BOARDS OF EDUCATION SUMMER TRANSFERS JOB AID

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Board of Education Summer Transfer Job Aid - Effective May 1, 2017 / Revised January 9, 2020

Definitions

Add Update File (AUF) – The "AUF" file is used by Employers to transmit eligibility records for new hires, newly eligible employees, retiring employees, and employees terminating employment for any reason, as well as SHBP Eligibility status and demographic updates (e.g., address, city, state, zip code, date of birth, social security number, and gender) and should be submitted as often as possible.

Board of Education Coverage Start Date (BCSD) – The date the employee's SHBP coverage starts with the new Employer (or if an employee is transferring internally with an Employer with multiple payroll locations, the BCSD would be the date the employee's SHBP coverage starts in the new Payroll Location).

Board of Education Coverage End Date (BCED) – The date the employee's SHBP coverage ends with the former employer (or if an employee is transferring internally with an Employer with multiple payroll locations, the BCED would be the date the employee's SHBP coverage ends in the former Payroll Location). An employee's coverage can only terminate at the end of the month.

BOE – Board of Education.

Break in Employment – 31 calendar days or more between the "Date of Last Deduction" transmitted by the former Employer to SHBP and the "Hire Date" transmitted by the new Employer to SHBP.

Date of Last Deduction or Last Deduction Date – The date that an Employer takes the final payroll deduction for an employee's health coverage (or if employee is not enrolled in SHBP coverage, date that an Employer takes the final payroll deduction), which the Employer is responsible for transmitting to SHBP via an AUF.

Employing Entity – An SHBP Employing Entity or Employer primarily includes Public School Systems and State Agencies who are required to participate in the Plan. Board Members of Public School Systems, Charter Schools, Critical Access Hospitals, and Federally Qualified Health Centers may also participate in SHBP, but are not required to.

Future Dated New Hires – A new hire (NEMP) record transmitted by an employer for an employee where the Hire Date is after the current date the record was transmitted.

Future Dated Terminations – A termination (TERM) record transmitted by an employer for an employee where the Date of Last Deduction is after the current date the record was transmitted.

Hire Date – The date than an Employer hires an employee or date a current employee becomes benefits eligible or ineligible, which the Employer is responsible for transmitting to SHBP via an AUF.

Newly Eligible Employee – A current employee who recently became eligible to enroll in SHBP coverage.

New Hire – A new employee <u>or</u> a former employee previously employed with another SHBP Employing Entity with a Break in Employment.

Record Types – Specific types of records (e.g., NEMP or TERM) approved by SHBP to transmit employee eligibility data and updates on the AUF *(see BOE AUF File Layout for a complete list)*.

Regular Transfer – See Regular Transfers Job Aid.

Summer Transfer – A transfer event, specifically for Boards of Education (and Employers treated as Boards of Education), where an employee has no Break in Employment, the employee has a hire date that occurs between May 1st and October 31st **and** the BCSD is populated which determines when the employee's coverage begins with the new Employer. Unlike a Regular Transfer, a Summer Transfer to a new Employer does not determine when coverage ends with a former Employer unless the new and former Employer coordinate their use of the BCSD and BCED for transferring employees.

Definitions

Summer Transfer Period – A period that occurs specifically for hire dates between May 1st through October 31st of each calendar year.

Termination – When an Employer ends an individual's employment in their Payroll Location, which also terminates their status as an employee and/or their SHBP coverage in the SHBP Enrollment Portal.

Transfer - A Regular or Summer Transfer event occurs when an employee transfers from their former Employer to their new Employer with no Break in Employment (or if an employee is transferring internally with an Employer with multiple payroll locations, transferring from that Employer's former Payroll location to that same Employer's new Payroll Location with no Break in Employment). The employee transitions to their new Employer with the same coverage status (i.e., plan option/tier) or waiver of coverage status (i.e., no coverage) he/she had prior to the transfer.

Summer Transfer Event: General Information

Purpose of Summer Transfer Event

The Summer Transfer Event was successfully implemented on May 1, 2017. The purpose of the Summer Transfer Event is to provide a process for Board of Education employees with contracts, primarily teachers, to continue their SHBP Coverage and avoid paying for COBRA when the employee transitions from one Employer to another Employer during the Summer Transfer Period (i.e., May 1 – October 31), *and the BCSD and BCED fields are properly populated and coordinated by the new and former Employer Payroll Locations*.

Calculating Whether Break in Employment has Occurred

The calendar days between the Date of Last Deduction field transmitted on a TERM Record for a former employee by a former Employer to SHBP and **Hire Date field** transmitted on a NEMP Record for an employee by a new Employer determine whether a Break in Employment has occurred. If former Employer and new Employer are the same, the Date of Last Deduction field transmitted on a TERM Record would include the date the Employer took the final payroll deduction in the former Payroll Location (e.g., non-certified) and the Hire Date field transmitted on a NEMP Record would include the date employment begin in the new Payroll Location (e.g., certified).

- **No Break in Employment Has Occurred:** 30 calendar days or less between the "Date of Last Deduction" transmitted by the former Employer to SHBP and the "Hire Date" transmitted by the new Employer to SHBP.
- **Break in Employment Has Occurred:** 31 calendar days or more between the "Date of Last Deduction" transmitted by the former Employer to SHBP and the "Hire Date" transmitted by the new Employer to SHBP.

Summer Transfer Event: Transferring Out

Transferring Out: Board of Education Coverage End Date (BCED)

When the BCED field is populated, SHBP coverage will end the last date of that month. For example, if an Employer transmits August 15th in the BCED field, the SHBP Enrollment Portal will populate August 31st as the last date of SHBP coverage with that Employer. The BCED field is active in the SHBP Enrollment Portal throughout the year, which means the SHBP Enrollment Portal will always recognize dates in the BCED field; however, it should only be used during the Summer Transfer Period.

Note on Date of Last Deduction field (required for all Transfer Out/TERM records): When the Date of Last Deduction is entered, SHBP coverage will end the last day of the following month, unless the BCED field is populated. As noted in example 5 below, if an Employer populates the BCED field but does not populate the required Date of Last Deduction field, the record will error out.

Transferring Out Examples:

Example #	Date of Last Deduction (Former Employer)	BOE Coverage End Date (Former Employer)	Term Date in SHBP Enrollment Portal	Benefits Coverage End Date
1	2/28/2020	Blank	3/1/2020	3/31/2020
2	3/15/2020	Blank	3/16/2020	4/30/2020
3	2/28/2020	4/30/2020	3/1/2020	4/30/2020
4	5/31/2020	8/31/2020	6/1/2020	8/31/2020
5	Blank	5/30/2020	Record Errors	Record Errors

Note on First BCED Sent: The SHBP Enrollment Portal will use the first BCED sent to determine the employee's SHBP coverage end date. If additional BCEDs are sent on later files, the additional BCEDs will not automatically change when the employee's coverage ends, meaning the date coverage ends will continue to be based on the first BCED sent. Therefore, if the first BCED needs to be corrected, please contact your Employer Services Specialist for instructions via the SHBP (X)change at https://shbp.georgia.gov/xchange.

Summer Transfer Event: Transferring In

Transferring In: Board of Education Coverage Start Date (BCSD)

When the BCSD field is populated during the Summer Transfer Period **and** the employee has no Break in Employment, SHBP coverage will begin on the date populated in the BCSD field.

- For example, if Jane Doe has no Break in Employment, and her Employer enters July 25th as her Hire Date and October 15th in the BCSD field, the SHBP Enrollment Portal <u>will populate</u> the October 15th BCSD as the coverage start date.

In comparison, when the BCSD field is populated during the Summer Transfer Period **and** the employee has a Break in Employment, the SHBP Enrollment Portal **will ignore** any date sent in the BCSD field and the employee's SHBP coverage effective date will be based on the "New Hire Event" *(see New Hire Event section)*.

- For example, if Jane Doe has a Break in Employment, and her new Employer enters July 25th as her Hire Date and October 15th in the BCSD field, the SHBP Enrollment Portal <u>will not populate</u> the October 15th BCSD as the coverage start date, and coverage will begin September 1st as a "New Hire Event" *(see New Hire Event section)*. **The Employee must enroll in coverage within 31 days of their Hire Date with their new Employer because they are a New Hire due to the Break in Employment; otherwise the Employee must wait until the next Open Enrollment period to select coverage.**

Note on BCSD field: The BCSD field is ONLY active in the SHBP Enrollment Portal from May 1st – October 31st, which means the SHBP Enrollment Portal will ONLY recognize dates in the BCSD field that are between May 1st – October 31st. Therefore, please note the following:

- If an Employer enters a date in the BCSD field that is between November 1 thru April 30 **and** the employee has no Break in Employment, the SHBP Enrollment Portal **will ignore** any information sent in the BCSD field and the employee's SHBP coverage effective date will be based on "Regular Transfer" rules *(see Regular Transfer in Definitions section for more information)*.
- If an Employer enters a date in the BCSD field that is between November 1 thru April 30 **and** the employee has a Break in Employment, the SHBP Enrollment Portal **will ignore** any information sent in the BCSD field and the employee's SHBP coverage effective date will be based on "New Hire Event" *(see New Hire Event section)*. **The Employee must enroll in coverage within 31 days of their Hire Date with their new Employer because they are a New Hire due to the Break in Employment; otherwise the Employee must wait until the next Open Enrollment period to select coverage.**

Transferring In Examples (assumes <u>no</u> Break in Employment)

Example #	Hire Date (new Employer)	BOE Coverage Start Date (new Employer)	Hire Date in SHBP Enrollment Portal	Coverage will start in the SHBP Enrollment Portal
1	7/25/2020	10/1/2020	7/25/2020	10/1/2020
2	8/26/2020	9/1/2020	8/26/2020	9/1/2020
3	7/15/2020	Blank	7/15/2020	9/1/2020
4	8/24/2020	Blank	8/24/2020	10/1/2020
5	7/25/2020	8/15/2020	7/25/2020	8/15/2020
6	8/16/2020	9/15/2020	8/16/2020	9/15/2020

Note on First BCSD Sent: The SHBP Enrollment Portal will use the first BCSD sent to determine the employee's SHBP coverage start date. If additional BCSDs are sent on later files, the additional BCSDs will not automatically change when the employee's coverage begins, meaning the date coverage begins will continue to be based on the first BCSD sent. Therefore, if the first BCSD needs to be corrected, please contact your Employer Services Specialist for instructions via the SHBP (X)change at https://shbp.georgia.gov/xchange.

Summer Transfer Event: Examples

Sequential Transferring Out and Transferring In Examples

Scenario: No Break in Employment

	Event Type	Date of Last Deduction (Former Employer)	BOE Coverage End Date (Former Employer)	Hire Date (new Employer)	BOE Coverage Start Date (new Employer)	Hire Date in SHBP Enrollment Portal	Coverage will start in SHBP Enrollment Portal
1	Transfer Out	8/19/2020	9/30/2020	Blank	Blank	Blank	Blank
2	Transfer In	Blank	Blank	7/25/2020	10/1/2020	7/25/2019	10/1/2020

In the above example, there is no Break in Employment because the time period between the Date of Last Deduction - 8/19/2020 and the Hire Date 7/25/2020 is *30 days or less*. Therefore, the SHBP Enrollment Portal will populate the October 1st BCSD as the coverage start date.

Scenario: Break in Employment

	Event Type	Date of Last Deduction (Former Employer)	BOE Coverage End Date (Former Employer)	Hire Date (new Employer)	BOE Coverage Start Date (new Employer)	Hire Date in SHBP Enrollment Portal	Coverage will start in SHBP Enrollment Portal
1	Transfer Out	5/19/2020	7/31/2020	Blank	Blank	Blank	Blank
2	Transfer In	Blank	Blank	9/4/2020	10/1/2020	9/4/2020	11/1/2020

In the above example, there is a Break in Employment because the time period between the Date of Last Deduction -5/19/2020 and Hire Date - 9/4/2020 is *31 days or more*. Therefore, the SHBP Enrollment Portal will ignore the 10/1/2020 date in the BCSD field and the employee's SHBP coverage effective date will be based on the "New Hire Event" *(see New Hire Event section)*. Additionally, if the Employee fails to enroll in coverage within 31 days of their Hire Date - 9/4/2020 with their new Employer, the Employee must wait until the next Open Enrollment period to select coverage.

Summer Transfer Event: Future Dated Terminations/Transfers

Future Dated Terminations of Transferring Employees

TERM Records transmitted for Terminations and Transfers are loaded into the SHBP Enrollment Portal based on the Date of Last Deduction. However, if a former Employer submits a Transfer or Termination on a TERM Record for an employee and then a new Employer submits a Transfer or New Hire on a NEMP Record for the same employee with a Hire Date occurring prior to the former Employer's Date of Last Deduction, the SHBP Enrollment Portal will not load the Transfer or Termination Record (i.e., the future termination date) from the former Employer. This will prevent a transferring employee's coverage from being terminated by their former Employer after they have been hired by their new Employer. If in the event the former Employer sends a coverage end date for the employee that results in overlapping coverage with the new Employer, then the former Employer will need to report the overlapping coverage as part of the Premium Billing Discrepancy Process.

Scenario: In this scenario the current date is August 3, 2020. The former Employer submitted a TERM Record for an employee on July 22, 2020 with a Date of Last Deduction of August 15, 2020. The new Employer submitted a NEMP Record for the same employee on August 1, 2020 with an August 1, 2020 Hire Date. Since the new Employer submitted a NEMP Record for that same employee with a Hire Date of August 1, 2020, which occurs prior to the former Employer's Date of Last Deduction on the TERM Record for the employee, the former Employer's TERM Record was NOT loaded into the SHBP Enrollment Portal.

	Event Type	Date AUF File Submitted	Date Record loaded into SHBP Enrollment Portal	BOE Coverage End Date (Former Employer)	Benefits Coverage End Date	Hire Date in SHBP Enrollment Portal	BOE Coverage Start Date (new Employer)	Coverage will start in SHBP Enrollment Portal
1	Transfer Out/TERM	7/22/2020	Record not loaded	8/31/2020	8/31/2020 *	Blank	Blank	Blank
2	Transfer In/NEMP	8/1/2020	8/1/2020	Blank	Blank	8/1/2020	9/1/2020	9/1/2020

Scenario with Overlapping Coverage: *In these situations where the former Employer's TERM Record is not loaded into the SHBP Enrollment Portal, it could result in an overlap of coverage, which the former Employer will need to report as a discrepancy through the Premium Billing Discrepancy Process. SHBP Premium Billing will ensure the employee's Hire Date (and Coverage Start Date if applicable) with his/her new Employer is used to determine when the former Employer's responsibility to provide coverage to the employee ends.

As you can see in the below scenario, an overlap in coverage would occur because based on the records transmitted by both employers, the former Employer's responsibility to provide coverage would not end until 9/30/2020 and the new Employer's responsibility to provide coverage would begin 9/1/2020. Once notified by the former Employer, SHBP Premium Billing will end coverage with the former Employer on 8/31/2020 since the new Employer is taking responsibility for coverage beginning 9/1/2020.

	Event Type	Date AUF File Submitted	Date Record loaded into SHBP Enrollment Portal	BOE Coverage End Date (Former Employer)	Benefits Coverage End Date	Hire Date in SHBP Enrollment Portal	BOE Coverage Start Date (new Employer)	Coverage will start in SHBP Enrollment Portal
1	Transfer Out/TERM	7/22/2020	Record not loaded	9/1/2020	9/30/2020*	Blank	Blank	Blank
2	Transfer In/NEMP	8/1/2020	8/1/2020	Blank	Blank	8/1/2020	9/1/2020	9/1/2020

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Summer Transfer Event: Future Dated New Hires/Transfers

Future Dated New Hire Records for Employees

NEMP Records transmitted for New Hires and Transfers are loaded into the SHBP Enrollment Portal based on the Date of Hire. However, if an Employer submits a New Hire or Transfer on a NEMP Record with a Date of Hire that is after the date the file was transmitted, the NEMP Record will not load into the SHBP Enrollment Portal until the Date of Hire is reached.

Scenario: In this scenario the current date is July 22, 2020. The Employer submitted a NEMP Record for an employee on July 22, 2020 with an August 1, 2020 Hire Date. The NEMP Record will not be loaded and displayed in the SHBP Enrollment Portal until the file load is complete on August 1, 2020.

	Event Type	Date AUF File Submitted	Hire Date in SHBP Enrollment Portal	Date Record loaded into SHBP Enrollment Portal
1	Transfer In/NEMP	7/22/2020	8/1/2020	8/1/2020

Scenario: In this scenario the current date is May 22, 2020. The Employer submitted a NEMP Record for an employee on May 22, 2020 with a July 15, 2020 Hire Date. The NEMP Record will not be loaded and displayed in the SHBP Enrollment Portal until the file load is complete on July 15, 2020.

	Event Type	Date AUF File Submitted	Hire Date in SHBP Enrollment Portal	Date Record loaded into SHBP Enrollment Portal
1	Transfer In/NEMP	5/22/2020	7/15/2020	7/15/2020

New Hire Event

New Hire Event

A New Hire Event is triggered for New Hires and Newly Eligible Employees only.

Coverage Start Date for New Hires and Newly Eligible Employees

The effective date of coverage for New Hires and Newly Eligible Employees is the first of the month following one full calendar month of employment in a benefits eligible position with an SHBP Employing Entity, unless the hire date or date an employee transitions to a benefits eligible position is concurrent with the First Workday of the month determined by SHBP. If the hire date or date an employee transitions to a benefits eligible position is concurrent with the First Workday of the month determined by SHBP, then coverage is effective the first day of the month following the hire date or date an employee transitions to a benefits eligible position.

Coverage Start Date Examples:

	Hire Date or Date of Transition to a Benefits Eligible Position	One Full Calendar Month Waiting Period	Coverage will start in SHBP Enrollment Portal
1	1/31/2020	2/1/2020 - 2/29/2020	3/1/2020
2	4/1/2020	4/1/2020 - 4/30/2020	5/1/2020
3	10/15/2020	11/1/2020 - 11/30/2020	12/1/2020

BOE Coverage Start Date Field Should Not Be Used for New Hire Event

The SHBP Enrollment Portal **will ignore** any information transmitted in the BCSD field when a New Hire Event is triggered. The employee's SHBP coverage effective date will be based on the New Hire Event eligibility rules if:

- The employee is a New Hire who enrolls in health coverage within 31 days of their hire date in a benefits eligible position, or
- The employee is a Newly Eligible Employee who enrolls in health coverage within 31 days of the date they transition to a benefits eligible position.

New Hire Examples:

The examples below include New Hires and Newly Eligible Employees.
As noted in examples 1 and 4 below, if an Employer populates the BCSD field for a New Hire or Newly Eligible Employee, the SHBP Enrollment Portal will ignore the BCSD field to determine the employee's coverage start date.

	Hire Date or Date of Transition to a Benefits Eligible Position on AUF	BOE Coverage Start Date on AUF	Hire Date in SHBP Enrollment Portal	Coverage will start in SHBP Enrollment Portal
1	7/25/2020	10/1/2020	7/25/2020	9/1/2020
2	7/25/2020	Blank	7/25/2020	9/1/2020
3	8/26/2020	Blank	8/26/2020	10/1/2020
4	5/1/2020	7/1/2020	5/1/2020	6/1/2020

Termination Event

Termination Event
A termination event occurs when an Employer terminates an employee's SHBP coverage in its Payroll Location.

Date of Last Deduction (required for all TERM records)
The date an Employer takes the final deduction from the employee is required for all TERM records. When the Date of Last Deduction is entered for an employee, SHBP terminates their status as an employee and/or their SHBP coverage in the SHBP Enrollment Portal. For an Active Member, SHBP coverage will end the last day of the following month.

Coverage End Date Examples:

	Last Date of Deduction	One Full Calendar Month Following Last Date Deduction	Coverage will end in SHBP Enrollment Portal
1	1/31/2020	2/1/2020 - 2/29/2020	2/29/2020
2	4/1/2020	5/1/2020 – 5/31/2020	5/31/2020
3	10/15/2020	11/1/2020 - 11/30/2020	11/30/2020

BOE Coverage End Date Field Should Not Be Used for Termination Event
Entering a BCED field overrides the Date of Last Deduction field and should only be used by Employers during the Summer Transfer Period to end coverage outside of the normal termination date that occurs when populating the Date of Last Deduction (i.e., generally when populating Date of Last Deduction, SHBP coverage will end the last day of the following month).

Because the BCED Field is active in the SHBP Enrollment Portal throughout the year, BOEs **should not use** this field outside of the Summer Transfer Period. *For more information on the BCED field, see Summer Transfer Event section.*

Termination Event Examples:
The examples below include terminated employees. *As noted in example 4 below, if an Employer populates the BCED field for a terminated employee, the SHBP Enrollment Portal will ignore the Date of Last Deduction field to determine the employee's coverage end date. As noted in example 5 below, if an Employer populates the BCED field but does not populate the required Date of Last Deduction field, the record will error out.*

	Last Date of Deduction	BOE Coverage End Date	Term Date in SHBP Enrollment Portal	Coverage will end in SHBP Enrollment Portal
1	7/25/2020	10/1/2020	7/26/2020	9/30/2020
2	7/25/2020	Blank	7/26/2020	8/31/2020
3	8/26/2020	Blank	8/27/2020	9/30/2020
4	5/1/2020	7/1/2020	5/2/2020	6/30/2020
5	Blank	9/30/2020	Record Error	Record Error

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Weekly BOE Coverage Date Report

Weekly BOE Coverage Date Report

When the Summer Transfer Event was successfully implemented on May 1, 2017, SHBP also developed the Weekly BOE Coverage Date Report for Boards of Education. The report allows Employers who transmit employee records that include the Summer Transfer fields, BOE Coverage End Date (BCED) or BOE Coverage Start Date (BCSD), to see exactly how those records are processed in the SHBP Enrollment Portal.

Availability of Weekly BOE Coverage Date Report

Weekly BOE Coverage Date Reports are uploaded to each Employers applicable Payroll Location folder every Monday throughout the Summer Transfer Period (i.e., May 1 – October 31) for AUFs that include employee records with the BCED or BCSD fields populated. The cutoff date for data appearing on the Report is Fridays at 5pm of the prior week.

Data on Weekly BOE Coverage Date Report

The Weekly BOE Coverage Date Report includes a weekly snapshot of each employee record with the BCED or BCSD fields populated and transmitted on an AUF by an Employer to SHBP. Specifically, the data on the report indicates:

- ➢ Whether the record transmitted is a New Hire Event or Transfer Event
- ➢ For Transfer Events, whether the transfer is a Regular Transfer or Summer Transfer
- ➢ Dates coverage will begin or end in the SHBP Enrollment Portal for each employee record

Accessing the Weekly BOE Coverage Date Report

The Weekly BOE Coverage Date Report is located in State Health Repository Tool (SHRT) in an Employer's Payroll Location From_ADP folder, titled *Weekly BOE Cov Date Report*. The report is only produced for Employers who submit employee records with the BCED and BCSD fields populated and transmitted on an AUF; therefore, BOEs who do not use the Summer Transfer fields will not receive a report.

Questions?

Employers who have questions or concerns regarding their report should contact their Employer Services Specialists via the SHBP (X)change at https://shbp.georgia.gov/xchange.
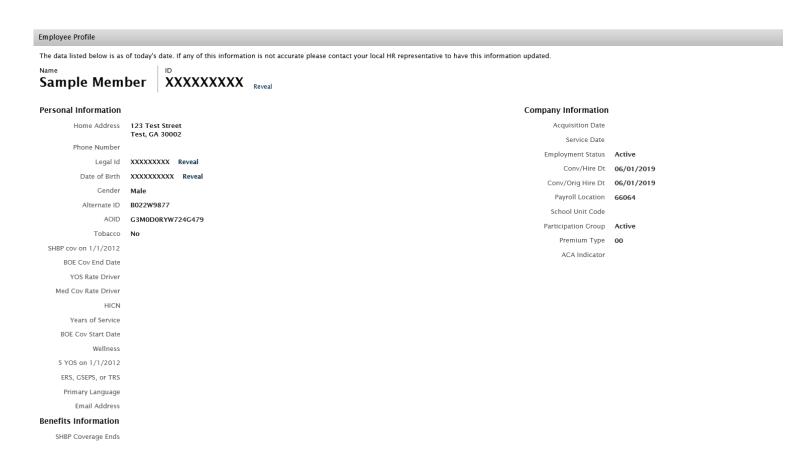
Employee Profile Page

Employee Profile Page

After an Employer transmits a NEMP record to SHBP hiring an employee in their Payroll Location, the Employer can view the employee's profile in the SHBP Enrollment Portal. The profile will include a "Benefits Information" section that shows when SHBP Coverage Ends.

The SHBP Coverage Ends field includes the calculated date when an Active Member's coverage will be termed when a TERM record (Transfer Out or Termination) has been transmitted by an Employer. If an employee is currently employed and enrolled in SHBP coverage (excluding COBRA), this field will be blank.

Please Note – The SHBP Enrollment Portal will use the first successful TERM record sent to determine the employee's SHBP coverage end date displayed in the SHBP Coverage Ends field. Subsequent records transmitted to change the Date of Last Deduction or BOE Coverage End Date will not update the SHBP Coverage Ends field and should not be a concern for Employers who send subsequent records. The Employer should rely on their Premium Billing Report (BRP) to determine whether they were charged correctly based on the subsequent files transmitted, and if they are not, the Employer should contact SHBP Premium Billing at SHBP.PremiumBilling@ADP.com.

Employee Profile

The data listed below is as of today's date. If any of this information is not accurate please contact your local HR representative to have this information updated.

Name	ID
Sample Member	**XXXXXXXX** Reveal

Personal Information

			Company Information	
Home Address	**123 Test Street** **Test, GA 30002**		Acquisition Date	
Phone Number			Service Date	
Legal Id	XXXXXXXX **Reveal**		Employment Status	**Active**
Date of Birth	XXXXXXXXXX **Reveal**		Conv/Hire Dt	**06/01/2019**
Gender	**Male**		Conv/Orig Hire Dt	**06/01/2019**
Alternate ID	B022W9877		Payroll Location	**66064**
AOID	G3M0D0RYW724G479		School Unit Code	
Tobacco	**No**		Participation Group	**Active**
SHBP cov on 1/1/2012			Premium Type	**00**
BOE Cov End Date			ACA Indicator	
YOS Rate Driver				
Med Cov Rate Driver				
HICN				
Years of Service				
BOE Cov Start Date				
Wellness				
5 YOS on 1/1/2012				
ERS, GSEPS, or TRS				
Primary Language				
Email Address				

Benefits Information

SHBP Coverage Ends	

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BOE AUF File Layout

BOE AUF File Layout

Field Name	Position	Size	AUF - Add and Update File from Billing Location	PUF - Payroll Update File from Billing Location	Comments (all fields should be left justified)
Payroll location	001	5	Y	Y	SHBP Payroll Location Number
Record Type	006	4	Y	Y	See record type valid values (e.g. NEMP, TERM, etc.)
Employee SSN	010	9	Y	Y	
Employee ID	019	12			Optional employee ID from payroll system
Last name	031	35	Y	Y	
First name	066	25	Y	Y	
Middle name	091	25	O		
Prefix	116	10	O		
Suffix	126	10	O		
Street Address 1	136	55	Y		
Street Address 2	191	55	Y		
City	246	30	Y		
State	276	2	Y		
Postal Code	278	15	Y		
County of residence	293	15	O		001 - 159 and 160 (out of state) or county name (see attached list)
Country	308	3	O		default to USA
Phone number	311	20	O		
Date of birth	331	8	Y		CCYYMMDD
Sex	339	1	Y		F or M
Unit/School code	340	15	O	O	
County of employment	355	15	O		001 - 159 and 160 (out of state) or county name
SHBP eligible	370	1	Y		Y or N Must be provided for all members as this will drive benefits (in)eligibility.
Retirement system	371	5			14990 -ERS, 89929 or 89990 - TRS, 89409 - PSERS, 14960 - LRS, 14930 - SCRS, other
Hire Date	376	8	Y		CCYYMMDD The 1st date for which the employee is compensated.
Deduction date	384	8		Date deduction taken	CCYYMMDD Deduction Date Example: 20060225

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Field Name	Position	Size	AUF - Add and Update File from Billing Location	PUF - Payroll Update File from Billing Location	Comments (all fields should be left justified)
Board of Education COVERAGE START DATE (BCSD)	392	8			CCYYMMDD Coverage Month Example: 20060301 The date the employee's benefit coverage starts at the employing agency. This field should only be used for summer transfers from May 1 through October 31. During this timeframe, the date provided in this field will be used to replace the hire date when determining the benefit start date in the ADP system. This field should only be used by BOEs. State agencies should keep this field blank.
Board of Education COVERAGE END DATE (BCED)	400	8	Y		CCYYMMDD The date the employee's benefit coverage ends at the employing agency. This date should always be the last day of the month. Any dates other than the last day of the month will be rolled to the last day of the month. (Example: 8/15 will be 8/31). The date provided in this field will be used to replace the Last Deduction Date when determining the benefit end date in the ADP system. This field should only be used by BOEs. State agencies should keep this field blank.
Option	408	2		O	See Option Valid Values
Type/Tier	410	2		O	See Tier Valid Values
Premium (Employee portion)	412	9(4)V99S			Examples: 010000 for $100.00 010000- for -$100.00 last character(position 418) is minus sign if negative, blank if positive NOTE: Amount shown in positions 419 to 425 plus amount shown in positions 426 to 432 should equal total amount billed by SHBP for the employee's portion of the premium

Field Name	Position	Size	AUF - Add and Update File from Billing Location	PUF - Payroll Update File from Billing Location	Comments (all fields should be left justified)
Deduction amount	419	9(4)V99S		Amount deducted from employees check for health insurance premium	Examples: 010000 for $100.00 010000- for -$100.00 last character(position 425) is minus sign if negative, blank if positive NOTE: Amount shown in positions 419 to 425 plus amount shown in positions 426 to 432 should equal total amount billed by SHBP for the employee's portion of the premium
Subsidized amount	426	9(4)V99S		Amount employer pays of the Employee portion of health insurance premium	Examples: 010000 for $100.00 010000- for -$100.00 last character(position 432) is minus sign if negative, blank if positive NOTE: Amount shown in positions 419 to 425 plus amount shown in positions 426 to 432 should equal total amount billed by SHBP for the employee's portion of the premium
Date of death	433	8	Y (if applicable)		CCYYMMDD, must be provided with record type DCSD.
Date of Last Deduction	441	8	Y (if applicable)		CCYYMMDD
Insufficient earnings for deduction	449	1		Y	Y or N
Employee Status	450	1	Y	Y	A = Actively working L = LWOP
SSN of retiree (if ENSD or ENSS)	451	9			For use by Retirement Systems only
Monthly Salary	460	9(5)V99	Y	O	Teachers - State Based Salary, Everybody else - amount paid for the performance of his/her duties
(Filler)	467	99V99	O	O	
Payroll Frequency	471	1	O	O	Payroll Frequency can be provided with the PUF. See Payroll Frequency Valid Values
Email	472	X(128)	Y (if applicable)		Email Address of the employee. Email addresses will be required for Fall 2013 Open Enrollment
Ethnicity	600	X(1)		O	See Ethnicity tab for valid values

Field Name	Position	Size	AUF - Add and Update File from Billing Location	PUF - Payroll Update File from Billing Location	Comments (all fields should be left justified)
Primary Language	601	X(55)		O	ENGLISH or whatever language is the Primary Language for the employee

Total Record Length = 655

Y = Required

O = Optional

All files types should be in ASCii (.txt) format

File Naming Conventions

AUF Files

1. AUF_#####_LocationName_YYYYMMDDhhmm.txt
    a. ##### is the Payroll Location Number.
    b. Next is Pay Location Name
    c. Followed by YYYYMMDDhhmm which is the date and time the file was created.
    d. Example: AUF_12345_YourLocation_201408140218.txt

PUF Files

1. PUF_#####_LocationName_YYYYMMDDhhmm.txt
    a. ##### is the Payroll Location Number.
    b. Next is Pay Location Name
    c. Followed by YYYYMMDDhhmm which is the date and time the file was created.
    d. Example: PUF_12345_YourLocation_201408140218.txt

Record Types		
Code	Description	Used in Which File
NEMP	Employment Record Start - New employee/ hire	AUF
DCSD	Employment Record Stop - Deceased	AUF
KLOD	Employment Record Stop - Killed in the Line of Duty	AUF
LOFF	Employment Record Stop - Laid off	AUF
RHRS	Employment Record Stop - Reduced hours	AUF
RETR	Employment Record Stop - Retired	AUF
TERM	Employment Record Stop - Terminated employment	AUF
MISC	Miscellaneous Change Record - Name, Address, City, State, Zip Code, phone #, email address, salary)	AUF

Frequently Asked Questions (FAQ)

Q1.   What if I don't know whether my employee is a New Hire or Transfer and I use the BCSD field?
A1.   You can use the BCSD field, but if the employee is a New Hire for SHBP purposes (i.e., new employee or a former employee previously employed with another SHBP Employing Entity with a Break in Employment), then the New Hire rules will apply and override the BCSD field. Please check your *Weekly BOE Coverage Date Report* to see exactly how the record is processed in the SHBP Enrollment Portal.

Q2.   What if I don't know whether my employee is transferring to another BOE or terminating his/her employment and I use the BCED field?
A2.   You can use the BCED field when sending a termination for the member. However, please note the BCED field will end coverage as of the last date of the calendar month populated, in comparison to the Date of Last Deduction field which would not end coverage until the last day of the following calendar month. When using both the BCED and the Date of Last Deduction fields, the BCED field will override the Date of Last Deduction field.

Q3.   Can I submit multiple types of records (e.g., NEMP, TERM) on a single AUF?
A3.   Yes, the file will load the events in sequential order based on the events received. The event will be loaded on different days until all events are loaded in the SHBP Enrollment Portal, except for future terminations. SHBP does not recommend sending multiple records for the same employee on a single AUF.

Q4.   Why doesn't an employee's coverage start date with the new Employer determine the coverage end date with the former Employer?
A4. This depends on the type of Transfer Event an Employer transmits to SHBP.

For a Regular Transfer Event, the coverage start date with the new Employer automatically determines the coverage end date with the former Employer, based on SHBP eligibility requirements.

For a Summer Transfer Event, however, Employers have greater control over when coverage ends and begins. Therefore, SHBP cannot automatically program our system to determine the coverage end date with the former Employer based on the coverage start date with the new Employer for Summer Transfers. Employers should keep in mind the purpose of the Summer Transfer Event was to provide SHBP coverage for BOE employees under contract to avoid paying for COBRA when the employee transitions from one BOE to another BOE during the Summer Transfer Period.

In contrast, State agencies do not provide contracts to their employees. State Agencies also have the same pay cycles and utilize a single system (i.e., the PeopleSoft system through the State Accounting Office) to transmit employee eligibility records, and as a result coordination amongst State Agencies is not required. However, not only do BOE contracts vary, BOE's pay cycles for their employees are different and many of their HRIS/benefits/payroll systems are also different, which makes it impossible for the SHBP Enrollment Portal to accommodate an automated summer transfer process without requiring the use of the BCED and BCSD fields.

State agencies and BOEs still follow the same Regular Transfer process outside of the Summer Transfer Period where coordination is not required.

Board of Education Summer Transfer Job Aid - Effective May 1, 2017 / Revised January 9, 2020