

SPECIAL ELIGIBILITY –GT FORM

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South Carolina

PURPOSE

STREAMLINE THE CURRENT SPECIAL ELIGIBILITY/LIFE EVENT PROCESS FROM MANUAL TO ELECTRONIC.

- The Problem :

The current Special Eligibility process is time-consuming, with frequent interactions between employees and HR, leading to redundant work and delays due to inconsistent procedures.



- The Goal:

This project aims to create a user-friendly and an Employee - Driven Special Eligibility Form for Benefits using GT eForms, with clear sections, pre-populated Employee Data , and conditional behavior for easy navigation and accurate data collection.



PEOPLE INVOLVED

Director of Benefits – Helen Mack

Director of HR Systems and Reporting - Stacy Lee

Benefits Office – Benefits Team (Counsellors)

HCM Support Team (IT) - Jennifer McKay and Chris Poore



PROJECT PATH

1. Analyze Current Workflow: Document the existing enrollment process for special eligibility, identifying any inefficiencies or pain points.

2. Investigate Technology Options: Research and evaluate technology solutions that can support the development and implementation of the enrollment form.

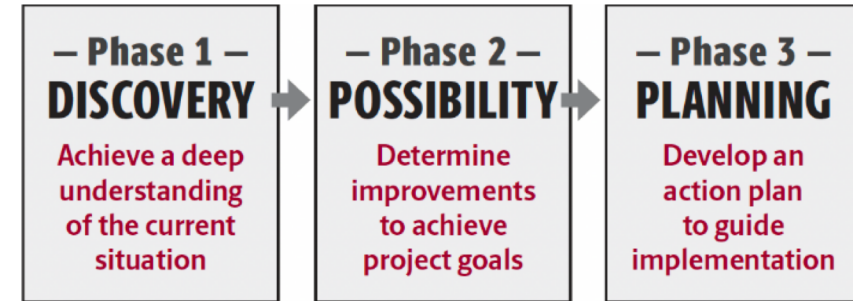
3. Design Improved Process: Create the future-state process, incorporating improvements and leveraging the selected technology to streamline the enrollment process.

4. Conduct System Testing: Perform thorough testing of the new enrollment form to ensure it functions correctly and meets all requirements.

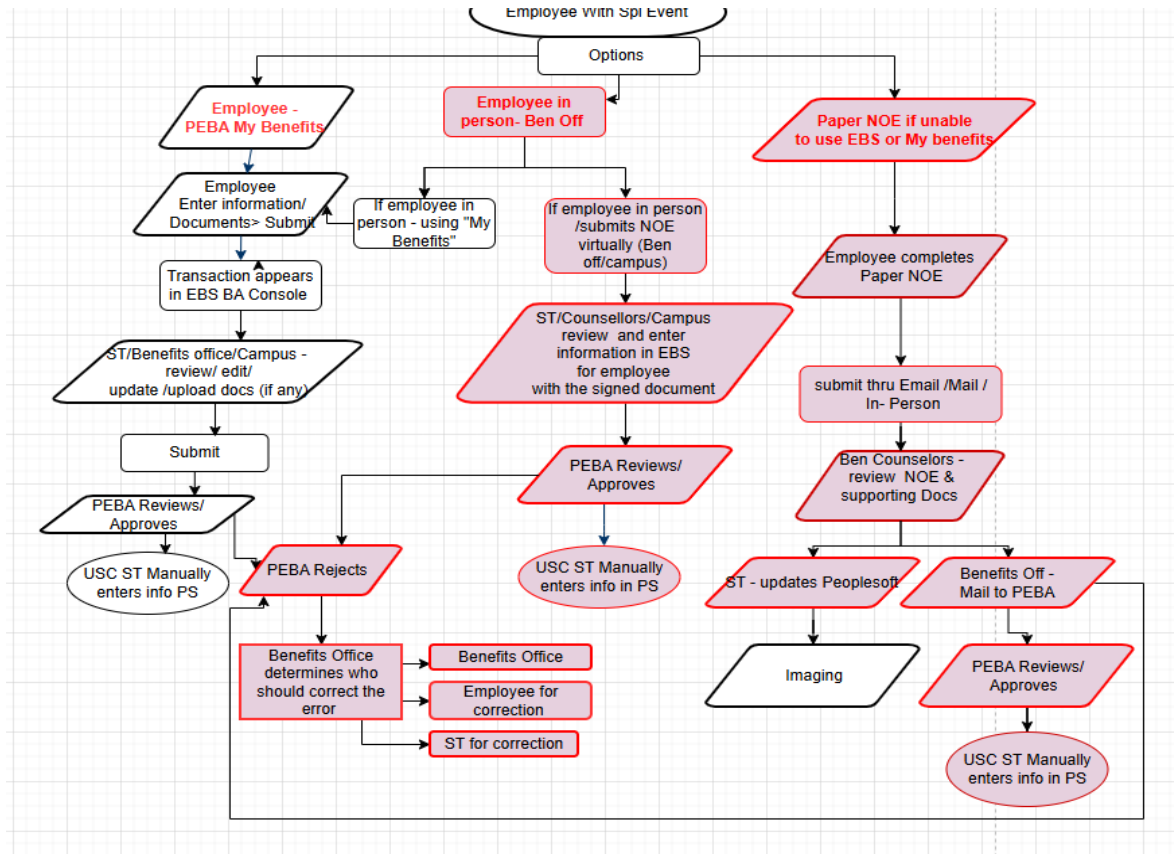
5. Train HR and End Users: Provide training and resources to HR and end users to ensure they understand how to use the new enrollment form effectively.

6. Deploy the Solution: Roll out the new enrollment form, ensuring a smooth transition from the old process to the new one.

7. Evaluate Performance: Continuously monitor the performance of the new enrollment form, gathering feedback and making adjustments as needed to ensure it meets user needs and project goals.



PHASE 1 - DISCOVERY



- **Stakeholder Identification and Engagement:** Identified the stakeholders, users, project sponsors, and team members.
- **Requirement Gathering:** Facilitated meetings to gather data, understand requirements, and identify special life events for streamlining.
- **User Research:** Analyzed existing solutions and user feedback to design a user-friendly form that meets the target audience's needs.
- **Process Mapping:** Documented the enrollment process, identified improvements, and created process maps to visualize inefficiencies
- **Technical Feasibility Assessment:** Evaluated technical needs with the IT Team to decide the tech stack, integration points, and challenges



PHASE 2 - POSSIBILITY

SP Elig

Special Eligibility Events

Form ID 804798 (NEW)

Highlights Enabled: Current Values:

Empl ID: Y09541281 **Add SSN**

First Name: Jennifer Date of Birth: [Redacted]

Address Line 1: 230 Sandstone Rd Last Name: Mckay

City: Columbia Address Line 2: [Redacted]

Postal Code: 29212 State: SC

USC Email: xxxxxxJMCKAY@mailbox.sc.edu Personal Email: xxxxxxjogden74@yahoo.com

Telephone: [Redacted]

*Benefit Special Eligibility Event: [Dropdown]

*Effective Date of Change: [Calendar]

*Details of Change: (Provide a brief description of the event and any relevant details)

Current Benefits

Review your current benefits before completing form

Certification

I certify that the information provided on this form is true and accurate to the best of my knowledge. I understand that providing false information may result in the denial of my application.

*Signature (I hereby authorized these changes): [Dropdown]

File Attachments

Add Text here: *Attach Document(s) below

Status	Upload	Description %1	File Name %1	Delete
1	<input type="button" value="Upload"/>	[Dropdown]		<input type="button" value="Delete"/>

> Comments

- **Brainstorming:** Brainstormed ideas and approaches for developing the special eligibility enrollment form with the Benefits team.
- **Feasibility Analysis:** Evaluated proposed ideas with the IT Team to determine viable solutions.
- **Prototyping:** Developed a prototype for Business team feedback, refining ideas to meet business needs.
- **Risk Assessment:** Identified risks and developed mitigation strategies, including compliance, security, and user adoption.
- **Decision Making:** Made a final decision based on feasibility analysis and Business feedback



PHASE 3 - PLANNING

Project Plan: Created a Functional Document and Process flow, detailing project boundaries and confirming requirements for the special eligibility enrollment form.

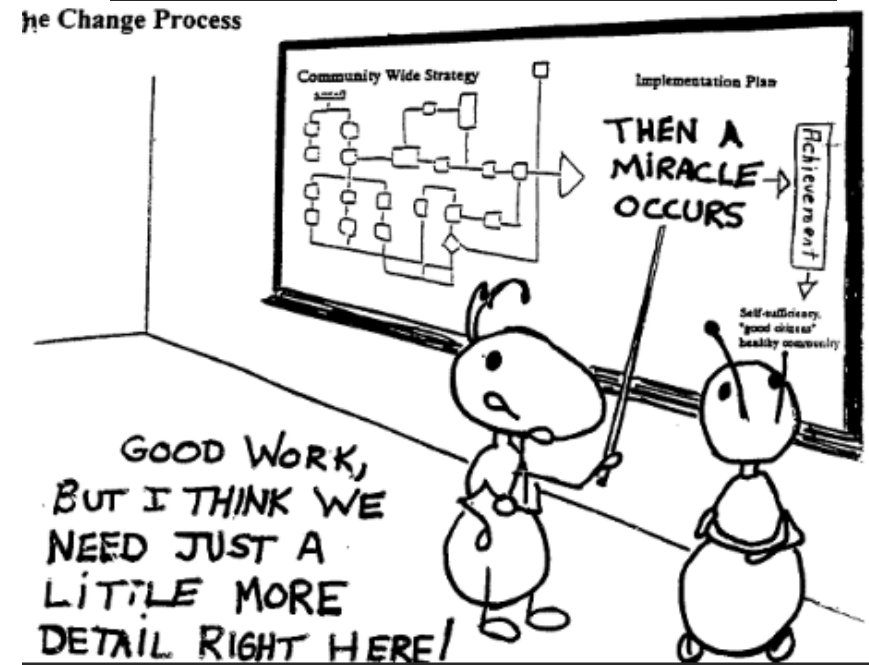
Testing Plan : Defined testing scope and objectives

Job Aids : Provides step-by-step help for HR Counsellors, Campus Contacts and Service teams.

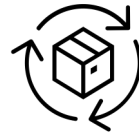
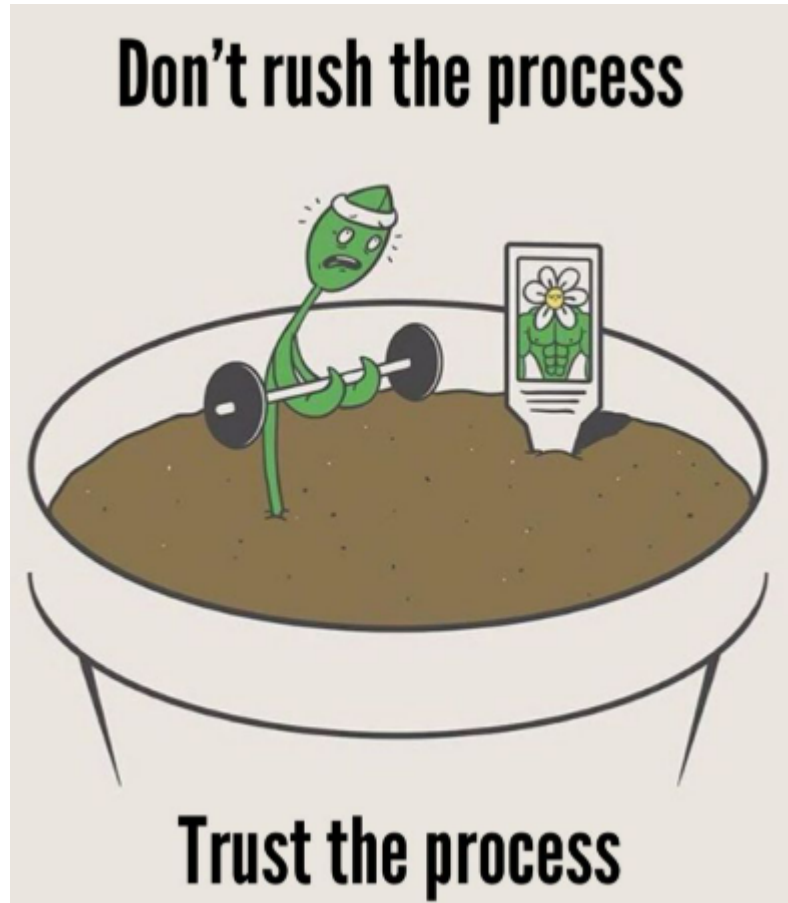
Approval and Sign-Off: After testing and review, obtain formal approval for successful migration to Production.



The Change Process



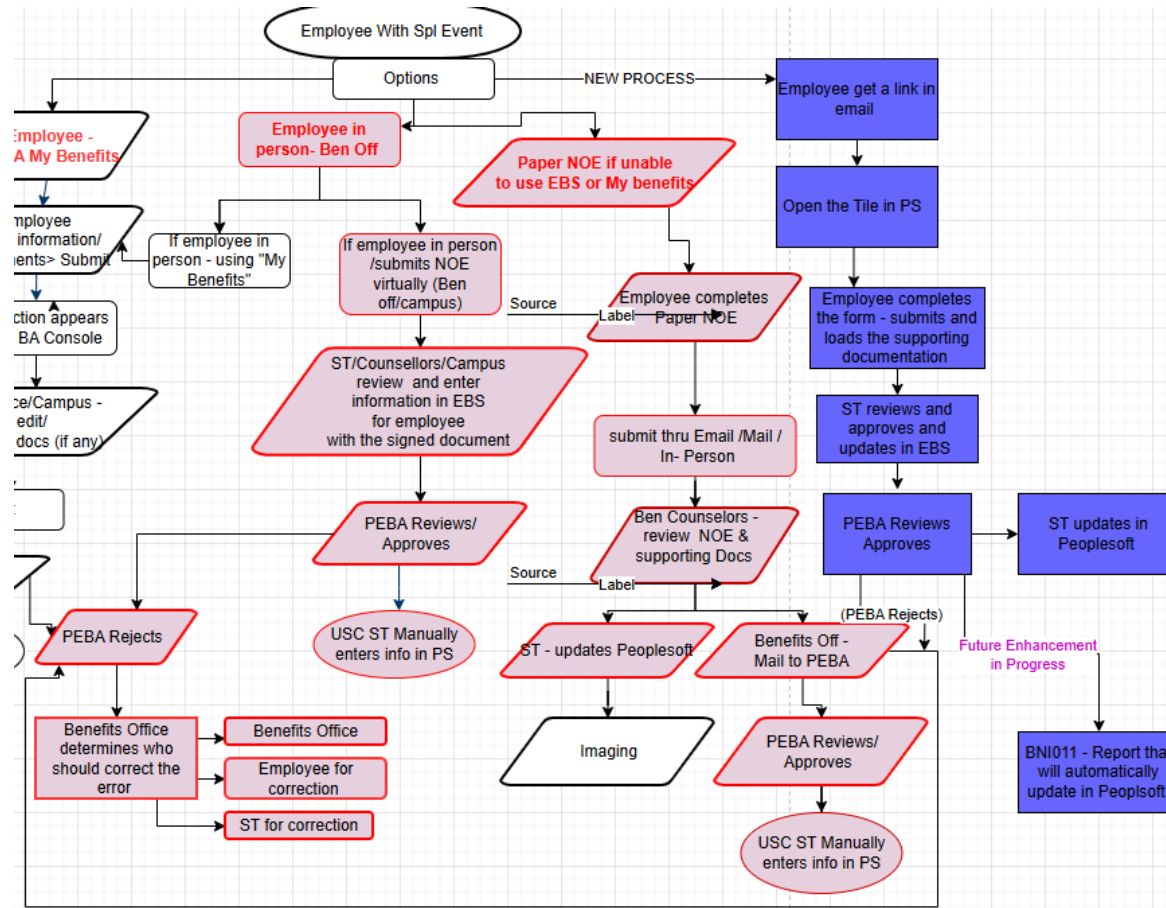
KEY IMPROVEMENTS



Spl Eligibility - Process	Current	Future
Form Submission	Onsite support /assist by Benefit counsellors to Employees	Employees Independently Complete the Form Online – GT Form
Supporting Documentation	Supporting Documentation Managed by Benefits Office	Online Supporting Documentation is Accessible to Counselors, Support Teams, and Employees anytime.
Form Processing and approvals	Individual Forms processed and approved manually	Forms processing and Approvals will be completed online with tracking and history for future references
Updating People Soft	Service Team Updates in PeopleSoft Post-PEBA Approval	PEBA reconciliation file will automatically update PS – (post project enhancement -In progress)
Overall process time	Time Invested by Employees and Counselors	Significant Time Savings for Counselors and Employees



RESULTS



Current	Future
2 Entry points	1 Entry point
> 15 possible process steps	6-7 process Steps

The Electronic Submission Form (Gideon Taylor form) helps:

- Completely employee-driven, reduced manual work, ensures uniformity, minimizes errors, and boosts efficiency and productivity.
- Real-time updates improve tracking and user experience, making form management easier with intuitive interfaces and helpful prompts.
- Speeds up approvals with notifications, tracking, and future references of documentation and/or Forms and is easily accessible to Employee and HR.

NEXT STEPS



In progress..

Testing , Review and Sign off : March/April 2025

Test features, identify defects, validate new features, and ensure user satisfaction. After review, obtain formal approval for sign-off.

Training and documenting Job Aids :March 2025

Document job aids to create clear, step-by-step guides for HR Contacts , Counselors, Service Team to efficiently assist employees.

Implementation: Will go live on April 17th 2025.

Monitoring :Post Implementation task.

Monitor process efficiency from the counselor's and user's perspective.



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REFLECTIONS



The biggest learning from this project during the different phases of this project, I learned three key aspects:

- 1.Adaptability:** We adapted the design multiple times due to unforeseen barriers, improving it to meet business needs while ensuring cost-effectiveness and efficiency.
- 2.Flexibility with Timelines:** Despite challenging timelines and delays, we stayed on track by being flexible and reassessing our timelines, ensuring project goals were met..
- 3.Collaboration:** **Collaborating with our Business and IT teams** was challenging yet rewarding. Effective communication ensured alignment and enriched the project.

This project underscored the value of adaptability, flexibility, and collaboration, enabling us to navigate challenges and exceed expectations.



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