

Date: September 20, 2023

To: SCHOOL DISTRICT BENEFITS ADMINISTRATORS, FINANCE & HR STAFF, AND LOCAL SUPPORT STAFF UNIONS

From: TRUSTEES OF THE PUBLIC EDUCATION BENEFITS TRUST FUND

Re: **BENEFITS ADMINISTRATION CHANGE - SEPTEMBER 2023 UPDATE 1**

What is happening

As reported in our June memo, we are transitioning our benefits administration services from TELUS Health (formerly LifeWorks) to Pacific Blue Cross (PBC). Once complete, district benefits administrators will be making updates directly to PBC's system for all benefits within this same system, even those that PBC does not insure (e.g. accident and disability).

Why are we changing

With this change, we aim to reduce the current administration system issues and create a more positive user experience for school district administrators by having a more straightforward, efficient process and system.

Additionally, this transition creates an opportunity to re-visit reporting and administrative functions to make them better and more efficient. And transitioning to a direct-to-insurer model removes the need for a third-party administrator.

When is this happening

While we are still finalizing the transition schedule, we believe, with timely support in Q1 from School Districts, we can target a late Q2 (April to June 2024) implementation.

Where we are so far

- ▶ We have notified TELUS Health of the pending change.
- ▶ We are in the pre-kick-off phase, which includes weekly planning meetings with PBC.
- ▶ We are finalizing a step-by-step project plan to ensure a smooth transition.
- ▶ We are determining what data and inputs are required to reduce risk.
- ▶ We have engaged additional resources, including Roxanne Burton of Ktwelve ERP Consulting, who will contact you soon.

An automated data feed is an option – learn about *Blue Automate*

While district benefits administrators can manually enter employee and dependent data into the PBC system, we are pleased to share that there is an opportunity to leverage an automated data feed. PBC's *Blue Automate* interface is already operational and being used by PBC clients across the province, and this tool will now be available for PEBT benefits as well. Those school districts interested in setting up an automated data feed file with PBC must email us about their interest. Up front work and resources are required to participate and there may be costs associated with implementation. Roxanne will reach out to guide you.

Advantages of *Blue Automate* include:

- ▶ Eliminates duplication of data entry into two systems (HRIS and AdminNet), saving time, resources and costs.
- ▶ Unlike the TELUS Health system, school districts have full access and control to the data source within their HRIS systems. (Source of Truth)
- ▶ Benefit reporting capabilities available through HRIS system(s) provide districts with benefit reports directly from the Source of Truth.
- ▶ Secure transfer of data additions/changes are automated and transferred at scheduled intervals to *Blue Automate*.
- ▶ School districts have control over scheduling intervals for transferring data to *Blue Automate*.
- ▶ Extensive error reporting is available with detailed actions on how to resolve any issues.
- ▶ Secure sandbox environment available for validation and testing before going live.

What to expect next

In the months ahead, you can expect the following:

- ▶ Regular communication about the project, timeline and what we need from you
- ▶ Communication from Roxanne Burton if you are interested in *Blue Automate*. Roxanne will also assist with data reconciliation and system testing throughout the project
- ▶ A request for contact information on **September 28th with an October 13th** return date to keep on schedule for the target date
- ▶ Involvement in a reconciliation process to ensure a smooth transition
- ▶ A request to confirm eligibility and plan details for configuration in PBC's system
- ▶ Testing the new system configuration – dates to be determined for Q1/Q2 2024
- ▶ A black-out period where changes to the current TELUS Health system cannot be made– dates to be determined and ample notice provided to avoid issues
- ▶ Training in the new system closer to going live

What we currently need from school districts

- ▶ Respond to the contact information request between September 28th and October 13th. A detailed request will come soon.
- ▶ Let us know if you are interested in Blue Automate by emailing us at llofthaug.pebt@cupe.ca

We want to thank the district benefits administrators for their continued patience working within the current administration model while we work to introduce this new system. The success of this new system will depend on the school districts and PEBT working together, and we are committed to communicating with you every step of the way.