



United States Department of Agriculture  
Office of the Chief Financial Officer  
National Finance Center  
Government Employees Services Division

### Functional Requirements Document (FRD)

<b>Project#</b> 766433	<b>Project Title: FEHB Self Plus One Enrollment</b>	<b>Date Prepared:</b> 04/01/14
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<b>Scope:</b>	<p>This year, the Office of Personnel Management (OPM) will be implementing a new Self Plus One enrollment type in all health insurance plans under the Federal Employees Health Benefits Program (FEHB). The new Self Plus One enrollment type will cover an enrollee and one designated family member only. OPM's Benefits Administration Letters (BALs) 14-203 (dated March 24, 2014) and 14-213 (dated December 30, 2014) mandate that agencies and payroll offices must modify their systems to process Self Plus One enrollments for the 2015 FEHB Open Season, which begins on November 9, 2015. As a result, NFC is modifying CLER, DPRS, DPRW, TIPS, POWR, EPP, EPIC-Web, TMGT, PINE, and PEPL to allow Self Plus One FEHB enrollments to be entered and processed.</p> <p>Note: Copies of BALs 14-203 and 14-213 are attached to the back of this document.</p>
<b>Assumptions:</b>	

### Functional Requirements

**Payroll Applications Systems Branch (PASB) Requirements**

**Table Management System (TMGT) Requirements:**

Modify TMGT to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

**Blue Cross Blue Shield Service Benefit Plan**

- 111 - Basic Self
- 112 - Basic Self and Family
- 113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

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**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
- 343 - HDHP Self Plus One**

**Blue Cross Blue Shield Service Benefit Plan**

- 104 - Standard Self
- 105 - Standard Self and Family
- 106 - Standard Self Plus One**

**GEHA Benefit Plan**

- 314 - Standard Self
- 315 - Standard Self and Family
- 316 - Standard Self Plus One**

**Personnel Applications Systems Branch (PESB) Requirements**

Personnel Application Systems will be modified to accept new Self Plus one enrollment codes. The first two digits of the enrollment code correspond to the Carrier and will remain the same in Self Plus One. Personnel Application Systems will be modified to accept the two new Option Codes associated with Self Plus one; the new codes will be '3' and '6'.

Personnel Application Systems will modify and create a PINE ERROR message to ensure only one family member are being added for those employees who select Self Plus One.

Modifications will be made to allow users who have Self Plus One enrollments to make changes to the family member data only using the following Qualifying Life events: 1B, 1C, 1I, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R for employees with Premium Conversion. For employees not enrolled in Premium conversion allow these changes with the following HB-EVENT- CHANGE codes are used 5B, 5C, 5D, 5F, 5G, 5H, 5I, 5J, and 5N.

The following Qualifying Life Event Codes will also apply to Self Plus One Plan Option Codes: codes 1B, 1C, 1E, 1F, 1I, 1J, 1K, 1M, 1N, 1O, and 1R and will allow Premium Conversion enrollments to be increased from Self Only to Self Plus One or from Self Plus One to Self and Family during Open Season.

The following Qualifying Life Event Codes will also apply to Self Plus One Option Codes: 5B, 5C, 5D, 5E, 5F, 5G, 5H, 5I, 5J, and 5N will allow Non-Premium Conversion enrollments to be increased from Self Only to Self Plus One or from Self Plus to Self and Family.

The following Qualifying Life Event Codes will also apply to Self Plus One Option Codes 1B, 1C, 1E, 1F, 1G, 1H, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R to allow Premium Conversion enrollments to be decreased from Self Plus One to Self Only or from Self and Family to Self Plus One.

Currently, Non-Premium Conversion enrollments are allowed to be decreased from one plan to another at any time, there is no change to this process. Modifications are being allowed to add Self Plus One. Allow Self Plus One to decrease to a Self Only or from Self and Family to Self Plus One.

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**Administrative Applications Systems Branch (AASB) Requirements**

"Not Applicable"

**Payroll Web Systems Branch (PWSB) Requirements**

**Employee Personal Page (EPP) FEHB Self Service Requirements:**

Modify the appropriate programs and screens in the EPP FEHB Self-Service to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type covers an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One.

The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

**Blue Cross Blue Shield Service Benefit Plan**

- 111 - Basic Self
- 112 - Basic Self and Family
- 113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
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- 105 - Standard Self and Family
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For the screens displayed for the **Enroll** and **Change Plan** options in EPP's FEHB Self-Service Request: Require the entry of family member data for one family member (and no more than one family member) on the **Enter FEHB Self-Service Request: Enter Family Members** screen when a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Plan Code/Name** field on the **Enter FEHB Self-Service Request** screen. Disallow the entry of family member data for more than one family member on the **Enter FEHB Self-Service Request: Enter Family Members** screen when a Self Plus One enrollment code was previously entered in the **Plan Code/Name** field on the **Enter FEHB Self-Service Request** screen. If, upon clicking the [Continue] button on the **Enter FEHB Self-Service Request: Enter Family Members** screen and no family member data was previously entered for the Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

For the screens displayed for the **Enroll, Change Plan, and Change Self-Only to Family** options in EPP's FEHB Self-Service Request: If, upon clicking the [Continue] button on the **Enter FEHB Self-Service Request: Enter Family Members** screen and family member data for only one family member was previously entered on the **Enter FEHB Self-Service Request: Enter Family Members** screen and a Self & Family enrollment code (an enrollment code that ends in 2 or 5) was previously entered in the **Plan Code/Name** field on the **Enter FEHB Self-Service Request** screen, then display the message "**Self and Family - 1 family member entered - You have chosen a Self and Family enrollment with 1 family member entered. Self Plus One enrollment is available. Do you wish to proceed with Self and Family enrollment?**" with "YES" and "NO" as the options for the user to select. If the user selects "YES", then the enrollment data shall be saved, as is currently done. If the user selects "NO," then the enrollment data entered on the **Enter FEHB Self-Service Request: Enter Family Members** screen shall be saved; however, the user shall be returned to the **Enter FEHB Self-Service Request** screen. On the **Enter FEHB Self-Service Request** screen, the user shall be allowed to enter the Self Plus One enrollment code (an enrollment code that ends in 3 or 6) in the **Plan Code/Name** field for his/her enrollment plan and option.

Add a **Change Self-Only to Self Plus One** option on the **FEHB Self-Service Request** screen that, when clicked, displays a screen that allows the user to increase his/her FEHB coverage from Self Only to Self Plus One within the same plan and option. The **Change Self-Only to Self Plus One** option shall only be available to users who are enrolled in a Self Only enrollment. The user shall be required to enter family member data for one family member for the Self Plus One enrollment. Disallow the entry of family member data for more than one family member for a Self Plus One enrollment. If, upon clicking the [Continue] button on the **Enter FEHB Self-Service Request: Enter Family Members** screen and no family member data was previously entered for the Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue. EPP shall use Transaction Code 5 (Change in Enroll - SF-2809) with the **Change Self-Only to Self Plus One** option during Open Season and outside of Open Season. EPP shall use Event Code 1 (Open Season) with the **Change Self-Only to Self Plus One** option during Open Season, and Event Code 6 (Other) with the **Change Self-Only to Self Plus One** option outside of Open Season. For employees participating in Premium Conversion, EPP shall use Qualifying Life Event Code 1B with the **Self Only to Self Plus One** option during Open Season. For employees not participating in Premium Conversion, EPP shall use Qualifying Life Event code 5B with the **Self Only to Self Plus One** option during Open Season. Note: The new

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**Change Self-Only to Self Plus One** option shall be made available to Treasury (premium conversion) employees outside of Open Season when they select 1C, 1I, 1M, or 1O on the **FEHB Self-Service Request: Life Event Change** screen. Also, the new **Change Self-Only to Self Plus One** option shall be made available to Treasury (non-premium conversion) outside of Open Season when they select 5C, 5G, 5H, or 5J on the **FEHB Self-Service Request: Life Event Change** screen.

Add a **Change Family to Self Plus One** option on the **FEHB Self-Service Request** screen that, when clicked, displays a screen that allows the user to decrease his/her FEHB coverage from Family to Self Plus One within the same plan and option. The **Change Family to Self Plus One** option shall only be available to users who are enrolled in a Family enrollment. Also, the family member data for a Family enrollment shall not be transferred over to a Self Plus One enrollment. Users who change a Family enrollment to a Self Plus One enrollment shall be required to enter the family member data for one family member for the Self Plus One enrollment. Disallow the entry of family member data for more than one family member for a Self Plus One enrollment. If, upon clicking the [Continue] button on the **Enter FEHB Self-Service Request: Enter Family Members** screen and no family member data was previously entered for the Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue. EPP shall use Transaction Code 5 (Change in Enroll - SF-2809) with the **Change Family to Self Plus One** option during Open Season and outside of Open Season. EPP shall use Event Code 1 (Open Season) with the **Change Family to Self Plus One** option during Open Season, and Event Code 6 (Other) with the **Change Family to Self Plus One** option outside of Open Season. For employees participating in Premium Conversion, EPP shall use Qualifying Life Event Code 1B with the **Change Family to Self Plus One** option during Open Season. For employees not participating in Premium Conversion, EPP shall use Qualifying Life Event code 5B with the **Change Family to Self Plus One** option during Open Season. Note: The new **Change Family to Self Plus One** option shall be made available to Treasury (premium conversion) employees outside of Open Season when they select 1C, 1M, 1O, or 1P on the **FEHB Self-Service Request: Life Event Change** screen. The new **Change Family to Self Plus One** option shall be made available to Treasury (non-premium conversion) employees outside of Open Season when they select 5C, 5G, 5H, or 5J on the **FEHB Self-Service Request: Life Event Change** screen. Also, the new **Change Family to Self Plus One** option shall be made available to non-Treasury (non-premium conversion) employees outside of Open Season.

Add a **Change Self Plus One to Self Only** option on the **FEHB Self-Service Request** screen that, when clicked, displays a screen that allows the user to decrease his/her FEHB coverage from Self Plus One to Self Only within the same plan and option. The **Change Self Plus One to Self Only** option shall only be available to users who are enrolled in a Self Plus One enrollment. EPP shall use Transaction Code 5 (Change in Enroll - SF-2809) with the **Change Self Plus One to Self Only** option during Open Season and outside of Open Season. EPP shall use Event Code 1 (Open Season) with the **Change Self Plus One to Self Only** option during Open Season, and Event Code 6 (Other) with the **Change Self Plus One to Self Only** option outside of Open Season. For employees participating in Premium Conversion, EPP shall use Qualifying Life Event Code 1B with the **Change Self Plus One to Self Only** option during Open Season. For employees not participating in Premium Conversion, EPP shall use Qualifying Life Event code 5B with the **Change Self Plus One to Self Only** option during Open Season. Note: The new **Change Self Plus One to Self-Only** option shall be made available to Treasury (premium conversion) employees outside of Open Season when they select 1C, 1M, 1O, or 1P on the **FEHB Self-Service Request: Life Event Change** screen. The new **Change Self Plus One to Self-Only** option shall be made

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available to Treasury (non-premium conversion) employees outside of Open Season when they select 5C, 5G, 5H, or 5J on the **FEHB Self-Service Request: Life Event Change** screen. Also, the new **Change Self Plus One to Self-Only** option shall be made available to non-Treasury (non-premium conversion) employees outside of Open Season.

Add a **Change Self Plus One to Family** option on the **FEHB Self-Service Request** screen that, when clicked, displays a screen that allows the user to increase his/her FEHB coverage from Self Plus One to Family within the same plan and option. The **Change Self Plus One to Family** option shall only be available to users who are enrolled in a Self Plus One enrollment. Also, the family member data for a Self Plus One enrollment shall not be transferred over to a Family enrollment. Users who change a Self Plus One enrollment to a Family enrollment shall be required to enter the family member data for all family members for the Family enrollment. If, upon clicking the [Continue] button on the **Enter FEHB Self-Service Request: Enter Family Members** screen and family member data for only one family member was previously entered on the **Enter FEHB Self-Service Request: Enter Family Members** screen and a Self & Family enrollment code (an enrollment code that ends in 2 or 5) was previously entered in the **Plan Code/Name** field on the **Enter FEHB Self-Service Request** screen, then display the message "**Self and Family - 1 family member entered - You have chosen a Self and Family enrollment with 1 family member entered. Self Plus One enrollment is available. Do you wish to proceed with Self and Family enrollment?**" with "YES" and "NO" as the options for the user to select. If the user selects "YES", then the enrollment data shall be saved, as is currently done. If the user selects "NO," then the enrollment data entered on the **Enter FEHB Self-Service Request: Enter Family Members** screen shall be saved; however, the user shall be returned to the **Enter FEHB Self-Service Request** screen. On the **Enter FEHB Self-Service Request** screen, the user shall be allowed to enter the Self Plus One enrollment code (an enrollment code that ends in 3 or 6) in the **Plan Code/Name** field for his/her enrollment plan and option. EPP shall use Transaction Code 5 (Change in Enroll - SF-2809) with the **Change Self Plus One to Family** option during Open Season and outside of Open Season. EPP shall use Event Code 1 (Open Season) with the **Change Self Plus One to Family** option during Open Season, and Event Code 6 (Other) with the **Change Self Plus One to Family** option outside of Open Season. For employees participating in Premium Conversion, EPP shall use Qualifying Life Event Code 1B with the **Change Self Plus One to Family** option during Open Season. For employees not participating in Premium Conversion, EPP shall use Qualifying Life Event Code 5B with the **Change Self Plus One to Family** option during Open Season. Note: The new **Change Self Plus One to Family** option shall be made available to Treasury (premium conversion) employees outside of Open Season when they select 1C, 1I, 1M, or 1O on the **FEHB Self-Service Request: Life Event Change** screen. Also, the new **Change Self Plus One to Family** option shall be made available to Treasury (non-premium conversion) employees outside of Open Season when they select 5C, 5G, 5H, or 5J on the **FEHB Self-Service Request: Life Event Change** screen.

Add a **Change Self Plus One Dependent** option on the **FEHB Self-Service Request** screen that, when clicked, displays a screen that allows the user to change family member (dependent) data in a Self Plus One enrollment when there is no change in the enrollment code. The **Change Self Plus One Dependent** option shall only be available to users who are enrolled in a Self Plus One enrollment. The new **Change Self Plus One Dependent** option shall not allow any other changes to be made to the enrollment. The Self Plus One enrollment record that is created using the **Change Self Plus One Dependent** option will replace the existing dependent for that particular Self Plus One enrollment. If, upon clicking the [Continue] button on the **Enter FEHB Self-Service Request: Enter Family Members** screen and no family member data was previously entered for the Self Plus One

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enrollment, then display the error message "Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member." The user must enter family member data for one family member in order to continue. EPP shall use Transaction Code 5 (Change in Enroll - SF-2809) with the **Change Self Plus One Dependent** option during Open Season and outside of Open Season. EPP shall use Event Code 1 (Open Season) with the **Change Self Plus One Dependent** option during Open Season, and Event Code 6 (Other) with the **Change Self Plus One Dependent** option outside of Open Season. For employees participating in Premium Conversion, EPP shall use Qualifying Life Event Code 1B with the **Change Self Plus One Dependent** option during Open Season. For employees not participating in Premium Conversion, EPP shall use Qualifying Life Event Code 5B with the **Change Self Plus One Dependent** option during Open Season. Note: The new **Change Self Plus One Dependent** option shall be made available to Treasury (premium conversion) employees outside of Open Season when they select 1C, 1I, 1M, IO, or 1P on the **FEHB Self-Service Request: Life Event Change** screen. Also, the new **Change Self Plus One Dependent** option shall be made available to Treasury (non-premium conversion) employees outside of Open Season when they select 5C, 5G, 5H, or 5J on the **FEHB Self-Service Request: Life Event Change** screen. Also, the **FEHB Self-Service Request** screen that is displayed for non-Treasury (non-premium conversion) employees outside of Open Season shall be modified to include the **Change Self Plus One Dependent** option. Upon clicking the **Change Self Plus One Dependent** option, display a screen named "**FEHB Self-Service Request: Qualifying Life Event (QLE) to change a dependent in a Self Plus One enrollment**" with options for QLE codes 5C, 5F, 5G, 5H, 5I, 5J, or 5N for the user to select. Upon selecting the QLE code 5C, 5F, 5G, 5H, 5I, 5J, or 5N button and clicking the [Continue] button at the bottom of the screen, the new **Change Self Plus One Dependent** screen shall be displayed. For a copy of the modified **FEHB Self-Service Request** screen that will be displayed for non-Treasury (non-premium conversion) employees outside of Open Season, see **Attachment 1**. For a copy of the new **FEHB Self-Service Request: Qualifying Life Event (QLE) to change a dependent in a Self Plus One enrollment** screen that will be displayed for non-Treasury (non-premium conversion) employees outside of Open Season, see **Attachment 2**.

**Entry, Processing, Inquiry, and Correction System (EPIC) –Web Requirements:**

Modify the appropriate programs and screens in EPIC-Web to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type will cover an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One. The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

**Blue Cross Blue Shield Service Benefit Plan**

- 111 - Basic Self
- 112 - Basic Self and Family
- 113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

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**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
- 343 - HDHP Self Plus One**

**Blue Cross Blue Shield Service Benefit Plan**

- 104 - Standard Self
- 105 - Standard Self and Family
- 106 - Standard Self Plus One**

**GEHA Benefit Plan**

- 314 - Standard Self
- 315 - Standard Self and Family
- 316 - Standard Self Plus One**

Modify EPIC-Web to require the entry of family member data for one family member (and no more than one family member) on the **Health Registration Form (SF-2809)/Family Members Tab - Expanded Fields** screen when a Self Plus One FEHB enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Enrollment Code** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen. Disallow the entry of family member data for more than one family member on the **Health Registration Form (SF-2809)/Family Members Tab - Expanded Fields** screen when a Self Plus One FEHB enrollment code was previously entered in the **Enrollment Code** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen. If, upon clicking the [Release for Processing] option on the **Health Registration Form (SF-2809)/Family Members Tab - Expanded Fields** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message **"Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member."** The user must enter family member data for one family member in order to continue.

Only Qualifying Life Event (QLE) codes 1B, 1C, 1E, 1F, 1I, 1J, 1K, 1M, 1N, 1O, and 1R shall be used in the **Event Code That Permits Change** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen to allow Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 5B, 5C, 5D, 5E, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event Code That Permits Change** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen to allow Non-Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 1B, 1C, 1E, 1F, 1G, 1H, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R shall be used in the **Event Code That Permits Change** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen to allow Premium Conversion enrollments to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6).

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Non-Premium Conversion enrollments shall be allowed to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6) at any time (including outside of Open Season).

Users shall be allowed to change a family member under a Self Plus One enrollment when there is no change to the enrollment code by submitting a change request that contains the new family member's data. The Self Plus One change request record that is created will replace the existing family member for that particular Self Plus One enrollment. The following requirements apply to changing a family member under a Self Plus One enrollment when there is no change to the enrollment code:

**For enrollees participating in Premium Conversion:** Only QLE codes 1B, 1C, 1I, 1J, 1M, 1N, 1O, 1P 1Q, and 1R shall be used in the **Event Code That Permits Change** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

**For enrollees not participating in Premium Conversion:** Only QLE codes 5B, 5C, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event Code That Permits Change** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

Transaction Code "5" (**Change in Enroll - SF-2809**) shall be used in the **Transaction** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen during Open Season and outside of Open Season for a change to the family member under a Self Plus One enrollment when there is no change to the enrollment code.

Event Code "1" (**Open Season**) shall be used in the **Event Code** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen during Open Season for a change to the family member under a Self Plus One enrollment when there is no change to the enrollment code.

Event Code "6" (**Other**) shall be used in the **Event Code** field on the **Health Registration Form (SF-2809)/Insurance Tab** screen outside of Open Season for a change to the family member under a Self Plus One enrollment when there is no change to the enrollment code.

**Administrative Web Systems Branch (AWSB) Requirements**

**Office of Personnel Management, Federal Employees Health Benefits, Centralized Enrollment Clearinghouse System (CLER) Requirements:**

Modify the appropriate CLER programs, processes, and screens to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type will cover an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One. The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment

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codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

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- 315 - Standard Self and Family
- 316 - Standard Self Plus One**

Modify CLER to require the entry of a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) or a Self & Family enrollment code (an enrollment code that ends in 2 or 5) in the New Enrollment Code field on the Form 2809 Parts B - H (Add/Update) screen when family member data for one family member was previously entered in the Last Name, First Name, Initial, Date of Birth, Code, SSN, Sex, and Zip fields (also known as the family member fields) on the Form 2809 Part A Continued (Add/Update) screen. Disallow the entry of a Self Plus One enrollment code in the New Enrollment Code field on the **Form 2809 Parts B - H (Add/Update)** screen when family member data for more than one family member was previously entered in the family member fields on the **Form 2809 Part A Continued (Add/Update)** screen. If, upon clicking the [Save Form] button or [Update Form] button on the **Form 2809 Parts B - H (Add/Update)** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message **"Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member."** The user must enter family member data for one family member in order to continue. If, upon clicking the [Save Form] button or [Update Form] button on the **Form 2809 Parts B - H (Add/Update)** screen and no family member data was previously entered for a Self & Family enrollment, then display the error message **"Self & Family - no dependents entered - You have chosen a Self & Family enrollment code, please enter family members."** The user must enter family member data for at least one family member in order to continue.

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Only Qualifying Life Event (QLE) codes 1B, 1C, 1E, 1F, 1I, 1J, 1K, 1M, 1N, 1O, and 1R shall be used in the **Event That Permits Change** field on the **Form 2809 Update (Parts B - H)** screen to allow Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 5B, 5C, 5D, 5E, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event That Permits Change** field on the **Form 2809 Update (Parts B - H)** screen to allow Non-Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 1B, 1C, 1E, 1F, 1G, 1H, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R shall be used in the **Event That Permits Change** field on the **Form 2809 Update (Parts B - H)** screen to allow Premium Conversion enrollments to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6).

Non-Premium Conversion enrollments shall be allowed to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6) at any time (including outside of Open Season).

**For enrollees participating in Premium Conversion:** Only QLE codes 1B, 1C, 1I, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R shall be used in the **Event That Permits Change** field on the **Form 2809 Update (Parts B - H)** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

**For enrollees not participating in Premium Conversion:** Only QLE codes 5B, 5C, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event That Permits Change** field on the **Form 2809 Update (Parts B - H)** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

### **Direct Premium Remittance System (DPRS) Requirements:**

Modify the appropriate DPRS programs, online enrollment processes, online cancellation processes, FEHB Open Season processes, batch processes, files, copy members, and screens to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type will cover an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One. The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

#### **Blue Cross Blue Shield Service Benefit Plan**

111 - Basic Self

112 - Basic Self and Family

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**113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
- 343 - HDHP Self Plus One**

**Blue Cross Blue Shield Service Benefit Plan**

- 104 - Standard Self
- 105 - Standard Self and Family
- 106 - Standard Self Plus One**

**GEHA Benefit Plan**

- 314 - Standard Self
- 315 - Standard Self and Family
- 316 - Standard Self Plus One**

Modify DPRS to require the entry of family member data for one family member (and no more than one family member) on the **New Enrollee SF2809** screen when a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Enroll Code** field on the same screen. Disallow the entry of family member data for more than one family member on the **New Enrollee SF2809** screen when a Self Plus One enrollment code was previously entered in the **Enroll Code** field on the same screen. If, upon pressing the [Enter] key at the **New Enrollee SF2809** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

Modify DPRS to require the entry of family member data for one family member (and no more than one family member) on the **Change SF2809** screen when a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Enroll Code** field on the same screen. Disallow the entry of family member data for more than one family member on the **Change SF2809** screen when a Self Plus One enrollment code was previously entered in the **Enroll Code** field on the same screen. If, upon pressing the [Enter] key at the **Change SF2809** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

Add an edit in the DPRS batch process that only allows Qualifying Life Event (QLE) codes 2A, 2B, 2F, 2G, 2H, 2I, 2J, 2K, 3B, 3C, 3F, 3G, 3H, 3I, 4A, 4B, 4C, 4D, 4F, 4G, and 4H to be used for enrollments being increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

A decrease in a DPRS enrollment from **Self Plus One** (an enrollment code that ends in 3 or

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6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6) shall be allowed at any time.

Only QLE codes 2A, 2B, 2F, 2G, 2H, 2I, 2J, 3B, 3C, 3F, 3G, 3H, 3I, 4B, 4C, 4D, 4F, 4G, and 4H shall be used to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

Modify DPRS to require the entry of family member data for one family member (and no more than one family member) on the **Family Members** screen when a Self Plus One FEHB enrollment code (an enrollment code that ends in 3 or 6) is entered in the **Enrollmen** field on the **Retroactive Changes** screen. Disallow the entry of family member data for more than one family member on the **Family Members** screen when a Self Plus One FEHB enrollment code is entered in the **Enrollmen** field on the **Retroactive Changes** screen. If, upon pressing the [Enter] key at the **Family Members** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

Modify DPRS to add subscripts 3 and 6 for the Self Plus One options 3 and 6 on the **Agency Contribution Info** screen. Also, add the literal "Self Plus One: 3 and 6" on the **Agency Contribution Info** screen.

**Direct Premium Remittance Web (DPRW) Requirements:**

Modify the appropriate DPRW programs, processes, and screens to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type will cover an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One. The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

**Blue Cross Blue Shield Service Benefit Plan**

- 111 - Basic Self
- 112 - Basic Self and Family
- 113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
- 343 - HDHP Self Plus One**

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**Blue Cross Blue Shield Service Benefit Plan**

- 104 - Standard Self
- 105 - Standard Self and Family
- 106 - Standard Self Plus One**

**GEHA Benefit Plan**

- 314 - Standard Self
- 315 - Standard Self and Family
- 316 - Standard Self Plus One**

Note: The requirements below apply to the **SF2809 Part A - Enrollee Information, SF2809 Part A - Family Information, and SF2809 Part B** screens that are displayed for the **Add SF2809-Registration, Search/Complete SF2809-Registration, and Correct SF2809-Registration** options in DPRW.

Modify DPRW to require the entry of all required family member data for one family member (and no more than one family member) on the **SF2809 Part A - Family Information** screen when a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Current Enrollment Plan** or **New Enrollment Plan** field on the **SF2809 Part A - Enrollee Information** screen. If, upon clicking the [Add Family] or [Update Family] button on the **SF2809 Part A - Family Information** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

Only Qualifying Life Event (QLE) codes 2A, 2B, 2F, 2G, 2H, 2I, 2J, 2K, 3B, 3C, 3F, 3G, 3H, 3I, 4A, 4B, 4C, 4D, 4F, 4G, and 4H shall be used in the **Event Code** field on the **SF2809 Part B** screen to allow enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 2A, 2B, 2F, 2G, 2H, 2I, 2J, 3B, 3C, 3F, 3G, 3H, 3I, 4B, 4C, 4D, 4F, 4G, and 4H shall be used in the **Event Code** field on the **SF2809 Part B** screen for a change to the family member under Self Plus One enrollments when there is no change to the enrollment code.

Note: The requirements below apply to the **SF2810 Part A - Enrollee Information, SF2810 Part A - Family Information, and SF2810 Part B** screens that are displayed for the **Add SF2810-Transfer In, Search/Complete SF2810-Transfer, and Correct SF2810-Transfer In** options in DPRW.

Modify DPRW to require the entry of all required family member data for one family member (and no more than one family member) on the **SF2810 Part A - Family Information** screen when a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) is entered in the **Current Enrollment Plan** field on the **SF2810 Part A - Enrollee Information** screen. If upon, clicking the [Add Family] or [Update Family] button on the **SF2810 Part A - Family Information** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

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Only QLE codes 2A, 2B, 2F, 2G, 2H, 2I, 2J, 2K, 3B, 3C, 3F, 3G, 3H, 3I, 4A, 4B, 4C, 4D, 4F, 4G, and 4H shall be used in the **Event Code** field on the **SF2810 Part B** screen to allow enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

A decrease in a DPRW enrollment from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6) shall be allowed at any time.

Only QLE codes 2A, 2B, 2F, 2G, 2H, 2I, 2J, 3B, 3C, 3F, 3G, 3H, 3I, 4B, 4C, 4D, 4F, 4G, and 4H shall be used in the **Event Code** field on the **SF2810 Part B** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

**Tribal Insurance Processing System (TIPS) Requirements:**

Modify the appropriate TIPS programs and screens to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type will cover an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One. The Self Plus One FEHB enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

**Blue Cross Blue Shield Service Benefit Plan**

- 111 - Basic Self
- 112 - Basic Self and Family
- 113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
- 343 - HDHP Self Plus One**

**Blue Cross Blue Shield Service Benefit Plan**

- 104 - Standard Self
- 105 - Standard Self and Family
- 106 - Standard Self Plus One**

**GEHA Benefit Plan**

- 314 - Standard Self
- 315 - Standard Self and Family

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**316 - Standard Self Plus One**

Modify TIPS to require the entry of family member data for one family member (and no more than one family member) in the **Part A - Enrollee Information Continued: Family Members** section on the **Health Benefits Election Form (2809)** screen when a Self Plus One enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Enrollment Code** field in the **Part C - FEHB Plan You are Enrolling In or Changing To** section on the **Health Benefits Election Form (2809)** screen. Disallow the entry of family member data for more than one family member in the **Part A - Enrollee Information Continued: Family Members** section when a Self Plus One enrollment code was previously entered in the **Enrollment Code** field in the **Part C - FEHB Plan You are Enrolling In or Changing To** section. If, upon clicking the [Save] button on the **Health Benefits Election Form (2809)** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

Modify TIPS to require the entry of family member data for at least one family member in the **Part A - Enrollee Information Continued: Family Members** section on the **Health Benefits Election Form (2809)** screen when a Self & Family enrollment code (an enrollment code that ends in 2 or 5) was previously entered in the **Enrollment Code** field in the **Part C - FEHB Plan You are Enrolling In or Changing To** section on the same screen. If, upon clicking the [Save] button on the **Health Benefits Election Form (2809)** screen and no family member data was previously entered in the **Part A - Enrollee Information Continued: Family Members** section for a Self & Family enrollment, then display the error message "**Self & Family - no dependents entered - You have chosen a Self & Family enrollment code, please enter family members.**" The user must enter family member data for at least one family member in order to continue.

Only Qualifying Life Event (QLE) codes 1B, 1C, 1E, 1F, 1I, 1J, 1K, 1M, 1N, 1O, and 1R shall be used in the **Event Code** field in **Part D - (Event that Permits You to Enroll, Change or Cancel)** on the **Health Benefits Election Form (2809)** screen to allow Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 5B, 5C, 5D, 5E, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event Code** field in **Part D - (Event that Permits You to Enroll, Change or Cancel)** on the **Health Benefits Election Form (2809)** screen to allow Non-Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 1B, 1C, 1E, 1F, 1G, 1H, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R shall be used in the **Event Code** field in **Part D - (Event that Permits You to Enroll, Change or Cancel)** on the **Health Benefits Election Form (2809)** screen to allow Premium Conversion enrollments to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6).

Non-Premium Conversion enrollments shall be allowed to be decreased from **Self Plus One**

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(an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6) at any time (including outside of Open Season).

**For enrollees participating in Premium Conversion:** Only QLE codes 1B, 1C, 1I, 1J, 1M, 1N, 1O, 1P 1Q, and 1R shall be used in the **Event Code** field in **Part D - (Event that Permits You to Enroll, Change or Cancel)** on the **Health Benefits Election Form (2809)** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

**For enrollees not participating in Premium Conversion:** Only QLE codes 5B, 5C, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event Code** field in **Part D - (Event that Permits You to Enroll, Change or Cancel)** on the **Health Benefits Election Form (2809)** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

**Human Resources Applications Branch (HRAB) Requirements**

**EmpowHR (POWR) Requirements:**

Modify the appropriate POWR programs and screens to allow Self Plus One FEHB enrollments to be entered and processed. The Self Plus One enrollment type will cover an enrollee and one designated eligible family member only. The eligibility requirements for family members under other FEHB coverage also apply to Self Plus One. The Self Plus One enrollment codes end in "3" and "6". The Self Plus One enrollment codes that end in "3" correspond to each plan's 3-digit FEHB enrollment codes that end in "1" and "2." The Self Plus One enrollment codes that end in "6" correspond to each plan's 3-digit FEHB enrollment codes that end in "4" and "5."

For example:

**Blue Cross Blue Shield Service Benefit Plan**

- 111 - Basic Self
- 112 - Basic Self and Family
- 113 - Basic Self Plus One**

**GEHA Benefit Plan**

- 311 - High Self
- 312 - High Self and Family
- 313 - High Self Plus One**

**GEHA High Deductible Plan (HDHP)**

- 341 - HDHP Self
- 342 - HDHP Self and Family
- 343 - HDHP Self Plus One**

**Blue Cross Blue Shield Service Benefit Plan**

- 104 - Standard Self
- 105 - Standard Self and Family
- 106 - Standard Self Plus One**

**GEHA Benefit Plan**

- 314 - Standard Self
- 315 - Standard Self and Family

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**316 - Standard Self Plus One**

Modify POWR to require the entry of family member data for one family member (and no more than one family member) on the Payroll Documents/Health Benefits (Dependents tab) screen when a Self Plus One FEHB enrollment code (an enrollment code that ends in 3 or 6) was previously entered in the **Benefit Plan** field on the **Payroll Documents/Health Benefits (Elections tab)** screen. Disallow the entry of family member data for more than one family member on the **Payroll Documents/Health Benefits (Dependents tab)** screen when a Self Plus One FEHB enrollment code was previously entered in the **Benefit Plan** field on the **Payroll Documents/Health Benefits (Elections tab)** screen. If, upon clicking the [Save] button on the **Payroll Documents/Health Benefits (Dependents tab)** screen and no family member data was previously entered for a Self Plus One enrollment, then display the error message "**Self Plus One - no dependent entered - You have chosen a Self+Plus One enrollment code, please enter one family member.**" The user must enter family member data for one family member in order to continue.

Only Qualifying Life Event (QLE) codes 1B, 1C, 1E, 1F, 1I, 1J, 1K, 1M, 1N, 1O, and 1R shall be used in the **Event Change Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen to allow Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 5B, 5C, 5D, 5E, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event Change Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen to allow Non-Premium Conversion enrollments to be increased from **Self Only** (an enrollment code that ends in 1 or 4) to **Self Plus One** (an enrollment code that ends in 3 or 6) or from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self and Family** (an enrollment code that ends in 2 or 5).

Only QLE codes 1B, 1C, 1E, 1F, 1G, 1H, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R shall be used in the **Event Change Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen to allow Premium Conversion enrollments to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6).

Non-Premium Conversion enrollments shall be allowed to be decreased from **Self Plus One** (an enrollment code that ends in 3 or 6) to **Self Only** (an enrollment code that ends in 1 or 4) or from **Self and Family** (an enrollment code that ends in 2 or 5) to **Self Plus One** (an enrollment code that ends in 3 or 6) at any time (including outside of Open Season).

Users shall be allowed to change a family member under a Self Plus One enrollment when there is no change to the enrollment code by submitting a change request that contains the new family member's data. The Self Plus One change request record that is created will replace the existing family member for that particular Self Plus One enrollment. The following requirements apply to changing a family member under a Self Plus One enrollment when there is no change to the enrollment code:

**For enrollees participating in Premium Conversion:** Only QLE codes 1B, 1C, 1I, 1J, 1M, 1N, 1O, 1P, 1Q, and 1R shall be used in the **Event Change Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

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**For enrollees not participating in Premium Conversion:** Only QLE codes 5B, 5C, 5F, 5G, 5H, 5I, 5J, and 5N shall be used in the **Event Change Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen to allow Self Plus One enrollments to change a family member when there is no change to the enrollment code.

Transaction Code "5" (**Change in Enroll - SF-2809**) shall be used in the **Transaction Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen during Open Season and outside of Open Season for a change to the family member under a Self Plus One enrollment when there is no change to the enrollment code.

Event Code "1" (**Open Season**) shall be used in the **Event Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen during Open Season for a change to the family member under a Self Plus One enrollment when there is no change to the enrollment code.

Event Code "6" (**Other**) shall be used in the **Event Code** field on the **Payroll Documents/Health Benefits (Elections tab)** screen outside of Open Season for a change to the family member under a Self Plus One enrollment when there is no change to the enrollment code.

**External Vendor Requirements**

"Not Applicable"

**Signature of acting Web Requirements Branch Chief: /s/ Ronald Douglas      Date: 08/10/15**

**Signature of Systems Requirements Branch Chief: /s/ Lisa Stafford      Date: 08/10/15**

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Date Prepared:  
04/01/14

Attachment 1

FEHB Self Service Request screen for Non-Treasury (Non-Premium Conversion) Employees outside of Open Season

FEHB Self-Service Request

Outside of FEHB Open Season, you can change or cancel coverage only in connection with certain events called "qualifying life events".

"Cancel Enrollment" change requests will be effective the LAST DAY of Pay Period XX unless you choose a future pay period.

"Self Plus One to Self Only," "Family to Self Plus One," "Family to Self Only," and "Change Self Plus One Dependent" change requests will be effective the first day of Pay Period XX unless you choose a future pay period. If you are in a non-pay status, it cannot take effect until the pay period that follows a pay period during any part of which you were in a pay status. It is your responsibility to ensure that the plan you select is available in your area. Read plan brochures carefully before selecting a plan.

Please select the type of change you wish to make:

Self Plus One to Self Only
Family to Self Plus One
Family to Self Only
Change Self Plus One Dependent
Cancel Enrollment

Note: The enrollment change options (e.g., **Self Plus One to Self Only**) displayed on the FEHB Self Service Request screen will be dependent upon the user's enrollment. For example, the new **Self Plus One to Self Only** option will be displayed only for users who are enrolled in a Self Plus One enrollment.

For other types of changes, please contact your Servicing Personnel/Human Resources organization.

EXIT

Functional Requirements Document (FRD)

Project#  
766433

Project Title: FEHB Self Plus One Enrollment

Date Prepared:  
04/01/14

Attachment 2

FEHB Self-Service Request: Qualifying Life Event (QLE) to change a dependent in a Self Plus One enrollment screen for Non-Treasury (Non-Premium Conversion) Employees outside of Open Season

**FEHB Self-Service Request: Qualifying Life Event (QLE) to change a dependent in a Self Plus One enrollment**

You can only use the following Employee Personal Page QLE section to change a dependent in a Self Plus One enrollment if you have one of the QLEs shown below and you submit your request within the timeframe established in FEHB regulations. If you have any questions about your eligibility to change a dependent in a Self Plus One enrollment, contact your servicing Personnel/Human Resources organization for assistance.

Please select a Qualifying Life Event.  
You must enter Life Event Month.  
You must enter Life Event Day.  
You must enter Life Event Year.

Please select a Qualifying Life Event:

SC Change in family status; for example: marriage, birth, or death of family member, adoption, or divorce. (Time Limit: From 31 days before through 60 days after event.)

SF Transfer from a post of duty within the United States to a post of duty outside the United States, or reverse. (Time Limit: From 31 days before leaving old post through 60 days after arriving at new post.)

5G Employee or eligible family member loses coverage under FEHB or another group insurance plan; for example: (Time Limit: From 31 days before through 60 days after loss of coverage.)

Loss of coverage under another FEHB enrollment due to termination, cancellation, or change to Self Only of the covering enrollment;

Loss of coverage under another federally-sponsored health benefits program;

Loss of coverage due to termination of membership in the employee organization sponsoring the FEHB plan;

Loss of coverage under Medicaid or similar State-sponsored program;

Loss of coverage under a non-Federal health plan.

5H Enrollee or eligible family member loses coverage due to the discontinuance, in whole or part, of an FEHB plan. (Time Limit: During open season, unless OPM sets a different time.)

5I Loss of coverage under a non-Federal group health plan because an employee moves out of the commuting area to accept another position and the employee's non-federally employed spouse terminates employment to accompany the employee. (Time Limit: From 31 days before the employee leaves the commuting area through 180 days after arriving in the new commuting area.)

5J Employee or covered family member in a Health Maintenance Organization (HMO) moves or becomes employed outside the geographic area from which the carrier accepts enrollments, or if already outside the area, moves or becomes employed further from this area. (Time Limit: Upon notifying the employing office of the move or change of place of employment.)

5N Employee or eligible family member becomes eligible for assistance under Medicaid or a State Children's Health Insurance Program (CHIP). (Time Limit: Within 60 days after the date the employee or family member becomes eligible for assistance.)

Enter the Effective Date of your Life Event:

MM  DD  YYYY

Please verify your current address. If this address is not your current address, you CANNOT continue with your Qualifying Life Event Change. This is the address that will be sent to your health carrier. If you need to update this address, select "Residence Address" on the menu on the left and click the "Self-Service" button. You must wait until that change is processed before proceeding with your Qualifying Life Event change.

Functional Requirements Document (FRD)

Project# 766433	Project Title: FEHB Self Plus One Enrollment	Date Prepared: 04/01/14
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United States

**Office of  
Personnel Management**  
The Federal Government's Human Resources Agency



***Benefits Administration Letter***

Number: 14-203

Date: March 24, 2014

**Subject: Federal Employees Health Benefits (FEHB) Program: Self Plus One Enrollment**

Purpose

The purpose of this letter is to notify you that the Office of Personnel Management (OPM) will be implementing a new enrollment type, Self Plus One, under the Federal Employees Health Benefits (FEHB) Program. This letter also outlines agency responsibilities for the implementation of the Self Plus One enrollment type.

The effective date for the new Self Plus One enrollment type will be **January 1, 2016**. Therefore, the annual Open Season beginning on **November 9, 2015** will include the Self Plus One enrollment type in the available enrollment choices.

Background

Section 706 of the Bipartisan Budget Act of 2013 amends Section 8905 of title 5, United States Code, to add a Self Plus One enrollment type to the FEHB Program. The Self Plus One enrollment type will cover the enrollee and one eligible family member.

Agency and Payroll Office Responsibilities

Agencies and payroll offices must ensure their systems will be able to process the Self Plus One enrollments for the 2015 Open Season which begins November 9, 2015. All enrollment policies, procedures, and instructions must be updated to include the Self Plus One enrollment type. In addition, **all testing must be completed no later than September 1, 2015 to ensure a smooth implementation.**

We will be updating our materials including the Standard Form 2809, the FEHB Handbook, the Guide to Federal Benefits, and our website. The FEHB Program regulations will also be updated. The FEHB carriers are taking action to have Self Plus One implemented by September 1, 2015.

Functional Requirements Document (FRD)

Project# 766433	Project Title: FEHB Self Plus One Enrollment	Date Prepared: 04/01/14
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The new Self Plus One 3-digit enrollment codes will end in "3" or "6". The codes ending in "3" will correspond to each plan's 3-digit enrollment codes ending in 1 and 2.

For example:

Blue Cross Blue Shield Service Benefit Plan

111 – Basic Self

112 – Basic Self and Family

113 – Basic Self Plus One

GEHA Benefit Plan

311 – High Self

312 – High Self and Family

313 – High Self Plus One

GEHA High Deductible Plan (HDHP)

341 – HDHP Self

342 – HDHP Self and Family

343 – HDHP Self Plus One

Likewise, the new Self Plus One 3-digit enrollment codes ending in "6" will correspond to each plan's 3-digit enrollment codes ending in 4 and 5.

For example:

Blue Cross Blue Shield Service Benefit Plan

104 – Standard Self

105 – Standard Self and Family

106 – Standard Self Plus One

GEHA Benefit Plan

314 – Standard Self

315 – Standard Self and Family

316 – Standard Self Plus One

Conclusion

In summary, the effective date for the new Self Plus One enrollment type will be **January 1, 2016**. Therefore, the annual Open Season beginning on **November 9, 2015** will include the Self Plus One enrollment type.

Functional Requirements Document (FRD)

Project# 766433	Project Title: FEHB Self Plus One Enrollment	Date Prepared: 04/01/14
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We will provide more information as it becomes available.

Sincerely,

John O'Brien  
Director  
Healthcare and Insurance

Functional Requirements Document (FRD)

Project#  
766433

Project Title: FEHB Self Plus One Enrollment

Date Prepared:  
04/01/14

United States

**Office of  
Personnel Management**  
*The Federal Government's Human Resources Agency*



***Benefits Administration Letter***

Number: 14-213

Date: December 30, 2014

**Subject: Federal Employees Health Benefits (FEHB) Program: Self Plus One Enrollment**

Purpose

The purpose of this letter is to provide guidance regarding the new enrollment type, Self Plus One, under the Federal Employees Health Benefits (FEHB) Program. This letter outlines agency responsibilities for systems changes necessary for implementing the Self Plus One enrollment type.

The effective date for the new Self Plus One enrollment type will be January, 2016. Therefore, the annual Open Season beginning on November 9, 2015 will include the Self Plus One enrollment type in the available enrollment choices.

Our initial Benefits Administration Letter (BAL) 14-203 on the FEHB Program Self Plus One Enrollment was published on March 24, 2014 and is available at [www.opm.gov/retirement-services/publications-forms/benefits-administration-letters/2014/14-203.pdf](http://www.opm.gov/retirement-services/publications-forms/benefits-administration-letters/2014/14-203.pdf).

In order to accept and process the Self Plus One enrollment type, agency systems must be updated as follows:

Electronic enrollment systems:

- Self-service systems that allow Qualifying Life Event (QLE) changes outside of open season must be updated to allow appropriate changes to Self Plus One.
- Self-service systems must be updated to allow changes to the family member data in a Self Plus One enrollment when there is no change in the enrollment code.
- Self Plus One must allow only one family member to be entered.

All systems:

- Databases, fields and files must accept, process, transmit and/or display the numerals 3 and 6 in the 3<sup>rd</sup> position of the enrollment code field.
- Databases, fields and files that contain and/or pass premium amounts must be updated to accommodate the Self Plus One premium.

Functional Requirements Document (FRD)

Project# 766433	Project Title: FEHB Self Plus One Enrollment	Date Prepared: 04/01/14
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OPM has estimated that approximately 30 percent of the FEHB enrollments are Family enrollments with only one family member. Thus, there may be as many as one million changes to the Self Plus One enrollment type. Agencies whose systems are not ready to process Self Plus One enrollments risk delays in the processing of I.D. cards and claims processing, as well as lost forms and changes not being processed.

For those agencies that transmit enrollment information to the OPM-Macon Data Hub, the agency flat file *FEHB Data Hub SF 2809* must be updated for Self Plus One enrollment code in field 23 of the file layout as the Data Hub system transmits the enrollment code to the Carrier. Please ensure that your internal system will successfully transmit the new Self Plus One codes to the Data Hub. The OPM-Macon Data Hub will conduct testing for the *FEHB Data Hub SF 2809* file in the Spring of 2015. Additional information on the testing will be released at a later date.

To ensure a smooth transition to a three tiered enrollment model, OPM recommends that a comprehensive end to end testing plan is developed for all systems that contain enrollment codes and/or premium data.

Please complete the attached status report (Attachment 1) and return to [selfplusone@opm.gov](mailto:selfplusone@opm.gov) by January 31, 2015.

In addition, OPM is researching the impact of notifying Carriers electronically when there is an addition or deletion of family members under a Self and Family enrollment. To assist OPM, please complete Attachment 2 and submit to [selfplusone@opm.gov](mailto:selfplusone@opm.gov) by January 31, 2015.

Conclusion

Agencies and payroll offices must ensure their systems will be able to process the Self Plus One enrollments for the 2015 Open Season which begins November 9, 2015. All enrollment systems, policies, procedures, and instructions must be updated to include the Self Plus One enrollment type. In addition, all testing must be completed no later than September 1, 2015 to ensure implementation. Information concerning which QLEs are affected by the Self Plus One enrollment code will be released at a later date.

Questions

Should you have any questions, please email [selfplusone@opm.gov](mailto:selfplusone@opm.gov).

Sincerely,

John O'Brien  
Director Healthcare and Insurance