Thank you for participating in today’s webinar

The presentation will start around 10:05 a.m.

- All attendee’s will be “muted”. Please do not “unmute” yourself if the program allows you to.
- We can not assist with technical issues and apologize if they keep you from participating.
- This webinar will be recorded and posted on the Benefits Administrator website.
SEBB: Special Open Enrollments (SOE)

Addressing questions during the webinar

- Please use the “questions” feature to send questions throughout the webinar.
- We will address questions:
  - Throughout the presentation when appropriate – by topic.
  - At the end of the presentation – in summary – as time allows.
  - Questions not answered during the webinar will be addressed the following week via either:
    - Email
    - Phone
    - FUZE

- If you have employee related questions or scenarios, please send via FUZE
- For urgent matters, call Outreach & Training (O&T) at 1-800-700-1555
Special Open Enrollment (SOE)

School Employees Benefits Outreach & Training 2020
Special Open Enrollment

**Policy 45-2**
Special Open Enrollment (SOE)

**Policy 45-2A**
Addendum – special open enrollment (SOE) matrix: summary of permitted election changes
Special Open Enrollment

WAC 182-30-090
When may a subscriber change health plans?

WAC 182-30-100
When may a school employee enroll or revoke an election and make a new election under the premium payment plan, medical flexible spending arrangement (FSA), or dependent care assistance program (DCAP)?
Special Open Enrollment

**WAC 182-31-080**
When may a school employee waive enrollment in school employees benefits board (SEBB) medical and when may they enroll in SEBB medical after having waived enrollment?

**WAC 182-31-150**
When may subscribers enroll or remove eligible dependents?
Special Open Enrollment (SOE)

A qualifying event that occurs outside of annual OE that allows an employee to make changes to their health plan coverage.

- Employees have **no later than 60 days** after the SOE event
  - Must provide proof of the event that created the special open enrollment as valid documentation
    - Marriage, birth certificate, proof of loss of other coverage, etc.
    - SMA or submit *School Employee Change* form to BA
  - Change must be consistent with the event that triggered the SOE
  - Refer to SEBB Administrative Policy 45-2, Addendum 45-2A
- Remind employees to complete enrollment as soon as possible
  - Effective dates are generally the later of the first of the month following the event or the date the form is received
What qualifies an employee for a SOE?

Certain life events or special circumstances will qualify an employee for a special open enrollment event.

- An employee gaining initial eligibility does not qualify them for a SOE.
Qualifying Life Event

Examples Include:

- Marriage
- Birth, adoption, assumption of legal obligation for anticipation of adoption
- Change in residence
  - If current health plan is unavailable
- Child becomes extended dependent
- Dependent loses other coverage
Special Open Enrollment Matrix

Addendum 45-2A

Special open enrollment (SOE) matrix: Summary of permitted election changes (effective 1/1/2020)

This matrix only summarizes special open enrollment events in chapter 182-10 WAC and 182-31 WAC and the corresponding actions that are allowed. It does not describe other circumstances such as initial eligibility, open enrollment, termination for loss of eligibility, or National Medical Support Notices. Notification of the SOE event must be received no later than sixty (60) days after the event occurs, except for death/adoption SOE event.

- Provides examples of internal Revenue Service (IRS) "consistency rule," the election changes must be allowable under Internal Revenue Code and Treasury regulations, and correspond to and be consistent with the event that creates the SOE.

Events below may create a Special Open Enrollment:

### Change Health Plan Election

- "Health plan" means a plan offering medical, vision, dental, or any combination of those covered.

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### Change Eligible Dependents from Health Plan Coverage

- Eligible Dependents include: Spouse, Children, Parents.

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### waive enrollment in Medical

- Waive enrollment in Medical

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### Return from Waived Enrollment in Medical

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Note: The SOE event must be received no later than sixty (60) days after the event occurs, except for death/adoption SOE event.
Special Open Enrollment Matrix

BA Website
- Laws, Rules and Policies
- SEBB rules and policies
- Special Open Enrollment

<table>
<thead>
<tr>
<th>Number</th>
<th>Title</th>
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</tr>
</thead>
<tbody>
<tr>
<td>45-2</td>
<td>Special Open Enrollment (SOE)</td>
<td>01/13/2020</td>
</tr>
<tr>
<td>45-2A</td>
<td>Addendum - Special open enrollment (SOE) matrix; Summary of permitted election changes</td>
<td>01/13/2020</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
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<th>Title</th>
<th>Effective Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>56-1</td>
<td>Continuation coverage reinstatement for subscribers with mental impairment or physical incapacitation</td>
<td>10/1/2019</td>
</tr>
<tr>
<td>56-2</td>
<td>Election period rolling for applicants with mental impairment or physical incapacitation</td>
<td>10/1/2019</td>
</tr>
</tbody>
</table>
Special Open Enrollment Verification

When a SOE event is created in SMA, BA’s must verify the event prior to the employee being enrolled in SEBB benefits.

BA’s must approve or deny verification of:

- SOE events – via SOE verification tab
- Dependents (if needed) – via dependent verification tab

SOE guides – **coming soon**

- A step by step SOE guide for both employees and employers (BA’s)
Enrollment Changes

Employees can make enrollment changes during:

- Annual Open Enrollment (OE)
  - October 26 – November 23, 2020
  - Changes effective January 1, 2021
- Special Open Enrollment (SOE) events
  - Up to 60 days after the SOE event
Special Open Enrollment Scenarios
Scenario - Marriage

Fred Anderson gets married to Sally on May 29th. Fred logs into SEBB My Account (SMA) and creates the SOE event and uploads valid documentation on June 12th.

What is considered valid documentation?
- Marriage certificate and proof of the marriage being valid (e.g. utility bill, financial statement)

When does coverage begin?
- The coverage effective date is July 1
Addendum 45-2A

Special open enrollment (SOE) matrix: Summary of permitted election changes effective 1/13/2020

This matrix only summarizes special open enrollment events in chapter 182-30 WAC and 182-31 WAC and the corresponding actions that are allowed. It does not describe other circumstances such as initial eligibility, open enrollment, termination for loss of eligibility, or National Medical Support Notices. Notification of the SOE event must be received no later than thirty (60) days after the event occurs, except for death/Adoption SOE event 4.

Provided exemples of internal Revenue Service (IRS) “consistent rule,” the election changes must be allowable under Internal Revenue Code and Treasury regulations, and correspond to and be consistent with the event that creates the SOE.

### Events below may create a Special Open Enrollment:

**Marriage**

- **Allowed only if the subscriber acquires a new dependent due to marriage.**
- **Effective Date:** The new plan takes effect on or before the later of:
  - The date of marriage, or
  - Date form is received if the later of (a) or (b) is the first day of the month, the effective date is that day.

- **Record of Change:** The subscriber’s name and the new dependent’s name.

<table>
<thead>
<tr>
<th>Change Health Plan Election</th>
<th>Eligible Dependents</th>
<th>Remove Eligible Dependents</th>
<th>Waive Enrollment in Medical</th>
<th>Return from Waived Enrollment in Medical</th>
<th>Enroll in or Change Premium Payment Plan</th>
<th>Enroll in or Change Medical ESA</th>
<th>Enroll in or Change DCAP</th>
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<td>&quot;Health plan&quot; means a plan offering medical, vision, dental, or any combination of those coverage (182-30-060)</td>
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### Note:

- The enrollment or change is effective the first day of the month following the later of:
  - Date of marriage, or
  - Date form is received if the later of (a) or (b) is the first day of the month, the enrollment or change begins on that day.

- The school employee may enroll or increase election for a tax-dependent spouse or child or decrease election if a tax-dependent spouse or child is not employed or makes a DCAP coverage election under their plan.

- Premiums may be collected pre-paid in a spouse or dependents qualify as tax dependents (IRC 5266 otherwise requested).

- The school employee may enroll or increase election for a tax dependent spouse or child or decrease election if the school employee or tax-dependent child who is gain eligible and enroll in a new spouse’s health plan or FSA.

- The school employee may enroll or increase election for a tax dependent spouse or child or decrease election if the school employee or tax-dependent child who is gain eligible and enroll in a new spouse’s health plan or FSA.

- The school employee may enroll or increase election for a tax-dependent spouse or child or decrease election if the school employee or tax-dependent child who is gain eligible and enroll in a new spouse’s health plan or FSA.

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- The school employee may enroll or increase election for a tax-dependent spouse or child or decrease election if the school employee or tax-dependent child who is gain eligible and enroll in a new spouse’s health plan or FSA.
Scenario- Birth

Madison Smith gives birth to a newborn baby, Hannah, on May 15th. Madison logs into SMA and creates the SOE event and uploads valid documentation on June 20th. She wishes to change her medical plan at this time.

What is considered valid documentation?
• Birth certificate or hospital certificate with the child’s footprints

When does coverage begin for the newborn?
• The coverage effective date is May 15th (Date of birth)

What is the new medical plan effective date?
• The coverage effective date is May 1st
SOE Matrix - Birth

**Addendum 43-2A**

**Special open enrollment (SOE) matrix: Summary of permitted election changes (effective 1/13/2020)**

This matrix only summarizes special open enrollment events in chapter 182-30 WAC and 182-31 WAC and the corresponding actions that are allowed. It does not describe other circumstances such as initial eligibility, open enrollment, termination for loss of eligibility, or National Medical Support Notices.

Notification of the SOE event must be received no later than sixty (60) days after the event occurs, except for death adoption SOE event.

**Provisions and examples of internal Revenue Service (IRS) taxability rules:** The election change must be allowable under Internal Revenue Codes and Treasury regulations, and correspond to and be consistent with the event that triggers the SOE.

### Events below may create a Special Open Enrollment:

- Birth certificate for hospital certificate of the child’s parents on file, or
- Certificate of delivery of adoption, or
- Placement letter from adoption agency.

### Change Health Plan Election

- Health plan election.
- Eligible dependent on health plan.
- Remove eligible dependent on health plan.
- Change in enrollment in medical plan.
- Return from waived enrollment to medical plan.
- Enroll in or change premium payment plan.
- Enroll in or change medical Dop.

### Enroll Eligible Dependents

- Enroll eligible dependents in health plan coverage.
- "Health plan" means a plan offering medical, vision, dental, or any combination of these coverages.
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### Remove Eligible Dependents

- Remove eligible dependents from health plan coverage.
- "Health plan" means a plan offering medical, vision, dental, or any combination of these coverages.
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### Waive Enrollment in Medical Plan

- Waive enrollment in medical plan.
- "Health plan" means a plan offering medical, vision, dental, or any combination of these coverages.
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### Return from Waived Enrollment in Medical Plan

- Return from waived enrollment in medical plan.
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### Enroll in or Change Premium Payment Plan

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### 3 Birth or Adoption

- The subscriber acquires a new dependent due to birth, adoption, or when the subscriber has assumed legal obligation, or in anticipation of adoption.

### Valid documents for proof of the event that created the Special Open Enrollment (SOE) are:

- Birth certificate for hospital certificate of the child’s parents on file, or
- Certificate of delivery of adoption, or
- Placement letter from adoption agency.

All valid documents for proof of this event must show the name of the person who is the subscriber, the subscriber’s name, or the subscriber’s state再生能源 department.
Scenario – Dependent loses eligibility

Ben gets divorced from Shelly which is finalized on May 30th. Ben logs into SMA and creates the SOE event and uploads valid documentation on June 13th.

What is considered valid documentation?

- Petition for dissolution of marriage (divorce)

When does coverage end?

- The coverage termination is effective May 31st.
SOE Matrix - Dependent loses eligibility

Addendum 45-2A
Special open enrollment (SOE) matrix: Summary of permitted election changes (effective 1/13/2020)

This matrix only summarizes special open enrollment events in chapter 182-31 WAC and the corresponding actions that are allowed. It does not describe other circumstances such as initial eligibility, open enrollment, termination for loss of eligibility, or National Medical Support Notices. Notification of the SOE event must be received no later than sixty (60) days after the event occurs, except for birth/adoption SOE event. (See Events below may create a Special Open Enrollment)

Refer to WAC 182-31-150 - When may subscribers enroll or remove eligible dependents.

Subscribers must provide notice when a dependent is no longer eligible due to divorce, annulment, dissolution, or qualifying event of dependent ceasing to be eligible as a dependent child.

### Events below may create a Special Open Enrollment:

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### Medicate Eligibility

- Divorce, annulment, dissolution of state registered domestic partnership, or death of a dependent child ceases to be eligible (SOC): 182-30-390
- Death of a dependent child ceases to be eligible (SOC): 182-30-390
- Divorce of dependent child ceases to be eligible (SOC): 182-30-390
- Annulment of a dependent child ceases to be eligible (SOC): 182-30-390
- Dissolution of state registered domestic partnership (SOC): 182-30-390

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### Providers

- Refers to WAC 182-31-150 - When may subscribers enroll or remove eligible dependents.

Subscribers must provide notice when a dependent is no longer eligible due to divorce, annulment, dissolution, or qualifying event of dependent ceasing to be eligible as a dependent child.

### Enroll In or Change

- Enrollment or change from Waived Enrollment in Medical: 182-35-100
- Enrollment or change Premium Payment Plan: 182-35-100
- Enrollment or change in Medical TSA: 182-35-100

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Devin Harris is currently enrolled in medical, dental and vision. Mel Harris, Devin’s spouse, gets laid off from her job effective May 13th. Devin now needs to add Mel onto SEBB coverage. He logs into SMA and creates the SOE event and uploads valid documentation on June 12th.

What is considered valid documentation?

- Termination letter or letter of resignation AND a marriage certificate and proof that the marriage is still valid.

When does coverage start?

- Coverage is effective July 1st.

How long does Devin have to create the SOE event and upload valid documentation?

- 60 days from the date of the event starting May 13th.
## SOE Matrix – Employment status change (DEP)

**Events below may create a Special Open Enrollment:**

**Addendum 45-2A**

**Special open enrollment (SOE) matrix: Summary of permitted election changes effective 1/1/2020**

**SOE Matrix**

- **Employment status change (DEP)**

**Documents listed in this column are used to verify evidence of the SOE.**

### Valid documents for proof of the event that created the Special Open Enrollment (SOE) are listed below.

- **This list is not all-inclusive.***

### Change Health Plan Election

- **Health plan** means a plan offering medical, dental, or any combination of these coverages.

### Enroll in or Change Medical Plan (SAP)

- **School employees only**

### Premium Payment Plan (SAP)

- **School employees only**

### Return from WAC Enrollment in Medical

- **School employees only**

### Waive Enrollment in Medical

- **School employees only**

### What may create an SOE must apply to the school employee’s tax dependent.

### Change in Employment Status (Subscriber’s Dependent):

- The subscriber’s dependent has a change in employment status that affects their eligibility for their employer’s group health plan.

### Required form to be received:

- The required form must be received 60 days after the effective date of the change in employment status.

### Exception:

- The required form is not applicable if the subscriber’s dependent leaves employment within 30 days of the effective date of the change in employment status.

### Effective Date:

- The effective date is the first of the month after the later of:
  - (a) Date of change in employment,
  - (b) Date form is received.

### Extensive Data:

- The extensive data is the first of the month after the later of:
  - (a) Date of change in employment,
  - (b) Date form is received.

### Notes:

- If the subscriber leaves the plan after the effective date, the plan terminates effective the last day of the previous month.

### Refer to WAC 182-31-150 - When may subscribers enroll or remove eligible dependents.
SEBB My Account - Demonstration

- Marriage
- Birth
- Change of employment status (dep)
SOE Reminders

Review employee’s SOE request

- Did they submit valid documentation?
- Did they add/remove dependent? (if applicable)
  - Will vary by SOE event
- Did they make attestations?
- Did they make plan elections?

After all of this is completed by the employee, please go to SOE request tab to approve/deny SOE request
Resources
Resources

SEBB BA website
- [hca.wa.gov/sebb-benefits/admin](http://hca.wa.gov/sebb-benefits/admin)

Outreach & Training
- [1-800-700-1555](tel:1-800-700-1555)
- Online via [FUZE](https://www.hca.wa.gov) secure messaging system

SEB Board
- [https://www.hca.wa.gov/employee-retiree-benefits/about-sebb](http://www.hca.wa.gov/employee-retiree-benefits/about-sebb)
Upcoming Webinars

**June 26:** Retirement, Accounting & Billing  
**July 31:** Understanding Error Correction  
**Aug 14:** Preparing for the upcoming school year

**Coming Soon:** A webinar on each SOE event

How to register: [https://www.hca.wa.gov/sebb-benefits-admins/training-schedule](https://www.hca.wa.gov/sebb-benefits-admins/training-schedule)
Questions & Answers

We will now address some of the questions that did not get answered during the webinar.

• Any questions that do not get addressed today will be responded to by phone, email or FUZE

• Employee specific questions or scenarios should be sent through FUZE

• After the webinar, participants will receive a follow up email that includes a brief survey. We would greatly appreciate your feedback.
Thank you for participating!