



Job Aid: Overriding Critical Illness Rates

Last Update: 06/05/2023



Document Version History

Date	Version	Comments
06/05/2023	1.0	Initial version

Pre-Requisites/ Job Descriptions

This job aid is applicable to the following Oracle Cloud job descriptions:

ID	Job Description



STEP 1

Login to Oracle Fusion Cloud. Click on the “Benefits Administration” tab.

The screenshot shows the Oracle Fusion Cloud dashboard for Yamhill County, Oregon. The top navigation bar includes the Yamhill County logo, a search bar, and utility icons. The main navigation bar features tabs for 'Me', 'My Team', 'My Client Groups', 'Benefits Administration' (highlighted with a red box), 'Contract Management', and 'Supply Chain Plann'. Below the navigation bar, there are sections for 'QUICK ACTIONS' and 'APPS'. The 'APPS' section contains a grid of tiles: Directory, Journeys, Onboarding, Checklist Tasks, Pay, Time and Absences, Career and Performance, and Personal Information.

STEP 2

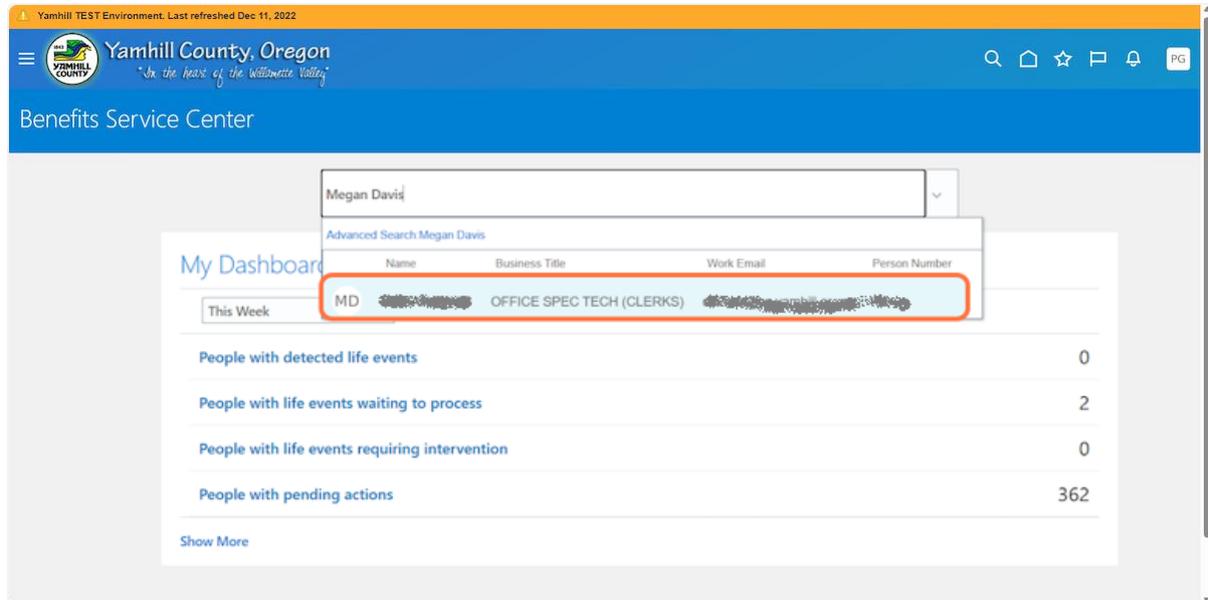
Click on the “Enrollment” tile.

The screenshot shows the Oracle Fusion Cloud dashboard for Yamhill County, Oregon, with the 'Benefits Administration' tab selected. The 'APPS' section is visible, showing a grid of tiles: Employee Wellness, Enrollment (highlighted with a red box), Plan Configuration, and Evaluation and Reporting. Below the 'APPS' section, there is a 'Things to Finish' section with a tile labeled 'Assigned to Me'.



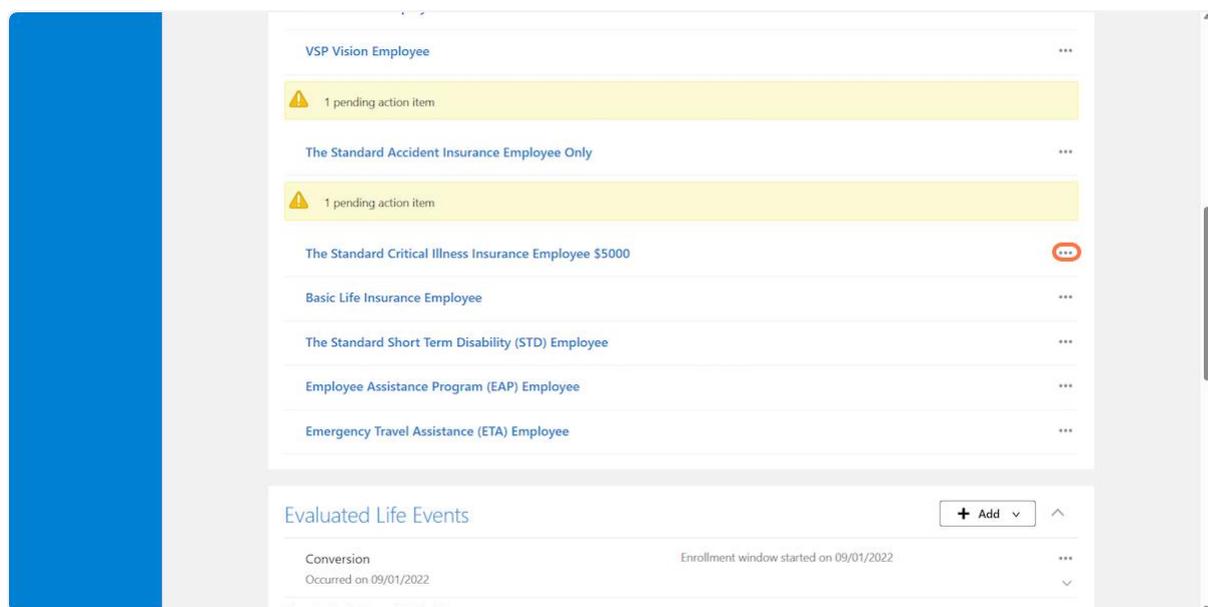
STEP 3

Enter the employee's Name or Person ID and, without pressing the "Enter" key, click on the employee.



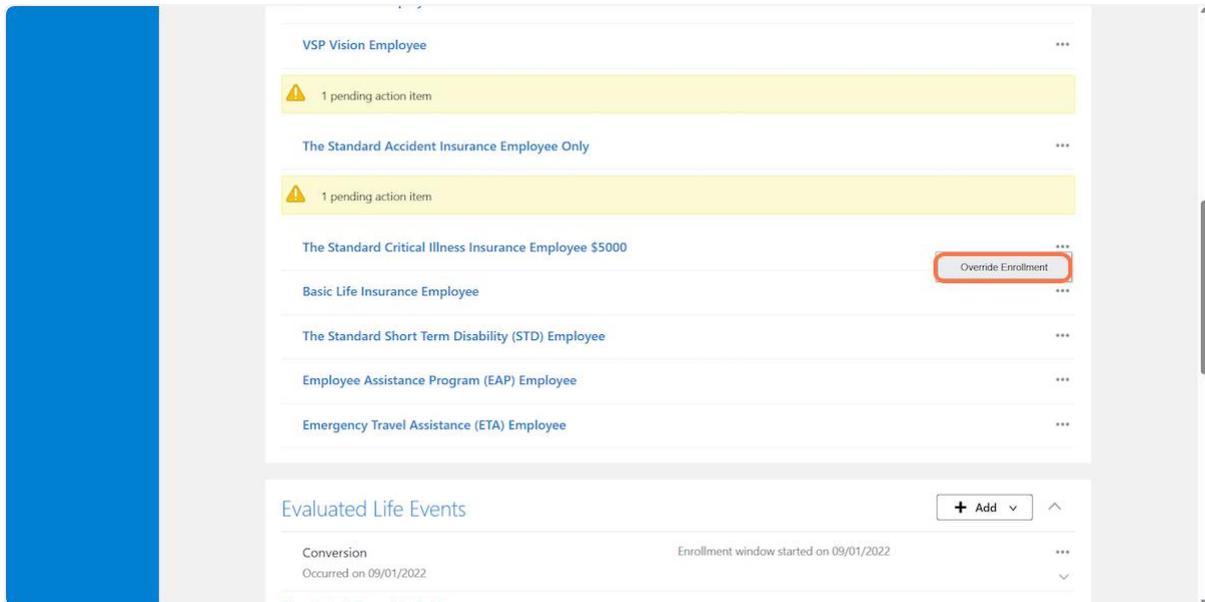
STEP 4

Next to the Critical Illness plan, click on the three dots to the right of it. The override to Critical illness plan is required as the rates don't change with age. Rates change only when the coverage is update. When employee is newly enrolled the rates are correct but must be overridden once the age bracket changes.



STEP 5

Select “Override Enrollment”.



The screenshot displays a list of insurance options for a 'VSP Vision Employee'. The options are:

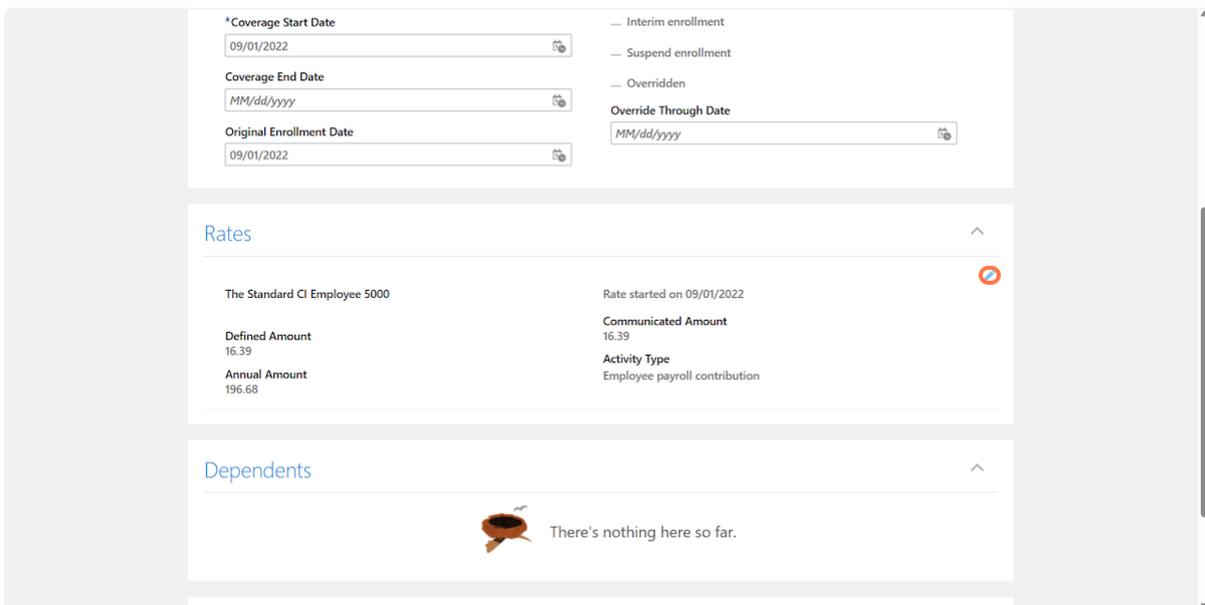
- VSP Vision Employee
- The Standard Accident Insurance Employee Only
- The Standard Critical Illness Insurance Employee \$5000
- Basic Life Insurance Employee
- The Standard Short Term Disability (STD) Employee
- Employee Assistance Program (EAP) Employee
- Emergency Travel Assistance (ETA) Employee

Each option has a '1 pending action item' warning icon. The 'Override Enrollment' button is highlighted with a red box next to the 'The Standard Critical Illness Insurance Employee \$5000' option.

Below the list is a section titled 'Evaluated Life Events' with a '+ Add' button. It shows a 'Conversion' event that occurred on 09/01/2022, with an enrollment window starting on 09/01/2022.

STEP 6

In the Rates section, click on the pencil icon to edit.



The screenshot displays the 'Rates' section of the application. It shows the following information:

- *Coverage Start Date: 09/01/2022
- Coverage End Date: MM/dd/yyyy
- Original Enrollment Date: 09/01/2022
- Interim enrollment
- Suspend enrollment
- Overridden
- Override Through Date: MM/dd/yyyy

The 'Rates' section is expanded, showing the following details for 'The Standard CI Employee 5000':

- Rate started on 09/01/2022
- Defined Amount: 16.39
- Annual Amount: 196.68
- Communicated Amount: 16.39
- Activity Type: Employee payroll contribution

A pencil icon is highlighted next to the 'The Standard CI Employee 5000' rate. Below the rates section is a 'Dependents' section with a message: "There's nothing here so far."

STEP 7

Update “Defined Amount”, “Annual Amount” and “Communicated Amount”. Click on the “OK” button. Defined Amount and Communicated Amount should be same and are Employee’s monthly contributions. Annual Amount is Annual contribution.

The screenshot shows the 'Rates' configuration screen for 'The Standard CI Employee 5000'. The 'Defined Amount' field is highlighted with an orange box and contains the value '17'. The 'Annual Amount' field contains '197' and the 'Communicated Amount' field contains '17'. A tooltip points to the 'Communicated Amount' field with the text: 'Changing the communicated value might impact defined and annual values, depending on whether their calculation methods use this value'. The 'OK' button is highlighted in black. Other fields include 'Coverage Start Date' (09/01/2022), 'Coverage End Date' (MM/dd/yyyy), 'Original Enrollment Date' (09/01/2022), 'Interim enrollment', 'Suspend enrollment', 'Overridden', and 'Override Through Date' (MM/dd/yyyy).

STEP 8

Click on the “Save and Close” button towards the top right of the screen.

The screenshot shows the 'Override Enrollment' screen for 'The Standard Critical Illness Insurance Employee \$5000'. The 'Save and Close' button is highlighted with an orange box. The screen displays the 'Details' section with fields for 'Plan and Option', 'Plan Type', 'Started Life Event', 'Coverage Start Date', 'Coverage End Date', 'Original Enrollment Date', 'Earliest Disenroll Date', 'Benefit Amount', 'Interim enrollment', 'Suspend enrollment', 'Overridden', and 'Override Through Date'. The 'Yamhill County, Oregon' logo and name are visible at the top left, and the user 'MD' is shown in a circular profile picture.



STEP 9

Verify that “Override” is displayed next to the plan.

The screenshot shows a list of insurance plans for an employee. The plans listed are:

- VSP Vision Employee
- The Standard Accident Insurance Employee Only
- The Standard Critical Illness Insurance Employee \$5000 (highlighted with a red box, with "Override" text next to it)
- Basic Life Insurance Employee
- The Standard Short Term Disability (STD) Employee
- Employee Assistance Program (EAP) Employee
- Emergency Travel Assistance (ETA) Employee

Below the list is a section titled "Evaluated Life Events" with a "+ Add" button and a list of events, including "Conversion" which occurred on 09/01/2022.

STEP 10

Click on the “Home” button to return to the main screen.

The screenshot shows the "Benefits Summary" page for an employee (MD). The page header includes the Yamhill County logo and the text "Yamhill County, Oregon" and "In the heart of the Willamette Valley". The page title is "Benefits Summary".

Key information displayed includes:

- Effective As-of Date: 01/01/2023
- Benefit Relationship: DFLT Yamhill County

A summary of pending items is shown:

Category	Count
Events Require Intervention	0
Life Events Added	0
Court Orders	0
Documents Pending Approval	0
Pending Action Items	2

The "Enrollments" section is visible below, with a dropdown menu set to "All benefits" and an "Actions" dropdown.

STEP 11

End of the Procedure

