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Governor Charlie Crist

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MANAGEMENT ADVISORY #09-013

DATE: May 4, 2009

TO: Agency and University Personnel Officers and Benefit Coordinators

FROM: Suzetta Furlong, Manager

SUBJECT: Agency Error Correction Requests

Our experience over the last year has shown that we need to clarify the process for agency error correction requests. The process has not changed, but clarification has been added regarding documentation. Providing appropriate documentation will keep everyone protected throughout the process.

With the many demands on HR offices, we understand that occasional mistakes are made in processing enrollment changes for employees. The purpose of this advisory is to clarify the process for documenting and subsequently reviewing agency error correction requests.

First, we offer these self-service recommendations for you to consider to reduce the need for correction requests:

- The [Benefits Guide](#) and the Web site, myFlorida.com/myBenefits, provide a wealth of information for employees. We encourage employees to use these resources to research their benefit options. If they find they have questions, the service center is available to help. The service center follows a process for documentation that can be retrieved if an employee disputes an issue. Following this avenue for information provides protection for employees.
- Employees can enroll in benefits and make many qualifying event elections online in the People First system (some elections, such as death and divorce, require a call to the service center). When employees make their own elections, they take ownership for their decisions and system selections. They'll also be familiar with the system for open enrollment.
- Per the Florida Statutes (Chapter 110.123), Florida Administrative Code (60-P), and plan documents, participants in the State Group Insurance Program always have the option to file a level one appeal if they feel an error has been made. This is the best route for participants to take because it protects their rights through the appeal process, including the right to an administrative hearing.

Process for Documenting Errors:

Chapter [110.1165 of the Florida Statutes](#) states that erroneous written information that is detrimental to the employee may be considered to provide a remedy for the employee. Additionally, Plan rules and IRS tax laws must be followed.

With these criteria in mind, we are directing People First to consider the following when responding to an agency error correction request:

1. The correction request must be on letterhead stationery from the agency and be signed by the personnel officer or designee.
2. The request should describe in detail the nature of the error: how it occurred, any appropriate steps already taken by the agency to resolve the issue, and the action requested of People First.
3. Appropriate supporting documentation is critical for our audit trail. Documentation—copies of emails, date stamped forms, meeting logs, etc.—should be provided with the letter. Correction requests that do not include this type of documentation will not be considered, per the Statute.
4. Fax the request and supporting documentation to (904) 828-6092, with the cover sheet marked "Agency Error," or mail it to:

People First Service Center
Post Office Box 6830
Tallahassee, FL 32314

5. People First will review the information provided:
 - a. The correction will be made if:
 - The documentation supports the request, and
 - Plan rules are followed, and
 - There are no IRS tax implications, and
 - The request is consistent with state and federal requirements
 - b. The request will be denied if:
 - There is insufficient documentation, or
 - Plan rules would be compromised, or
 - There are tax implications, or
 - The request is not consistent with state and federal requirements

If the request is denied, the employee may begin the appeal process.

6. People First will provide a written response to the correction request as quickly as possible, given research may be needed.

Ultimately, we all want to do what is best for our employees. Promoting the self-service recommendations above is step one. When that is not possible and an error is made, providing ample documentation will ensure that employees are treated fairly and that we are able to act upon the agency error correction request.