

# Overview of Benefits Eligibility

Quick Reference Guide



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## Introduction

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The Employee Work Center enables benefit groups to be created that dynamically use eligibility rules to define the membership criteria for each group. All employees who meet the criteria defined for a group's eligibility rule are automatically assigned to that group.

There are several behind-the-scenes steps completed by the Administrative Services Benefits team that enable the process to work correctly. **This is an overview of that process for informational purposes only.**

## Prerequisite

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Supervisory organizations are created. In the Employee Work Center, all workers are hired or contracted into supervisory organizations, and compensation structures apply to workers within these organizations.

## Steps

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**NOTE: THESE STEPS ARE COMPLETED BY THE ADMINISTRATIVE SERVICES BENEFITS TEAM. AGENCIES ARE NOT RESPONSIBLE FOR CREATING THESE ELIGIBILITY RULES.**

- 1. Create Benefit Coverage Types**
  - a. Define categories of health care, flexible spending accounts, insurance plans, retirement plans, and additional benefit plans, including leaves.
- 2. Define Enrollment Events**
  - a. Identify the events, such as open enrollment, termination, birth of a child, and other employment or life events that trigger benefit gains or losses, and identify the coverage types that can be lost or gained in connection with each event.
- 3. Define Enrollment Event Rules**
  - a. Define coverage begin dates, end dates, increase limits, Evidence of Insurability requirements, waiting periods, and other rules and conditions for enrollment events.
- 4. Create Employee Benefit Eligibility Rules**
  - a. Define criteria for inclusion in a benefit group.
  - b. Define eligibility criteria for benefit coverage.
- 5. Create Employee Benefit Eligibility Rules**
  - a. Qualify groups of workers for similar benefit plans and elections based on the eligibility rules created during Step 4.