Processing an Open Enrollment in Sage HRMS Webinar

Questions and Answers
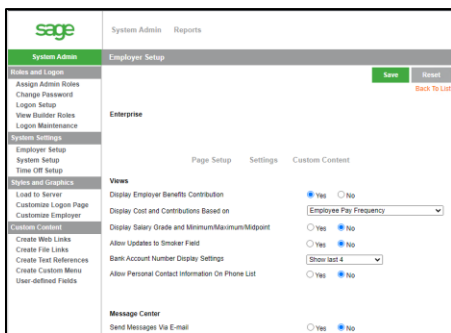
September 24, 2020 and September 28, 2020

How do you know if you have ESS setup to send out emails to the employees regarding open enrollment?

In System Maintenance (on the server where ESS is installed) email must be enabled and the mail server set up.

In Sage ESS > (System Settings) Employer Setup > Settings tab, 'Send Messages via E-mail should be set to yes.


Can you have the Benefit Calculator calculate the cost of more than one benefit?

No. You would have to choose each benefit separately, there is no "bulk calculate".

How do I get the benefits tab to be an option under my Administer tab?

You will need to add the "Benefits Administrator" role to yourself. Log into Sage ESS as Master, System Admin > (Roles and Logon) Assign Admin Roles.
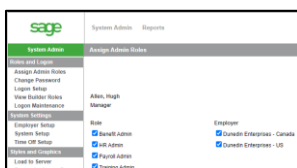
How can ESS handle the monthly eligibility of employees that are hired during the year and have met the plan's eligibility criteria?

An employee can do a life event or Open Enrollment from within Sage ESS and select their benefits. You can set up any eligibility in ESS from the "Benefit Eligibility" option where there is a ton of different options, including Hire Date + an amount of days/months.

How are employees notified of open enrollment? Is a message sent to the email address on file in HRMS?

In ESS there is an option to allow emails to be sent to employees. As long as this is set up, the employee will receive an email to their work email address. They are also sent a notification in the employee's Message Centre in Sage ESS.

For employee notifications, do all employees have to have work email addresses or can we use their personal email address?

The emails will be sent to what is the employee's Work Email Address. If they don't have a work email address, just make sure to put their personal email address in this field (which I've seen done before). Email address is located in Sage HRMS > Demographics page.

For 401K Plans I understand how the HRMS is updated but EE would still need to log into the 401K provider website to update correct? How would that be forced during OE?

The Open Enrollment will only push the information back to Sage HRMS. If you used Benefit Messenger (Sage Endorsed Solution) the information can be sent.   For any other third party software, you would need to manually send the data to the provider.

If an employee does not finish or start an open enrollment, can the system assume same coverage as the prior year?

Yes. Depending on how the Benefit is set up in Sage HRMS, it will just keep on trucking along without any changes. Just be careful for any benefit plan that has an end date at the end of the year.

Is this webinar being recorded?

Yes. It will be available in several weeks on the Sage HRMS Learning Series registration page. Handouts and Questions and answers will also be posted there.
https://www.sage.com/en-us/cp/hrmslearningseries/

If an employee needs help going through the OE process, do you have the ability as the Administrator to complete OE on their behalf?

Yes. From within Sage HRMS, as long as you have it configured, every employee has an ESS login link on their record called Self Service. You would find the employee, click the link (it will log in as the employee assuming they have an active valid login), and you can make their selections for them.
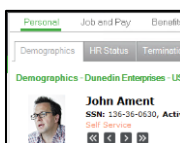
Do you have to use the Enrollment notification option? We hand key and sit with each of our EE's to complete their benefits.

You could hand key and work with each employee. You can also delay inviting them and do it on a one by one basis.

Can you make the reminder notice any bigger and bold so it's easier to catch?

No, not at the Open Enrollment message level. However, you could create a welcome message for the ESS login page that you can adjust the size and bold it. Log into Sage ESS as Master > System Admin tab > Styles and Graphics > Customize Logon Page.
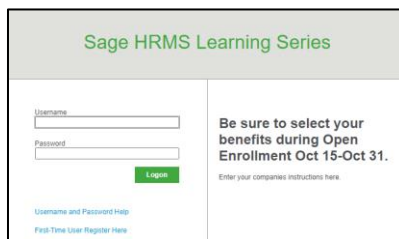
We have a lot of Spanish speaking employees, is there a way to have the information translated into Spanish?

No. However, you could type instructions in English, then repeat in Spanish. For example, Open Enrollment questions, during Open Enrollment setup enter Welcome Page and Announcement text in both languages. You could even attach multiple attachments (one in English, another in Spanish) in the Open Enrollment Links tab. Please note, that the overall ESS Open Enrollment product will be in English.

With approving all the pending enrollments, does this push through the changes they elected even though they did not finish the process?

Auto-approve will only finalize any Open Enrollment selections marked as "Pending." That is where an employee has gone all the way through the process and has submitted it as finished. If an employee has started an open enrollment and did not indicate they were finished, it would be marked as "In Process" and not update automatically.

I have found that I have to update benefits twice, once when I update enrollment, and a second time after we get into the new benefit period so that it will appropriately change the rate for employees that dropped a dependent.

That is definitely a best practice right there. If you can, we recommend that you run the Update Benefits process at least once a week.

Can you show us the benefits plans are setup in HRMS not ESS?

We don't cover benefit plan setup in this webinar but if you go to the Sage HRMS Learning Series website in your handout, you can view a video of a past webinar that covers an example of this. The webinar is called 'Setting Up Open Enrollment in Sage HRMS On-Demand'.

https://www.sage.com/en-us/cp/hrmslearningseries/

For Passive enrollment, can you just have an employee do the beneficiary update or confirm? or do they need to elect the plan again?

If an employee logs into Sage Employee Self Service to add a dependent during open enrollment, they would have to select the plan again to enroll.