



# Sage HRMS Learning Series

## Setting Up Open Enrollment in Sage HRMS



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Visit our Web site at [www.SageU.com](http://www.SageU.com) or call (866) 888-6062 to learn about training classes that are added throughout the year.

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## Sage HRMS Training Classes

### Sage HRMS Learning Series

This learning session uses concepts contained in the following training class on Sage University:

### ES - Sage HRMS - Sage Employee Self Service (ESS) Benefit Enrollment: From Start to Finish

**Scheduled Training Virtual Classroom 16 hours \$949.00 (C\$949.00)**

Learn how to navigate an Open Enrollment using the Benefits Enrollment module from Employee Self Service. With this course, you will be able to prepare for your Open Enrollment by updating the Benefit Plan information in Sage HRMS, ensure the information is correct, and then build the Open Enrollment correctly in the Employee Self Service Benefits Enrollment module!

This course is a must have for anyone who will be running an Open Enrollment and has the Benefits Enrollment module!

After completing this course you will be able to:

- Identify Sage HRMS Benefit setup changes
- Process the steps to accurately set up Benefits
- Run the Duplicate Key report to eliminate potential errors
- Select Benefit Plans for ESS Benefits Enrollment
- Identify the steps for setting up an Open Enrollment from the Election Codes to defining the Open Enrollment parameters
- Recognize Life Events and how to use them
- Set up and approve Life Events
- Identify Life Event and Benefit Plan changes
- Follow the process for managing Rate Tables for the new year
- Run an Open Enrollment
- Run Benefits Enrollment Reports
- Identify the different report elements

## Sage University

To find training and register for training courses, visit [Sage University](https://www.sageu.com/hrms) at <https://www.sageu.com/hrms>. If you have Gold Support, you are entitled to 50% off Sage HRMS instructor-led training and Sage HRMS Any-time learning (ATLs) are free. If you register for an instructor-led training class be sure to use code **TRNLycle10** to receive 10% off. If you have Gold Support, this is in addition to the 50% discount.

To enroll in a course, go to [Sage University](#) and log on. If you do not have a log on, you will need to create one. For registration assistance, call Sage University Help Desk at 1-855-724-3864 or email [SageUniversity@sage.com](mailto:SageUniversity@sage.com).

## Session Objectives

At the end of this session, you will be able to:

- Modify an existing rate table in Sage HRMS to be used in Open Enrollment
- Create a new benefit insurance plan to be used in Open Enrollment

## Introduction

Before you begin setting up Open Enrollment in Sage ESS, you need to make sure the Sage HRMS Environment is set up. In today's Learning Session we will focus on Steps 2-5.

- Step 1 – Run the Duplicate Key Report & Correct the Duplicate Entries
- Step 2 – Enter Effective From and To Dates
- Step 3 – Add Plans for Future Enrollment
- Step 4 – Copy or Create New Rate Tables for the New Plans
- Step 5 – Select Benefit Plan and Rate Tables to be used in Open Enrollment

## Enter Effective From and To Dates

For each benefit plan to be available for open enrollment and life events, each plan must have valid dates in the “Plan is in Effect From” and “To” fields. If a benefit plan is to be effective indefinitely, use 12/31/2099 as the “To” date.

1. Open your Sage HRMS solution.
2. Select Setup > Employees > Benefits > Insurance (or Savings) Plans.
3. Select a benefit plan.

Benefit Insurance Plans Detail - Enterprise

Code: HMO Description: HMO Medical

Other Calculated Amount | Standard Eligibility | Custom Eligibility | Dependent Coverage

General | Coverage Amount | Employee Premium | Dependent Premium | Employee Contribution

Benefit Type: Medical

Employee Contribution Frequency: Monthly

☒ Benefit Continuable Under COBRA or During LOA

Plan Is In Effect From: 01/01/2003 To: 12/31/2099 ☐ Inactive

Current Amounts Went Into Effect On: 01/01/2010

Previous Next Copy Plan OK Cancel Apply

4. Ensure the “Plan Is In Effect From” and “To” dates are populated.
5. Repeat Steps 2 - 4 for each insurance and savings plan in Sage HRMS.



Blank dates may cause an Open Enrollment to fail. It is highly recommended to ensure all date fields are populated.

## Add Plans for Future Enrollment

If you are going to use a new benefit plan, the plan will need to exist in Benefit Insurance or Benefit Savings Plan Setup. Therefore, we will need to create any new plans to be used as part of the benefits open enrollment process. For our open enrollment, we will create a new benefit plan at the Enterprise Employer level called **NEWMEDICAL – New Medical**.



We are creating our Benefit Plan at the Enterprise Employer level. However, based on how your Sage HRMS is setup, you may be setting up your Benefit Plans at your Employer level.

Tab	Field	Value
<b>General</b>	Benefit Type	Medical
	Employee Contribution Frequency	Monthly
	Benefit Continuable Under COBRA or During LOA	Check
	Plan Is In Effect From...To	The first of the year – 12/31/2099
	Current Amounts Went Into Effect On	The first of the year
<b>Coverage Amount</b>	Coverage Amount	Leave Blank
	Coverage Amount For	Employee and Dependents
<b>Employee Premium</b>	Monthly Employee Premium	120.00
<b>Tab</b>	Field	Value
<b>Dependent Premium</b>	Monthly Dependent Premium	200.00
<b>Employee Contribution</b>	Employee Contribution Amount	NEWMEDRATE (will be created in the next step)

	Employee Contribution Frequency	Monthly
<b>Other Calculated Amount, Standard Eligibility, Custom Eligibility</b>	Leave at Default Values	Leave at Default Values

When finished, click on the “OK” button to save the Insurance Benefit plan.

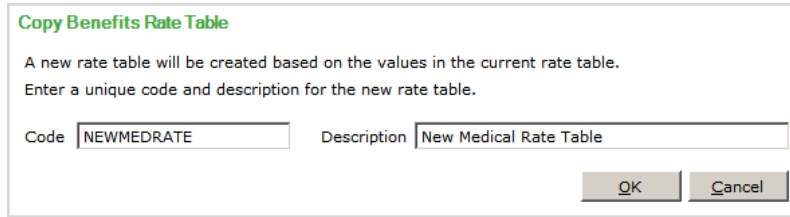
## Copy or Create New Rate Tables for the New Plans

The next step is to either copy or create new Rate Tables for your new Benefit Plans. You can either select the “Add” button to create a new Rate Table or follow the directions below to copy the Rate Table.

1. To Copy an existing Rate Table, click on the “More” button for the MED RATE Rate Table.
2. Click on the Copy Table button.

3. Enter a new code for this table in the “Code” field and a new description for the table in the “Description” field. For our Rate Table, we will select

“NEWMEDRATE” for the Code and “New Medical Rate Table” for the Description.



**Copy Benefits Rate Table**

A new rate table will be created based on the values in the current rate table.  
Enter a unique code and description for the new rate table.

Code  Description

4. Click “OK.”
5. Modify the values in the new rate table.

**Column 1** will have a Column Heading of “Spouse,” a Column Match Type of “Up to and including,” and a Column Expression of the following:

COUNTDEP("NEWMEDICAL","SPOUSE")

**Column 2** will have a Column Heading of “Child,” a Column Match Type of “Up to and including,” and a Column Expression of the following:

COUNTDEP("NEWMEDICAL","CHILD")

We will leave Column 3 blank and move on to the Rate Table Tab. Use the following rate amounts:

Order	SPOUSE	CHILD	Rate
1	0	0	60.00
2	1	0	75.00
3	1	1	80.00
4	0	99	130.00
5	1	99	150.00

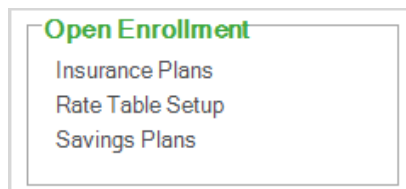
6. Save the Rate Table by pressing the “OK” button and then add the Rate Table to the Employee Contribution tab of the NEWMEDICAL plan.



## Select Benefit Plans & Rate Tables to be used in Open Enrollment

This step enables you to select the Benefit Plans you want to be available for the Open Enrollment process in ESS. Sage HRMS contains an area specific to the Benefits Enrollment module and Open Enrollment.

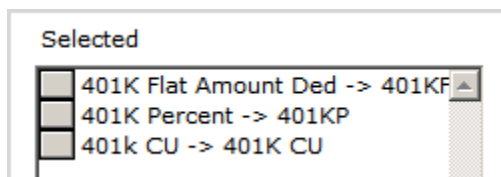
This area, called Open Enrollment, is where information is shared with ESS. In addition, once an Open Enrollment process completes the information from the Open Enrollment area will be pushed to your existing benefit plans, updating the plans automatically.



In the previous step, we create a new Insurance Benefit Plan for use with Open Enrollment. However, both new and existing Benefit Plans can be added to this area for use with your Open Enrollment.

Before you select a plan in the Open Enrollment area, ensure you have entered all of the necessary information for each plan, especially the start and end dates for the plan.

1. From your Sage HRMS solution, navigate to the Open Enrollment section by going to Setup > Employees > Open Enrollment. We will start with the Savings Plans.
2. In the Employer drop-down list, make sure the Enterprise level ("\*\*\*\*") is selected.
3. Click the "Add" button.
4. If you wished to bring over any of the Savings Plans, click on the "Select" or the "Select All" button and then click "OK."



The 401K codes now appear in the Open Enrollment section of Sage HRMS and are available for use with your Open Enrollment.

For our training, we will not bring over any additional Savings Plans.

5. From the Enrollment Savings Plans page, click on the Rule Type drop-down list, select "Enrollment Insurance Plans" and ensure the New Medical Plan is added to your open enrollment.
6. As both our Savings and Insurance Plans have been added to the Open Enrollment section of Sage HRMS, we now want to update any Rate Table

changes going live with the new Open Enrollment period. While we previously created a new Rate Table for use with a new plan, we now want to make any adjustments to the Rate Tables for existing plans.

From the Enrollment Insurance Plans page, navigate to the Rule Type drop down menu and select “Enrollment Rate Table Setup.” You will now be viewing the different Rate Tables associated with your Open Enrollment plans and can adjust any of the plans pertaining to your Open Enrollment.

Rate Table Code	Description
+ 401(K) %	401(K) Percent
+ ADDCONTRIB	ADD EE Contrib
+ DENTALCONTRIB	Dental Employee Contrib
+ HMOCONTR	HMO Contribution
+ LIFECONTRIB	Life Contribution
+ MED RATE	Medical Rates/ Dependents
+ PPODEP	PPO Dependent Rate Table
+ SVGS 401(K) FLAT	SAVINGS / EMPLOYER MATCH

For our Open Enrollment, we will select the Med Rate item and click on the “More...” button. We are now able to make any modifications to the Rate Table as needed. For our example, we want to add \$20 to the Rates for Order 2-6. When finished, click on the “OK” or “Apply” button to save your changes.



Please note that any changes made to Rate Tables located in the Enrollment Rate Table Setup page will affect your Open Enrollment rates only and not your current Rate Table amounts. Only when the Open Enrollment has completed will these rates update your current Rate Table amounts.

When all the Sage HRMS processes have been completed, you are ready to begin the ESS Open Enrollment setup.

## Links and contact information

Topic	URL	Additional Information
<a href="https://www.sagecity.com/support_communities/sage_hrms/f">Sage City – HRMS Forum</a>	<a href="https://www.sagecity.com/support_communities/sage_hrms/f">https://www.sagecity.com/support_communities/sage_hrms/f</a>	Ask product questions Share tips and tricks with Sage peers, partners, and pros
<a href="https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training">Questions and Answers relating to Sage HRMS Learning Series</a>	<a href="https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training">https://www.sagecity.com/support_communities/sage_hrms/f/sage-hrms---training</a>	This link will take you directly to the Sage HRMS – Training forum on Sage City
<a href="https://www.sageu.com/hrms">Sage University</a>	<a href="https://www.sageu.com/hrms">https://www.sageu.com/hrms</a>	Log on Training and certification View training by subject Create a Profile Test your knowledge View training schedule
Sage University Help Desk		Telephone: 1-855-724-3864 Email: <a href="mailto:SageUniversity@sage.com">SageUniversity@sage.com</a>
Discount code when registering for Sage HRMS instructor-led training	TrnLycle10	10% off
<a href="https://get.sage.com/HRMSLearningSeries">Register</a> or access on demand recording for Sage HRMS Learning Series	<a href="https://get.sage.com/HRMSLearningSeries">https://get.sage.com/HRMSLearningSeries</a>	