

Date: December 11, 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 - DECEMBER 2023 UPDATE 2**

What is happening

As reported in our September memo, we are transitioning our benefits administration services from TELUS Health (formerly LifeWorks) to Pacific Blue Cross (PBC), and work is progressing on schedule for a targeted spring launch. Once complete, district benefits administrators will make 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). This will be more consistent with how you administer other employee groups.

What we have done so far

It has been a busy few months with all pre-planning activities on track, and plan set-up and configuration and data reconciliation beginning. We have also:

- Listened to feedback from district benefits administrators
- Provided formal termination notice to Telus Health
- Engaged Roxanne Burton from KTwelve for project support
- Collected contact information and ADMINnet access for each district
- Started meeting with districts to discuss Blue Automate (PBC’s automated data feed file)
- Held weekly project meetings with PBC
- Introduced PEBT changes with key HRIS vendors
- Preparing eligibility and plan details summaries for districts to confirm
- Begun a preliminary district data review by PBC

District support is required

We want to thank you for your timely responses to our first queries. To assist you in planning your time, here is a list of activities requiring your support during the project. Each activity will happen in phases or batches.

Activity	Timing
Eligibility & plan details confirmation	Dec 2023 – Jan 2024
Data reconciliation review	Dec 2023 – Feb 2024
Administration System Testing	Feb – March 2024

Immediate next steps

Eligibility and plan detail summaries are being sent to districts for review and sign-off. PBC will use this information to set up plan rules within their system for all benefits. This summary will include basic information such as waiting periods, minimum hour requirements and termination rules for each benefit. Some simple plan information for those benefits not held with PBC will also be included for review. While this information is available on the PEBT website and from TELUS Health, we wanted to provide districts with an opportunity to review it to ensure the PBC administration system is set up correctly. Many districts have already received an email from the PEBT regarding this review; others will receive their summary shortly. Your prompt response is critical to ensuring the project stays on track.

Initial reconciliation of employee and dependent profile and coverage data between the TELUS Health system and PBC is another activity. We are doing as much as we can behind the scenes to keep things simple. Our current pilot with two school districts is going well with no surprises. To ensure a smooth transition, you can expect a request to participate in the process over the next two months. You will get an email providing instructions about how to review the results, and will have approximately two weeks to validate the data.

What will be the same and what will change

Function	Current	New
Administration system technology	TELUS Health	PBC ADMINnet
Benefits administered	All PEBT benefits	All PEBT benefits
Contribution payment made to	PEBT	PEBT
Contribution payment options	EFT or cheque	EFT only
Contribution payment reflected on bill	N/A	Reflected on next invoice if paid by cut-off
HRIS file	Available	Blue Automate (optional)
Payroll file	Available	Not Available, a reconciliation report is available
Salary update file loading	Available	Available
Contribution rates	Full month only	Pro-rated
Invoice timing	District controlled	PBC controlled – same date for all districts
Historical enrolment data	Available	Not available
Optional Life/Optional AD & D admin	District enters coverage to Admin system	The district sends the application to PBC, and they update the system
Overage Dependents Reports	TELUS Health	PBC
Disability Reimbursement Reports	TELUS Health	PBC
Waiver of premium letters	TELUS Health	No longer required
Communicating questions or issues	Ariel Vu	Email to PBC
Website	TELUS Health	PEBT

An automated data feed is an option – how to get involved

While district benefits administrators can manually enter employee and dependent data into the PBC system, like for your other employee groups, 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 soon be available for PEBT benefits as well. Those school districts interested in setting up an automated data feed file with PBC are strongly encouraged to contact their HRIS vendor, let them know your interest, and email us. Some work is required to participate, and Roxanne Burton is working with the vendors and districts to guide you; however, you have the greatest influence with your HRIS provider.

What to expect

We will continue to communicate and involve you as the project progresses. As is best practice in a transition of this nature, you can expect a black-out period where you cannot make changes in the current system. This will assist in a smoother transition. The blackout dates are still to be determined; however, we will give you plenty of notice. We will provide training prior to go-live.

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. If you have questions please reach out to Lori Lofthaug at llofthaug.pebt@cupe.ca.