Life, Vol Life, LTD, STD

Interface Requirements Specification

# Tyndall Federal Credit Union

# Contact Information

## Customer Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Phone** | **Email** |
| [Sarah Navarez](https://tekpartnersap2pcompany-a4f866.pipedrive.com/person/317) |  | [snavarez@tyndall.org](mailto:snavarez@tyndall.org?bcc=tekpartnersap2pcompany-a4f866%2Bdeal327%40pipedrivemail.com) |

## Vendor Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Phone** | **Email** |
| Natlie Chastain |  | [EDX@sunlife.com](mailto:EDX@sunlife.com?bcc=tekpartnersap2pcompany-a4f866%2Bdeal327%40pipedrivemail.com) |

## Integration Contact

|  |  |  |
| --- | --- | --- |
| **Name** | **Phone** | **Email** |
| Lea King |  | lking@tekpartners.com |

## 

# Revision History

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | Date | Version | Revision Description | Comments | Author |
| 1 | 04/15/2020 | 1.01 | Initial Draft |  | Lea King |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |

# Customer Confirmation

Health and Welfare Exports (Medical, Dental, and Vision)

1. **Vendor Name: Sunlife**
2. **Group or Policy Number: 936915**
3. **Will you have employees that are active in multiple component companies?**

☒ No ☐ Yes

1. **Are there any Employee Types, Pay Groups, Org Levels, etc. that need to be excluded?**

☐No ☒ Yes

If Yes, please list field and values to exclude or include *(whichever is a shorter list)*:

Exclude emptype TES

1. **Which Employees would you like to include on this export?**☒ Employees Active on Applicable Deduction Code
2. **When did you start coverage with this provider:**01/01/2020
3. **Confirm the applicable UltiPro Deduction Codes for each that apply:**

|  |  |  |
| --- | --- | --- |
| **Deduction Code** | **Benefit Plan Name** | **Deduction Type** |
| GLIFE | GTL - Life3 | GTL |
| LTDEE | Long Term Disability - EE 2018 | LTD |
| LTDEX | Long Term Disability - VP 2018 | LTD |
| CLIFE | Child Voluntary Life | OPC |
| SPLIF | Spouse Voluntary Life | OPS |
| VLIFE | Employee Voluntary Life | OPT |
| STDEE | Short Term Disability - EE 2018 | STD |
| STDEX | Short Term Disability - VP 2018 | STD |
| VIS17 | Vision | VIS |

1. **Confirm how you would like to send termination of coverage on this file:**

**☒** Terminations sent one time only - based on the actual (audit) date entered into UltiPro.

1. **What is the Relationship Code(s) that define:**

“Spouse” SPS

“Children” CHL, STC

1. **Open Enrollment Option = 2 files will be built based on the two Open Enrollment Sessions – one Active and one Passive.**

**What month is your OE effective?**

**What type of enrollment will you be offering?**

☐ Active ☐ Passive

*An ACTIVE session requires all employees to go in and make an election. If an employee does not re-elect their benefit, they will be dropped from that benefit. Since this is a changes-only file, we need to know if to include the employee with a coverage stop date, or if they will be termed by omission from the file. We do not need to worry about the passive file since this is a full file, and we will send a coverage stop date automatically.*

**If an employee stops their current benefits during an ACTIVE Open Enrollment, would you like to include them on the file with a stop date?**

X No ☐ Yes

# Mapping/Notes to Developer

File format - 834

Full file

# Vendor Confirmation

Health and Welfare Exports (Medical, Dental, and Vision)

1. **Do you allow for future-dated coverage START dates on the file?**

☐ No X Yes

If Yes, please include the number of days in the future that are accepted. We will default to 30 days.

1. **Do you allow for future-dated coverage STOP dates on the file?**

☐ No X Yes

If Yes, please include the number of days in the future that are accepted. We will default to 30 days.

1. **Do you require a minimum coverage start date on the file (Ex. We cannot send any effective dates older than 1/1/2018 on the file)? If so, what is that date?**

01/01/2020

1. **Benefit Change Effective Date Option:**

☒ Actual Benefit Coverage Start Date as keyed on the EMP and DEP Record.