



BENEFITS ENROLLMENT PROCEDURE (BEN-P001)

Clarksville-Montgomery County School System

1.0 SCOPE:

- 1.1 This procedure describes the process for benefits enrollment for new employees.

2.0 RESPONSIBILITY:

- 2.1 Benefits Associate

The online version of this procedure is official. Therefore, all printed versions of this document are unofficial copies.

3.0 APPROVAL AUTHORITY:

- 3.1 Chief Human Resources Officer

4.0 DEFINITIONS:

- 4.1 BCBS: Blue Cross/Blue Shield
- 4.2 Life Insurance
- 4.3 Sick Leave Bank

5.0 PROCEDURE:

- 5.1 Benefits Associate is notified by email by HR In-processing staff of new hires and their appointment times for in-processing (Ref. [HUM-P003](#)).
- 5.2 Benefits Associate meets with new hire employee group in person or via zoom to present information regarding benefits.
- 5.3 Benefits Associate sends onboarding email to new hires.
- 5.4 Employee elects or declines Medical, Dental, Vision, Voluntary Life, Dependent Life, and Sick Leave Bank via onboarding email.
- 5.5 Benefits Associate prints Blue Cross enrollment forms for which employee elected coverage.
 - 5.5.1 Sick leave bank enrollment forms are printed and maintained in file in Benefits Office pending processing and notification of two sick leave days being deducted from employee.
 - 5.5.2 Enrollment forms are held in a pending status by the Benefits Associate until appropriate HR staff enters and releases a Personnel Action in MUNIS regarding the new employee.
- 5.6 Benefits Associate receives electronic notice that a personnel action has been entered into MUNIS.
- 5.7 Benefits Associate keys appropriate benefit deductions and action is released to the Business Office.
 - 5.7.1 Benefits Associate or designee enters BCBS enrollment applications on the BCBS website and form is placed in pending folder until coverage is verified by Benefits Associate. Form is then filed.



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- 5.7.2 Basic/Voluntary Life Insurance enrollment/beneficiary forms (PA-9604) are electronically forwarded to Employee's master file in DocuPhase.
- 5.7.3 Voluntary Life Insurance enrollment is entered onto Hartford website by Benefits Associate or designee.
- 5.7.4 PA-9604 is maintained in Benefits Office until attachment to DocuPhase Personnel File is verified and then shredded.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Blue Cross Blue Shield Enrollment Form
- 6.2 Basic/Voluntary Life Insurance Enrollment/Beneficiary Form (PA-9604)
- 6.3 Sick Leave Bank Enrollment Form ([BEN-F050](#))
- 6.4 Creation of Employee Record Procedure ([HUM-P001](#))
- 6.5 In-Processing (New Hire) Procedure ([HUM-P003](#))

7.0 RECORD RETENTION TABLE:

<u>Identification</u>	<u>Storage</u>	<u>Retention</u>	<u>Disposition</u>	<u>Protection</u>
BC Insurance Applications	Benefits Office/HR Vault	Indefinitely	Permanent	Secured Office
Sick Leave Bank Enrollment Form	Benefits Office/HR Vault	Indefinitely	Permanent	Secured Office

8.0 REVISION HISTORY:

<u>Date:</u>	<u>Rev.</u>	<u>Description of Revision:</u>
2/07/03		Initial Release
5/28/03	A	Add TCRS to 4.0, 5.4, 5.5, 6.0, 7.0 and to flowchart
3/23/05	B	Add LTD to 4.0, 5.4 & 5.5
4/26/05	C	Add "or declines" to 5.3, add 5.3.1 & 5.3.2, add 5.5.1.1 and 5.7, revise flowchart
3/05/07	D	Update procedure and flowchart re MUNIS
11/22/11	E	Changed Jefferson Pilot to Lincoln National. See additional changes on attachment. Updated logo.



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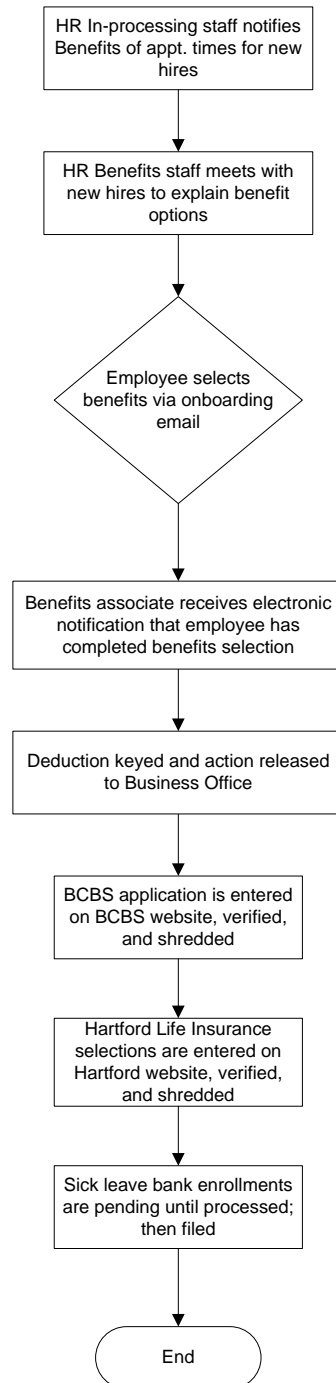
5/29/12	F	Removed IED: Individual Employee Data, add VSP enrollment card to retention table, remove TCRS from retention table, update flow chart.
9/17/14	G	Deleted reference to TCRS, added Reliance Standard information and sick leave bank information, added Lincoln insurance and sick leave forms to Record Retention Table; updated flowchart and logo
10/26/15	H	Changed responsibility from HR Director to CHRO.
6/21/17	I	Updated 5.6.3 – 5.6.5, associated documents, and flowchart.
5/8/18	J	Removed all references to Vision Service Plan. 5.6.1 changed to reflect electronic filing. Removed 5.7. Added HR vault to storage of sick leave bank enrollment forms. Updated flowchart.
4/24/19	K	Updated 5.3. Added 5.5. Updated 5.7.1, 5.7.2, and 5.7.4. Updated flowchart.
2/28/20	L	Minor updates to 5.5, 5.5.1, and 5.7.2 and the record retention table.
1/19/21	M	Minor updates to include meetings available via Zoom.
4/28/22	N	Updated 5.7.1 to add “or designee” next to the Benefits Associate.

9.0 FLOWCHART:

9.1 A flowchart detailing this process can be found below.

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***** End of Procedure *****