

Life Conversions Process

Procedures/Tasks: HRIS Report

HRIS reporting runs a termination report listing all employees who have been terminated since the previous run date. This report runs bi-weekly.

The HR Communications Representative (HRCR) will use this termination report to create mailing labels and life insurance conversion letters by mail merge.

Creating Mailing Labels

1. Open a new Word Document
2. Click Mailings tab > Start Mail Merge > Labels
3. Choose correct labels utilizing the label vendor drop-down menu and the product number selection
 - a. Label Vendor: Avery US Letter
 - b. Product Number: Avery 5160 Labels
4. Click OK
5. On Mailings ribbon bar, click Select Recipients > Use Existing List
6. Navigate to most recent termination report in the reports folder
7. Highlight and open the report
8. Select table data
9. Click OK
10. Mailings ribbon bar > Address Block
11. Select Match Fields (lower left corner of address block window)
12. In the Match Fields window, use the drop-down menu to select the corresponding Excel field from the termination report:
 - a. **First Name:** First Name
 - b. **Last Name:** Last Name
 - c. **Address 1:** Home Address Line 1
 - d. **City:** Home Address City
 - e. **State:** Home Address State
 - f. **Postal Code:** Home Address Zip/Postal
 - g. **Unique Identifier:** Not Matched
13. Click OK
14. Verify address block preview in next window
15. Click OK
16. Mailings Ribbon Bar > Update Labels
17. Click preview results to ensure you have pulled over the correct data
18. Save as a PDF to a designated folder.
19. Title the document, 'Mailing Labels' followed by the date.

Creating Life Conversion Letters

1. Use the "Job Reason" column of the termination report to determine which letter to send to employee.

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- a. If the job reason is reported as anything other than LTD, use the Life Conversion Letter Template.
- b. If the job reason is reported as LTD, use the LTD Letter Template
2. Open the appropriate letter template in Word
3. Mailings Ribbon Bar > Select Recipients > Use Existing List
4. Navigate to correct termination report
5. Highlight report and click Open
6. Select table data
7. Click OK
8. Click on the Match Fields button on the Mailings Ribbons Bar
9. In the Match Fields window, use the drop-down menu to select the corresponding Excel field from the termination report:
 - a. **First Name:** First Name
 - b. **Last Name:** Last Name
 - c. **Address 1:** Home Address Line 1
 - d. **City:** Home Address City
 - e. **State:** Home Address State
 - f. **Postal Code:** Home Address Zip/Postal
 - g. **All Other Fields:** Not Matched
10. Click preview results to ensure you have pulled over the correct data
11. Mailings Ribbon Bar > Finish & Merge > Print Documents
12. Leave the selection at "All" and click OK
13. Print as PDF and then save to a designated folder
14. Save a copy of each individual letter titled as 'Last Name, First Initial' under the employee's name

Create Application for Life Insurance Carrier

The HRCR will complete employer sections of the application for each employee on the termination report.

1. Use the "Job Reason" column of the termination report to determine which application to send to the employee.
 - a. If the job reason is reported as anything other than LTD, use the Application to Convert Grp Term Life
 - b. If the job reason is reported as LTD, use the LTD Application for Extended Insurance Benefits
2. Application to Convert Grp Term Life (terminated employees)
 - a. Retrieve data from database to complete the following fields in Section 1:
 - i. Full Legal Name of Employee
 - ii. Group Number
 - iii. Name of Employer
 - iv. Last Date of Active Work
 - v. Group Life Insurance Amount
 - vi. Authorized Benefits Administrator Name/Date

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- b. Electronically sign next to Authorized Benefits Administrator Name/Date
- c. Save a PDF copy of each application on your desktop or in the same folder where you have saved the rest of the information. Save the file as Last Name, First Name.
3. LTD Application for Extended Insurance Benefits (Long Term Disability Employees)
 - a. Complete all of Employer's Statement (page 1)
 - b. Save completed application to your designated folder
 - c. Print and sign/date Employer's authorized group benefits administrator section of application
 - d. Save a PDF copy of each application on your desktop or in the same folder that you have saved the rest of the information to
 - e. Inform the HRIS representative mailing the packages to also mail these pages to the Life Insurance Carrier
 - i. PO Box 9999, Example City, Example State 99999-0000
 - ii. Place Cost Center '1111' at the bottom left to charge back for postage
 - f. Save completed application as PDF to your designated folder

Assemble Package and Mail

The HRCR then prepares the mailing packets by combining the following:

1. Open the application for each employee (this should be the file titled with the employee's Last Name, First Name) in Adobe and attach the following documents:
 - a. Once the document is open click the arrow on the right-hand side of the document, click the double pages at the top of the sidebar, select the drop-down menu below the title 'Page Thumbnails',
 - b. Terminated Employees:
 - i. Life Insurance Conversion Letter (Employee Letter Template)
 - ii. Application to Convert Grp Term Life
 - iii. Summary of Terminating Benefits
 1. If Job Title referenced on termination report is listed as Director or VP, use the Summary of Terminating Benefits Directors and VP document
 - c. Long Term Disability (LTD) Employees
 - i. Long Term Disability Letter (LTD Letter Template)
 - ii. LTD Application for Extended Insurance Benefits
 - iii. Long Term Disability Information Guide (LTD Employees Only) Summary of Terminating Benefits
 1. If Job Title referenced on termination report is listed as Director or VP, use the Summary of Terminating Benefits Directors and VP document
2. The individual employee letter(s) and mailing labels are then attached to an e-mail and sent to an HRIS representative for mailing.