



INFORMATIONAL MESSAGE

To: Finance Coordinators Statewide & Information Service Center Managers
From: WSIPC Finance Services
Date: February 18, 2015
Re: New interface for the Year 3 - OIC Request for K-12 Health Benefit Data Extract

INTERFACE(S) AFFECTED:

SMS 2.0 WESPaC

UPDATE:

1. Carrier Name is added to Section 3 of the extract
2. Section 6 is limited to include Medical Plans only
3. Minimum Deductions processed outside of Insurance Tracking can be included
4. Section 8 is added to extract dependent information from Insurance Tracking or Custom Form.

ATTENTION:

To assist in accommodating the Year 3 - OIC Request for K-12 Health Benefit Data, WSIPC has created an interface in the Skyward School Management System that will allow each district to create an extract interface, specific to its data. This interface has been applied to production as of February 18, 2015 (05.14.10.00.11).

The interface and extract process provides the ability to extract the appropriate data, and create and populate that data into the seven .CSV files. This provides the district with full control over the parameters for the data contained in the extract as well as the ability to generate the extract files at any time.

The following sections instruct you on configuring the Generate OIC Data screen and extracting the data into CSV files:

- [Configuring the Generate OIC Extract Data Screen](#)
- [Generating Dependent Custom Form](#)
- [Generating Dependent Custom Form](#)
- [This utility will create or update the custom form screen called 'OIC Dependent Information'. The custom form can be completed in a couple of ways:](#)
 - Through Employee Access
 - Through Employee Profile



- Import data from a spreadsheet into Employee Profile
1. From the Generate OIC Extract Data screen, click Generate Dependent Custom Form. A message window will display
 2. Select Run.
 3. The process will run through the Print Queue. When complete the following message appears:

“The creation or update of the ‘OIC Dependent Information’ screen is complete. You can now add to the screen via the Employee Profile.”

4. Click Back

Once the custom Form is created it does not automatically display in Employee Access. To display the custom form in Employee Access do the following:

1. Go to Human Resources\Employee\EP Setup\CF\MS. You may see Switch System message appear. Select Custom Profile.
2. Click Apply.
3. Locate OIC Dependent Information and expand the arrow to the left.

<p>NOTE: The Custom Form may display the incorrect year. To verify the correct year expand the Custom Fields and review the Year. Select Edit if needed.</p>

4. Expand Custom Screens and select Edit
5. Click Employee Access.
6. Form screen will appear. For Show Type select Update. This will allow the employees to enter information.
7. For Screen Type select Information.
8. It is recommended to Add an Employee Selection Parameter for this process. You may consider excluding inactive employee. Also consider adjusting the Name Key High and Low Range to exclude fictitious employees commonly used, for example: ZZZClassified or **Extra Time.
9. Click Save.



10. Click Save.

In addition to activating the Custom Form to display in Employee Access the configuration for Employee Access should be reviewed to verify employees are able to view the form. To review for proper configuration setting do the following.

1. Go to Product Setup\Employee Access\CF\SE.
2. Under Tabs to Display on Personal Information Screen select Display Custom Forms.
3. Click Save.

Employee can access the OIC Dependent Information custom form by accessing the Custom Form tab under Employee Information

- [Generating Extract Files And Saving Your Configurations](#)

Configuring the Generate OIC Extract Data Screen

As depicted in Figure 1, this new extract interface will allow you to specify data to accommodate the following fields and areas:

- Report Year
- Whether or not to use Insurance Tracking to Setup OIC data
- Your Export Directory
- Salary Negotiations Plan Year and Salary Negotiations Plan to Report From
- Payroll Selection, Vendor Payments and Medical Plans

Generate OIC Extract Data

* Report Year: Use Insurance Tracking to Setup OIC data
 * IT Processing Date:
 Extract Dependents from Insurance Tracking

* Export Directory:

Choose Salary Negotiations Plan to Report From
 * Plan Year: * Select Salary Negotiations Plan:

Payroll Selection
 Payroll Method: Dates Select Payrolls
 * Select Payrolls

Seq ID	Check Date	Check Type
9314	09/30/2014	Regular

Check Date Range: to

Vendor Payments

GROUP HEALTH
 WEA - VISION SERVICE PLAN
 WEA - WILLAMETTE DENTAL
 WEA-PREmera MEDICAL
 WEA-WASHINGTON DENTAL SERVICE
 WEA/APA TRUST FUND

WASHINGTON STATE TREASURER

Medical Plans [Coverage Category Cross-Reference](#)

Carrier Name	Plan Code	Plan Name	Approved Plan Name
▶ WEA-PREmera MEDICAL	WEA	WEA	
▶ WEA/APA TRUST	PLAN 2	PLAN 2	
▶ WEA/APA TRUST	WEA-PLAN 3	WEA-PLAN 3	WEA-PLAN 3
▶ WEA/APA TRUST	WEA-PLAN 5	WEA-PLAN 5	WEA-PLAN 5
▶ WEA/APA TRUST	WEA-PLAN EASY CHOICE A	B OR C	WEA-PLAN EASY CHOICE A
▶ WEA/APA TRUST	WEA-QHDHP	WEA-QHDHP	WEA-QHDHP

6 records displayed

Figure 1 - Generate OIC Extract Data screen

The following sections provide guidance on setting up the Generate OIC Extract Data screen:

- [Configuring the Top Sections of the Screen](#)
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- [Adding a Medical Plan](#)

Configuring the Top Sections of the Screen

Before setting up your medical plans, select your Salary Negotiations plan, payroll data, and vendor payments.

To configure the top sections of the screen:

1. Go to Human Resources\Federal/State Reporting\SR\WA\State Reports\CR\ED.
2. Configure the top portion of the screen (Figure 1). For information regarding these options, see Table 1.

Option	Description
Report Year	Enter the year of the extracted data
Use Insurance Tracking to Setup OIC data	<p>Identifies how the Medical Plans area of the Generate OIC Extract Data will be configured and where the employee medical coverage information is taken from during the extract. This prompt allows configuration based on whether a district uses Insurance Tracking or the Payroll Deduction and Benefits to track their insurance related costs.</p> <p>It is important to understand that Payroll check deductions and benefits are always used to identify the costs, regardless of how this option is configured. Additional information and details, such as Group, Plan and Sub Plan information are taken from Insurance Tracking for medical plan identification when this box is checked.</p> <p>When checked, an IT Processing Date must be entered and you will be able to create records to identify Carrier Names, Plan Codes, Plan Names and Approved Plan Names. For each of these records, you will be able to identify an associated insurance tracking plan(s).</p> <p>When unchecked, you will be able to create records to identify Carrier Names, Plan Codes, Plan Names and Approved Plan Names. For each of these records, you will be able to identify the associated Payroll Deduction and Benefit Code(s) as well as the total premium dollar amount for each of your coverage tiers.</p>



Option	Description
Extract Dependents from Insurance Tracking	<p>When checked, it results in the extract of dependent information found in Insurance Tracking.</p> <p>NOTE: When checked, this setting will still allow the collection of eligible dependents (covered and not covered) not found in Insurance Tracking, to be entered in the OIC Dependent Information custom form.</p>
Export Directory	<p>Identifies the location of the generated .CSV files. This must be a UNC path.</p> <p>The extract files can be placed in any directory the district would like to use. The files will ultimately need to be in the same directory as the stored spreadsheet provided from Treinen, so they can be loaded into that spreadsheet via the macro.</p> <p>NOTE: <i>The UNC Path must be a directory accessible by the print queue server. It cannot be a directory on your computer.</i></p> <p><i>ex. \\Server\SharedFolder\ ex. C:\Temp\Folder\ (this would be the C drive on the <u>server</u>)</i></p> <p>NOTE: The Test button shows you whether your directory is found. However, you can't use this button until later in this process because you must first enter data into all required fields (those with * beside them) on this screen.</p> <p>CAUTION: If the Fin_Sec directory is used to store the generated files, be aware that security restrictions may not allow the process to overwrite existing files on subsequent runs.</p>
Plan Year	<p>Identifies the plan year that the Salary Negotiation plans will be selected from.</p>
Select Salary Negotiations Plan	<p>Allows you to select the Salary Negotiations Plan that this extract will run against.</p> <p>NOTE: It is required that you select your S275 plan from your initial S275 submission for the current fiscal year.</p>



Option	Description
Payroll Method	<p>Allows you to select the payroll check date ranges or the specific payroll(s) that you want this extract to run against.</p> <p>Choices are:</p> <ul style="list-style-type: none"> • Dates • Select Payrolls
Check Date Range	<p>Identifies a date range of checks to be included in the extract. This is filled in if the Payroll Method is set to Dates.</p> <p>NOTE: The paycheck(s) containing premiums for October coverage, of the current fiscal year, must be selected.</p>
Select Payrolls	<p>Allows you to select the specific payrolls that will be included in the extract.</p> <p>NOTE: The payroll(s) containing premiums for October coverage, of the current fiscal year, must be selected.</p>
Medical, Dental, Vision Vendor Selection	<p>Allows you to select each of the vendors who received payments for medical, dental or vision premiums in the previous fiscal year.</p> <p>For each Vendor, you select the vendor from the vendor table and then select the OIC Official Carrier Name to it. The OIC Official Carrier Name is only required for medical vendors.</p>
HCA Carveout and Supplemental Vendor Selection	<p>Allows you to select those insurance related vendors that you paid HCA Carveout and Supplemental medical fees to in the previous fiscal year.</p> <p>For each Vendor, you select the vendor from the vendor table and then enter the associated OIC Official Carrier Name to it. The OIC Official Carrier Name is not required for these vendors.</p>
Coverage Category Cross-Reference	<p>Allows you to create a mapping of each Insurance Tracking Coverage Code to its State OIC Code defined by the OIC, see (Figure 4).</p> <p>NOTE: You will not see this link if Use Insurance Tracking to Setup OIC data is unchecked, see (Figure 1).</p>

Table 1 - Description of options available on the Generate OIC Extract Data screen.

NOTE	Premium amounts for Medical Dental and Vision Vendors should not include Cobra payments. Districts that do not use separate vendors codes for Cobra payments will need to manually subtract those amounts from the Section 3 CSV file.
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Adding a Medical Plan

The Medical Plans area allows you to identify either the Medical Plans to be included when using Insurance Tracking, or the Payroll Deduction and Benefit codes and their coverage-tier dollar amounts when using the Payroll Deductions and Benefits.

NOTE: The medical plans defined here allow the extract to determine the employee's previous year October coverage from the selected paycheck(s).

To add a Medical Plan:

1. In the Medical Plans area, click Add.
2. From Medical Plan Maintenance screen, configure the following boxes:
 - Carrier Name - Identifies the insurance carrier name that you define.
 - Plan Code - Identifies the Plan Code that you define for this carrier.
 - Plan Name - Identifies the user defined Plan Name associated to this plan and carrier.

NOTE: You can leave the Approved Plan Name box blank as it is not required or needed.

3. Click Save.
4. From the Medical Plans area on the Generate OIC Extract Data screen, expand the Medical Plan record.
5. Do one of the following:
 - If Use Insurance Tracking to Setup OIC Data is not checked, click the Add Deduction/Benefit link.
 - Configure the Deduction/Benefit Information screen (Figure 2) to associate with this Carrier Name medical plan record. Table 2 explains the options on the screen.
 - If Use Insurance Tracking to Setup OIC Data is checked, click the Add Insurance Plan link.



- Select the insurance plan(s) that is associated with this Carrier Name medical plan record (Figure 3). If you are using a separate minimum deduction plan, make sure you select that plan, in addition to the primary benefit plan.
- Click the Coverage Category Cross Reference link.
 - In the Coverage Codes screen, click Edit.
 - In the State OIC Code box on the Coverage Code Maintenance screen, select the State OIC Code that cross references to the Coverage Code, see (Figure 4).
- Click the Add Minimum Deductions link if the district does not define separate minimum deduction sub plans and process a separate deduction code through payroll.
 - Configure the Deduction code to associate with this Carrier Name medical plan record, see (Figure 5)

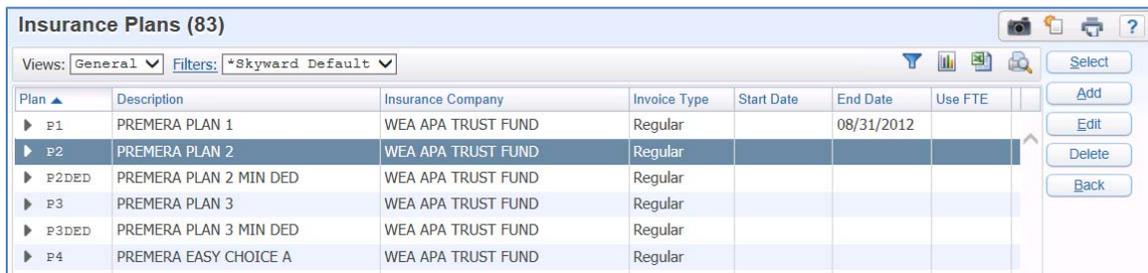
Add additional Medical Plans as appropriate.

Figure 2 - Deduction/Benefit Information screen

Option	Description
Deduction Code	Allows you to select the deduction code that is associated with this medical plan.
Benefit Code	Allows you to select the benefit code that is associated with this medical plan.
EE(Employee Only)	Identifies the premium rate for the employee only coverage tier.

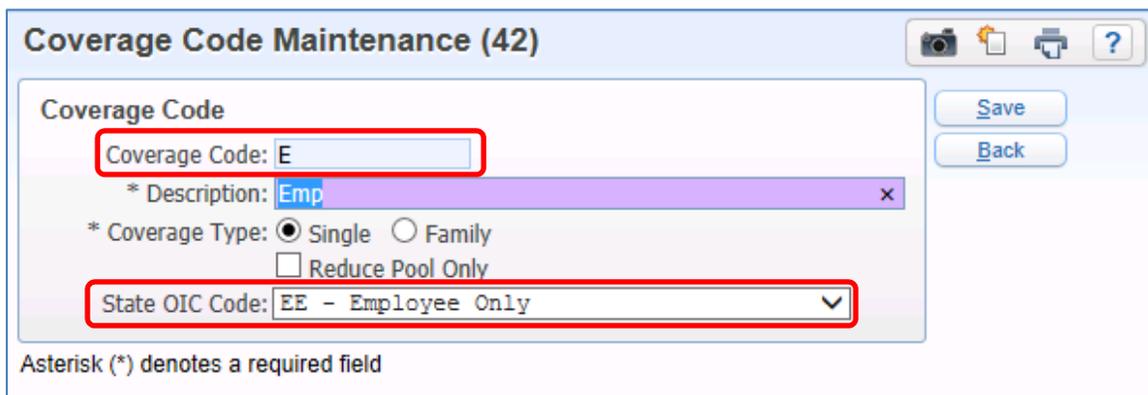
Option	Description
ES(Employee plus Spouse)	Identifies the premium rate for the employee plus spouse coverage tier.
EC(Employee plus Children)	Identifies the premium rate for the employee plus children coverage tier.
EF(Employee plus Family)	Identifies the premium rate for the employee plus family coverage tier.
E2(Employee plus 2)	Identifies the premium rate for the employee plus 2 coverage tier. This is not common, but can be used by districts who break out their tiered employee/children insurance plan coverage to an additional level. Leave the value at 0.0000, if not applicable to your district.
F2(Employee plus Spouse plus 2)	Identifies the premium rate for the employee plus spouse plus 2 coverage tier. This is not common, but can be used by districts who break out their tiered family insurance plan coverage to an additional level. Leave the value at 0.0000, if not applicable to your district.

Table 2 - Describes the options on the Deduction/Benefit Information screen



The screenshot shows a table titled "Insurance Plans (83)". The table has columns for Plan, Description, Insurance Company, Invoice Type, Start Date, End Date, and Use FTE. The "P2" row is selected, showing "PREMERA PLAN 2" with "WEA APA TRUST FUND" as the insurance company and "Regular" as the invoice type. The end date is 08/31/2012. Other rows include "PREMERA PLAN 1", "PREMERA PLAN 2 MIN DED", "PREMERA PLAN 3", "PREMERA PLAN 3 MIN DED", and "PREMERA EASY CHOICE A".

Figure 3 - Select Insurance Plan



The screenshot shows the "Coverage Code Maintenance (42)" screen. It features a form with the following fields: "Coverage Code" (containing "E"), "Description" (containing "Emp"), "Coverage Type" (with "Single" selected), "Reduce Pool Only" (checkbox), and "State OIC Code" (containing "EE - Employee Only"). There are "Save" and "Back" buttons on the right. A note at the bottom states "Asterisk (*) denotes a required field".

Figure 4 - Coverage Code Maintenance screen



Minimum Deduction Information

Deduction Code: [dropdown]

Save

Save and Add Again

Back

Figure 5- Minimum Deduction Information

Generating Dependent Custom Form

This utility will create or update the custom form screen called 'OIC Dependent Information'. The custom form can be completed in a couple of ways:

- Through Employee Access
 - Through Employee Profile
 - Import data from a spreadsheet into Employee Profile
5. From the Generate OIC Extract Data screen, click Generate Dependent Custom Form. A message window will display
 6. Select Run.
 7. The process will run through the Print Queue. When complete the following message appears:

“The creation or update of the ‘OIC Dependent Information’ screen is complete. You can now add to the screen via the Employee Profile.”
 8. Click Back

Once the custom Form is created it does not automatically display in Employee Access. To display the custom form in Employee Access do the following:

11. Go to Human Resources\Employee\EP Setup\CF\MS. You may see Switch System message appear. Select Custom Profile.
12. Click Apply.
13. Locate OIC Dependent Information and expand the arrow to the left.



NOTE: The Custom Form may display the incorrect year. To verify the correct year expand the Custom Fields and review the Year. Select Edit if needed.

14. Expand Custom Screens and select Edit
15. Click Employee Access.
16. Form screen will appear. For Show Type select Update. This will allow the employees to enter information.
17. For Screen Type select Information.
18. It is recommended to Add an Employee Selection Parameter for this process. You may consider excluding inactive employee. Also consider adjusting the Name Key High and Low Range to exclude fictitious employees commonly used, for example: ZZZClassified or **Extra Time.
19. Click Save.
20. Click Save.

In addition to activating the Custom Form to display in Employee Access the configuration for Employee Access should be reviewed to verify employees are able to view the form. To review for proper configuration setting do the following.

4. Go to Product Setup\Employee Access\CF\SE.
5. Under Tabs to Display on Personal Information Screen select Display Custom Forms.
6. Click Save.

Employee can access the OIC Dependent Information custom form by accessing the Custom Form tab under Employee Information

Generating Extract Files And Saving Your Configurations

After you configure the Generate OIC Extract Data Screen, including your district's Medical Plans, generate CSV files in specified Export Directory.



NOTE	The Section 2 CSV file will not be generated by the extract; however districts will be required to answer the Section 2 questions directly in the spreadsheet.
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After generating an extract file, save your current configuration.

To generate extract files and save your configurations:

1. From the Generate OIC Extract Data screen, click **Generate**. The process runs in the Print Queue. When complete you can click **View Report** to see a report that is produced with a list of the CSV files generated.
2. From the Generate OIC Extract Data screen, click **Save**.

You can now access and examine the contents of each of your CSV files. If you need to change or update data in your system to improve the data accuracy of the extract, run the Generate process again.

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