EMPLOYEE HOURS CHANGE NOTICE

ONLY for HOURS INCREASE RESULTING IN BENEFIT ELIGIBILITY

Hours Increased and Eligible for Benefits is a qualifying life event the **location** reports to Insurance & Benefits. Submit this form as early as possible to Insurance & Benefits, **preferably 2 weeks ahead** of the start of the employee's working increased hours. Insurance & Benefits Dept. uses this form to change the employee class to set benefit eligibility in Reta/MyEnroll.

IMPORTANT: All Qualifying Life Events are effective 1st of the month after hours increase/decrease date. The 1st of the month is the eligibility date. Exception: if employee's hours increase on the 1st of the month and that day is a normal workday, employee is **eligible** for benefits **immediately**. Employees have **only 30 days from their eligibility date** to elect benefits. Early notification from you, the location, will afford the employee that full 30 days.

Understand the importance of timely RETA Update for Class Change so you can provide employees time to enroll. If you don't notify Insurance & Benefits of the hours increase timely, it may shorten your employee's enrollment window.

IF the 1st day of Increased Hours =	**Eligibility Date** /Effective Date	**EE can Enroll**	**Notify** Ins&Ben	>>>> **THEN** RETA Class Change Needs Done:
8/1	8/1	**8/1 to 8/30**	8/17	ASAP to allow EE to enroll by 8/30
8/2	9/1	**9/1 to 9/30**	8/25	By 8/31
12/15	1/1	**1/1 to 1/30**	12/07	By 12/31

Complete this form and fax to Insurance & Benefits Dept., Diocese of Oakland FAX 510-272-0725.
Email this form only when time-sensitive. **Site Administrator** is responsible to promptly follow with employee and ensure RETA record and employee documents are in order- **details on next page**.
krabbach@oakdiocese.org and lcarlson@oakdiocese.org

Location Name	Parish / School - Indicate One ☐ ☐
Employee Last Name	Employee First Name
Employee ID as it appears in MyEnroll360	**Last 4 Digits only of** Employee Soc. Sec. No.

☐ **Hours Increased (ELIGIBLE for benefits)**

Effective Date of Hours Change: _____(1st day of new work schedule)

Site Administrator Signature Date Submitted

Site Administrator Phone# Email

See Next Page for REQUIRED ACTION and additional instructions

Ins&Ben Use Only: ____ RETA Update to Lay Class ____ Present in AccDB?

LOCATION ADMINISTRATOR USE:

____ Email in RETA
____ Job Title in RETA
____ MAIL Updated EQ to Insurance & Benefits

HOURS CHANGE ACTIONS FOR SITE ADMINISTRATORS R8

Site Administrators: Review this entire sheet.

1) Determine which instructions apply to THIS EMPLOYEE and THIS CHANGE IN THEIR WORK SCHEDULE.
2) You are responsible to take the appropriate actions described here.

Hours Changes in RETA are time-sensitive. Act quickly and early. Follow with your employee to ensure they complete enrollment within 30 days of the eligibility date. The Insurance & Benefits Department is here to support you. 510-267-8360 / 8361

When Employee Hours INCREASE To 25/+ Hours/Week,

the employee becomes eligible for benefits (see the chart on the Hours Change Form). **Insurance & Benefits Dept. makes the Class Change in RETA (Lay Employee Class)**. Use the **Employee Hours Increased & Eligible for Benefits** instructions available on the Insurance & Benefits intranet page.

Advise the employee:

- Employee must establish logon credentials in Reta (www.retatrust.org) and elect benefits online **within 30 days of the eligibility date.** Employee should find an email from Reta or MyEnroll360 (check the Spam or Junk folder) on or around **the eligibility date;** then employee follows instructions in that email to establish logon credentials in Reta (www.retatrust.org) and elect benefits.
- **All benefit enrollment is online.** Employee must elect benefits online within 30 days of **the eligibility date** or else they will have to wait for the next Open Enrollment. If the employee does not have computer access, location administrators (YOU) are responsible to assist the employee in making online elections.
- **Make elections as early as possible. Do not wait until the last minute. Guide the employee,** answer questions about enrollment.
- Direct the employee to review comprehensive information regarding medical, dental/vision, prescription, retirement, life insurance, short/long term disability, flexible spending account and other benefits online before their effective date, so they can prepare to make their elections. Go to www.oakdiocese.org; select **Chancery** in the top navigation bar; choose **Insurance & Benefits**; scroll to *"Learn More About Employee Benefits"* and review all the items there.
- Comprehensive benefits information is **also** available in the **RBC Quick Link** on www.retatrust.org (after login).
- Employee is responsible to timely provide all required documents for spouse/dependent enrollment.

When Employee Hours Are REDUCED from 25/+Hrs To <25 Hrs/Week

Site Administrator is responsible to perform these REQUIRED TASKS

1. **Terminate** the employee's active eligible record in **Reta.** This **MUST** happen so **COBRA** will be offered. *Do Not Delay this action.*
2. **Add New Employee in Reta.** Enter the first day of the new work schedule as the "Hire Date", choose **Benefit Ineligible class** and complete all fields. Submit Employee Questionnaire PLUS the contract/letter of engagement, both items to include the new reduced work schedule.
3. Notify the employee their benefits with the Diocese end on the last day of the month that hours decrease (e.g., if hours decrease starting 3/2, benefits terminate 3/31; if hours decrease starting 5/25, benefits terminate 5/31).

Site Administrator Actions for EVERY Hours Change, BOTH Increased AND Reduced:

- **WORK email address for the employee** is present in Reta. **WHY:** Enrollment is online so the employee work email is essential for enrollment and for benefits-related communication. At minimum the WORK email should be present in **each** employee's record in Reta regardless of benefit eligibility.
- **Employee's job title** in Reta is accurate with the hours change. No "Unknown" job titles.
- **Provide an up to date Employee Questionnaire** to Insurance & Benefits promptly via FAX or US Mail.
- **If employee is eligible immediately but No email address is present in Reta:**
  1. You must immediately populate the employee's WORK email address in Reta.
  2. You must immediately advise the employee to logon to www.retatrust.org, establish a username/password and elect their benefits. Email is required for benefit elections.