

		United States Department of Agriculture Office of the Chief Financial Officer National Finance Center Government Employees Services Division
<b>Functional Requirements Document (FRD)</b>		
<b>Project#</b> 1034904	<b>Project Title:</b> FEHB Program Self Plus One Limited Enrollment Period	<b>Date Prepared:</b> 04/06/15 (Revised: 02/04/16)

<b>Version 3.0</b>	<b>As of: 02/04/16</b>
<p><b>Please Note:</b> The requirements in the Employee Personal Page (EPP) Requirements section have been revised to allow Treasury employees who participate in premium conversion to decrease their FEHB enrollment from Self &amp; Family to Self Plus One during the Limited Enrollment Period. The changes to the requirements in the Employee Personal Page (EPP) Requirements section are in <b><i>bold italics</i></b>. The requirements in the attached copy of the FEHB Self-Service Request screen have been revised to remove the reference to Treasury premium conversion employees.</p>	

<b>Scope :</b>	<p>The Office of Personnel Management (OPM) Final Benefits Administration Letter (BAL) 15-205 (dated September 17, 2015) mandates that agencies and payroll offices allow Federal Employees Health Benefits (FEHB) Program enrollments to be decreased from Self and Family to Self Plus One during a one-time Limited Enrollment Period outside of this year's FEHB Open Season. This Limited Enrollment Period is scheduled to run from February 1, 2016, thru February 29, 2016. The Limited Enrollment Period is not an extension of Open Season. Also, it will not apply to annuitants, Temporary Continuation of Coverage (TCC) enrollees, and other individuals who do not participate in premium conversion because they may decrease their enrollment at any time. After the Limited Enrollment Period has ended, individuals who participate in premium conversion will need to experience a Qualifying Life Event (QLE) in order to decrease their enrollment type outside of the FEHB Open Season dates. OPM has created QLE Code "1Z," which will be used to decrease FEHB enrollments from Self and Family to Self Plus One during the Limited Enrollment Period. CLER, TIPS, EmpowHR, EPP, EPIC-Web, and PINE/PEPL shall be modified to allow the new QLE Code "1Z" to be entered and processed for FEHB enrollment decreases from Self and Family to Self Plus One during the Limited Enrollment Period.</p> <p>Note: BAL 15-205 can be viewed online at OPM's Website under Publications and Forms (Benefits Administration Letters).</p>
<b>Assumptions:</b>	

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### Functional Requirements

#### ☐ Payroll Applications Systems Branch (PASB) Requirements

"Not Applicable"

#### ☒ Personnel Applications Systems Branch (PESB) Requirements

The Personnel Systems will be modified to allow the use of new Qualifying Life Event Code (QLE) 1Z. This new QLE 1Z will be effective only during the limited enrollment period from February 01, 2016-February 29, 2016. After February 29, 2016, this QLE can no longer be used. The Personnel Systems will ensure that only the employees enrollment changes from Self and Family to Self plus One during this time frame when a SF2809 is entered. The SF2809 will go into suspense if any other type of change is made, i.e. decreases from Self Plus One to Self Only, any type of plan changes, option decreases, or increases in enrollment. The effective date of changes made during the limited Enrollment period enrollment will be the first day of the first pay period following the one in which the enrollment was changed.

#### ☐ Administrative Applications Systems Branch (AASB) Requirements

"Not Applicable"

#### ☒ Payroll Web Systems Branch (PWSB) Requirements

##### Employee Personal Page (EPP) Requirements:

Modify EPP's FEHB Self-Service Request to allow the new Qualifying Life Event (QLE) Code "1Z" to be entered and processed according to the following requirements:

- Add QLE Code "1Z" to all tables and programs that contain QLE codes.
- QLE Code "1Z" shall be used only during a one-time Limited Enrollment Period, which will be from February 1, 2016, thru February 29, 2016.
- Only allow a decrease in a premium conversion FEHB enrollment from Self and Family to Self Plus One within the same plan and option when "1Z" is used as the QLE Code.
- QLE Code "1Z" shall be used on the Change Family to Self Plus One option during the Limited Enrollment Period for ***all*** premium conversion employees ***(including Treasury premium conversion employees)*** who are under a Self and Family enrollment

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code (an enrollment code that ends in 2 or 5).

- Display the Self-Service button on the Health Insurance screen during the Limited Enrollment Period for premium conversion employees who are under a Self and Family enrollment code. Also, create a new FEHB Self-Service Request screen that shall be displayed only during the Limited Enrollment Period. The new FEHB Self-Service Request screen shall be displayed for premium conversion employees who are under a Self and Family enrollment code. When premium conversion employees who are under a Self and Family enrollment code click the Self-Service button during the Limited Enrollment Period, display the new FEHB Self-Service Request screen with the Change Family to Self Plus One option. A copy of the new FEHB Self-Service Request screen is attached to the back of this document. ***The new FEHB Self-Service Request screen shall not be displayed for Treasury premium conversion employees. Instead, Treasury premium conversion employees who wish to decrease their enrollment from Self and Family to Self Plus One shall be allowed to select QLE code "1Z" as a Qualifying Life Event code.***
- Changes to the employee's premium conversion status shall not be allowed on the Change Family to Self Plus One option when "1Z" is used as the QLE code.
- Use Transaction Code "5" (Change in Enroll - SF-2809) for the Change Family to Self Plus One option when "1Z" is used as the QLE code.
- Use Event Code "6" (Other) for the Change Family to Self Plus One option when "1Z" is used as the QLE code.
- All FEHB enrollment changes made with QLE Code "1Z" shall be prospective to the first day of the first pay period following the one in which the change is requested.
- All Self Plus One edits from the FEHB Open Season shall remain in place.

### Entry, Processing, Inquiry and Correction System (EPIC-Web) Requirements:

Modify EPIC-Web to allow the new Qualifying Life Event (QLE) Code "1Z" to be entered and processed according to the following requirements:

- Add QLE Code "1Z" to all tables and programs that contain QLE codes.
- QLE Code "1Z" shall be used only during a one-time Limited Enrollment Period, which will be from February 1, 2016, thru February 29, 2016.
- On the **Health Registration Form (SF-2809)/Insurance Tab** screen, allow QLE code "1Z" to be entered and saved in the **Event Code that Permits Change** field for an enrollment update record only when the enrollment is premium conversion and a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is entered in the **Enrollment Code** field. If upon saving the data on the **Health Registration Form (SF-2809)/Insurance Tab** screen with QLE Code "1Z" entered in the **Event Code that Permits Change** field and (1) the enrollment is not premium conversion and (2) a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is not entered in the **Enrollment Code** field, then display the error message **"Only a decrease from Self and Family to Self Plus One is allowable."** The user shall be required to enter a Self Plus One enrollment code in the **Enrollment Code** field in order to continue. If the enrollment is not premium conversion, then the user shall not be allowed to continue.

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- Only Transaction Code "5" (**Change in Enroll - SF-2809**) shall be used in the **Transaction** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen for the enrollment changes with QLE Code "1Z."
- Only Event Code "6" (**Other**) shall be used in the **Event Code** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen for the enrollment changes with QLE Code "1Z."
- All FEHB enrollment changes made with QLE Code "1Z" shall be prospective to the first day of the first pay period following the one in which the change is requested.
- All Self Plus One edits from the FEHB Open Season shall remain in place.

### ☒ **Administrative Web Systems Branch (AWSB) Requirements**

#### **Office of Personnel Management, Federal Employees Health Benefits, Centralized Enrollment Clearinghouse System (CLER) Requirements:**

Modify CLER to allow the new Qualifying Life Event (QLE) Code "1Z" to be entered and processed according to the following requirements:

- Add QLE Code "1Z" to all tables and programs that contain QLE codes.
- QLE Code "1Z" shall be used only during a one-time Limited Enrollment Period, which will be from February 1, 2016, thru February 29, 2016.
- Only allow a decrease in a premium conversion FEHB enrollment from Self and Family to Self Plus One within the same plan and option when "1Z" is used as the QLE Code.
- On the **Form 2809 Update (Parts B - H)** screen, allow QLE code "1Z" to be entered and saved in the **Event That Permits Change** field for an enrollment update record only when (1) the enrollment is premium conversion, (2) a Self and Family enrollment code (an enrollment code that ends in 2 or 5) populates the **Present Enrollment Code** field, and (3) a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is entered in the **New Enrollment Code** field. Also, the Self Plus One enrollment code that is entered in the **New Enrollment Code** field shall be required to be within the same FEHB plan and option as the Self and Family enrollment code that populates the **Present Enrollment Code** field. For example, if the **Present Enrollment Code** field is populated with enrollment code 105 (Standard Self and Family for Blue Cross Blue Shield Service Benefit Plan), then the user shall be required to enter the enrollment code 106 (Standard Self Plus One for Blue Cross Blue Shield Service Benefit Plan) in the **New Enrollment Code** field. If upon saving the data on the **Form 2809 Update (Parts B - H)** screen with QLE Code "1Z" entered in the **Event That Permits Change** field and (1) the enrollment is not premium conversion and (2) the update does not decrease the enrollment from Self and Family to Self Plus One within the same FEHB plan and option, then display the error message "Only a decrease from Self and Family to Self Plus One is allowable." The user shall be required to enter the appropriate Self Plus One enrollment code in the **New Enrollment Code** field in order to continue. If the enrollment is not

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premium conversion, then the user shall not be allowed to continue.

- All FEHB enrollment changes made with QLE Code "1Z" shall be prospective to the first day of the first pay period following the one in which the change is requested.
- All Self Plus One edits from the FEHB Open Season shall remain in place.

### **Tribal Insurance Processing System (TIPS) Requirements:**

Modify TIPS to allow the new Qualifying Life Event (QLE) Code "1Z" to be entered and processed according to the following requirements:

- Add QLE Code "1Z" to all tables and programs that contain QLE codes.
- QLE Code "1Z" shall be used only during a one-time Limited Enrollment Period, which will be from February 1, 2016, thru February 29, 2016.
- Only allow a decrease in a premium conversion FEHB enrollment from Self and Family to Self Plus One within the same plan and option when "1Z" is used as the QLE Code.
- On the **Health Benefits Election Form (2809)** screen, allow QLE code "1Z" to be entered and saved in the **Event Code** field in **Part D - (Event that Permits You to Enroll, Change or Cancel)** for an enrollment update record only when (1) the enrollment is premium conversion, (2) a Self and Family enrollment code (an enrollment code that ends in 2 or 5) populates the **Enrollment Code** field in **Part B - (FEHB Plan You Are Currently Enrolled In)**, and (3) a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is entered in the **Enrollment Code** field in **Part C - (FEHB Plan You Are Enrolling In or Changing To)**. Also, the Self Plus One enrollment code that is entered in the **Enrollment Code** field in **Part C - (FEHB Plan You Are Enrolling In or Changing To)** shall be required to be within the same FEHB plan and option as the Self and Family enrollment code that populates the **Enrollment Code** field in **Part B - (FEHB Plan You Are Currently Enrolled In)**. For example, if the enrollment is currently under the enrollment code 105 (Standard Self and Family for Blue Cross Blue Shield Service Benefit Plan), then the user shall be required to enter the enrollment code 106 (Standard Self Plus One for Blue Cross Blue Shield Service Benefit Plan) in the **Enrollment Code** field in **Part C - (FEHB Plan You Are Enrolling In or Changing To)**. If upon saving the data on the **Health Benefits Election Form (2809)** screen with QLE Code "1Z" entered in the **Event Code** field and (1) the enrollment is not premium conversion and (2) the update does not decrease the enrollment from Self and Family to Self Plus One within the same FEHB plan and option, then display the error message **"Only a decrease from Self and Family to Self Plus One is allowable."** The user shall be required to enter the appropriate Self Plus One enrollment code in the **Enrollment Code** field in **Part C - (FEHB Plan You Are Enrolling In or Changing To)** in order to continue. If the enrollment is not premium conversion, then the user shall not be allowed

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to continue.

- All FEHB enrollment changes made with QLE Code "1Z" shall be prospective to the first day of the first pay period following the one in which the change is requested.
- All Self Plus One edits from the FEHB Open Season shall remain in place.

### ☒ Human Resources Applications Branch (HRAB) Requirements

#### EmpowHR Requirements:

Modify EmpowHR to allow the new Qualifying Life Event (QLE) Code "1Z" to be entered and processed according to the following requirements:

- Add QLE Code "1Z" to all tables and programs that contain QLE codes.
- QLE Code "1Z" shall be used only during a one-time Limited Enrollment Period, which will be from February 1, 2016, thru February 29, 2016.
- On the **Payroll Documents/Health Benefits (Elections tab)** screen, allow QLE code "1Z" to be entered and saved in the **Event Change Code** field for an enrollment update record only when (1) the enrollment is premium conversion (Pre-Tax FEHB Premium) and (2) a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is entered in the **Benefit Plan** field. If upon saving the data on the **Payroll Documents/Health Benefits (Elections tab)** screen with QLE Code "1Z" entered in the **Event Change Code** field and (1) the enrollment is not premium conversion (Pre-Tax FEHB Premium) and (2) a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is not entered in the **Benefit Plan** field, then display the error message "**Only a decrease from Self and Family to Self Plus One is allowable.**" The user shall be required to enter a Self Plus One enrollment code in the **Benefit Plan** field in order to continue. If the enrollment is not premium conversion (Pre-Tax FEHB Premium), then the user shall not be allowed to continue.
- Only Transaction Code "5" (**Change in Enroll - SF-2809**) shall be used in the **Transaction Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen for the enrollment changes with QLE Code "1Z."
- Only Event Code "6" (**Other**) shall be used in the in the **Event Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen for the enrollment changes with QLE Code "1Z."
- All FEHB enrollment changes made with QLE Code "1Z" shall be prospective to the first day of the first pay period following the one in which the change is requested.
- All Self Plus One edits from the FEHB Open Season shall remain in place.

### ☐ External Vendor Requirements

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"Not Applicable"	
Signature of Systems Requirements Branch Chief: /s/ Lisa Stafford	Date: 02/04/16
Signature of Web Requirements Branch Chief: /s/ Alisa R. Wells	Date: 02/04/16

The following is the Employee Personal Page's (EPP's) new FEHB Self-Service Request screen that shall be displayed during the Limited Enrollment Period for premium conversion employees who are under a Self and Family enrollment code.

#### **FEHB Self-Service Request**

Since your FEHB premiums are withheld from pre-tax dollars and you are currently enrolled in a Family plan, you may decrease your enrollment from Family to Self Plus One within the same plan and option during a Limited Enrollment Period, which runs from February 1, 2016, thru February 29, 2016.

To decrease your enrollment from Family to Self Plus One within the same plan and option, please select the button below:

**Change Family to Self Plus One**

For other types of changes, please contact your serving Personnel/Human Resources organization.