

Date: January 26, 2024

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 – JANUARY 2024 UPDATE 3**

What is happening

As previously reported, 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.

Progress Update

Since our last update in December, we have made significant progress in the following areas:

- Eligibility and plan details summaries sent to districts for confirmation
- Preliminary data reconciliation results provided to districts for review
- Discussions with districts and HRIS vendors about configuring their system for PBC’s *Blue Automate* interface

We continue to meet with PBC weekly to ensure the project plan is running smoothly.

Immediate Next Steps for Districts

These activities are very important steps to keeping the project on track. The success of this new system will depend on the school districts and PEBT working together. To assist you in planning your time, here is a list of activities requiring your support during the project.

Activity	Details
Eligibility & plan details confirmation 80% complete	Timing: December 2023 – January 2024 Eligibility and plan detail summaries have been sent to districts for review and sign-off in phases. 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. It is very important to review it and send your comments back promptly.

<p>Initial Data reconciliation review <i>87% completed</i></p>	<p>Timing: December 2023 – February 2024</p> <p>Initial data reconciliation results were provided to district benefits administrators on December 19th via the PEBT’s SharePoint site with instructions for how to review the data and provide comments.</p> <p>PBC and TELUS Health are reviewing the feedback provided and making any necessary adjustments to remove employee profiles no longer needed and ensuring extended health and dental data in both systems is aligned for covered employees. Other benefits data will be based on information in the TELUS Health system at the time of transition. Therefore, it is important to ensure the current administration system is up to date.</p> <p>PBC and/or TELUS Health may reach out to district administrators if they need more information when making adjustments.</p> <p>If your district has not reviewed the data reconciliation results or has not advised PEBT when the data will be reviewed please do so as soon as possible.</p>
<p>Data reconciliation phase 2</p>	<p>Timing : Late February 2024 – Early March 2024</p> <p>Once the initial data reconciliation activities are completed, PBC will run another comparison to determine if there are any further discrepancies to clean up prior to the system transition. This reconciliation will be more detailed, include comparing coverage levels, and birth dates.</p> <p>A communication will be sent out in late February with instructions for reviewing the data and providing comments. The turnaround for providing feedback will be quick (i.e. approximately 2 weeks) to ensure the project stays on track. Please ensure your district plans for this step of the project.</p>
<p>PBC ADMINnet Training</p>	<p>Timing: April 2024</p> <p>System training will be provided to all district benefits administrators in April. Multiple online training session dates will be provided for administrators to choose from based on level of familiarity with ADMINnet. Information about how to sign up for a session will be provided in our next communication. PBC will have staff available to support you outside of these sessions as well.</p>
<p>Black-out Period</p>	<p>Timing: To be determined</p> <p>As is best practice in a transition of this nature, you can expect a black-out period of approximately two weeks 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.</p>

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, 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. Some work is required to participate, and Roxanne Burton can guide you through the process, including assisting with discussions with HRIS vendors and coordinating with PBC.

If you are interested in setting up an automated data feed file with PBC and haven't met with Roxanne yet, please contact us.

We want to thank the district benefits administrators for their continued patience working within the current administration model while also participating in the steps required to transition to 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.