Benefits Orientation Process Streamlining
University of British Columbia
November 12 – November 21, 2003
Executive Summary

The Benefits Sign on Process is the University’s primary vehicle for communicating health and welfare benefits to new faculty and staff and also to present employees with information on staff training, library cards, and parking.

The current process is inadequate for a number of reasons.:

- Employees are not able to retain the information communicated during the session, and are not given the tools to answer any questions they might have at a future date.
- Not all new staff attend sign-on sessions, and there is no way of knowing how many new staff miss the sessions.
- New faculty members do not even attend an orientation session at all. Instead, they are mailed information on their benefits and an enrolment form. There is no clear process for ensuring that benefits reflect job and lifecycle changes.
- Departments complain about their staff being absent with pay for a half day.
- The hand-offs between presenters for the different elements of the presentation is not always smooth, and presenters are sometimes late and are hard to track down.

A process streamlining team was brought together to improve the process, increase internal and external client satisfaction, and ensure that new staff and faculty fully understand their individual benefits programs and have the resources to enrol and make changes to the programs when necessary.

The recommendation of the PS team is to provide new and existing staff and faculty with a central, UBC Benefits Home page that will provide a virtual first day orientation/welcome to the university, and a step-by-step guide to the various benefit entitlements. The “virtual orientation” will contain all of the enrolment forms in type able PDF format. We recommend that the navigation link to the Benefits page reside on UBC’s homepage at www.ubc.ca.

The PS team also recommends that employees be provided with a checklist to use in tracking their own enrolment and that benefits/payroll (?) expand their use of post audit IHRIS queries.

The PS team would like to stress the importance of marketing in the overall benefits orientation and sign-on process. For the purposes of this report, marketing begins with the content of the offer letter. The University has an excellent benefits package, and the team recommends that this be highlighted in the offer letter, and that the benefits enclosure in the offer letter be changed to look more like a formal part of the offer letter. Employees should be encouraged
to learn about their optional and required benefits as soon as possible, by accessing the Benefits homepage.

Finally, the team recommends the creation of a bi-weekly welcome reception and lab for new staff and faculty. The first half hour of this session (the reception) would be an opportunity for new staff to mingle and get to know other new employees. The second half (the lab) would be for those employees who wish to access the benefits homepage on-line in room 241, or who had specific questions for benefits staff.

1 Project Case for Action, End Results, Bounds, and Structure

1.1 Case for Action

The primary vehicle for communicating health and welfare benefits to newly hired staff employees is the staff benefits orientation (sign-on) session. Sessions are held twice a week on a bi-weekly basis and are half a day in length.

In addition to being an orientation session for traditional health and welfare benefits, information is presented about staff training programs, library cards, and parking. Payroll (Financial Services), Benefits, Faculty Relations, Pensions, and OTD (Human Resources) all participate in the session, either directly or indirectly. Cupe locals 2950 and 116, and the Association of Administrative and Professional Staff (AAPS), piggyback on the session to orient their respective members.

During the session, the new hire receives payroll, pension and benefits information and relevant sign up forms, as well as an employee equity questionnaire. The new hire either completes the forms during the session or returns them at a later date. Information provided is entered into several University systems and/or forwarded to other University departments for their use.

From a client perspective, the current process is inadequate for a number of reasons:

- Employees are given too much information in a short period of time and are not given the tools to answer any questions they might have at a future date. Thus, clients call Payroll and HR frequently for help, reflecting their lack of understanding about selecting and/or changing available benefits.

- Not all new staff that sign up for a session attend. In addition, there is no way of knowing how many new staff do not even sign up for a session.
These employees miss important information about benefits options and the unique entitlements, such as tuition waivers.

- New faculty members do not attend a group orientation session at all. Instead, they are mailed information on their benefits and an enrolment form.

There are also a number of problems with the current approach from an institutional perspective:

- Departments complain about their staff being absent with pay for a half-day.

- Each session is divided into sections: pensions follow benefits, which follow OTD. The hand-off between sections is not always smooth. Presenters are sometimes late or do not show up and are hard to track down.

The staff benefits sign-on session is an employee’s first formal exposure to UBC as an employer. In its current format, the environment is unwelcoming, information presented is confusing, and participation of new staff employees is not one hundred percent.

### 1.2 End Results

Streamline the current health and welfare benefits orientation process so that a new hire (eligible faculty or staff member) is aware of, fully informed about, and clearly understands the University’s benefit programs and can easily indicate and update benefit choices.

The streamlined process should assure that the new hire fully understands individual benefits available, the process to initially enrol for, or later change, any benefit, how to get answers to benefit questions and concerns, and the respective roles and responsibilities of the appropriate University departments and the new hire in the benefits process.

The streamlined process should be as hassle free as possible, available to the new hire when and where he/she wants it, and be flexible to allow the new hire to obtain and provide information when, where, and in the manner in which he/she chooses. The streamlined process should be engaging, use the new hire’s time efficiently, and minimize his/her time away from the office. The new hire should feel warmly welcomed into the community, especially given that this process is one of his/her first exposures to the institution.
The streamlined process should also reduce errors and calls to involved departments for information and assistance.

The new hire should also be aware of, and understand that they are possibly eligible for, other non-health-and-welfare University benefits (including but not limited to transportation, recreation, and library benefits as well as other appropriate benefits or general information the PS (Process Streamlining) team identifies). The route to finding out detailed information about these other University benefits should also be as simple as possible and available to the new hire when and where he/she wants it.

1.3 Constraints

- The streamlined process should coordinate with the current / future IHRIS PeopleSoft system whenever possible.
- The streamlined process serves new hires but not prospective or current employees.
- Recommendations from this process streamlining should be able to be implemented in approximately 90 days.
- Cupe and AAPS processes should not be considered as part of this streamlining project.

1.4 Start and End of Process

- Process Start: A new hire has accepted an offer
- Process End: A new hire’s benefit choices have been submitted to appropriate departments

1.5 Team Members

- Team Leader – Peter Godman
- Start of Process / Internal to Process
- Advisory Services (for staff members) Patricia Todaro
- HR Faculty Relations – Jennifer Cox
- Pensions – Frances Lu
- End of Process – Payroll (Leslie Chan) (faculty Payroll rep)
- Process Owner – Stephanie Mah
- Client – Recent new hire/Administrator Maria Shawcross
- Technologist – Rob Wilson
- External – Kevin Ciotta (JM Associates)
- Scribe – Sven Clarke
2 Project Approach

2.1 Team Training (1/2 day)

2.2 Process Mapping (1 day)

2.3 Process Streamlining (2 1/2 days)

2.4 External Research (1 day)

2.5 New Process Draft (2 days)

2.6 Design Verification (1 day)

3 Story of current and future process

3.1 Current process
This section contrasts the existing benefits sign-on process with the recommended process. The existing process is based on research gathered during the eight-day process streamlining, including information gathered during an in-person audit of a session.

3.1.1 Faculty
For Faculty the current process is fairly simple to start. The recruiting department prepares and send and appointment form to Faculty Relations. Faculty Relations indicates on the appointment form which of eight possible benefits packages the new employee is eligible for, and sends the form on to the Payroll department. A faculty service rep sends the appropriate package out to the faculty member’s department. The faculty member completes the forms and returns them to Financial Services. If the faculty member has questions, she has the option of calling Faculty Relations, Financial Services, Human Resources or the Faculty Association, may actually go through that list until they reach a live person. If she talked to more than one department, they may have received inconsistent (or conflicting) information. Finally, as she progresses in her career at UBC there is no flag that indicates that she may be eligible for different benefits.

3.1.2 Staff
For our staff process, put yourself in the place of an imaginary employee named Bob. Bob receives his offer letter from the university, which contains a flyer UBC’s benefits program, and a line that asks him to call Human Resources to register for a benefits sign-on and orientation session. Bob calls the number and registers to attend on a Wednesday morning, at nine o’clock. He is asked to report to the main reception area of Human Resources. He makes arrangements with his supervisor to miss a half-day of work to attend the sign-on session.
On the morning of the orientation, Bob shows up at Human Resources. There are a few other employees sitting in the reception area; it is not clear what they are waiting for. Bob reports to the receptionist, who ticks off his name and asks him to take a seat. Bob takes a seat and waits. The reception area is silent. No one talks. More people come in to register for the session. As the chairs fill up people lean against walls, or wait outside of the HR reception area. HR staff walk the gauntlet to visit the ladies washroom. One staff member walks through the reception area and says, “Is it orientation again? Oh god!”

At nine the waiting employees are taken downstairs to room 241, and the presentation starts. The first ten minutes are a bit of a blur; a sign-up sheet for another orientation is past around, along with some brochures. Not everyone seems to know what to do with the sign-up sheet. After the first ten minutes, the benefits presenter comes in, and presents about 50 slides, in 35 minutes. It is difficult to remember all of the information, and Bob’s mind wanders. He does flip through his benefits binder and scans some of the pages of interest.

After the benefits presenter, someone comes in to make a presentation on the UBC pension plan. After the presentation, enrolment forms are handed out, and the presenter stays to help complete the forms, and answer questions. The presenter leaves the room to make copies of required documentation (e.g. birth certificates).

After the Pensions presenter leaves, representatives from the Payroll department come into the room, to answer questions and help complete the forms. Bob has 14 different forms to fill in. Although the same information is collected a number of times, each form has a unique look and feel, – some ask for date information in one format, some in another. Some ask for middle initial, some for a middle name, some for just a first and last name. There are nine variations on the UBC logo, and Bob amuses himself by comparing them.

When the session is over Bob waits to his completed forms. His questions have all been answered, and he would like hand in his forms and go, but the Payroll representative is surrounded by a group of people with more questions. Finally Bob has a chance to hand in his forms and go.

3.2 Recommended process for Faculty and Staff

In our recommended process (a good model is the University of California at San Diego: http://www.ucsd.edu/staff.html), Bob’s exposure to UBC’s benefits would also start with his offer letter, although he may have already “surfed” the UBC Benefits Homepage. Bob’s offer letter contains a “benefits password”. After receiving his offer letter, Bob signs on to www.ubc.ca/benefits, and visits the “first day” page, which contains information on UBC related information such as parking, library cards, and athletics. He visits the benefits orientation page, types in his password, and finds a list of optional and mandatory benefits, and links to
each form, displayed in typable PDF format. Standard fields, such as name, address, department and employee number have been automatically filled in. For unfamiliar forms, Bob is able to pull up a detailed description on their purpose and completion. Bob e-mails his completed forms to his payroll service representative. As a final step, Bob receives electronic confirmation of the benefits options that he has chosen.

3.2.1 Philosophy and Principles
• Benefits should be perceived in a positive light (as a perk) vs. a necessary evil
• All benefits info sources (website – process based, free search, hierarchical, on demand printed). Should be based on one electronic master sources, maintained by individuals responsible
• Separate benefits education from sign up. Start both as soon as possible
• Provide benefits info based on lifecycle and be proactive about educating employees and remailing them when we know of changes
• Share benefits responsibility and capabilities between HR and departments/employees
• Customize presentation to ee
• Tie forms with clear link to applicable website
• Reduce forms to as few as possible (see spreadsheet matrix)
• Stop asking for information we do not use (eg. We sometimes ask for information that never gets keyed into the system), or have on file
• Use the information we ask for
• Recommendation - Website pulls information from IHRIS and can enter information from the web – possibly a shadow database between the web and IHRIS which would empty once the information is downloaded into IHRIS
• Employees know benefits as soon as possible
• Make translations available eg. On first day website
• Printed = outdated

4 Process Streamlining Recommendations

4.1 Recommendation Summary

The Process Streamlining team has five recommendations. These recommendations are considered implementable within 90 days (medium term solution). See section 6.2 for long-term solutions and 8.7 for short-term solutions:

1. Move from in-person, paper based orientation to a process based virtual orientation.
2. Move from paper based forms to on-line typeable pdf’s (portable document format).
3. Employee to track their own enrollment using paper checklist and post audit IHRIS queries.
4. On going marketing, which should also work in parallel with the website.
5. Reception and lab for employees who want one on one, in person help with the benefits orientation.

1. Website/virtual orientation - Process Based

<table>
<thead>
<tr>
<th>Resources required</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional designer/technology person</td>
<td></td>
</tr>
<tr>
<td>High level technology resource/programmer</td>
<td></td>
</tr>
<tr>
<td>Staff time for redesign</td>
<td></td>
</tr>
<tr>
<td>Staff time for education and distribution</td>
<td></td>
</tr>
<tr>
<td>Technology costs</td>
<td></td>
</tr>
<tr>
<td>Building consensus on consolidating information</td>
<td></td>
</tr>
<tr>
<td>Staff time</td>
<td></td>
</tr>
<tr>
<td>Affects more stakeholders</td>
<td></td>
</tr>
<tr>
<td>Greater education</td>
<td></td>
</tr>
</tbody>
</table>

2. Forms - Typeable pdf’s (portable document format)

<table>
<thead>
<tr>
<th>Resources required</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional designer/technology person</td>
<td></td>
</tr>
<tr>
<td>Staff time for redesign</td>
<td></td>
</tr>
<tr>
<td>Staff time for education and distribution</td>
<td></td>
</tr>
<tr>
<td>Building consensus on form design</td>
<td></td>
</tr>
<tr>
<td>Distribution</td>
<td></td>
</tr>
<tr>
<td>Staff time</td>
<td></td>
</tr>
<tr>
<td>Greater education required</td>
<td></td>
</tr>
</tbody>
</table>

3. Tracking - employee to track their own enrollment using paper checklist and Benefits to track employees via post audit (enrollment) IHRIS queries

<table>
<thead>
<tr>
<th>Resources</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web designer time</td>
<td></td>
</tr>
<tr>
<td>Staff time</td>
<td></td>
</tr>
<tr>
<td>Mailing supplies</td>
<td></td>
</tr>
<tr>
<td>Staff time</td>
<td></td>
</tr>
<tr>
<td>Mailing and printing costs</td>
<td></td>
</tr>
<tr>
<td>Education - Making sure people respond</td>
<td></td>
</tr>
</tbody>
</table>

4. Marketing

<table>
<thead>
<tr>
<th>Resources</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources available will determine quantity and quality of education that occurs</td>
<td></td>
</tr>
<tr>
<td>Importance of marketing and education is not diminished based</td>
<td></td>
</tr>
</tbody>
</table>
on low medium or high level of other chosen solutions.
Work in parallel with website development
Time sensitive

5. Reception and lab

<table>
<thead>
<tr>
<th>Resources</th>
<th>Staff time</th>
<th>Money for additional equipment (printer, copier), food and catering, prizes</th>
<th>Name tags</th>
</tr>
</thead>
<tbody>
<tr>
<td>Challenges</td>
<td>Cultural challenges for staff</td>
<td>Food and drink in room</td>
<td>Finding money for additional food and catering</td>
</tr>
<tr>
<td></td>
<td>Not being risk averse (since we are taking a wait and see approach)</td>
<td></td>
<td>Education of new employees, administrators and community</td>
</tr>
</tbody>
</table>

4.2 *See live demo*

To see a prototype demonstration of what the website might look like, visit [www.hr.ubc.ca/otd/ps/benefitsorientation/](http://www.hr.ubc.ca/otd/ps/benefitsorientation/)

Please note that this is only a demonstration website, not the actual site, which would eventually be developed during the implementation phase.

5 Case for Recommendations

The Case for Action (see Section 2) identified problems with the current benefits orientation process. The goal of the process streamlining exercise was to recommend alternatives which address these inadequacies. These are outlined in the following table.

<table>
<thead>
<tr>
<th>Problem</th>
<th>Solution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Too much information in to short a period of time</td>
<td>Website which is self paced, clearly organized, with on-line forms. If the employee feels over loaded, she/he can resume at any later time.</td>
</tr>
<tr>
<td>2 Not all staff that sign up attend. As well, there is no way of knowing how many new staff</td>
<td>Tracking mechanisms. The employee tracks their own enrolment with a paper check, and Benefits to track enrolment with post audit IHRIS queries. The longer-term solution is that this process will be automated.</td>
</tr>
<tr>
<td>#</td>
<td>Description</td>
</tr>
<tr>
<td>---</td>
<td>-------------</td>
</tr>
<tr>
<td>3</td>
<td>New faculty do not attend group orientation sessions, but instead have it mailed to them</td>
</tr>
<tr>
<td>4</td>
<td>Departments complain about the employee being away for half a day</td>
</tr>
<tr>
<td>5</td>
<td>Sometimes presenters are not on time or do not show up</td>
</tr>
</tbody>
</table>

6 Ideas for the Future

6.1 Parking Lot

Below is a list of issues identified by the Process Streamlining group that emerged from discussions. These issues fall outside the scope of the current project, but were felt to be important to the Benefits process, and the operation of the system as a whole.

1. Prospective’s knowledge of benefits (so they can coordinate with current employer) and handouts, flyers for prospectives
2. Post selection process
3. Changes to benefits categories (sessional to tenure)
4. Faculties should manage offer process
5. Consolidating various orientations? Eg. HR, Research Services, Faculty Relations
6. Turnaround time for M&P appointments
7. New employees don’t always call and no follow up from UBC
8. 2 ee groups in one session with different benefit entitlement
9. Faculty MSP problems?
10. Faculty Relations – signed offer letter to departments does it go to faculty relations.
11. Department info. To bring offer letter package.
12. Home department address vs. work location address (IHRIS problem)
13. Natasha would like to see annual benefit statements.
14. Educating departments on benefits so it can be used as a marketing tool with employees. For example, in Maria’s case, could wind up without coverage for a month since the sign on sessions are at the beginning of every month and if you miss a sign up session you can lose a month of benefits. Also, Maria being an immigrant, was not familiar with health care/plans in Canada. There has been the odd case where potential employees have rescinded contracts because of mis-information.

15. Have departments market MOST programs periodically in their communication vehicles

16. University wide system for answering questions ie. On line system that captures questions and answers, when frequently asked, will automatically be answered on the web. Over time there should be fewer and fewer phone calls. See - askme.ubc.ca

17. Find a way to provide a single point of contact for all benefit questions – a phone tree. Single resource for additional first week of eg. Bus parking

18. Eligibility data for consecutive appointments

19. Eligibility data for consecutive appointments

20. Would like to see benefits package more flexible (eg. Amount of dental, aging parents vs. dependants)

21. New employee section in phone book

22. Provide pension and benefits information to Departments and prospective employees during the interview or before the offer.

23. If possible, change payroll workflow to accommodate changes

24. Assign UBC ID’s earlier in appointment process

25. Commercial for HR

26. Look at/rework employee ID assignment from current process with regard to changing content of union orientation sessions

6.2 Long Term solutions

<table>
<thead>
<tr>
<th>1. Forms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Difficult - on line forms</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resources</th>
<th>Professional designer/technology person</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resources</td>
<td>High level technology resource/programmer</td>
</tr>
<tr>
<td>Resources</td>
<td>Staff time for redesign</td>
</tr>
<tr>
<td>Resources</td>
<td>Staff time for education and distribution</td>
</tr>
<tr>
<td>Resources</td>
<td>No printing costs</td>
</tr>
<tr>
<td>Resources</td>
<td>Technology costs</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Challenges</th>
<th>Building consensus on form design</th>
</tr>
</thead>
<tbody>
<tr>
<td>Challenges</td>
<td>Distribution</td>
</tr>
<tr>
<td>Challenges</td>
<td>Staff time</td>
</tr>
<tr>
<td>Challenges</td>
<td>Security issues</td>
</tr>
<tr>
<td>Challenges</td>
<td>Integration with other technology products</td>
</tr>
</tbody>
</table>
2. Website/virtual orientation

Difficult - personalized secure website

<table>
<thead>
<tr>
<th>Resources</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional designer/technology</td>
<td>Building consensus on consolidating information</td>
</tr>
<tr>
<td>person</td>
<td>Staff time</td>
</tr>
<tr>
<td>High level technology resource/programmer</td>
<td>Affects more stakeholders</td>
</tr>
<tr>
<td>Staff time for redesign</td>
<td>Making a priority for UBC’s technology community</td>
</tr>
<tr>
<td>Staff time for education and distribution</td>
<td>Greater education</td>
</tr>
<tr>
<td>Technology costs</td>
<td>Security</td>
</tr>
<tr>
<td></td>
<td>Integration with other technology products</td>
</tr>
</tbody>
</table>

3. Tracking

Difficult - automated tracking for employee and UBC

<table>
<thead>
<tr>
<th>Resources</th>
<th>Challenges</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web designer time</td>
<td>Staff time</td>
</tr>
<tr>
<td>Staff time</td>
<td>Education - Making sure people respond</td>
</tr>
<tr>
<td>Programmer time</td>
<td>Security</td>
</tr>
<tr>
<td></td>
<td>Integration with other technology products</td>
</tr>
<tr>
<td></td>
<td>Building consensus on tracking design</td>
</tr>
</tbody>
</table>

7 Implementation

7.1 Dedicated project manager

7.2 Seconded project team

Some of the member so the PS team would like to be on the project team. Others would like to consult to the team. All would like to be updated on project status.

8 Appendix

8.1 Quick Fixes to Current Process

Quick fixes are changes to the current system that can be implemented in less than two weeks, require no programming or training, and require minimal cost. Quick fixes include:
1. Name tags, color coded for two groups staff
2. Educate presenters on what the color codes are
3. Improved signage
4. Send people directly to room 241.
5. A printed agenda – instructions on where to sit eg. Do not need a computer
6. Coffee/tea
7. Handouts of PPT
8. Piping PPT onto computers
9. Consider changing person who does set up and take down/administrative clerk does set up
10. Get rid of 10 minute OTD presentation, maybe throw up one slide with website address
11. Distribute forms at end of presentation to avoid people filling them out while presenter is speaking
12. Presenters announces up front when they will take questions
13. Use the term spouse and partner consistently
14. Provide url's and contact information – handout of all associated, relevant websites – eg. Pension, otd, FR, HR etc
15. Instructions for setting up the projector – logging on
16. Make sure we aren’t repeating information in presentation (among offices as well as aaps)
17. FR gives heads up to faculty reps about approximate quantity of appointment types for package generation

8.2 Flow Charts

8.2.1 M&P and Union Orientation
It is possible to group the Benefits orientation process into 5 phases

1. Registration
2. Check-in
3. Orientation & Form Completion
4. Form collection
5. Form distribution to appropriate offices

8.2.2 Faculty Process

8.2.3 Recommended Process

8.3 List of External Research
BC Hydro
Telus
BC Gas
Delaware
CN - wanted ee’s to know that materials are available and they are not alone, there is help. Cost of process (comm. Strategy) $140,000
University of HR
Carnegie Melon University
UC San Diego
Government of Canada
Staff finders (UBC)
University of Alberta
U. of Regina
Nortel
Cognos
Telus
Martin – Marneau Sobeco

8.3.1 Insert patrizia’s handout

8.3.2 Insert Stephanie’s handout

8.3.3 UBC Staff - past experiences with the Benefits orientation
Talked to 12 people – hard to get a hold of
All of them found the room fine
One person said it is small – but most liked style
Length of time – long enough
So many questions that the presenter allowed questions so had to rush through presentation
Overall – one out of 12 thought it boring – slides were good. One person said she wished she had slides
Trying to read binder after the fact was too much, never had time
Information ahead of time would have helped
All like PPT presentation
Would have helped if orientation was extended for a half hour
Appreciated a half hour with the service reps
When rehired thought it was a waste of time to have a new session
One person went from CUPE to M&P – did not know if she had to reapply.
Ee’s who did not speak English as a second language – they appreciated their patience
One person used to work for future shop – offered on-line presentation. Maybe a Q&A session
Overall response was positive
Stephanie will contact consulting company to make contact with Rob

Rob asked if there is a national organization for HR professionals

8.3.4 UBC Faculty – past experiences with the Benefits process
Forms could be easier to understand
Not too many complaints.
Nice to have greater accessibility to payroll reps.
Hard time understanding forms. Benefits package can take a long time to get. Like one on one contact. Foreign faculty have trouble understanding process.

FA will sometimes refer faculty member to appropriate contact.

Talked to person who handles sessionals. There are outdated offer letter templates. Gets questions at time, usually gets answer himself rather than asking payroll.

Printed off offer letter. Different letters for different positions. Probably 8 different letters, several pages long.

8.3.5 Administrators

8.3.5.1 Hospital
Many have not seen the benefits package we send to faculty
Would like more flexible packages – less dental for ex.
Don’t know if person has received an offer letter – they would like to be able to follow up on their own ee’s – all part of their nurturing process
More info on how long it takes to process this so they do not work
Why in our phonebook do we have so many categories?

8.3.5.2 UBC Campus
Not concerned and do not seem to get many comments about whether or not staff understands.
No check off list for things they need to accomplish
Staff has a blue check off list
Administrators would like to know the flow of this process so they know who to contact
Faculty has a benefits calculator – would like to see for staff – note SFU has a benefits calculator
Voice mail is unsatisfactory
Seem to like the paper
Like the idea of faculty getting a physical orientation
Like the idea of a mandatory assignment
Sometimes too general and not specific to ee
For faculty research services tried an orientation
Want and FAQ library
Pre-education and follow up is needed
A flow chart of the steps in the process for the employee
8.4  Brainstorming Solutions

8.4.1  M&P and Union Orientation

Task: Advisory Services sends offer letter and benefits memo to department employee or holds for pick-up by EE.

Peripherals from flow chart:

Offer letters contain number to call for orientation. In letter we include Name, Department, position, salary, duration - and template information. 49 different offer letters. Green NUTS, Blue M&P, yellow CUPE forms. Photocopy and mail out. MS Word, photocopier. Process waits on appt form from department. Sometimes appt form comes in with or without job. Admin Asst to Assoc for review then to the Admin assistant and then to the ee. Cycle for half-day turn around from associate to assistant to associate. M&P letters do not indicate a "what to bring list". Benefits info not properly displayed in offer letter. Problem ee's don't read the attachment and do not know about benefits. EE does not receive mail (offer letter) on a timely basis. We don't know the address of the ee - work office may not be where the home department is. Sometimes offers go out with wrong info such as name, salary. 40-50 new hires/month (to be confirmed). Time between issue and receipt (1-day, 1-week). Signature and signing date on return letter needed.

Brainstorming

Self register through web access. The website has whatever path they take for particular session.

Say session is full. You are waitlisted for next one, but if someone cancels out of his or her session, then there is an open space and perhaps someone who was previously rejected could fill that. Possibly get letter via email.

Offer letter would list the website and phone number

Another option is to pre register and if you want to change then you can via the Internet.

Common excel spreadsheet. Add columns which tracks which session ee should attend, and also whether they have attended or not. Khiengsan can then check this.

Offer to go out on different formats if possible mail, fax, email etc.

Separating job offer from the benefits info. Or leaving it together and formatting differently ie. Looking less like a flier and more official
Providing prospective attendees with all the info beforehand so that when they come to session they have had a chance to review, talk to spouses about plans. If we were able to format package in a convenient way it could go out easier with the offer letter.

Option to have employees fill out paper work before they come to the session. Give them the forms and possible bring administrators in to get trained on how to fill out the forms. ie. Educating the administrators on the importance of benefits forms, completion and orientation.

Put forms on CD and print them as they go. Or a tutorial on the CD. Or fill out forms on line.

Perhaps we could figure out different ways of generating 49 offer letters.

Start offer letter process sooner (not original), instead of waiting for signature from Dean or whoever is on vacation.

Let Departments generate and send out the offer letters.

Build checklist for appointment form

Eliminate double checking step for offer letter creation (Admin Asst to Assoc for review then to the Admin assistant and then to the ee)

Offer letter should automatically be generated based on approved info.

Check with audit if HR can accept faxed copies of M&P letter

Revise offer letter - put a phrase in the offer letter that you are eligible for benefits. But you will not actually get them unless you do the following.

- Move line stating you must return the letter to get paid
- Or – you must complete benefit forms in order to be enrolled

Provide incentives for attending the session – good, coffee, social

Market the excellent benefit plans that UBC offers. Even put in beginning with offer letter.

Make the session/sign up. Info. Fun

Ask where they want offer letter sent to since they don’t ee does not always receive the letter
Other options for benefits form completion if they choose not to attend the session.

Frances - a monthly eligibility report and we do a merge of letters and send them out. HR to proactively contact ee based on mew ee info in IHRIS

Annual benefits statements like annual pension statements by letter or available on line

Broadcast phone message regarding benefits.

Method of tracking whether M&P received their offer letter
- Maybe at same time they sign up for orientation
- HR or department contact ee if we haven’t received signed letter by start letter

Method of tracking whether ee’s have received offer letter

Can offer letter be signed at time of last interview?

Could offer letter be signed at first day of work?

M&P sign offer letter on first day of work

Have department sign up ee for orientation

Remind M&P during orientation that they must return signed offer letter

“First Day” Web site

Offer benefits “MOST” course

Separate sign up part from the info part.

“Quick start” so you have a sign up session and an education session

And even split up benefits and the pension from the other UBC stuff.

Task: EE does not attend session

Peripherals from flow chart:

EE's who miss benefits-there's no follow up. Optional benefits missed IDEA! There should be follow up. EE could come to finance at a later date. Finance does one on one but EE misses benefits (how they work) and info. EE's aren't encouraged to attend. EE may work shifts that
prevent from attending. Off site ee’s can’t attend or is difficult for ee’s to attend. This can all lead to a problem with image and perception of UBC. EE could wind up without MSP (Medical Services Plan).

Do we need to track attendance?

If the ee cannot attend then add self-service tool other than the one on one

HR sends letter to departments who have ee’s who have not attended session with some sort of educational standard form to the Administrator’s highlighting the importance of attending. – ie more education

Process: Front desk register ee’s for orientation (paper & pencil) HR Receptionist or other HR staff. EE registers for next available session

Inform ee’s of importance of enrolling in MSP thru UBC ASAP

Checklist:
Info includes name, department, job title, phone, Full or part time, New ee or already employed, ee group, new or transfer, monthly or hourly, length of employment, ee group. Form: Khiengsan's form. No tracking of who is elicited vs. who attends and who wants to attend and cannot because sessions are full. There is no hardware or software. Depends on when the receptionist receives the offer letter. IDEA!: new ee first day web site. Receptionist counts attendees for each ee group. Need originals (hand signatures for people in hospitals, not faxes). Eligibility matrix not used at front counter. We give ee information and then ask for it back. If ee shows up for wrong session ... IDEA!: column on offer letter log denoting benefit eligibility. Note: eligibility matrix not used at front counter? Adaptability - pretty adaptable

Brainstorming

Orientation Presentation – presenter notification to all presenter’s available hr benefits, presenter, HR Admin, HR or assistant

Orientation session mandatory. This shows the department feels it is important as well. Overall more support for the ee to go to session. Makes it more smooth if mandatory. See Development Office model.

HR Departments follow up with employees different ways if they do not attend orientation session or return benefit forms.

Scheduling more sessions per week, bigger sessions, more sessions, different venue with more room.
Sessions in different ways, video, CD’s, live etc

Modify current paper or spreadsheet so do not need to ask as much info.

Tell ee in letter which days for orientation. Perhaps just let them know the next 2 sessions available.

Have departments sign ee's up for the session

If not registered ee shows up let me into listen to pension info at least then do one on one

Train a different department each month re. Pension benefits for administrators.

Task: benefits presenter set up room, projector and binders and also unlocks the room

Check List:

*Why does presenter have to set everthing up? Computers sit on desks in room and are not used. Is there a current log on available? Keys are not available. Sometimes projector is not available. There not instructions available on how to set up projector. Open cabinet and take binders out. There is a limitation on how much storage space you can allocate to the bulky binders. There are usually enough binders. Put binder info on the web. Setting up room is a problem - no one wants to do it. Binders are costly.*

Brainstorming

Set up presentation on each computer screen in the session. (every seat has a computer)

Pipe PPT to training computers; binder material on line

Multiple keys for room / AV cabinet

Dedicated projector (room?) for sessions

Update instruction sheet in room/sent electronically

Have Florence set up

Change format of binders to a packet or electronic or on the web. Put all binder information on the web
First person in to handle room setup regardless of unit.

Have a backup person who can set up.

Set up night before

Combine PPT files on shared drive

Keep OTD, other materials in room

Give attendees heads up heading downstairs

Signage in building

Separate the employee groups i.e. aaps, unions sessions

Have attendees go directly to presentation area

Nametags pre-filled (not used = no shows) color code the name tags

Shape of the day poster – tells you up on the board what is going to be covered.

Cookies and coffee

Introduce themselves – a get-to-know activity

Separate OTD, benefits sessions

Cross training presenters; have department administrators do training with the professionals backing up.

Have a dedicated (career) presenter

Mixed mode/multimedia (Video from Martha/Lisa)

Build in extra capacity to accept walk-ins

Task: OTD Presentation (Q&A's)

Check List:

Wasted time for presenter. Process can result in a backlog. If set up does not work, the first presenter is delayed. Cannot get presentation set up. OTD presenter checks # of ee’s and picks up packages. OTD presenter leaves the crowd downstairs. If ee lost then reception helps them.
Signage would help. Agenda not clearly outlined. Limited time available for social interaction. Warm welcoming can be the most useful part of the presentation. If presentation goes on too long there is a delay for other presenters. When OTD presenter not there, benefit presenter might not share the same information.

Task: HR prepares supply of benefit binders and benefit forms

Check List:

Binders and forms collating preparation is time consuming. Some presenters give out forms at beginning of presentation and that creates distraction. Employee group for information purposes. Direct cost: expensive binders, photocopying and ee time to collate. Hardware - we use ppt and projector and computer. Not everyone can see the screen. There's no feedback. It takes 35-45 minutes to complete a presentation. 1 to 5 minutes between steps. Sometimes presenter does not know the answer to a question. Sometime ee's do not want to ask questions in front of group. Lack of follow up on complex issues. Not enough people to answer questions. Need to ask more confidential questions and there is nothing in place to answer that. Also recently plan design changes and provider has not provided updated information yet the presentation has updated information - often a delay in info shared by carrier. Binders might not be updated. Missing sections in binders and forms package can be incomplete.

Brainstorming:

Change production of booklets (consolidate to 1 document)

Hand out all documents at the beginning but not the forms

Fill in forms immediately after related presentation

Put presentations on each individual computer

Allow attendees to critique/feedback presentations (after the fact?)

Better comfort level in room

Gather all questions that cannot be answered and follow up; facility to ask follow up questions

Immediately sign up to get follow up questions answered; ‘hot line’ in room to

Review/rewrite presentation materials to reduce length of session
More time or staff for QA sessions

Greater emphasis on lifecycle changes and how to find info to deal with those who need it

Session starts on time

Eliminate duplication - coordinate resources

Confirm who is responsible for binder information update; also consider future changes eg. Benefit X will change on January 1st.

Educate all staff on where latest up-to-date info can be found

Create single web page where people can get presentation info., links, what should have been learned

Just in time creation of binders

Have employee create his or her own binder – select own material

Task: Benefits presentation Q&A's

Checklist:

Ee's interest goes down when we talk about life ins. and disability. Clients are interested in benefits they would use daily. Task redone. Bad ventilation; Length of session; too much info to assimilate; some info not relevant. Not enough people to answer questions. Presenters are not excited about presentation. No emphasis on lifecycle changes. Lack of a single reference point where someone can get answer to his or her questions. Backlog if presenter did not start on time or too many questions are asked. For Friday sessions (aaps) they already talk about library information so there is a lot of duplication (ie. duplication between aaps and benefits presentation). When presenter doesn't know incorrect information is communicated. Often a delay if binders are not prepared correctly.

Brainstorming

Better comfort level in room

Gather all questions that cannot be answered and follow up; facility to ask follow up questions
Immediately sign up to get follow up questions answered; ‘hot line’ in room to

Review/rewrite presentation materials to reduce length of session

More time or staff for QA sessions

Greater emphasis on lifecycle changes and how to find info to deal with those who need it

Session starts on time

Eliminate duplication - coordinate resources

Confirm who is responsible for binder information update; also consider future changes eg. Benefit X will change on January 1st.

Educate all staff on where latest up-to-date info can be found

Create single web page where people can get presentation info., links, what should have been learned

Just in time creation of binders

Have employee create his or her own binder – select own material

Task: SPP Benefits Presentation

Checklist:

Ask if hourly versus monthly because of pension plans. Ask proof of age. There are 2 forms - orientation sign on and enrolment. She gets info on forms including name dept phone options and if they are eligible. PPT, projector, computer. Cost is booklet, binder, photcopying. If too many people attend Francis asks for help. Sometimes ees are not on the system. 25 minutes to complete presentation. Time between steps is 1 - 10 minutes between presenters. Sometimes it is hard to get a hold of presenters. Benefits clerk has to track down next presenter. People do not understand why they have to submit proof of age. Duplication - different departments ask for the same information. Or they do not know that they need to bring ID. For pension - info shared was useful and clear. Orientations attendance info taken down again - duplication.

Brainstorming

Figure out beforehand what pension benefit ee is eligible for, what they may have already signed up for
Allow alternative ID formats eg. Driver’s license

Make proof of age/ID consistent between staff and faculty

Put scanner or photocopier in room for ID proof

Clearer communication of eligibility rules during the offer process. See ideas for communication

Distribute questionnaire during session asking ee’s which area/topic they would like more info on. Schedule separate session for those ee’s

Alternative Delivery Methods

Web Cast
DVD
Website/Chat Room
Separate forms web from

Schedule on-site visits
Orient people before they start

Quick and dirty Q/A site

Centralized email address

Standard questioning format/model

Have a website that allows options of what info ee wants, and then appropriate websites/pages display – Filtering process

Book on tape

People responsible for website need tools for maintenance of website

Include IUOE and ELI

In-group presentations look at times for presentations. Keep one-on-ones where appropriate

Task: SPP presenter Calls payroll reps to come down

Check list:

Brainstorming:
Provide nifty UBC pens to attendees

Remind/ensure payroll presenter will be on time

All presenters present for session

More training for presenters enlist other presenter more comfortable with public speaking

Redesign form to specify mandatory vs. optional

Make clear as possible intention of the form

Any ee's to fill in forms for compulsory benefits?

Group form according to logical progression

Pre-fill forms

Ensure attendee has required documents for beneficiaries

Indicate where to return forms if take home

Clearly specify acceptable data formats when filling in forms

Task: Payroll collects completed banking and benefit forms

Brainstorming

Ensure someone available to handle photocopying/scanning of ID

Tracking system for what has been submitted, what to come

Input waives into the system; add this to benefits sign on checklist

One place for submission of forms

Task: Department sends offer letter. Hr may include benefits contact of info.

Checklist:

Inconsistent format of offer letter. At time of recruitment some benefits info is shared at the department level. Inconsistent Benefits info. Share. Sometime faculty members are not aware if they are eligible or not. Administrators are not aware of faculty eligibility. They do not know where
or how to access info. FR is not aware if offer letter has been issued or received. Faculty do not know who supposed to generate offers. Sometimes faculty have insurance brokers etc. enquire on their behalf. There is more lead-time for faculty than for staff.

Brainstorming:

Standardize offer letter according to different appt types
Distribute electronically
Send info directly to apptee
Have letter indicate what benefits eligible, send benefits info package
Direct one on one follow up with new faculty (any Q’s what need from UBC?)
Educate admins re. Faculty benefits legalities – CD Rom, info sessions
Make translators available, inform departments of the resource
Improve format of critical international start info (more official looking - bullets)
(Maybe research this at other universities to see what they do)
Do not send info, have apptee call to become informed

Task: Department completes appointment forms (paperwork). Appropriate approvals occur

Check list:

Faculty do not know who is supposed to generate papers. Department completes appt form. Sometimes faculty have insurance brokers etc. enquire on their behalf.

Brainstorm:

Send appt forms electronically, have e-workflow

Task: FR receives appointment form - complete and sign off

Checklist:

FR reviews and signs on behalf of Martha. Faculty could be working here for a while without coverage. Appt forms incomplete and sent back to fac/departments - this results in further delay. Client complaints - too long 2-3 days on campus. 2-3 weeks off campus. Payroll keeps log of benefits packages sent out. Faculty complain they do not have a proper orientation.

Brainstorm

Allow signed offer letter to be sufficient for benefits signup forms
Allow apptee/dept admins to be able to see where in process things are

Educate depts to timeline process

FR to send out benefits package (cut delay between FR approval and benefits data entry

Task: Send to payroll. HR prepares package. Board notice sent to ee notifying regarding Benefit status.

Checklist:

Faculty complain that they do not have proper orientation. 1 day to 1 week to get form from FR to payroll. 8 different types of pension packages.

Brainstorm

Have system assign benefits package based on data entry

Just in time printing of packages

Task: Payroll rep sends package to ee's department. Package sent within one week. But if no supplies can take 2 to 5 weeks. No way to anticipate no. of packages needed each week. Each payroll decides when to send the package.

Checklist:

Payroll keeps a log of benefits package sent out. Packages not always available when required. FR keep log of info, mail received date received, date sent to payroll, and comments, and type of document and department sent to. Payroll reps do not have time to sign in spot provided. Could be a couple or 4 weeks to get faculty packages made up. We do not know if the faculty (ee) has received the package. Hospital sent package back for misplaced label.

Brainstorm

Make benefits faculty package electronic (current pencil and paper) and standardize usage.

Advance heads up from FR on number of packages that will be needed in near future (use FR log)

Revise forms/cover letter to provide (or remove) personalization
Streamline package so it does not have to be so big or put packages on line

Confirm that department or apptee that they have received the package

Label needs to be in proper location for hospitals

Task: ee completes forms and returns to payroll- sometimes ee returns to department. ee can call payroll rep. for more information or an appointment. Payroll reps get up to 100 calls or emails per day

Checklist:

3 reps spend 30% of time answering questions about benefits. Unacceptable service - sometimes do not return emails or calls for over a day. Faculty not clear on who to call. There's inconsistent information depending on who you talk to - best not to answer if you don't know. Required documents not indicated. Forms may be incomplete or incorrect or even the wrong form. Benefits for Dummies included in some packages but not all. Clients do not see the point of doing the paperwork. Clients complain about no follow up. Forms don't all come in the same time for the same person - this causes a delay. Do not inform if there are lifecycle changes. Bad hand writing - hard to read.

Brainstorm:

Tell apptee in offer letter that they should receive package from department by date X, if do not receive contact us

Notify ee once package is on the way.

Send package directly to ee

Separate service reps job function so one person devoted to answer questions about benefits. Education vs. processing (30% FTE x 3)

Ensure calls/emails answered in timely manner

There should be a mutual understanding that the client knows when to expect to have their call returned (service level agreement SLA)

Cross training between service reps, FR, Dept's to avoid inconsistent information getting out

Define boundaries of providing information (what is FR's responsibility, what's Benefits' responsibility)
Document checklist on what apptee needs to return or provide

Bold where docs should be returned

“Benefits for Dummies” booklet (also put online); send to FR and Depts

Automatic enrolment

Only require ee’s to provide dependant info and what options they want

Colour code faculty vs. staff forms (standardize across functional units)

Inform re. Life changes how to

All forms to indicate rep with name or initial in corner so that stray is more easily tracked

8.4.2 Faculty Process

Task: Department sends offer letter. Hr may include benefits contact of info.

Checklist:

Inconsistent format of offer letter. At time of recruitment some benefits info is shared at the department level. Inconsistent Benefits info. Share. Sometime faculty members are not aware if they are eligible or not. Administrators are not aware of faculty eligibility. They do not know where or how to access info. English as a second language can be a problem. FR is not aware if offer letter has been issued or received. Faculty do not know who is supposed to generate offers. Sometimes faculty have insurance brokers etc. enquire on their behalf. There is more lead-time for faculty than for staff. Offer letter should included benefits eligibility package. Clients don’t understand benefits and difference between old plans. Phone, fax and direct line should be provided to link with service reps. Departmental administrators do not know what benefits there faculty are eligible for. Liability issue if benefits are not explained to the ee. eg pregnant faculty member sent home. "Plain English" forms for people whose second language is English. Sessionals, research associates do not get much info re regarding benefits at time of offer

Brainstorm:

Direct line contact to service reps

Upgrade communication to faculty re. Upcoming changes that impact decisions

Check previous page on chart
Benefits information to faculty ahead of time ahead of time when accept. Immigration vs Canadian

Telling up front what eligible for on offer letter

Customizing a cover letter in 'mother' language

FR to send out offer letters

Better, earlier, communication with sessionals and post docs.

Task: Department completes appointment forms (paperwork). Appropriate approvals occur

Checklist: Faculty do not know who is supposed to generate papers. Department completes appt form. Sometimes faculty have insurance brokers etc. enquire on their behalf.

Brainstorm:

Email appointment forms

Task: FR receives appointment form - complete and sign off

Checklist:

FR reviews and signs on behalf of Martha. Faculty could be working here for a while without coverage. Appt forms incomplete and sent back to fac/departments - this results in further delay. Client complaints - too long 2-3 days on campus. 2-3 weeks off campus. Payroll keeps log of benefits packages sent out. Faculty complain they do not have a proper orientation.

Brainstorm:

Bring administrator into the tracking loop with department administrators
Automate benefit package assignment based on criteria (and/or have department admins be able to do this)

“Send this package link to a friend” – on line

Task: Send to payroll. HR prepares package. Board notice sent to ee notifying regarding Benefit status.

Checklist:

Faculty complain that they do not have proper orientation. 1 day to 1 week to get form from FR to payroll. 8 different types of pension packages. Payroll keeps a log of benefits package sent out. FR keeps appointment forms and then sent to payroll.

Brainstorm:

Standardize use of package sent log

Give benefits people advance heads up re upcoming appointment forms

Place bureaucracy in hands of departments

Task: Payroll rep sends package to ee's department. ee can contact payroll rep for more information. Package sent within one week. But if no supplies can take 2 to 5 weeks. No way to anticipate no. Of packages needed each week. Each payroll decides when to send the package.

Checklist:

Packages not always available when required. FR keep log of info, mail received date received, date sent to payroll, and comments, and type of document and department sent to. Payroll reps do not have time to sign in spot provided. Could be a couple or 4 weeks to get faculty packages made up. We do not know if the faculty (ee) has received the package. Hospital sent package back for misplaced label. Sometimes faculty have insurance brokers to enquire on their behalf regarding benefits. Faculty save benefits questions until the last minute and expect immediate service.

Brainstorm:

Use automation to generate packages and send them out
Better contact list; phone book; phone tree; 1-800 number

If caught in telephone tag, provide other options

Marketing of benefits – ads on campus, in UBC reports, Ubyssey

Use pay advice information box to promote HR benefits site/materials

For marketing – “Bob the benefits guy”

Task: ee completes forms and returns to payroll- sometimes ee returns to department. ee can call payroll rep. for more information or an appointment. Payroll reps get up to 100 calls or emails per day

Checklist:

3 reps spend 30% of time answering questions about benefits. Unacceptable service - sometimes do not return emails or calls for over a day. Faculty not clear on who to call. There’s inconsistent information depending on who you talk to - best not to answer if you don’t know. Required documents not indicated. Forms may be incomplete or incorrect or even the wrong form. Benefits for Dummies included in some packages but not all. Clients do not see the point of doing the paperwork. Clients complain about no follow up. Forms don’t all come in the same time for the same person - this causes a delay. Do not inform if there are lifecycle changes. Bad hand writing - hard to read. There is no notice of which documents need to be provided. No follow up on benefits declined

Brainstorm:

Benefits channel in myUBC.ca

Single source of info for service provider reps (Benefits, FR, HR, Pensions)

If/then cheat sheets for ee change requests to a service unit (eg. Ee phones Pensions re name change. – ee told they also have to do x,y,z

Send notification to other units re. These changes

Fill out forms on-line

Typeable PDF for forms
8.4.3 Recommended Process

8.4.4 Top 3 Brainstorms from each Process Streamlining team participant

- Create a continually updated one source for educating and supporting all people needing benefits/pension info but customize the view each person gets (new employee, supervisor, administrator, etc)

- Develop (redevelop) benefits web site according to ee group; expanded FAQ’s life stage changes; prominent link to benefits carrier(s); “new employee” section/tutorial, dept/supervisor (Quick start/dummies)

- Other methods of benefits communication ie. Self directed session on DVD or CD-Rom

- Re-design HR benefit website – make it user friendly, idiot proof. Links to benefit info/forms/directory/FAQ/ Things to do: first day, first few weeks, first few months …

- First day website like staff finders

- On line benefits orientation; mandatory for all new hires; ee’s can do this on the first day at work – use office computer; or drop in to HR to use computer

- Comprehensive page with info and forms – copy University of California at San Diego; on-line forms; combined faculty and staff

- Eliminate XXXX orientation and introduce. Lunch and lead info benefits sessions (Q&A) forms XXXX

- Eliminate in person orientation; more to integrate self guided orientation using different formats (web’ audio etc). Presenters become Q&A people. Host a reception separately so new employees can meet and greet

- Online services. UC San Diego model; staff finders model; web based tutorial/procedure to enrol in benefits

- Provide pension and benefits info to new employees as early as possible in the format they want it (paper, electronic, web, etc)

- Educate department admins and ee’s. Benefit entitlement. Online help resources

- Pre-orientation. As much info to ees before session ie. First day website
• Educate ee’s earlier as to eligible benefits and what each benefit plan covers. Modify offer letters specific to ee. Send booklets with letter

• Separate education from form filling

• Separating education vs forms completion

• Have one or two people dedicated to answering bens. Questions from faculty and staff (phone, email, one on one)

• Separate informational from signup; more Q&A time; provide info package in advance

• Benefits and pension info forms distributed to ee (staff and faculty) prior to orientation

• Benefit info should be available prior to start date and form completion

• Separate education from sign up process (education done on own time ie. Web orientation for new ee’s) sign up done with payroll reps.

• Automate generation of 49 offer letters – use excel, access

• Marketing the benefit plans so ees have greater appreciation of benefits and cost to employers

• Streamline forms; fewer forms; consolidate forms; collect information just once

• Tracking that the benefits package by faculty and forms returned to payroll; follow faculty and staff enrolment

• Provide updates/ marketing to staff and faculty re. Changes to benefits or other

• Review rewrite all binder materials and make them available on web; review/ rewrite offer letter communication

• Closed mechanism for tracking info received/ session accepted or declined; benefits selected; make available to all involved parties

• Swift thinking re benefits from an occasional necessary evil to an ongoing concepts (friendly, marketed, “Bob”, etc)

• Review streamline content of binders (create virtual binder) to substitute and streamline forms
• Train department admins

8.5 Guest Presentations

8.5.1 Joanne Young – Assistant Manager, Payroll – Financial Services
Experience with benefits orientation
Was able to attend close to start date
Different groups took a lot of time to accommodate different groups. Redundant for her as she knew how to complete forms. Have not gone through binder. Too overwhelming

Length was ok. Eliminate aaps, OTD. Registration ok. Expecting warm and fuzzy introduction to UBC? No, not really. They are two separate things. First thing is getting paid. Getting paperwork in. Need info beforehand ie. Parking. Frances – what form would she like aaps, otd, ind – did not really answer

Binder useful as a resource. As long as you have binder available ie. Website


Important to get correct info in timely manner. Payroll still involved in process.

All manual, nothing on web. PPT. Forms completed at same time. School district – 2 per year. TOC 40-50. Fraser health authority. Health care. No orientation, huge area, off site ee's sent package, further questions contact benefits, toll free number. Too many websites. Yes needs to be centralized.

First day website to include virtual orientation plus other information. JY warm and fuzzy. Yes ee needs to have this. What other info? Sports activities, housing, squash time, golfing, trails, fun things to do. Centralizing infor key think. Would prefer coming in to complete forms then have to the warm and fuzzy orientation. Better for UBC to sign ees up for university.

8.5.2 Robert Boudreau – Director HR (Management Systems)
2 phases – one is tech upgrade
IHRIS, FMIS can be accessed across geography via the web, reduce customizations (benefits may be impacted the least)

Flowcharted process, and developed criteria for each process and sorted to see which process is in worst shape. Take worst one, then second worst etc (staff recruiting, faculty recruitment, absence tracking, position management, training, inventory, registration) and re-engineer. This will be the first project in phase 2.
So will take each of the top worst processes and re-engineer each one. Benefits was around 5 or 6.

Peoplesoft has put energy into self service apps. People soft software is not distributable. Screens are not user friendly. Ex. Joe darling said it takes 18 months to get a payroll service rep trained. Not just problem with peoplesoft, but complex business rules. We have 20 different employment groups, this business knowledge problem – so peoplesoft has a self-service application

2 benefits modules –

1. Benefits administration can embed administration business rules. Say employment change, the system will detect this and make appropriate changes

2. Self service module. Oriented to faculty and staff and allows them to enrol themselves into optional benefits. Ex. If single or married can change status. Can change dependants and beneficiaries.

E benefits dependant on ben admin module being implemented.

He took list and presented to HR directors. Also did own analysis when starting with HR. Compared analysis with a stakeholder group from campus community. 20 30 people came in, and list results were similar. Presented to HR, today is taking same list and presenting to IHRIS advisory group for input, in Jan goes to IHRIS update steering community. Dana Merritt, Anoush Poursartip, Ted Dodds ...

Phase one will be implemented first week in April. Between January and April hoping to do a streamlining process.

April – June hopefully start phase II. First project, recruiting, could take to end of 2004.

Will want to make first project one with big impact.

At earliest, last half of 2004 if benefits was in second place. But that is only if benefits became second place. May be able to do multiple projects in parallel.

Anything else, how peoplesoft can affect ben. Till ben admin is implemented, not much. However, in process documentation is picking things out that are quick wins. Some is software related, a lot is not. Data integrity is high on peoples radar screen. May have 30 day integrity work shops, of which a third to a half are benefits related. Data integrity is mostly central admin – hr, service reps. So if benefits data then will bring in Natasha’s group.
How does this play into what we are doing? Want to streamline forms, but also involve departments. So is there a way to have a wider audience attend the workshop. Well, workshops deal mostly with data integrity. A benefit is transaction between ee and payroll department.

But, if ee is filling in forms, ee will need to know what data to enter, and this ties into what we are doing. (Tie in to providing info to ee’s regarding data integrity). So there are things that we can provide that may tie in with data integrity issues.

Besides focus on integrity. Integrity is a big issue now because once first phase is implemented, many people will have access to it.

Other priorities involve training, documentation, forms design. Once date integrity is done, there is lots of stuff.

With forms, if we look at how forms should be streamlined, would you have involvement with that? Will give analysis of benefits enrolment. Of 58 processes, benefits had most problems with it, almost double the problems than second.

One of our top 5 problems is closing loop, how do we insure forms have been received, inputted etc. Does peoplesoft have any way of tracking? In release 8 there is an event manager … may be possible to track whether somebody had attended benefits orientation or not. One of the processes included in analysis was benefits orientation.

Covered peoplesoft, and some of the quick wins. How about myHR website

A year old. Never put into production. If your IHRIS no is registered with CWL, then you can get automatic info – 3 pages: personal, job and benefits page. If want to change data, can get a link to form – kind of low tech but starting small. No way to encrypt data so has not been actually used. IT services said would put in encryption by may of last year but still not implemented.

Recommendations from our project could put pressure on IT services. Berkeley was here for a couple of days, brainstorm. They use peoplesoft. They have a portal similar to myHR. They had a huge backlash from campus community. Turned out that a lot of faculty, particularly researchers, were getting administrators to sign on with their id to do work for them – so administrators had access to salaries etc. IF we implemented myHR UBC could have a similar problem. Communication re security must occur so that people keep their data personal
Will myHR go beyond just view of data? E benefits will replace 3 pages on myHR. Will probably buy e benefits in project 2 or 3. e profile can change home address etc.

Does it include pensions, or just benefits? Yes, includes pension enrolments.

HR website. Spent last 1.5 years interviewing peoples, asking what they want. 900 menu items taken customer oriented approach. Ee lifecycle is a guiding principle. Start off as prospect then ee then established ee then want to leave because of resignation or retirement – these are the actual menu items.

There are other menu items, devoted to departmental admins which does not fit into lifecycle. A huge component of every section is benefits, applicable to all stages of the ee lifecycle. Section on orientation for new ee. Hoping that benefits orientation material could be put on benefits section of website.

Can users customize, eg. If identify union, info changes. Yes, first thing is it asks what employment group a person in, and everything else follows from that. Personalization according to ee group.

Content development starts in January. Will they ask service reps for input? Yes. Have only identified menu items, no content yet. Talking to all groups, payroll, compensation, staff finders.

Might want to check U. of C. San Diego.

PRB is using Pam and Lindsay for construction.

Personalization according to ee group. By personal ID, or is it more navigating by ee group. Could not do for job applicants, but there are some automated things that can be done. First plan is a static website, but then over time, secondwave will be to integrate with IHRIS.

Customization such as maternity questions, dependant on say lifecycle? Is this easy to program, in say 3 month turn around? As long as it can be done in a secure way. Peoplesoft is basically oracle, so easy to write java code to get at data.

One of recommendations is a centralized benefits website. How does this flow into HR website overall? Already planning and asked for funds. Enough funds to keep 2 people busy for 8 months.

In menu structure outline services they have access to, even non-hr, like parking, swimming pool, theatre.
Two problems are training and documentation – identified through BPR. Documentation is currently non existent. With new release, what tools, training, categories. Peoplesoft provides “learning assistant”. Looked at this. Could use to document and train but then found out peoplesoft is discontinuing there relation with people who provide this tool. Is being replaced with user productivity too – from Global Knowledge. Great tool. Can map out screens. It tracks how you are doing. Can store scores. Another tool takes you through live IHRIS screens and guides you with pop ups. Like MS clippie.

Could use tool for benefits on line enrolment.

Could tools be used in other environments? Yes. All run on browser. Could be used for other training – like benefits sign on.

Providing training to department admins. This could be a tool for them. Or for the ee themselves. They can do this on their own time. Price is around same price as previous tool. Probably very little extra cost. Will probably be purchased soon. It is a very user friendly tool. Say forms change, flow chart highlights screens (like PPT slide view) and can easily replace.

Don’t have to be in peoplesoft system to access productivity tools. Could access through the web.

Is this a client server tool? End user does not need application. In pre e benefit world may just walk people through forms.

Could you have a writeable PDF. Not sure. Have to ook into it.

Talking about various ways of collecting info. If want people to fill out on line, what are possibilities of that? Anything is possible. Issue is making sure it is secure. Probably have to have an authentication process like CWL.

One idea is you identify yourself, and then system comes back and asks you for information. Just enter name, sin once.

Are there mechanisms for this now in software? Release 8 built so systems can integrate with other systems. If put in business rules once, peoplesoft system and online systems would use the business rules. IHRIS and FMIS was looking at using integration software as well. If service rep needs to review a transaction, this is where workflow comes in, and it can push the transactions to the appropriate person. Ex. New hire data, pushed into workflow, then to faculty.

Typeable pdf’s. fill out, save or email. Are there tools that so that you can map field to field, ie. From PDF to another screen. Seems possible.

Robert will send MS Project and visio flow charts.
### 8.6 Recommendation Brainstorming

#### 8.6.1 Website

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>The binder is going away.</strong></td>
<td></td>
</tr>
<tr>
<td>Employees administrators and or HR staff can print out parts or all of the booklets on the online site.</td>
<td></td>
</tr>
<tr>
<td>Kiosk for employees to print out documentation themselves – could go with the lab</td>
<td></td>
</tr>
<tr>
<td>Rewrite documentation contents in plain English and better organization</td>
<td></td>
</tr>
<tr>
<td>Reinforce concept that website is always the most current source of official information</td>
<td></td>
</tr>
<tr>
<td>Appropriate “owners” of documentation information. Have the ability to update respective information (This documentation would include/integrate suppliers documentation)</td>
<td></td>
</tr>
<tr>
<td>Various formats for documentation (website, printable pdf, audio). Documentation should all be created from a single source which feeds various formats.</td>
<td></td>
</tr>
<tr>
<td>Benefits information on website reduces storage space, releases employee time</td>
<td></td>
</tr>
<tr>
<td>Stephanie to cost the binders out</td>
<td></td>
</tr>
<tr>
<td>In each session have a person from payroll, benefits and pension. Or have a hotline in room.</td>
<td></td>
</tr>
<tr>
<td>A new hire website, with all information available, but open enough for ee’s who have been at UBC for awhile. Not linked to HR per say. Go through homepage at UBC. Resource for new ee’s but just as applicable to any ee on campus, you just choose a different path.</td>
<td></td>
</tr>
<tr>
<td>MBA ColdFusion type website not implementable in 90 days</td>
<td></td>
</tr>
<tr>
<td>When ee receives agreement, get ID code, employee ID, that they have all their life – issue with ee rejecting</td>
<td></td>
</tr>
<tr>
<td>Benefits Orientation Process Streamlining Project</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
</tr>
<tr>
<td>job offer after ID given</td>
<td></td>
</tr>
<tr>
<td>Offer letter directs ee to first day website</td>
<td></td>
</tr>
<tr>
<td>Benefit code – when log onto website, just enter code and all relevant eligible benefits information shows up. Ben Admin is working on this. See Linda LaSalle (Sp?)</td>
<td></td>
</tr>
<tr>
<td>Incentives that ee should look at site</td>
<td></td>
</tr>
<tr>
<td>Ee completes forms while going through first day website</td>
<td></td>
</tr>
<tr>
<td>Screens: possibly a search engine or menu system</td>
<td></td>
</tr>
<tr>
<td>Complete forms while being stepped through the orientation</td>
<td></td>
</tr>
<tr>
<td>A function like the MBA ColdFusion website – if form partially completed can return to later without any loss of information</td>
<td></td>
</tr>
<tr>
<td>Chat support while going through site – eg. Phone number, someone to speak to while going through site</td>
<td></td>
</tr>
<tr>
<td>A database which temporary holds information entered into each subsequent form, so if info has already been added eg. Name, then all subsequent forms with a name field will be pre-populated.</td>
<td></td>
</tr>
<tr>
<td>Continue to offer MOST courses on benefits</td>
<td></td>
</tr>
<tr>
<td>An optional post survey</td>
<td></td>
</tr>
<tr>
<td>Estimated times for process completion, so expectations are understood – customer service</td>
<td></td>
</tr>
<tr>
<td>Session for ee’s to meet and also have opportunity to fill forms on the spot with a rep available for assistance</td>
<td></td>
</tr>
<tr>
<td><strong>8.6.2 Forms</strong></td>
<td></td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>All need to be standardized in the same font, logo and look and feel. Dd/mm/yy vs mm.yy.dd email address should be on there. Requested documentation should be the same for all forms. Verify what Government accepts as legitimate.</td>
<td></td>
</tr>
<tr>
<td>Documentation should be collected once from employees and shared between HR and Payroll. Specific to pensions</td>
<td></td>
</tr>
<tr>
<td>Need to address need for verification of original Administrator to certify original document</td>
<td></td>
</tr>
<tr>
<td>Is forms are submitted electronically, then how are supporting documents submitted</td>
<td></td>
</tr>
<tr>
<td>Have typeable pdf's which can be manually filled out or electronically filled out and then printed</td>
<td></td>
</tr>
<tr>
<td>Forms printed out with automatic routing. Smart form Prefill previously completed information.</td>
<td></td>
</tr>
<tr>
<td>Recommend: Outsource to people who know this inside and out.</td>
<td></td>
</tr>
<tr>
<td>Recommend: go with typeable pdf's</td>
<td></td>
</tr>
<tr>
<td>Future recommendation: electronic submission, possibly with IHRIS interface</td>
<td></td>
</tr>
<tr>
<td>Remove duplicate information or unnecessary information. Don't request information that has already been collected</td>
<td></td>
</tr>
<tr>
<td>Forms need to be revised/reviewed ie. Is info relevant</td>
<td></td>
</tr>
<tr>
<td>Eg. Don't need to ask for student ID on personal data form</td>
<td></td>
</tr>
<tr>
<td>Extended health or dental – is material relevant to that form, or making a claim?</td>
<td></td>
</tr>
<tr>
<td>Eliminate carbon copy for optional life questionnaire</td>
<td></td>
</tr>
</tbody>
</table>
Staff pension forms – double sided one, on full time, “I wish to join staff pension form immediately …” but isn’t this the staff enrolment form?

Need to educate administrators on proper forms to be used

Is it possible to combine forms where there is duplication and when authorization can be streamlined

Benefits forms could go from 12 down to 6

Do we want to recommend that we get a form designer involved

Forms should be reviewed once a year

Tell departments to throw away all their old forms and educate them that forms are always available online

Instructions – form designer will have a lot of input.

Do we want directions on forms. Form directions are on website, and can be printed out if needed. Add a decline column to all forms for tracking.

Are we going to have a wall of forms? Replace with an on demand kiosk. Talk to student services about kiosk
### 8.6.3 Tracking

<table>
<thead>
<tr>
<th>Two perspective – client and institution</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Client</strong></td>
</tr>
<tr>
<td>Checklist – on one side all forms, eligible benefits, contact department and number, mailing instructions. Another column with estimated time to process, some blank columns, another for status update. Eg. Call and should be done at end of month. Closing the loop. How do you let people know forms are processed and they have unknowingly waived benefits? Like pensions, option to decline so know this is purposeful. If myHR is working, can get benefit info. from there.</td>
</tr>
<tr>
<td><strong>Institution</strong></td>
</tr>
<tr>
<td>Do we want to track things like, received offer letter, have visited website. Hard to track phone calls. Want to submit onus back to ee. Check website to make sure forms submitted, received etc.</td>
</tr>
<tr>
<td>Put employee ID in offer letter. Orientation is way to get ee ID. So after they key information, fill out forms on web, at end ee get employee ID.</td>
</tr>
</tbody>
</table>

### 8.6.4 Marketing and education

<table>
<thead>
<tr>
<th>Separating education from sign up</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mission statement – “we care”, “we will listen”. Get a few people together to come up with one. Have the mission statement in the offer letter.</td>
</tr>
</tbody>
</table>

*HR should come up with a vision. There is an upcoming HR retreat – this is on the agenda. Should be an HR mission statement, and then several key concepts. Use mission statement to drive HR’s benefits philosophies/messages. Create benefits mission statement. Key messages also used as marketing messages. On website, forms, posters, offer letter… in the end, must act it, live it. Put the human feel into HR.*

Poster showing stages of lifecycle. New ee, mat leave, retiring showing different options available.

*Visualize concept of ee lifecycle using posters and other*
<table>
<thead>
<tr>
<th><strong>marketing materials – email broadcast, mugs …</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>One benefit – one phone number. One benefit – one email. Creating a 1-800 number. Have one phone number you can call to reach a phone tree. Why should everyone have to figure out all these nos, and also reduces telephone tag.</td>
</tr>
<tr>
<td><strong>Single points of contact for all health, welfare and pension benefits – 1-800 number, email, phone tree, out source first level of support, changes to UBC directory and involve campus directory people</strong></td>
</tr>
<tr>
<td>Have trainers to go around to the departments and train the administrators.</td>
</tr>
<tr>
<td><strong>Have benefits trainers proactively going to departments to train both administrators and employees.</strong></td>
</tr>
<tr>
<td>Importance of a roll out communication plan before we go live with website (advisors to discuss topic in employee council meetings; HR proactively contacts administrators to set up training on website). To ensure that we communicate that we are all stakeholders of the process in ensuring employees are informed of their benefits and that they are properly enrolled in a timely fashion ie. Not just HR or payroll, but everyone.</td>
</tr>
<tr>
<td>Proactively informing people about their life changes</td>
</tr>
<tr>
<td>A “what’s new” indicator on website</td>
</tr>
<tr>
<td>Marketing as a form of education – want to market fact that this is a good thing</td>
</tr>
<tr>
<td>Incentives for completing the virtual orientation (Eg. If you are the 1000th person to visit website you win something)</td>
</tr>
<tr>
<td>Earlier education</td>
</tr>
<tr>
<td>Educate employees to use the web more and it’s a good thing</td>
</tr>
<tr>
<td>Poster and brochures put existing employees in them as highlights. Put picture of a benefits person on cover letter.</td>
</tr>
<tr>
<td>Set up MOST courses around benefits, beginner to advanced. Have a mini certification for incentive.</td>
</tr>
</tbody>
</table>
At the university wide orientation setting up a booth.
Give info to unions to send out and reach more members.
Add stories to UBC report that are dedicated to benefits.
HR working list, email tree for all administrators.
Focus on branding, create own and comply.
Nine versions of UBC logo on forms!!! There are standard logos on www.publicaffairs.ubc.ca/ubclogo
A commercial on benefits that could put on website. Maybe use arts students to save money.
Because impersonal and welcoming, have name tags for people.
Nice to have on the web, a quickstart.
A welcome sign in HR.
Some promotional materials, pens and coffee mugs.
List benefits website in paystubs.
Top 3 or 4 points
Mission statement
What points we want to come across – “we care”, “we listen”
Single point of contact for phone and email.
Education component, going out to departments.
Putting the human back in human resources – also pictures of ees on website.

Mission statement – everyone should be involved
Legal goes over everything released on web
Phone tree – problem, in payroll, hit zero to avoid tree
Who will make sure emails are answered
Out source first level of support to IT customer service center
If clear and limit options for eg. Sunlife is complicated
How often are departmental site visits? Once or twice a year
Name tags – HR only
All front line staff wear name tags
### 8.7 Short Term Solutions

<table>
<thead>
<tr>
<th>1. Forms</th>
<th>Easy - redesign forms, consolidating info, same style, proper logos etc pdf</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resources</strong></td>
<td>Staff time for redesign</td>
</tr>
<tr>
<td></td>
<td>Staff time for education and distribution</td>
</tr>
<tr>
<td></td>
<td>Printing costs</td>
</tr>
<tr>
<td><strong>Challenges</strong></td>
<td>Building consensus on form design</td>
</tr>
<tr>
<td></td>
<td>Distribution</td>
</tr>
<tr>
<td></td>
<td>Staff time</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. Website/virtual orientation</th>
<th>Easy - add/redesign forms to current website</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resources</strong></td>
<td>Minor staff and technologist time</td>
</tr>
<tr>
<td><strong>Challenges</strong></td>
<td>None</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Tracking</th>
<th>Easy - post audit IHRIS queries</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Resources</strong></td>
<td>Staff time</td>
</tr>
<tr>
<td></td>
<td>Programmer time</td>
</tr>
<tr>
<td></td>
<td>Mailing supplies</td>
</tr>
<tr>
<td><strong>Challenges</strong></td>
<td>Staff time</td>
</tr>
<tr>
<td></td>
<td>Mailing and printing costs</td>
</tr>
<tr>
<td></td>
<td>Education - Making sure people respond</td>
</tr>
</tbody>
</table>
## 8.8 Repetition on Forms Matrix

Forms used in the Benefit Orientation
Legend [ x = form field; o = optional; c = compulsory]

Note: There are 245 form fields, and 66 unique form fields. This means that 179 fields are repeated.

<table>
<thead>
<tr>
<th>Field</th>
<th>O.G.L.</th>
<th>Ext.</th>
<th>Personal data</th>
<th>Sun Life</th>
<th>SPP/FPP Enrolment</th>
<th>Basic GRP</th>
<th>E.F.A.P.M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal/external</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lname</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fname</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Optional vs Compulsory</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee group</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signature</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Birth date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SIN</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dept</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gender</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2nd Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Day phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ee ID</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Res. Address</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pos Title</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sponsor details</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EE Group</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appt Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ben Info</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appt Dates</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td>---</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mailing addr</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beneficiary Relation</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dep children details</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>F/T or P/T</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hrs of work</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pay Type</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Checked by</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attached on file will submit</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>health no</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>status in Can</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>new or rehire</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>division</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>class/plan</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Benefit plan election</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>coverage type</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>dental</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>new enroll</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>increase in coverage</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>date of hire</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>optional life</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>amt of coverage</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>tobacco use</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>spouse sig</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>spouse sig date</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>increase in optional group life coverage 8 boxes</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>name of employer</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>medical questioning</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>billing group</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>previous employer</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>date of termination</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
list of dependants x
relationship to ee x
bank information
AH phone and type of phone x
SI Student ID x
Frequency contact details x
e-mail address x
trustee info x
proof of age x
residence info
existing investment allocation box
new investment allocation box
request to waive waiting period
spouse proof of age

forms continued …

<table>
<thead>
<tr>
<th>Field</th>
<th>O.G.L.</th>
<th>A.D.B</th>
<th>Ext.</th>
<th>Health/Dental</th>
<th>Personal</th>
<th>Sun Life</th>
<th>SPP/FPP</th>
<th>Basic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal/external</td>
<td>i</td>
<td>i</td>
<td>i</td>
<td>e</td>
<td>i</td>
<td>i</td>
<td>l</td>
<td>i</td>
</tr>
<tr>
<td>Lname</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Fname</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Optional vs Compulsory</td>
<td>o</td>
<td>o</td>
<td>c</td>
<td>o</td>
<td>o/c</td>
<td>o</td>
<td>c</td>
<td>c</td>
</tr>
<tr>
<td>Employee group</td>
<td>all</td>
<td>all</td>
<td>all</td>
<td>all</td>
<td>all</td>
<td>all</td>
<td>all</td>
<td>all</td>
</tr>
<tr>
<td>Signature</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Date</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Birth date</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>SIN</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
<td>x</td>
</tr>
<tr>
<td>Field</td>
<td>Dept</td>
<td>Gender</td>
<td>2nd Name</td>
<td>Day phone</td>
<td>ee ID</td>
<td>Res. Address</td>
<td>Other phone</td>
<td>Pos Title</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------</td>
<td>--------</td>
<td>----------</td>
<td>-----------</td>
<td>-------</td>
<td>--------------</td>
<td>-------------</td>
<td>-----------</td>
</tr>
</tbody>
</table>
date of hire x
optional life x
amt of coverage x
tobacco use x
spouse sig x
spouse sig date x
increase in optional group life coverage 8 boxes x
name of employer x
medical questioning x
billing group x
previous employer x
date of termination x
list of dependnants x
relationship to ee x
bank information x
AH phone and type of phone x
SI Student ID x
Frequency contact details x
email address x
trustee info x
proof of age x
residence info t
existing investment allocation box
new investment allocation box
request to waive waiting period
spouse proof of age
8.9 Flowcharts

Benefits Orientation Process - M&P and Union

- Advisory sends offer letter and benefits memo to department, employee or holds for pick-up by EE.
- EE receives offer letter
- EE calls HR to sign up for session; EE calls or drops by HR
- TRA, Cufe 2950 & 116 keep letter
- M&P signs and returns offer
- Front desk register ee's for orientation (paper & pencil). HR Receptionist or other HR staff, EE registers for next available session
- EE checks name off list. Receptionist tracks inventory of binders/packages
- OTD Presenter greets ee's
- EE's taken down to session room 241
- EE does not attend session
- Check-in
- Benefits presenter set up room, projector and binders and also unlocks the room
- EE comes to GSAB
- EE fills out forms on own and does not attend session
- Orientation Phase...
EE completes SPP forms and takes them home to complete. EE is informed to provide proof of age at a later date.

SPP presenter photocopies proof of age.

EE informs SPP presenter of age to collect forms.

Payroll assists employees to complete banking and benefits forms.

Payroll assists employees to complete banking and benefits forms.

EE takes the forms home to complete and submit later.

Orientation & Form Completion

EE informed to provide proof of age at a later date.

SPP presenter calls payroll reps to come down.

Payroll assists employees to complete banking and benefits forms.

Hand out banking and benefits forms to get them started.

OTD hands out info.

EE receives benefits binder from OTD.

Benefits Orientation Process Streamlining Project
Payroll collects completed banking and benefit forms
Payroll photocopies documentation
Payroll disperses forms
Payroll (Health, Dental, BGL, etc)
SPP forms to pensions
HR (equity census) (orientation sign up)
Send to equity office

Benefits Orientation Process - M&P and Union con't
Form Collection and Dispersion
Scheduling Presenters

Florence emails presenters and asked their availability dates. Emails payroll and advisory services

Presenters advise benefits clerk on their availability by email

Benefits clerk prepares schedule and emails to presenters

Benefits clerk tallies attendees for upcoming session

2-3 days prior to presentation benefits clerk sends email reminders to presenters. If schedule presenter cannot attend they must find replacement
Website displays info particular to their benefits code.

Information page telling ee they can choose either education path or forms completion path.

**Offer Process**

- This whole process is about health, welfare and pension.

Employee goes to website, clicks on virtual orientation, enters benefits code.

HR generates offer letter.

Department asks how ee want to receive the offer letter, eg. email, web, print.

Employee provided with web address and benefits code.

Department sends staff appointment form to HR noting how the employee wants to receive the offer letter.

Department phones employee with verbal offer.

Department tells employee what benefits they are eligible for. Offer letter includes what benefits they are eligible for; web address and benefits code.

Department sends offer letter to Faculty Relations.

Department sends Faculty appointment form to Faculty Relations.

**Educational Quick Start Explanation of Forms Completion, Order, Importance, Document Checklist**

Quick start guide tour through educational information.

Forms completion.

**From other sites, department admins provide web address.**

Start:

- Offer letter
- Email
- Web
- Print

Confirm education and forms completed.

Thank you!

Sign up to attend university drop-in benefits lab.

After forms completed are dropped in secure inbox in the room for collection.

Interested employees/faculty attend drop-in benefits lab.

Forms are collected, sorted and distributed to appropriate department.

Hand out feedback questionnaire - 1. to assess our own process, and also 2. how well ee understands the process.