

Archdiocese of Denver

Office of People Support

Fall 2021 Business Manager Meeting

10.13.21



Our Archdiocese exists so that in Jesus Christ all might be rescued and have abundant life, for the glory of the Father.

From 'HR' to 'People Support'... Why?

Every good operation asks two key questions:

- What do we do...Why do we exist?
 - Administer a Self-funded Welfare Benefits Trust benefits plan
 - Administer a Money Purchase Pension Plan
 - Administer an HRIS (Human Resource Information System)
 - Accountable for the aggregate data that impacts the above 2 points
 - Maintain a repository of information and documents to provide guidance
 - Train on various elements of the HR Body of knowledge
 - Emphasize a culture of caring, accountability, and love for Christ and each other
- For whom do we do it?
 - 127+ locations/ministries
 - 140+ Business Manager(s)
 - 3,971 Employees/Seminarians/Priests/Religious

Simply put... we don't resource humans, we support people...

What we do...

Oversee an encompassing body of operational and employment knowledge commonly categorized as outlined below.

Benefits + Pension Administration	Payroll Operations	Employee Dev + Relations	Talent Acquisition	EE Administration
WBT (Welfare Benefits Trust) Plan design and execution	Time + Attendance	Skills Assessment + Coaching	Workforce Planning	Paycom Configuration
Lay Pension	PTO Accruals	Performance Mngt	Job Description Review	User Management
Priest Pension	Payroll Taxes	Training + Education	Exemption Status Review	Payroll Best Practices
FMLA / Leave Management	Year-End Tax reporting	Grievance Resolution	Recruitment	Record Keeping
EE Materials + Resources https://denverparish.org/welfare-benefits-trust/	Wage + Hour Compliance	Staff Restructuring + Terminations	Onboarding	W/C Reporting + Claims
<i>Within each area, there is underlying policy design and monitoring to support ongoing operations</i>				

Key realities driving focused improvement...

- Centralization in Paycom
 - ✓ 1 system w/ 1 administration team
 - ✓ Need to limit errors and create checks/balances
- Small team at AoD
 - ✓ *supporters* not *doers*
- Adoption of Payroll Operations
 - ✓ Needed alignment b/t employee data administration and payroll

Key realities driving focused improvement...

- Emphasis on areas of ownership + accountability = Generalist to Specialist
 - ✓ Needed to move to subject-matter experts
 - ✓ Too many people doing too many things for too many people lead to mistakes
 - ✓ Limited transparency into time usage and effectiveness
 - ✓ Lend clarity and consistency
- Documentation of expectations + processes
 - ✓ Limited business/operational continuity

A support model reset...

EMPLOYEE

- ❖ Paycom is an Employee Self-Service Software
- ✓ Update personal contact information
- ✓ Clock in/out and manage timecard
- ✓ Submit Time-Off Requests
- ✓ Enroll in benefits

AOD PEOPLE SUPPORT

- ❖ Measure, assess, and maintain processes that impact all locations
- ✓ Respond to and trouble-shoot requests
- ✓ Create and distribute materials to cross-train
- ✓ Audit and administer employee data at the highest level

BUSINESS MANAGER

- ❖ Responsible for management of respective location employee records + payroll
- ✓ Timely processing of changes
- ✓ Driving understanding of and appreciation for deadlines
- ✓ Submit requests for trouble-shooting or resources/enhancements

PARISH FINANCE + FASA

- ❖ Partnership in the support of Business Manager at every stage of lifecycle
- ✓ Distinguish b/t their department accountabilities and those of People Support
- ✓ Participate in redirection or trouble-shooting as needed
- ✓ Aid in the ongoing links b/t Paycom vs Parishsoft

PAYCOM SPECIALIST

- ❖ Supports the ongoing use of the product and system instructions
 - ✓ Does not instruct on our unique culture and *how we use the system*
 - ✓ Guide for year-end processes

Instructional Guides ready ...

New + Updated Documents to be sent via Zip File:

- Paycom ESS Employee View
- Paycom ESS Client Side
- Introduction to Paycom
- New Hire Onboarding Checklist
- Calendar of payroll events
- PAF Instruction Grid
- Termination Offboarding Checklist
- AoD Benefits Information Sheet
- Qualifying Event Instructions

Reminders:

- WBT Website has all of the related documents for benefits – (most FAQs can be answered there first)
- File retention policy is in the Pastoral Handbook (PDF)

Mission Branding Example...



ARCHDIOCESE OF DENVER FAMILY OF EMPLOYERS¹ EMPLOYEE BENEFITS

Thank you for your Fidelity and your Mission-Driven service. We are grateful.
To enhance your work experience, your Employer provides the following benefits:

WELFARE BENEFITS

Comprehensive Medical, Dental, Vision and Prescription Drug coverage through the various plan options is available under the **Archdiocese of Denver Welfare Benefits Trust** for eligible individuals and their dependents.

- Medical plan options provide general coverage, all aligned with Catholic Values,
- Medical plan options cover preventive care at 100%
- Teladoc Services: Provides access 24 hours, seven days a week to U.S. Board-certified doctors
- Maternity Management Program: Advice, free educational materials
- Healthy Rewards Program: Member discounts on health areas such as weight management, wellness products, tobacco cessation to name a few

AoD Welfare Benefits Trust

<https://denverparish.org/welfare-benefits-trust/>

Email: benefitssupport@archden.org

Phases of Benefit Plan Administration Lifecycle

Planning

- WBT includes DioCS and Cath Charities
- Plan Administrator (Team) oversees w/ Committee all changes
- Plan year runs from 7/1 to 6/30 every year
 - Matches the Fiscal Year
- Work with Lockton Consulting
- Updates made to plan and reflected in Open Enrollment roll-out

Enrollment

- **Self Service Model**
 - Facilitated within Paycom
- Timing
 - Annual Open Enrollment
 - Hires + Status Change(s)
 - Qualified Event
- Priest & Teacher Transfers done at centrally ***
- Stop-Loss carrier, SunLife, is engaged for exceptions made outside of the 31-day window
- Weekly Data file from Paycom instructs UMR to make commensurate changes

Maintenance

- First line of contact for the employee is directly with UMR as our TPA
- They review the data from weekly file and reach out to the AoD as needed for clarification and guidance per the plan design and document
- Employee may utilize UMR to the fullest extent to get questions answered, referrals for providers vetted, pre-authorization for services, and clarification on claims
- People Team maintains pertinent data in Paycom to address issues

Escalation

- If/as any point-of-service is not covered to the extent thought, the employee has the ability to go through a 1st level appeal with UMR. They will review and make a designation, again referring to our established plan document.
- If the appeal is denied, then they can appeal to the WBT for secondary review by the Plan Administrator

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Accountability of each role within the Benefit Plan Administration Lifecycle

Parish

- Key Benefits Eligibility Profiles and other employee record data correctly
- Be familiar with the WBT Benefits Guide
- Share enrollment information and remind employee they have 31 days to enroll, NO MORE for:
 - New hire
 - Newly eligible
 - Qualified Event
- Make 2021-2022 Benefits Guide available + direct to the WBT Site for FAQs
- *Key all employee data changes timely for proper eligibility impact*
 - PT to FT status + date change on Form 3
- Inform terminating employees their benefits end last day of month + how **COC** works
 - NOTE: This is not the termination date for their record or "effective date" in Paycom

Employee

- If new hire or newly eligible, mind the calendar and proceed with enrollment within the 31-day window
 - **Finalize + Print record**
- If qualified Event, respond to notification of instructions and provide required documentation
 - Subsequent enrollment changes ONLY to impacted plan(s)
 - Ensure beneficiaries and dependents are correct(ed)
- Mind instructions for Annual Enrollment (passive vs. changes)
- If benefits are terminating, mind the **Continuation of Coverage** packet sent after benefits term date.

AoD Admin

- Weekly approvals of:
 - PAFs that impact potential eligibility
 - Qualified Events
 - Enrolled-in benefits
 - Dependents turning 26
- Weekly clarification via standing call with UMR to review enrollment and billing issues
- Review of errors or oddities with enrollment
- Work with all vendors to ensure plan design as built in Paycom is working as intended
- Emails to impacted participants with dependents turning 26 and are losing coverage

UMR

- Review and follow instruction from weekly data file from Paycom make commensurate enrollment changes (Mondays)
- Work with AoD Admin on weekly standing call to scrutinize file errors or other enrollment errors
 - May only be done with expressed permission
- Issue **Continuation of Coverage** packet after the benefits end date within 7-10 business days to the address on file
- Issue bills (on month in advance) and credits for post-billing corrections

Benefit Enrollment Examples:

- New Hire with 9/2/21 date of hire
 - Eligible 10/1 for enrollment + has 31 days to enroll
- Employee moves from PT to FT on 10/14
 - Eligible as of 11/1
 - System will open up

Benefit Enrollment Examples:

- Employee terminates 4/2
 - Will be covered under plan through 4/30
 - Continuation of Coverage is issued ***after the 4/30*** benefits end date
 - If/as enrollment in COC takes place, employee coverage will be retroactive to 5/1 once completed and paid for in full
- Employee has a Qualified Event
 - Event date is the date it occurs so wedding on 5/4 or birth on 2/16
 - System opens up on or after that date so if entered prior, enrollment will not be possible until the date occurs
 - From there, 31 days to make changes before the system closes again

Thank you for all that you do!

- - - Please continue to the great work - - -

Keep it simple, ask good questions, speak up when you need more personalized training, breathe, and remember our department is here to support you all ~

People.Support@archden.org

Edwin + Julie + Nicki + Roxanne + Beth

God bless you!



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