Elig</strong> (include for eligibility), <strong>Incl Ded</strong> (include for deductions) flags. These flags are used primarily in multiple job processing.</td>
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| 13.  | The **Plan Type** page enables you to view employee benefit plan information.  

The **Curr Election** field is an indicator that explains why coverage might be terminated after event processing has occurred. The system displays one of the following options:
- **Yes**: The employee had coverage in this plan type as of the event date.
- **No**: The employee did not have coverage in this plan type as of the event date.
- **Only**: The employee had coverage in this plan type as of the event date, but is no longer eligible as a result of the event. Coverage is displayed here only because it will be terminated.
- **Future**: The employee has a future-dated election in this plan type that the system will terminate.

When the **Elections Allowed** check box is selected, it means the employee can elect options in this plan type. If it is cleared, the employee cannot elect options in this plan type.

Until the event is finalized, the **Enroll Action** field has default values of **None** and **Elect**. After finalization, **Enroll Action** can be either:
- **None**: No action occurred for this plan.
- **Enroll**: **Coverage Elect** is set to **Waive** or **Elect**.
- **Terminate**: **Coverage Elect** is set to **Terminate**.

A participant receives an enroll action of **None** if the election for the given plan type matches the participant’s current election. This way, if the participant stays in the same benefit plan for twenty years, there will be only one enrollment record rather than twenty. Participants also receive an enroll action of **None** if there is an error with the election, or no current election, when the participant is finalized. |
14. Click the Option and Cost tab. The Option and Cost page enables you to view and track employee options and costs.

If the Default Election check box is selected, it means that the option is a default option that can be assigned as a default to participants who fail to make their elections. It does not necessarily mean that this option was assigned to the participant as a default option.

The Proof Required field is generally used for life and retirement plans. When Proof Required is selected, it means the participant must pass proof rules to legitimately enroll in the plan. These proof rules are stored in the event rules you have defined for your Benefits Administration system.

The History Only check box identifies options which the employee is eligible for, but which the employee cannot choose. For example, when a participant undergoes a FSC (family status change) event such as a marriage, her eligibility for certain options will be unchanged, but the event rules associated with FSC events will only allow the participant to choose between the different options available to them as a direct result of the change in their coverage status. Later, when the participant enters Open Enrollment, she will have the ability to choose between the many different options for which she is eligible.

15. End of Procedure.