

*i*Navigator

HR User Manual

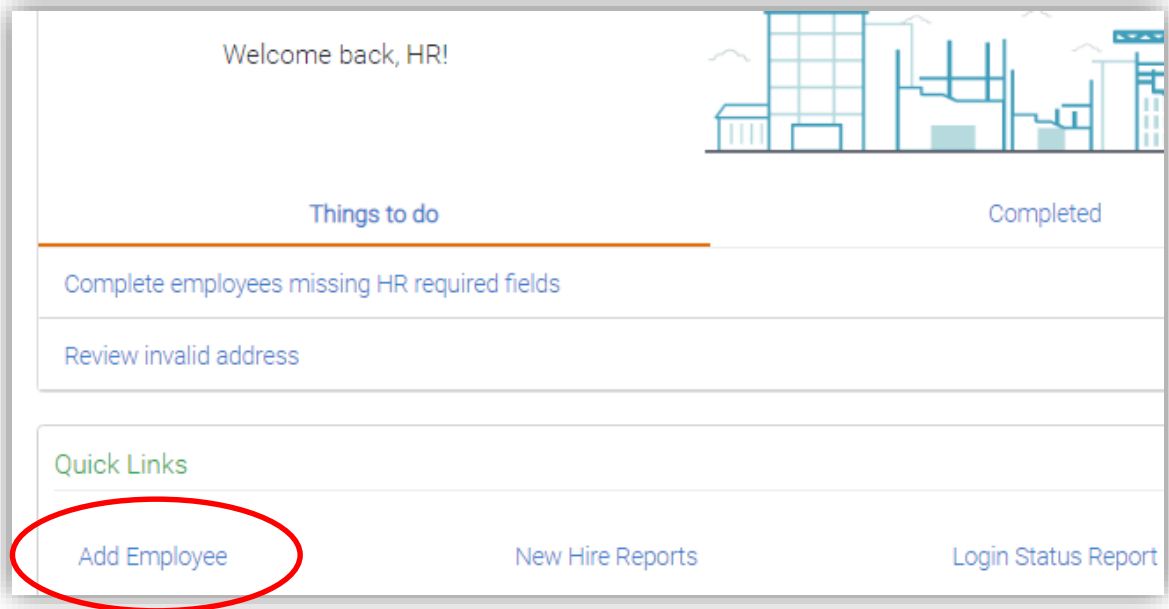
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How to Add a New Employee

Step 1:

From your HR landing page (the **Home** tab) select **Add Employee** (located under the **Quick Links** box)



Welcome back, HR!

Things to do Completed

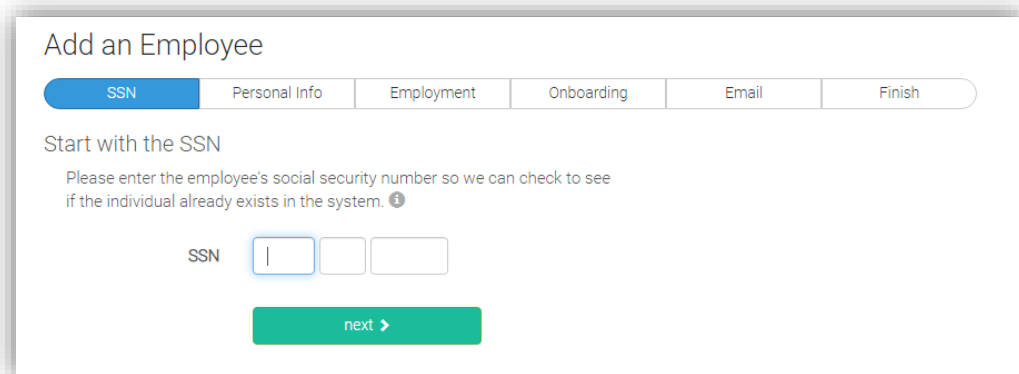
- Complete employees missing HR required fields
- Review invalid address

Quick Links

- Add Employee**
- New Hire Reports
- Login Status Report

Step 2:

Enter the employee's SSN and click **Next**.



Add an Employee

SSN Personal Info Employment Onboarding Email Finish

Start with the SSN

Please enter the employee's social security number so we can check to see if the individual already exists in the system. ⓘ

SSN

next >

How to Add a New Employee (con't)

Step 3:

Enter the employee's personal information and click **Next**.

TIP

*If you try and select **Next** without filling in mandatory information, that cell will flag red and request you to enter data before moving forward.*

Add an Employee

SSN Personal Info Employment Onboarding Email Finish

Then add the employee information

The following data is required to establish a new employee record

SSN 123-45-1235

First Name

Middle Name

Last Name

Suffix --Select--

Gender Male Female

Date of Birth

State of Residence --Select--

Payroll Work State --Select--

Work Email

Personal Email

next >

Add an Employee

SSN Personal Info Employment Onboarding Email Finish

Then add the employee information

The following data is required to establish a new employee record

SSN 123-45-1235

Hire Date

Job Title

Class --Select--

Payroll Group --Select--

Manager type manager's last name

No manager

Salary fields

Pay Basis --Select--

Hourly Rate

Hours Per Week 40.00

Annual Base Salary

ACA / Statutory Classifications

ACA Classification --Select--

Statutory Class --Select--

Is Seasonal Yes No

back next >

Step 4:

Enter the employee's employment information and click **Next**.

TIP

If your company's portal has setups such as offices or divisions, you will assign those for the employee under the ACA Classification section (which you can skip if not an ACA client).

How to Add a New Employee (con't)

Add an Employee

SSN | Personal Info | Employment | Onboarding

Jane Doe has been added

So which onboarding tasks should be set?

Getting Started

- Welcome
- Electronic Signature and Consent
- Address
- Form W-4, Employee's Withholding
- State Withholding Form
- Self Identification (EEOC)
- Emergency Contacts
- Form I-9, Employment Eligibility Verification

Orientation

- Confidentiality Agreement

Policies & Procedures

- Review Our Company's Employee Handbook
- Direct Deposit Authorization
- Employee Record Form
- Parking Form
- Onboarding Meeting

Workplace Safety

- Your rights under the Occupational Safety & Health Act

finish up >

Step 5:

Select (or deselect) the appropriate onboarding tasks that should be assigned to your employee. Click **Finish Up**.

TIP

Electronic Signature and Consent should be assigned to every employee.

Step 6:

If you would like to send your new employee a registration email (recommended for all full time/benefit eligible employees) enter their email address (if not entered in Step 3) and click **Send**. The employee can click on the link in their email to register and complete their new hire elections. Otherwise click **No, not now**. (*You will still be able to send them a welcome email later*).

Add an Employee

SSN | Personal Info | Employment | Onboarding | Email | Finish

Send Jane Doe a registration email?

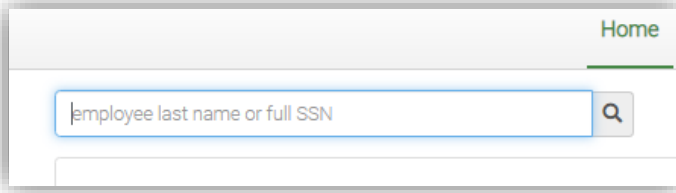
Email:

JaneDoe@gmail.com

Send ↗

No, not now

How to Terminate an Employee



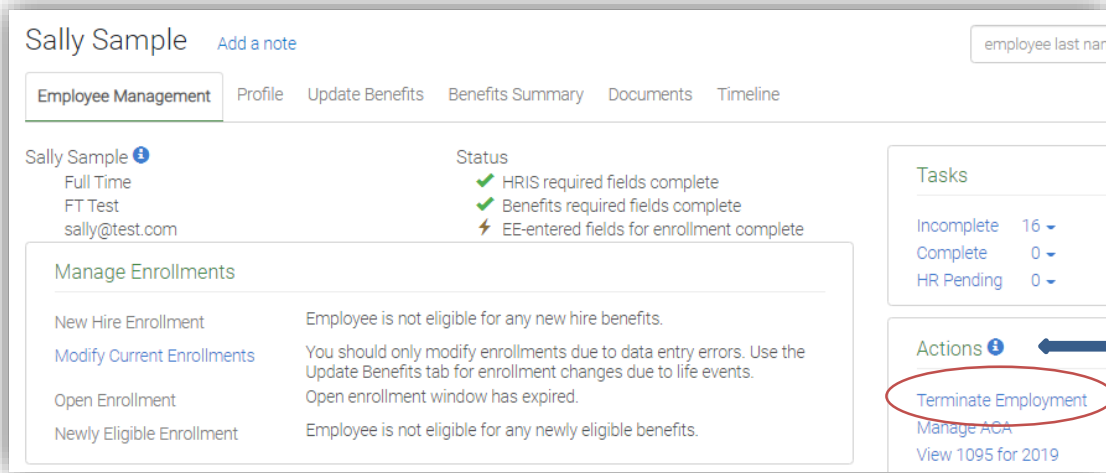
Home

employee last name or full SSN

Q

Step 1:

From either the **Home** or **Employees** tab, use the employee search bar to pull up the employee to be terminated.



Sally Sample [Add a note](#)

employee last name

Employee Management Profile Update Benefits Benefits Summary Documents Timeline

Sally Sample **Full Time** **FT Test** **sally@test.com**

Status

- ✓ HRIS required fields complete
- ✓ Benefits required fields complete
- ⚡ EE-entered fields for enrollment complete

Tasks

Incomplete 16 **▼**

Complete 0 **▼**

HR Pending 0 **▼**

Actions **ⓘ**

- Terminate Employment**
- Manage ACA
- View 1095 for 2019

Manage Enrollments

New Hire Enrollment Employee is not eligible for any new hire benefits.

Modify Current Enrollments You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.

Open Enrollment Open enrollment window has expired.

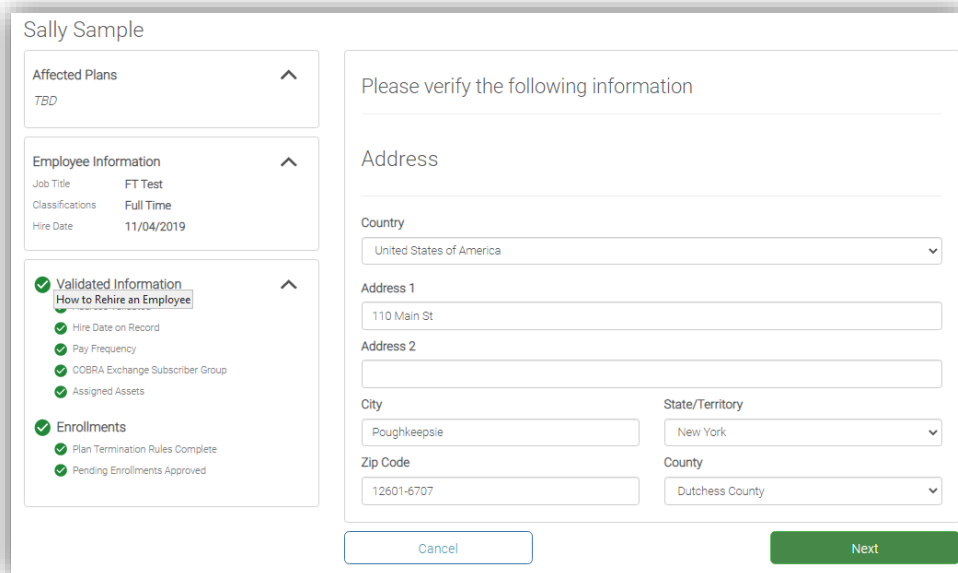
Newly Eligible Enrollment Employee is not eligible for any newly eligible benefits.

Step 2:

From the **Employee Management** tab (which is the employee landing page), select **Terminate Employment** under the *Actions* section.

Step 3:

You will have the opportunity here to review some basic information and update/verify the employee address. When done, click **Next**.



Sally Sample

Affected Plans **^**

TBD

Employee Information **^**

Job Title **FT Test**

Classifications **Full Time**

Hire Date **11/04/2019**

Validated Information **^**

How to Rehire an Employee

- ✓ Hire Date on Record
- ✓ Pay Frequency
- ✓ COBRA Exchange Subscriber Group
- ✓ Assigned Assets

Enrollments

- ✓ Plan Termination Rules Complete
- ✓ Pending Enrollments Approved

Please verify the following information

Address

Country

United States of America **▼**

Address 1

110 Main St

Address 2

City

Poughkeepsie

State/Territory

New York **▼**

Zip Code

12601-6707

County

Dutchess County **▼**

Cancel **Next**

How to Terminate an Employee (con't)

Step 4:

Enter the termination date – you will see the list of affected enrollments generate on the left-hand side after doing so. Select the termination reason and then click **Next**.

The screenshot shows a web form for terminating an employee named Sally Sample. On the left, there is a list of 'Affected Plans' categorized into 'Ending Plans' (MVP 2020 Liberty Bronze 1, 2020 Dental Plan, 2020 Vision Plan) and 'NON-COBRA Eligible Plans' (Anthem 2020 Life and AD&D, 2020 Anthem Short-Term Disability, 2020 Anthem Long-Term Disability). Below this is a section for 'Canceled Current/Open/Pending Plans' (Fidelity 401k). The main form area has a 'Termination Date' field set to 08/01/2020. Below that is a section titled 'What is the Reason for Termination?' with several radio button options: 'Voluntary Termination' (which is selected and highlighted in blue), 'Involuntary Termination', 'Reduction in Force', 'Retirement', 'Death of Employee', and 'Gross Misconduct'. At the bottom of the form are 'Cancel' and 'Next' buttons.

The screenshot shows a confirmation pop-up box with the text 'Are you sure?' and 'Are you sure you want to terminate this employee?'. At the bottom right, there are two buttons: 'Cancel' and 'Continue'.

Step 5:

A pop-up box will ask if you are sure you want to terminate. Click **Continue**.

Step 6:

You will see a screen showing Termination Complete with a list of all enrollment end dates. Click **Back to Manage** to return to the employee's profile.

The screenshot shows a 'Termination Complete' screen. It features a heading 'Termination Complete' with a printer icon. Below the heading, it states 'The following affected plans have been ended:' and lists 'MVP Health Care' with a sub-item 'MVP 2020 Liberty Bronze 1: End Date: 08/31/2020'.

TIP

Once you terminate an employee, they lose access to the iNavigator portal.

How to Rehire an Employee

TIP

If you want to remove a termination (for instance, if an employee resigned but then rescinded), do NOT rehire, and instead use the section on how to undo a termination.

Employee Management | Profile | Update Benefits | Benefits Summary | Documents | Timeline

Sally Sample ⓘ
Full Time
FT Test
sally@test.com

Status
✓ HRIS required fields complete
✓ Benefits required fields complete
⚡ EE-entered fields for enrollment complete

Employee has been terminated.

Manage Enrollments
New Hire Enrollment
Modify Current Enrollments You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
Open Enrollment Open enrollment window has expired.

Tasks
Incomplete 0 ▾
Complete 0 ▾
HR Pending 0 ▾

Termination Actions ⓘ
Rehire
Undo Termination
Terminate Editor beta

Step 1:

Pull up the employee's page. You will see **Employee has been terminated** under their name. On the right side, under **Termination Actions**, select **Rehire**.

TIP

You can use the **Terminate Editor** if an incorrect termination date was entered for an employee. Just click here, update the termination date (and/or reason), and click **Save**.

Step 2:

Enter the employee's rehire date and click **Next**.

Rehire an Employee

Rehire Employee | Personal Info | Employment | Onboarding | Send an Email | Finish Up

Sally Sample

* If you intend to change the termination date or reason then use the new **Terminate Editor** tool instead of rehiring and terminating.

Rehire Date

Hire Date: 11/04/2019
Termination Date: 07/01/2020
Terminated On: 07/27/2020
Reason: Voluntary Termination (COBRA)
COBRA Status: Not On COBRA
Previous Benefits: 2020 Vision Plan, 2020 Dental Plan, MVP 2020 Liberty Bronze 1, Anthem 2020 Life and AD&D, 2020 Anthem Long-Term Disability, 2020 Anthem Short-Term Disability

Employee was recently terminated. Carriers may not have received notice to end benefit coverage. It will be your responsibility to check with your carriers to ensure the termination was processed or contact them directly with any needed information.

Next > | Cancel rehire

How to Rehire an Employee (con't)

Rehire an Employee

Rehire Employee

Personal Info

Employment

Onboarding

Send an Email

Finish Up

Step 3:

You will now be taken through the same flow as when you enter a new hire and will be able to update personal and employment information for the employee, as well as assign any onboarding tasks for them (if applicable).

Send Sally Sample a registration email?

Email:

sally@test.com

Send ↗

No, not now

Step 4:

If the employee is benefits eligible and/or needs to log in to complete onboarding, be sure to send them a registration email.

Rehire an Employee

Rehire Employee

Personal Info

Employment

Onboarding

Send an Email

Finish Up

Sally Sample has been rehired

What do you want to do next?

👤 Go to profile

🛒 Go to enrollment

☰ Go check COBRA records

or

Finished

Step 5:

This completes the rehire process. You will see a screen where you have several options for the employee, such as going to their profile, or you can just click **Finished**.

How to Undo an Employee Termination

TIP

This will completely erase an employee's termination and reinstate benefits as of the date of their original coverage. If this is not what you want, please follow the steps for Rehiring an employee instead.

Employee Management | Profile | Update Benefits | Benefits Summary | Documents | Timeline

Sally Sample ⓘ
Full Time
FT Test
sally@test.com

Status
✓ HRIS required fields complete
✓ Benefits required fields complete
⚡ EE-entered fields for enrollment complete

Employee has been terminated.

Manage Enrollments
New Hire Enrollment
Modify Current Enrollments
Open Enrollment

Tasks
Incomplete 0
Complete 0
HR Pending 0

Termination Actions ⓘ
Rehire
Undo Termination
Terminate Editor

Step 1:

Pull up the employee's page. You will see **Employee has been terminated** under their name. On the right side, under **Termination Actions**, select **Undo Termination**.

Step 2:

You will see information displayed on the plans that will be reinstated for this employee (if applicable). To proceed, click **Undo Termination**.

Undo Termination for an Employee

Undo Termination | Onboarding | Send an Email | Finish Up

Sally Sample

Undo Termination is for undoing an erroneous termination. It removes the employee termination date and reason and restores the benefits in effect at the time of termination. If you intend to rehire with a different date and a new benefits eligibility period then use the Rehire tool.

Plans that will be reinstated:

- MVP 2020 Liberty Bronze 1 01/01/2020 07/31/2020
- 2020 Dental Plan 01/01/2020 07/31/2020
- 2020 Vision Plan 01/01/2020 07/31/2020
- Anthem 2020 Life and AD&D 01/01/2020 07/31/2020
- 2020 Anthem Short-Term Disability 01/01/2020 07/31/2020
- 2020 Anthem Long-Term Disability 01/01/2020 07/31/2020
- Fidelity 401k 09/01/2020 08/31/2020

Hire Date: 11/04/2019
Termination Date: 07/01/2020
Terminated On: 07/27/2020
Reason: Voluntary Termination (COBRA)

Employee was recently terminated. Carriers may not have received notice to end benefit coverage. It will be your responsibility to check with your carriers to ensure the termination was processed or contact them directly with any needed information.

Note: This will also remove the COBRA event record. It is your responsibility to contact your COBRA TPA after processing the reinstatement. If you intend to change the termination date or reason then use the Terminate Editor tool instead of reinstating.

Undo Termination | Cancel Undo Termination

How to Undo an Employee Termination (con't)

Undo Termination for an Employee

Undo Termination Onboarding Send an Email Finish Up

Sally Sample has been added

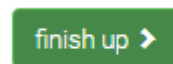
So which onboarding tasks should be set?

Getting Started

- Welcome
- Electronic Signature and Consent

Step 3:

You will have the option to reassign any onboarding tasks (if applicable) for this employee. Click off any tasks you wish the employee to fill out again and click **Finish up**.



Undo Termination for an Employee

Undo Termination Onboarding Send an Email Finish Up

Send Sally Sample a registration email?

Email:

sally@test.com

Send No, not now

Step 4:

If you want to send a registration email, you can do so here. Remember, the employee will not need to re-elect benefits.

Step 5:

This completes the undo termination process. You will see a screen where you can go to the employee's profile, or you can just click **Finished**.

Undo Termination for an Employee

Undo Termination Onboarding Send an Email Finish Up

Sally Sample's termination has been undone

What do you want to do next?

Go to profile Go check COBRA records

or

Finished

Managing Employee Records: Employee Management

When you pull up an employee you automatically land on their Employee Management tab. From here you can:

Sally Sample [Add a note](#)

Employee Management Profile Update Benefits Benefits Summary Documents Timeline

Sally Sample ⓘ
Full Time
FT Test
sally@test.com

Status
✓ HRIS required fields complete
✓ Benefits required fields complete
⚡ EE-entered fields for enrollment

Employee missing fields for enrollment
This employee is missing required fields for enrollment. Please contact the employee and have them complete the missing information on their profile.

Manage Enrollments
New Hire Enrollment
Modify Current Enrollments
Open Enrollment
Newly Eligible Enrollment

Notes
Access enrollment flows. Unless an employee is in an active enrollment, Modify Current Enrollments will be highlighted. This should only be used to correct enrollment errors.

On the right-hand side are three sections: Tasks, Actions, and Reviews:

Tasks

Incomplete 1 ▾
Complete 1 ▾
HR Pending 0 ▾

From here you can access your employee's complete and incomplete tasks, as well as see any of their tasks pending for your review.

Actions ⓘ

Terminate Employment
Manage COBRA
Unlock Open Enrollment
Unlock New Hire Enrollment

From here you can terminate employment or unlock open or new hire enrollment flows if the employee missed an election window.

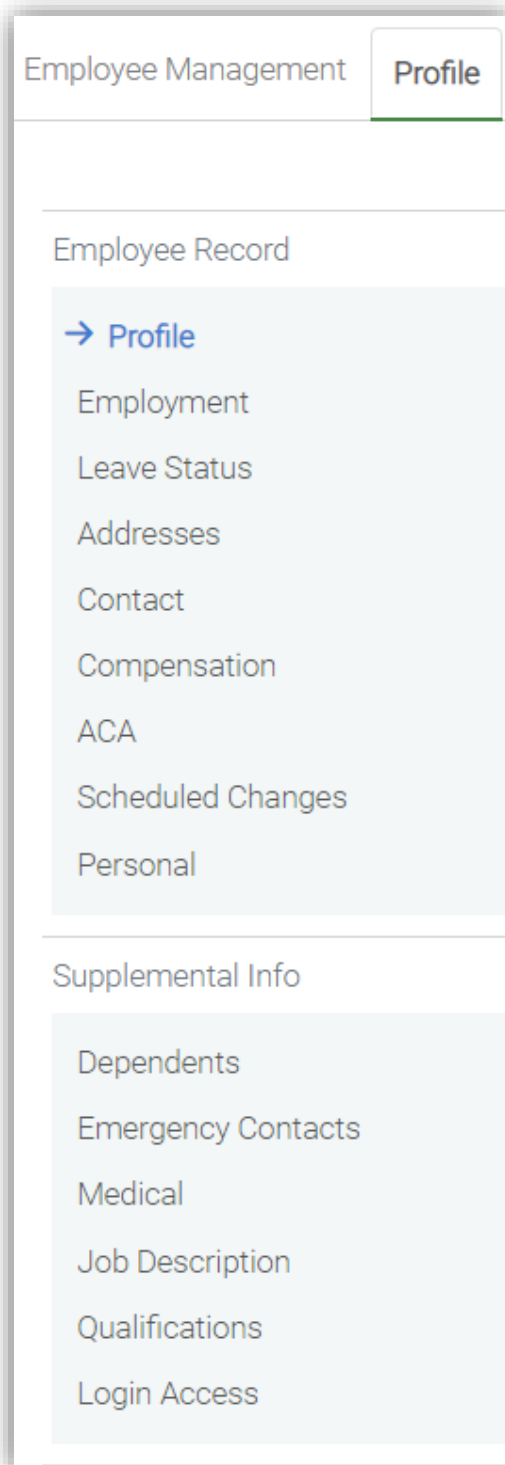
Reviews ⓘ

Employee Home Page
Employee Data Sheet
Total Compensation Statement
Employee Change Request History
Change History

From here you can see the employee view of their home page, view their total comp statement, or view their data sheet and change history logs

Managing Employee Records: Profile

From the employee's Profile tab, you have access to all of your employee's information. Most changes to an employee profile will be made within this tab:



Profile shows employee name and information such as Class, Division, etc.

Leave Status can be used to track a leave or furlough – this affects reporting only, NOT enrollments.

Contact is where email and phone info is located/updated.

Scheduled Changes are pending changes to a record. You can cancel a pending change here.

Dependents are any dependent (irrelevant of coverage) of an employee

Login Access displays the employee username. You can send welcome emails and resent password emails from here.

Employment displays ID and hire info. You can also terminate or retire an employee from here.

Address can be added/updated here.

Compensation displays employee salary - See p. 19 for more

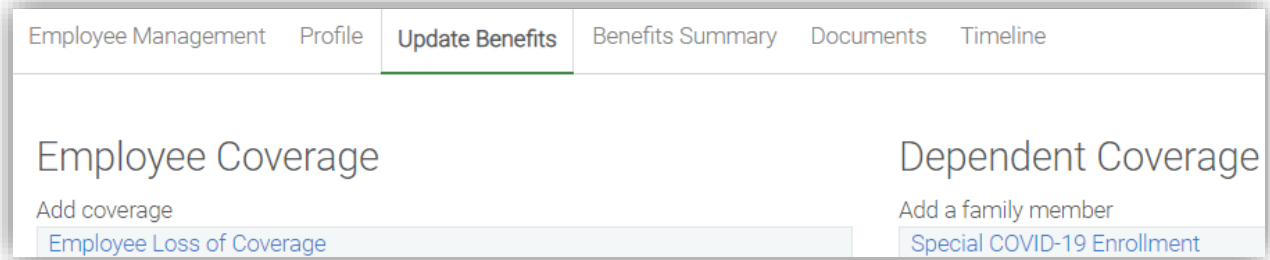
Personal houses an ee's demographic info such as DOB, Gender, EEOC, etc.

Emergency Contacts houses an ee's emergency contact info (this can be added as part of onboarding)

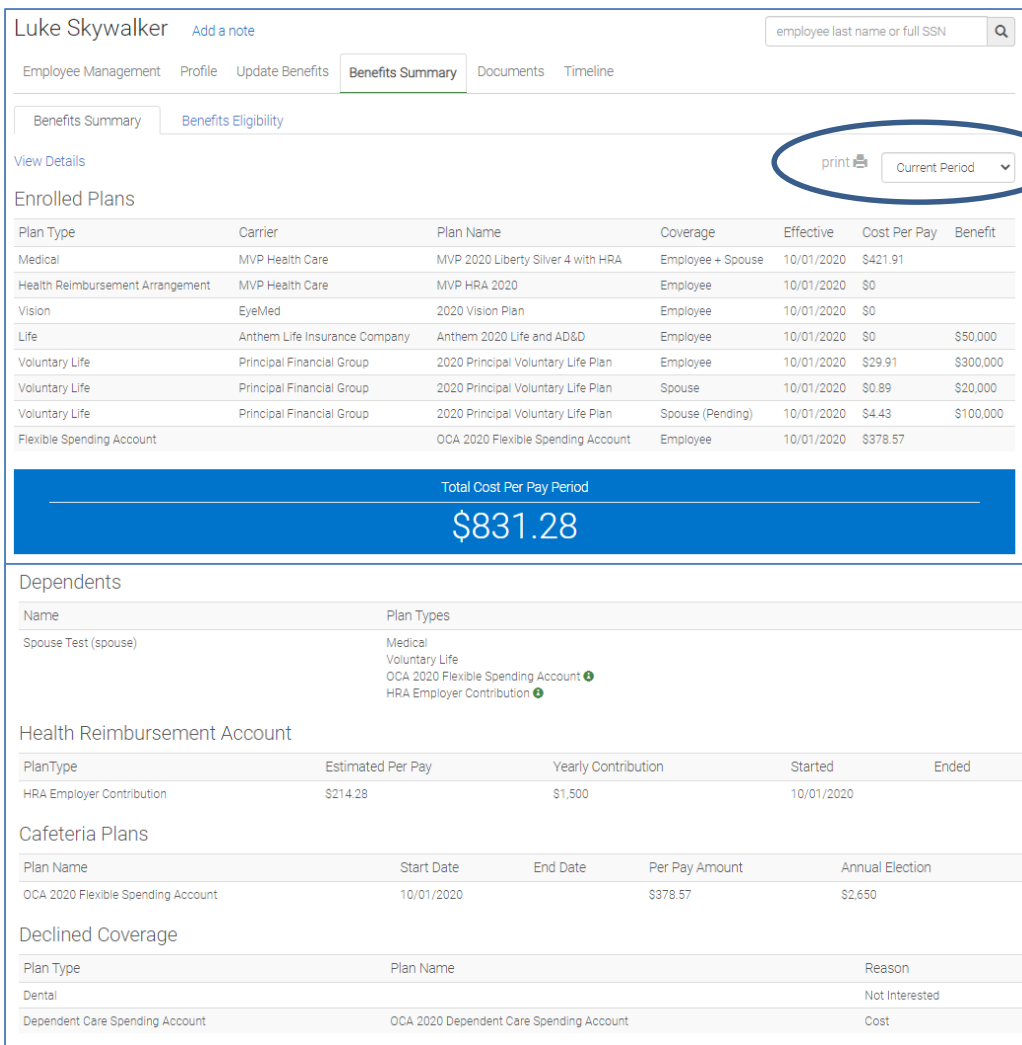
Personal houses an ee's demographic info such as DOB, Gender, EEOC, etc.

Managing Employee Records: Update Benefits/Benefit Summary

The Updates Benefits tab allows you to process Life Events for your employee. See page 34 for detailed instructions.

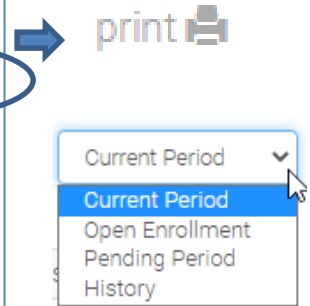


The Benefits Summary tab shows all of your employee enrollments:



Plan Type	Carrier	Plan Name	Coverage	Effective	Cost Per Pay	Benefit
Medical	MVP Health Care	MVP 2020 Liberty Silver 4 with HRA	Employee + Spouse	10/01/2020	\$421.91	
Health Reimbursement Arrangement	MVP Health Care	MVP HRA 2020	Employee	10/01/2020	\$0	
Vision	EyeMed	2020 Vision Plan	Employee	10/01/2020	\$0	
Life	Anthem Life Insurance Company	Anthem 2020 Life and AD&D	Employee	10/01/2020	\$0	\$50,000
Voluntary Life	Principal Financial Group	2020 Principal Voluntary Life Plan	Employee	10/01/2020	\$29.91	\$300,000
Voluntary Life	Principal Financial Group	2020 Principal Voluntary Life Plan	Spouse	10/01/2020	\$0.89	\$20,000
Voluntary Life	Principal Financial Group	2020 Principal Voluntary Life Plan	Spouse (Pending)	10/01/2020	\$4.43	\$100,000
Flexible Spending Account		OCA 2020 Flexible Spending Account	Employee	10/01/2020	\$378.57	

Total Cost Per Pay Period
\$831.28



TIP
You can print the summary by clicking on the printer icon.

If you want to see pending, previous, or open enrollments, you can click on the drop-down to choose which enrollment period to see.

You can view which plan(s) the employee is enrolled in, their costs for each and total cost per pay, dependents and which plans they are on, any flex accounts, as well as declined coverages.

Managing Employee Records: Documents/Timeline

The employee Documents tab shows items relevant to their eligibility/enrollments:

Employee Management Profile Update Benefits Benefits Summary **Documents** Timeline

Employee Documents
 M. Smith [icon] Blue Cross Blue Shield_NewHire_Group [icon] 4:PM

Enrolled Plan Documents
 2020-2021 Empire Blue Cross TotalBlue EPO

Plan Documents
 2020-2021 Empire Blue V [icon] 2020-2021 Empire Blue
 Aflac Voluntary Benefits [icon] Aflac Voluntary Benefits
 2020-2021 Voluntary Life [icon] 2020-2021 Anthem Voluntary Life Benefit Summary

Employee documents are any documents created during onboarding or plan enrollment

Enrolled plan documents are relevant to plans for which the employee is enrolled.

Plan documents are relevant to plans for which the employee is eligible.

The employee Timeline is a list of every action made in an employee's record since their original hire date:

Employee Management Profile Update Benefits Benefits Summary Documents **Timeline**

Search Timeline

Event	On	Event Date	Description	Dependent	By
Workflow requirement completed	10/20/2020 09:49 AM				HR User
Workflow requirement completed	10/20/2020 09:48 AM				HR User
Enrollment changed	10/20/2020 09:47 AM		Life		HR User
Enrollment changed	10/20/2020 09:47 AM		Vision		HR User
Enrollment changed	10/20/2020 09:47 AM		Dental		HR User
Enrollment changed	10/20/2020 09:45 AM		Medical		HR User
Update Address Employee	10/20/2020 09:41 AM		Address Changed		HR User

If there are three dots on the right of the event, you can click those dots for a pop-up with more detailed information.

Enrollment Changes

Plan	Change	Field	From	To
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Plan		MVP 2020 Liberty Bronze 1
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Start Date		11/01/2020
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Coverage Level		Employee
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Monthly Plan Cost		\$561.82
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Monthly Employee Cost		\$112.36
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Employee Per Pay Cost		\$51.86
MVP 2020 Liberty Bronze 1	10/20/2020 09:45 AM	Client Per Pay Cost		\$207.44

From left to right, you can see the Event, when the change was made in the system, the effective "Event" date, if applicable, a description, as well as who completed the change, whether it be the employee, automatically generated by the system, or a Broker or HR User.

How to Change an Employee's Classification

Step 1:

From the employee's home page, click the **Profile** tab.

Sally Sample [Add a note](#) employee last name or f

Employee Management **Profile** Update Benefits Benefits Summary Documents Timeline

Profile

Employee Record

- Profile
- Employment
- Leave Status
- Addresses
- Contact
- Compensation
- ACA
- Scheduled Changes
- Personal

Supplemental Info

Employee Record

Social security number [Save](#)

First name

Middle name

Last name

Suffix

Preferred name

Office

Class

Step 2:

Click the drop-down menu next to **Class** and choose the new class from the list (remember, classes are tailored specific to your company). Click **Save**.

Full Time

--Select--

Full Time

Part Time - Ineligible

Step 3:

A pop-up box will ask you to enter the effective date of this class change. You can click **use hire date** or enter a specific date. *Note: You will only be able to go as far back as the most recent class change.* Click **Next**.

Change date tracking

The following fields have changed and may affect eligibility or enrollment:

- Class

The following fields have changed and may affect enrollment per pay costs:

- Class

Change Effective Date [?](#) [Calendar](#)

must be between 11/4/2019 and 9/19/2020

[use hire date](#)

[Cancel](#) [Next](#)

How to Change an Employee's Classification (con't)

Preview demographic change results

Confirm Demographic Changes

Currently, we do not recalculate cost/enrollment for 3rd Party Apps, HSA, HRA, or Cafeteria plans that allow employees to make a per pay contribution. A manual adjustment will have to be made if the employee has this type of enrollment.

As a result of this change, the employee will be ineligible for the following plans:

Plan	Ineligible as of
MVP 2020 Liberty Silver 4 with HRA	08/19/2020
CDPHP 2020 HMO 20/20	08/19/2020
2020 HSA	08/19/2020

The employee is no longer eligible for the following plans. Drop the enrollment based on the plan termination rules now or skip and drop later.

Drop Skip

- Anthem 2020 Life and AD&D
- 2020 Vision Plan
- 2020 Dental Plan
- MVP 2020 Liberty Bronze 1
- 2020 Anthem Long-Term Disability
- 2020 Anthem Short-Term Disability
- Fidelity 401k

No, Cancel Changes

Step 4:

Another pop-up box will show all the employee's enrolled plans and their new ineligible date.

Scroll down to be prompted to **Drop** or **Skip** all enrolled plans. You **MUST** select **Drop** for all coverages to terminate. Do not skip ineligible plans.

After selecting **Drop**, click **Yes, Save Changes**. **Employees no longer have access to the system when terminated.**

TIP

You can use these same steps to update an employee's Payroll Group, Division, Department, and Business Unit. These drop-downs are all located on an employee's Profile tab.

Step 5 (ACA only):

If you are an ACA client, you **MUST** also change an employee's ACA classification when switching from full-time to part-time and vice-versa. See detailed instructions on the next page.

How to Change an Employee's ACA Classification

Step 1:

Click on the employee's **Profile** tab and then select **ACA** from the menu on the left-hand side (under the Employee Record section)

The screenshot shows the 'Sally Sample' employee profile page. The 'Profile' tab is selected. In the left-hand navigation menu, 'ACA' is highlighted with a red circle. A red box highlights the 'ACA classification' dropdown menu, which currently shows 'Eligible (Regularly works more than 30 hours a week)'. A blue arrow points down to a zoomed-in view of the dropdown menu. In this zoomed view, the 'Eligible (Regularly works more than 30 hours a week)' option is selected and highlighted in blue. Other options visible include 'Variable hour', '--Select--', and 'Ineligible (Regularly works less than 30 hours a week)'. A 'Save' button is visible to the right of the dropdown.

Step 2:

Click on the drop-down box next to **ACA classification** and choose either Eligible (for full-time employees) or Variable Hour (for part-time employees) and click **Save**.

The screenshot shows a 'Change date tracking' pop-up dialog. It contains the text: 'The following fields have changed and may affect eligibility or enrollment: ACA Classification'. Below this, there is a 'Change Effective Date' field with a calendar icon and a date range: 'must be between 8/19/2020 and 9/19/2020'. At the bottom, there are 'Cancel' and 'Next' buttons.

Step 3:

Enter the change effective date (*this should match the date entered on the previous class change step*) and click **Next**.

Step 4:

You will see a pop-up reviewing any demographic changes and then click **Yes, Save Changes**.

The screenshot shows a 'Preview demographic change results' pop-up dialog. It contains the text: 'Confirm Demographic Changes. Currently, we do not recalculate cost/enrollment for 3rd Party Apps, HSA, HRA, or Cafeteria plans that allow employees to make a per pay contribution. A manual adjustment will have to be made if the employee has this type of enrollment. Eligibility and enrollments are not affected.' At the bottom, there are 'No, Cancel Changes' and 'Yes, Save Changes' buttons.

How to Update Employee Salary

Step 1:

Pull up your employee and click on their **Profile** tab, and then on the left-hand side (under the Employee Record section) click on **Compensation**.

Sally Sample [Add a note](#)

Employee Management **Profile** Update Benefits Benefits Summary Documents Timeline

Employee Record **Compensation**

Pay basis Hourly Save

Salary effective date 11/04/2019

Annual base salary \$31,200.00

Hourly rate \$15.00 [edit](#)

Hours per week 40

Prior year W2 earnings

Profile
Employment
Leave Status
Addresses
Contact
→ Compensation

Step 2:

Click the **edit** link and a pop-up box will become available. Here, you can select the pay basis as salary or hourly from the drop down.

For salary employees, enter the annual base salary and effective date.

For hourly employees, enter the hourly rate and the hours per week (if different from the system setting), and the effective date. Click **Save**.

Change compensation

Pay basis

Annual base salary

Hire date 11/04/2019

Effective date

Salary change history

Effective	Pay basis	Compensation	Hours per week	Base salary	Delete
11/04/2019	Hourly	\$15.00	40	\$31,200.00	

* Future effective salaries will not be displayed on profile. Save Close

TIPS

You can delete any incorrectly entered salaries by clicking the red little trash can under the Salary change history in the pop-up box from Step 2.

Future effective salaries will not be displayed on the Compensation Profile until after the effective date.

How to Make New Hire or OE Elections


TIP

You can also view a short video on this topic at:


<https://www.brainshark.com/1/player/marshallsterling?pi=zHrzVRgo3zVOxPz0&r3f1=&fb=0>

Step 1:


As an HR User, you can make elections for your employees from their **Employee Management** tab. Your employee will be in one of the three enrollment windows: New Hire, Open Enrollment, or Newly Eligible Enrollment. All of the enrollment flows work the same way after clicking the links.

Manage Enrollments	
New Hire Enrollment	HR has 13 days left to complete or make changes to new hire enrollment. 
Modify Current Enrollments	Link disabled because employee has pending enrollments that require approval. Approve pending enrollments using the Set New Hire Complete action.
Open Enrollment	Open enrollment window has expired.
Newly Eligible Enrollment	Employee is not eligible for any newly eligible benefits.

The New Hire flow is available for all new hires throughout their new hire window (typically up until the plan effective date).

Manage Enrollments	
New Hire Enrollment	Employee is not eligible for any new hire benefits.
Modify Current Enrollments	You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
Open Enrollment	The employee has 14 days available to complete open enrollment. Employee's last day to enroll: 09/07/2020. Unlock Open Enrollment to extend the window. 
Newly Eligible Enrollment	Employee is not eligible for any newly eligible benefits.

Open Enrollment is for all current and new employees when your company is in an open enrollment period.

Manage Enrollments	
New Hire Enrollment	Employee is not eligible for any new hire benefits.
Modify Current Enrollments	You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
Open Enrollment	Open enrollment window has expired.
Newly Eligible Enrollment	HR has 38 days left to complete or make changes to newly eligible enrollment. 

Newly Eligible Enrollment windows will show when you have a non-eligible employee switch to an eligible position (such as part-time to full-time).

How to Make New Hire or OE Elections (con't)

Personal Information

First Name Jane

Middle Name

Last Name Doe

Suffix

Preferred Name

Gender Male Female

Date of Birth July 7 1977

SSN 495-48-6598

Tobacco User Yes No

Phone Number

Email Address

Save & Continue

Progress: 0 of 15

View steps ▶

TIP
You can always click on View Steps in the Progress Bar to see/navigate to an individual step/benefit.

Step 2:
On the Personal Information section – verify and complete any missing information. Click **Save & Continue**

Step 3:
Enter the employee's address. Click **Save & Continue**.

You will be presented with a pop-up box to verify the employee's address. Click **Use this address** to go with the recommended address, or you can go back and edit what was entered.

Address

Country United States of America

Address 1

Address 2

City State/Territory New York

Zip Code

Save & Continue

Verify Address

Recommended

110 Main St
Poughkeepsie, NY 12601-6707
Dutchess County

Use this address

Alternatives

Close and edit my address

Back to edit

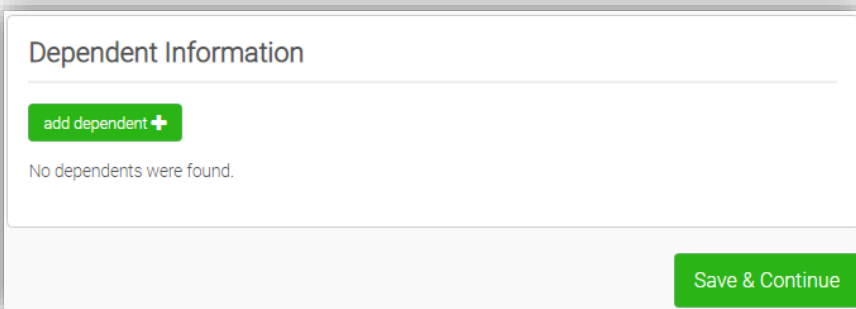
How to Make New Hire or OE Elections (con't)

Step 4:

On the Dependent Information section, any dependents who will be covered on any of the plans must be added here.

Click add dependent and fill out all information on the pop-up box. Click **Save** and repeat for every dependent who will be needing coverage.

When finished adding dependents, click **Save & Continue**.

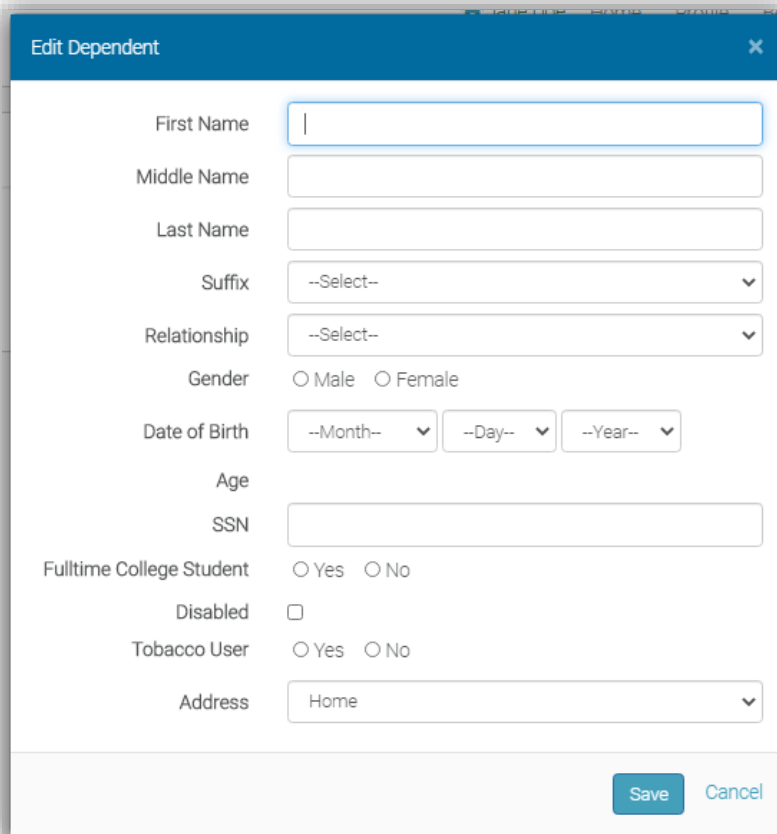


Dependent Information

add dependent +

No dependents were found.

Save & Continue



Edit Dependent

First Name

Middle Name

Last Name

Suffix --Select--

Relationship --Select--

Gender Male Female

Date of Birth --Month-- --Day-- --Year--

Age

SSN

Fulltime College Student Yes No

Disabled

Tobacco User Yes No

Address Home

Save Cancel

TIP

Adding dependents to this step does NOT add dependents to any benefits. Each benefit will have a space to add which dependents should be covered.

How to Make New Hire or OE Elections (con't)

Step 5:

From here you will go through every benefit your company offers and make or decline elections. Though different types of benefits have different features and steps to them, almost all benefit pages have the following in common:

The type of benefit being offered and any informative text

Medical

Please note the benefit summaries displayed on this site are for informational purposes only. Please refer to the plan documents to determine specifically how the plan will be administered.

Progress: 3 of 15



View steps >

Who am I enrolling?

- Myself
- John Doe (Spouse)

Who am I enrolling? This is where you can select dependents added in prior step to enroll in this benefit

My Selections

Current:
No election yet

Which plan do I want?



CDPHP 2020 HMO 20/20

\$57.69

Cost per pay period

Effective on 10/01/20
Employee

Compare

Details

Click select on desired plan

Select

Helpful Resources – plan documents and other information to assist in deciding on a benefit.

Helpful Resources

- CDPHP 2020 HMO 20/20 Pro
- Caremark Mail Service Order
- CDPHP Hearing Health Pro
- CDPHP Life Points Memb
- CDPHP Member Claim For
- CDPHP Preventive Drug List
- CDPHP Prior Authorization- M
- Request Form
- CDPHP SBC 2019
- CDPHP Wellness Life Points M
- MVP Bronze 1 SBC 2019
- MVP Liberty Bronze 1 Benefit
- MVP Liberty Silver 4 with HRA
- MVP Pharmacy Benefit Overv
- MVP Silver 4 SBC 2019
- myMVP Mobile App Flyer
- Rx Discount Programs



MVP 2020 Liberty Bronze 1

\$51.86

Cost per pay period

Effective on 10/01/20
Employee

Compare

Details

Select

You can click details (or compare if more than one plan is offered) to see information on each plan. Costs will change as dependents are selected.

Click **Save & continue** after selecting a plan OR click **Don't want this benefit?** To be presented with decline options.

Save & Continue

Don't want this benefit?

Choose a reason for declining this benefit

- Covered under spouse's plan
- Covered under parent/guardian's plan
- Covered under Medicare and/or Medicaid
- Covered under individual plan
- Covered under Tricare
- Covered under another employer's plan
- Covered under retiree plan
- Cost
- Not Interested
- Ineligible for this plan
- Unresponsive Enrollment - Mgmt determined
- Other

Cancel

Apply

How to Make New Hire or OE Elections (con't)

Step 6:

Some benefits have unique features or steps to complete the enrollment.

Primary Care Physician Form

Use the links below to add or update Primary Care Physician Information for you and your enrolled dependents.

[Primary Care Physician Directory Web Site](#)

	Name	Relationship	PCP ID	PCP Name	Current Patient
Add *	Jane Doe				No
Add *	John Doe	Spouse			No

⚠ * You must add Primary Care Physician information for yourself and each dependent.

[Continue](#)

Selecting an HMO plan will take you to this next step, where you will have to fill in your Primary Care Physician's information.

Primary Beneficiaries

[+ add a beneficiary](#)

⚠ You are required to enter a primary

Contingent Beneficiaries

[+ add a beneficiary](#)

Primary Beneficiary

Beneficiary Type:

Relationship:

Gender:

Allocation %:

First / Middle Name:

Last Name / Suffix:

Date of Birth:

SSN:

Address 1:

Address 2:

City:

State / Country:

ZIP/Postal Code:

Phone:

[Save](#)

Both Life and Voluntary Life plans require beneficiaries to be entered. You can enter primary and contingent beneficiaries. You can also enter multiple beneficiaries for both, however, amounts for each need to equal 100% between the beneficiaries.

How to Make New Hire or OE Elections (con't)

Choose your election

Plan year:

10/01/2020 to 12/31/2020

Available annual amounts:

\$1 to \$2,650

Number of pay periods:

7 remaining

How much do you want to defer?

By annual amount

- OR - [Defer Maximum \\$](#)

By per pay amount

\$

Cafeteria Plans (FSA, DCA, Parking, and Transit) allow you to enter the amount you want deducted, either by entering an annual or per pay amount. You can also click **Defer Maximum** to have the maximum election.

Select your benefit

Buy Guaranteed Issue

Myself

\$60,000

Slide to select →

Requested benefit	\$60,000
Requested per pay cost	\$5.98
Guaranteed Issue	\$60,000

My Spouse

\$5,000

Slide to select →

Requested benefit	\$5,000
Requested per pay cost	\$1.17
Guaranteed Issue	\$20,000

Evidence of Insurability Form

Your life insurance carrier requires you to answer questions regarding your health history, also known as *Evidence of Insurability*. This form may be downloaded from this page, is available on your home page or may be obtained from your Human Resources Administrator. Please fill out this form and mail it to the address on the form or return it to your Human Resources Administrator if instructed to do so.



Attention: Health History Needed

You have elected over the Guaranteed Issue amount for this plan.

Employee requested \$300,000 but is only pre-approved for \$60,000

Your designated beneficiary cannot receive the pending amount until this form has been submitted to, and approved by, the carrier.

Voluntary Life Plans have slider bars that allow elections in permitted increments for employee and dependents. You can click the **Buy Guaranteed Issue** button to set the allowable max without an EOI. Electing over the guaranteed issue will add a step for employees to indicate that they have to complete an EOI form. This also sets anything over the GI amount to pending on the employee benefit summary.

How to Make New Hire or OE Elections (con't)

View the Page

Click to open the marketplace page. When you've completed it, please come back and note if you would like to be contacted.

Open Marketplace

Contact me:

- Yes
 No

Marketplace plans, such as for Aflac voluntary benefits, require the **Open Marketplace** button to be clicked and then offers a choice on being contacted by the rep for more information/enrollment.

Step 7:

When all elections are made, the enrollment summary must be signed by clicking the green **Click to Sign** button.

Enrollments are not complete until this is done!

If an election has not been enrolled in or declined, the enrollment will show as incomplete and the benefits not yet completed will be highlighted.



Enrollment Summary

Print

Below is a summary of your elections and cost for the upcoming plan year. If you have any questions about your enrollment or would like to make changes, please contact HR.



Signature required

You've elected all your benefits, but we still require a signature before advancing.

Please review the acknowledgment below.

As an eligible employee, I acknowledge that I understand the benefits, rights, and obligations available to me under the plan. I certify the facts contained in this summary are true and complete to the best of my knowledge. I understand that deductions can be made on a pre-tax or post-tax basis. Furthermore, I understand that elections for plans that are deducted on a pre-tax basis cannot be changed during the plan year unless I experience a Qualified Life Event.



Sign to complete enrollment

Click to Sign

Enrollment Summary

Print

Below is a summary of your elections and cost for the upcoming plan year. If you have any questions about your enrollment or would like to make changes, please contact HR.



Enrollment Not Complete!

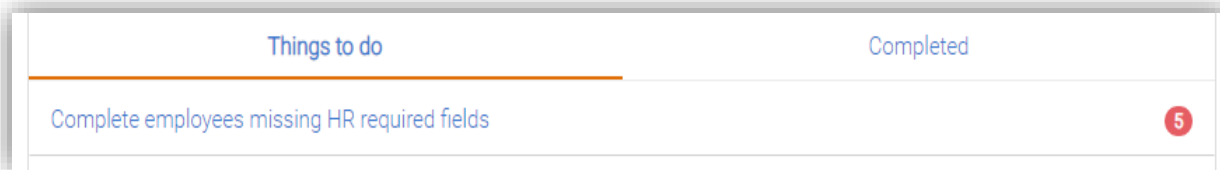
Please complete the required highlighted steps from your enrollment progress menu.

- 9. Life
- 9a. Life Beneficiary
- 10. Group Short-Term Disability
- 11. Group Long-Term Disability
- 12. Voluntary Life
- 13. Flexible Spending Account
- 14. Dependent Care Spending Account
- 15. Enrollment Summary

Managing “Things to Do”: Incomplete Employees

Step 1:

If you have incomplete employees, you will see the following flagged under your “Things to do section” of your home page with a number listed of how many outstanding items there are.



Step 2:

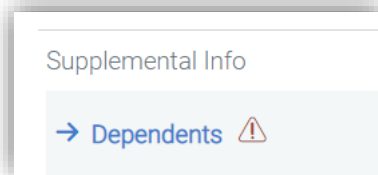
Click **Complete Employees Missing HR required fields** to see a list of employees missing items.

	First Name	Last Name	Gender	DOB	Class	Employment Status	Hire Date
Edit Profile Complete Hire	Christopher	Columbus	M	08/01/1962	Part Time - Ineligible	Active	07/12/2005
Edit Profile	Leif	Eriksson	M	04/08/1990	Full Time	Active	08/14/2014
Edit Profile	Franklin	John	M	08/25/1986	Full Time	Active	06/01/2015
Edit Profile Complete Hire	Ferdinand	Magellan	M	05/04/1974	Part Time - Ineligible	Active	06/01/2013
Edit Profile	Marco	Polo	M	07/01/1977	Full Time	Active	07/10/2015

5 employees

Step 3:

Always choose **Complete Hire** for your new hires in order to not put changes in a pending future status. This will take you back into the new hire flow and you can complete the flow using the “how to add a new employee” section of this manual. For those employees where that is not available, choose **Edit Profile**. You will be taken to the employee profile page where the section with missing info will be flagged with an exclamation symbol:



	Name	SSN	DOB	Relationship
Edit	Emily Eriksson		01/17/1992	Spouse



SSN

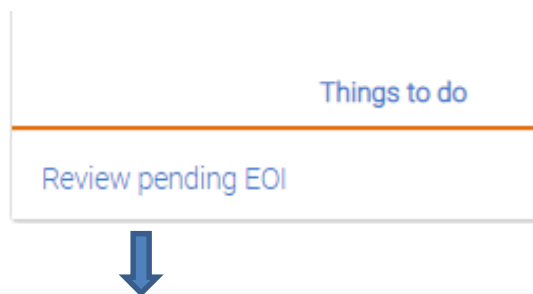
Step 4:

Click into the area and find the field surrounded by a red box that indicates which information is missing, and complete.

Managing “Things to Do”: EOI (Evidence of Insurability)

Step 1:

If you have voluntary benefits that pend over a guaranteed issue amount or for any amount at open enrollment, you will see **Review pending EOI** under your To-Do's when your employees make those elections. Click here to see a display of these employees, along with information such as plan name, coverage start date, and requested and GI amounts.



	SSN	Name	Email	Relationship	Plan Name	Coverage Start	Requested On	Approved	Requested	GI
Pending	019-91-8202	Fitzgerald, Francis	Francis@noemail.com	-	2020 Principal Voluntary Life Plan	11/1/2020	9/18/2020	\$60,000.00	\$250,000.00	\$60,000.00
Pending	012-22-9988	Fitzgerald, Zelda	Francis@noemail.com	Spouse of Fitzgerald, Francis	2020 Principal Voluntary Life Plan	11/1/2020	9/18/2020	\$20,000.00	\$80,000.00	\$20,000.00

Step 2:

Click **Pending** and you will be given a pop-up box with an Action drop-down. From here you can approve, decline, reject, or withdraw the pending enrollment.

TIP

- Approve:** Use to approve some or all of the requested amount above the GI Limit.
- Declined:** Use if the entire amount above the GI Limit was denied by the carrier (leaves only the GI amount).
- Rejected:** Use if the entire application, including the GI, was denied by the carrier (employee has NO life insurance).
- Withdrawn:** Use if employee withdraws the request for additional insurance/never completes EOI form.

Step 3:

If you choose **Approved**, enter approved amount and effective date from carrier. Then click **Save**. For other options, choose from drop-down and select **Save**.

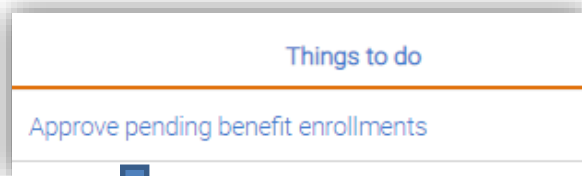
Managing “Things to Do”: Approve benefit enrollments

Step 1:

If your employee experiences a qualifying life event, they can complete new benefit elections from their home page by selecting **Life Events**. This will pend for your approval and you will see this under your Things to do from your HR home page. Click **Approve pending benefit enrollments** to see the list of employees with pending enrollments.

TIP

If you or another HR User completes the Life Event on behalf of your employee, it will not pend for approval.



Enrollments Requiring HR Approval			
Employee	Reason	Requested On	
Fitzgerald, Francis	Life Event	09/18/2020	Review

Step 2:

Click **Review** to see the Life Event Summary. You will see options to **Cancel**, **Approve**, or **Decline** the enrollments. You will also see a list of the chosen enrolled plans, cost per pay, and dependents being covered.

Please note only the only system notification that will be sent is for approvals. For the other two you will want to talk to your employees about why this was cancelled/denied.

Life Event Summary

You do not have any outstanding issues regarding your recent life event enrollment changes.

Employee Submitted For Approval Electronically

[Cancel This Enrollment Change Request](#)

Event: Add Employee Coverage for Spouse Loses Coverage at Their Employer

[HR Approve Pending Life Event Enrollments](#)

[HR Decline Pending Life Event Enrollments](#)


[Return to Home Page](#)

TIP

The portal has Life Event tasking set up for anyone who adds coverage for a QLE – this will assign a task to your employee to upload their necessary documentation. You can check this task for completion/have employee complete it before approving the enrollments.

Enrolled Plans

MEDICAL Collapse ▾



CDPHP 2020 HMO 20/20
Coverage: Employee + Family Effective: 09/02/2020
Cost Per Pay: \$230.77

TOTAL COST PER PAY PERIOD
\$230.77

Dependents

ZELDA FITZGERALD (SPOUSE)	Plans:	Medical
SCOTT FITZGERALD (CHILD)	Plans:	Medical

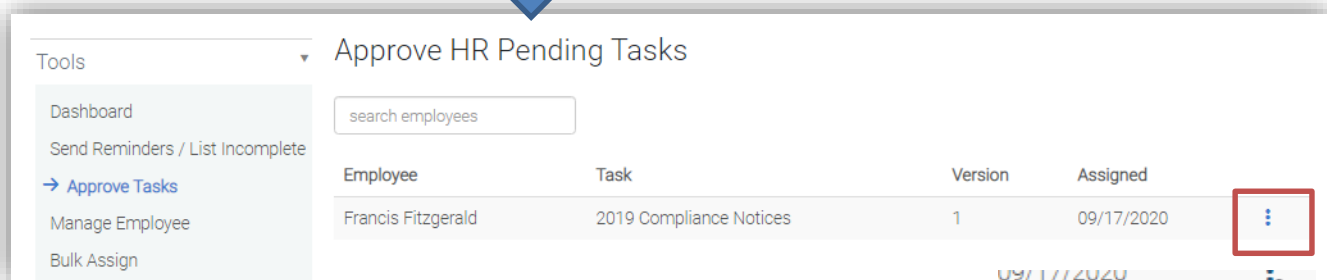
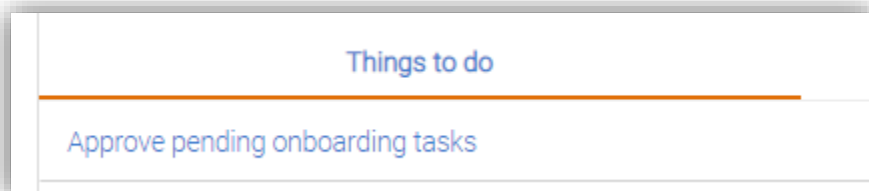
Managing “Things to Do”: Approve onboarding tasks

Step 1:

If you have onboarding tasks set up for your company that pend for HR approval, when your employee completes this task you will see the following under your Things to do:

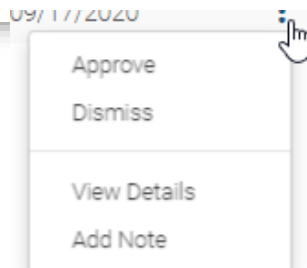
Step 2:

Click **Approve pending onboarding tasks** to be taken to the Tasks tab and a list of employees with pending tasks.

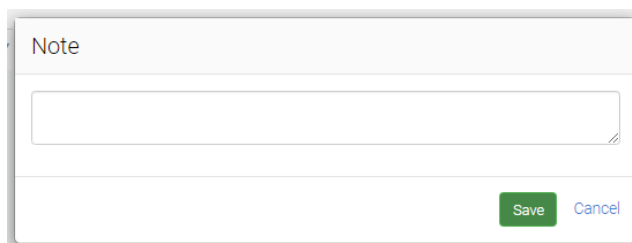
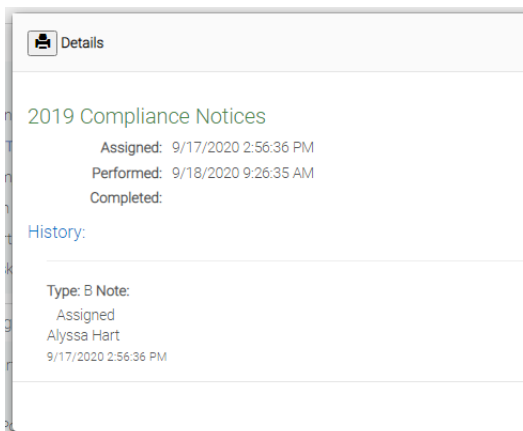
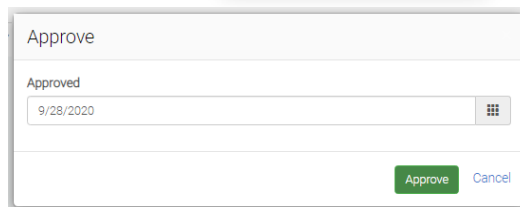


Step 3:

Click the three dots to the right and you will see a menu where you can **Approve** or **Dismiss** the task. When approving, the current date is automatically shown, but you can set to another date before clicking **Approve**.



You can also click **View Details** to see more information (bottom left) or **Add Note** (bottom right) to enter any comments that you would like saved onto the task.



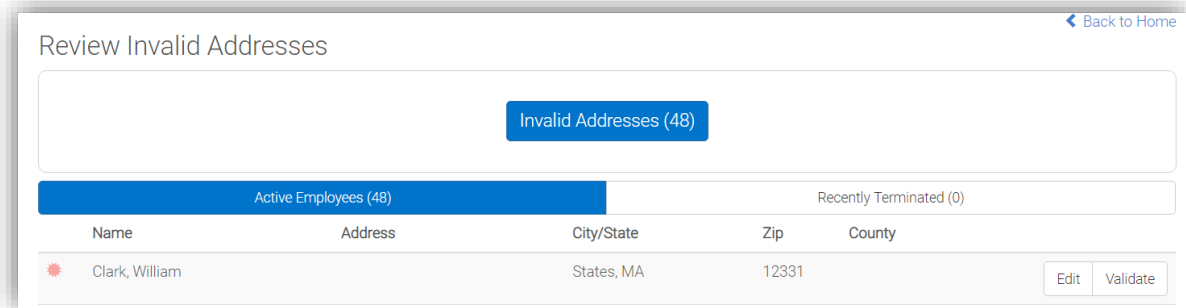
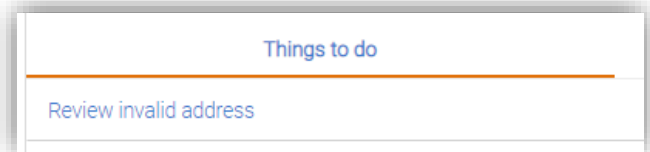
Managing “Things to Do”: Review invalid address

TIP

You employees will complete the address validation step when they complete their new hire or open enrollment period, so it's up to you whether you want to clear these errors out or leave for your employees to complete when making elections.

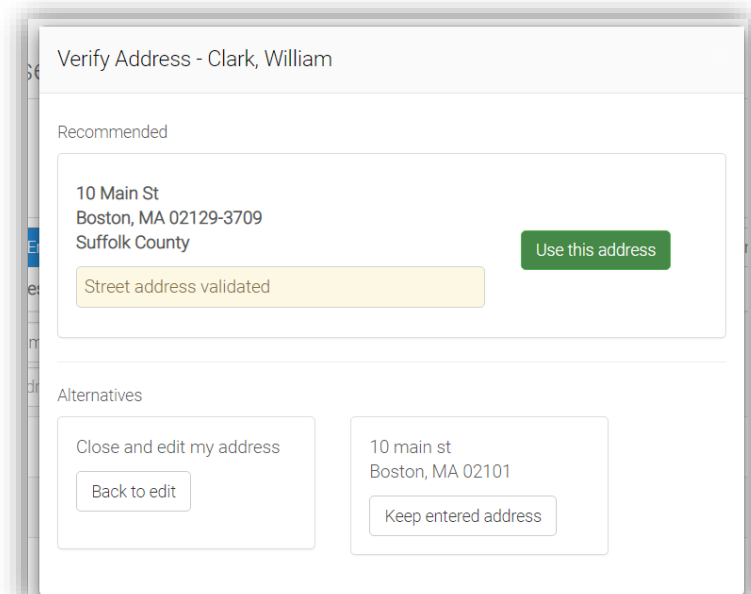
Step 1:

If you see the following flagged under your “Things to do section” of your home page you can validate your employees addresses, if desired, by first clicking **Review invalid address**.



Step 2:

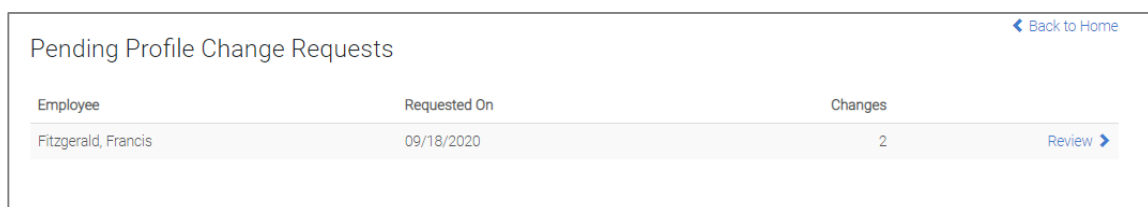
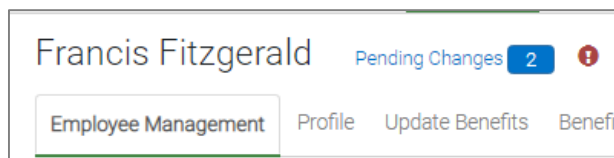
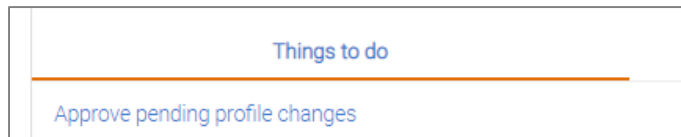
You will see a list of all employees with invalid addresses – you can **Edit** the address if what is shown looks incorrect or is incomplete. After editing, or instead of if the address looks correct/is complete, click **Validate**. Click **Use this address** if the validated address looks correct. Otherwise you can select **Back to edit** to fix the address or **Keep entered address** to disregard the validation option and keep the address as entered.



Managing “Things to Do”: Approve profile changes

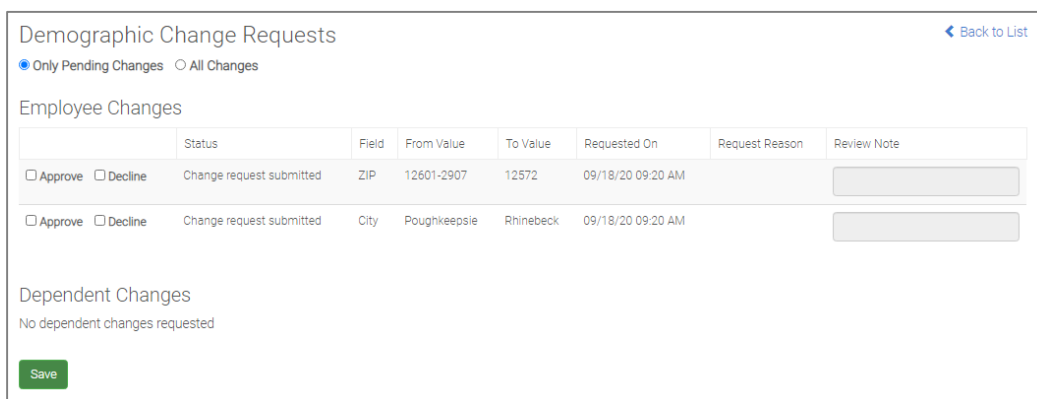
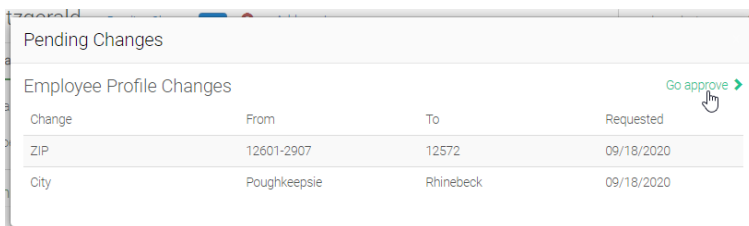
Step 1:

When your employee makes changes to something on their profile, such as their name or address, this will pend for your approval. You will see this under your Things to do, but also next to their name when you pull up their employee page.



Step 2:

Depending on where you started from, you will see the above (by clicking **Approve pending profile changes** from your home page) or the right (by clicking **Pending Changes** from the employee page). Click **Review** or **Go approve** to be taken to the below screen:



Step 3:

From here you can review what changes were made (From value -> To Value), when the change was requested, and any note the employee might have added to the request. Dependent changes are listed separately. Click **Approve** or **Decline** next to each line item, then **Save**.

How to Check the Wall for Updates

Step 1:

Click the Wall tab at the top of your screen.



Filter

A screenshot of the Filter sidebar. It has two tabs: 'Events' (selected) and 'Notes'. Under 'Events', there is a 'Feed' dropdown menu currently set to 'All Feeds'. Below that is a search box for employees. Further down are radio buttons for 'Checklists' (Incomplete, Complete, None, All). At the bottom are 'Apply' and 'Clear' buttons, and a 'Show More' link.

Events Notes

Feed

All Feeds

Search for an Employee

by last name or full SSN

Checklists

Incomplete

Complete

None

All

Apply Clear

Show More

A screenshot of the bottom part of the Filter sidebar. It includes 'Sort By' options (Newest First, Oldest First), 'Date' filters (From, To), and 'Number of Results' (Show recent, 250).

Sort By

Newest First

Oldest First

Date

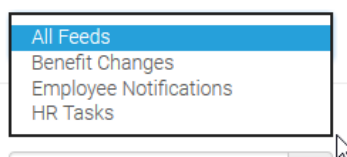
From From Date

To To Date

Number of Results

Show recent 250

Feed

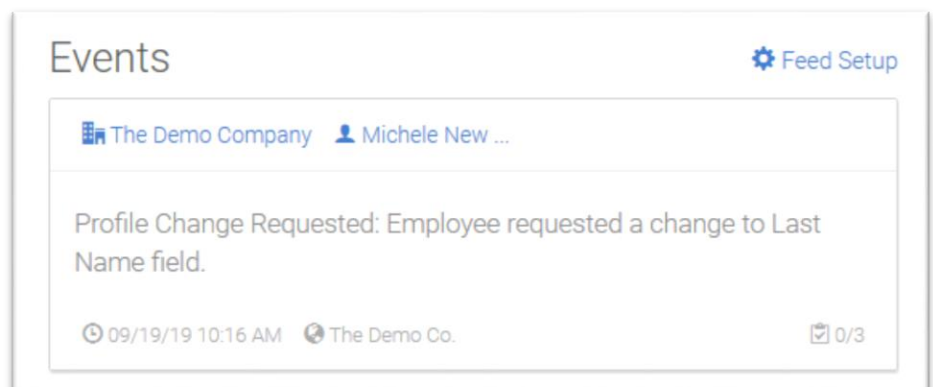


Step 2:

You will see the Filter on the left, where you can search for specific Feed or Employee. You can click Show More to have Sorting capabilities as well.

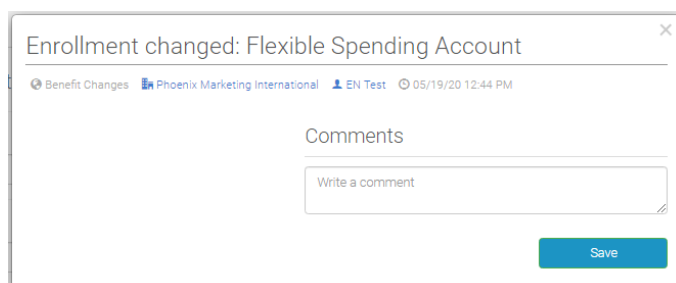
Step 3:

On the right-hand side will be the specific Wall Feed Events, and each one will look similar to the below:



Step 4:

Click anywhere on the event to see a pop-up with more details and to add Comments, if desired.



How to Process a Qualified Life Event For Your Employee

Step 1:

From either your **Home** or **Employees** tab, enter the last name of the employee and hit Enter or select them from the drop down to bring up their page. Then click on their **Update Benefits** tab.

Sally Sample [Add a note](#)

Employee Management **Profile** **Update Benefits** Benefits Summary Documents

Employee Coverage

Add coverage

- Employee Loss of Coverage
- Special COVID-19 Enrollment
- Divorce or Legal Separation
- Death of Spouse
- Increase in Hours
- Return from Leave of Absence
- Spouse Loses Coverage at Their Employer

Dependent Coverage

Add a family member

- Special COVID-19 Enrollment
- Marriage
- Newborn Child
- Adopt a Child
- Dependent Begins or Returns to College
- Court Ordered Dependent Coverage
- Dependent Loss of Coverage

TIP

All Qualifying Life Events must be processed through iNavigator and with the carriers within **30 days** of the life event.

Step 2:

There are two columns – one for employee and one for dependent coverage, as well as a multitude of reasons for both adding and dropping coverages. For our example, let us use a common scenario of adding dependent coverage for Marriage.

Step 3:

What you are presented with in the life event flow depends on which type of event you are processing, but most typically ask for the date of the event and who it is affecting. If plans are to be dropped, you would be presented with the list of enrolled plans to choose from. In our marriage scenario, you would enter date of event and then click **add a new one** for dependent addition.

Marriage

Getting married can have a big impact on your health and life insurance, taxes and finances. Don't forget to talk with your spouse about the choices that make the most sense for your new family. Generally you have a limited number of days after your marriage to change benefits, so don't miss the deadline. Otherwise, you must wait for the next open enrollment.

****NOTE****

Coverage will be added as of the date reported in the "Enter the date of this event" field.



Example: If the date is entered as 7/15, the coverage will be added with an effective date of 7/15

* Required Documentation: Marriage Certificate




The following tasks will need to be completed, please check your home page after finishing:

- Documentation Required for Life Event

Enter the date of this event

Select the dependent you wish to add

 or **add a new one**  

[Cancel](#) [Save](#)

How to Process a Qualified Life Event For Your Employee (con't)

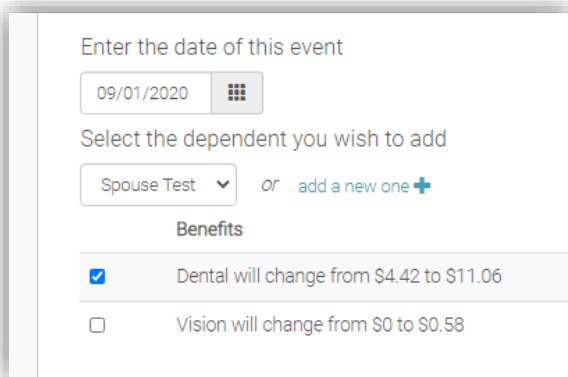
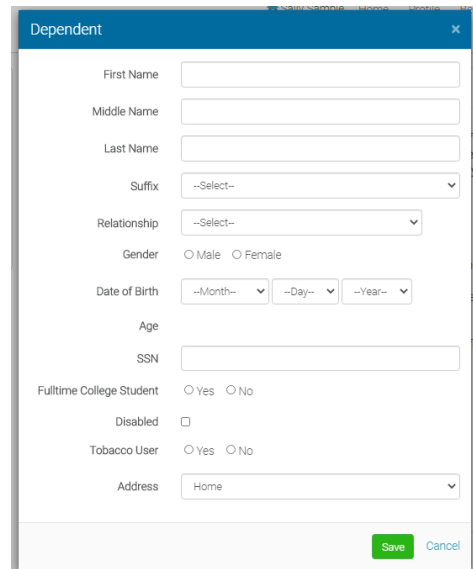
TIP

When you process a qualifying life event on behalf of your employee, it skips over the necessity for HR approval and will automatically complete the enrollment.

Step 4:

Add the information for the dependent (new spouse) in the pop-up box and click **Save**.

Note: At minimum you will need to enter their name, relationship, gender, DOB, SSN, and whether the dependent is a full-time college student.

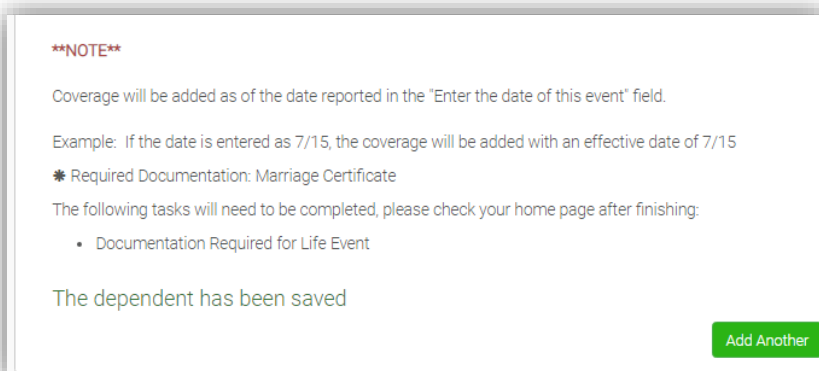


Step 5:

You will now be presented with the list of benefits that your employee is enrolled in, and you can check off the boxes for all plans to which you want to add the dependent. You will also see the change in costs for each benefit listed. Check off the desired benefits for the dependent and click **Save**.

Step 6:

You will receive confirmation of the addition as well as notification that documentation is required for this event. If you have chosen to have Life Events tasking added to your portal at setup, the employee will now be assigned a task requiring them to upload documentation supporting the QLE, in this case, a marriage certificate.



How to Add/View/Print Documents

Step 1:

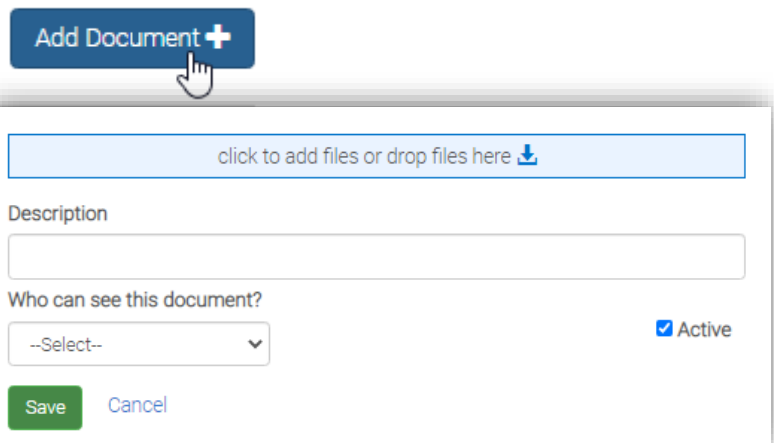
From your company home page, click the **Documents** tab.

Home Employees Reports Wall ACA Tasks Benefits Payroll **Documents** Settings

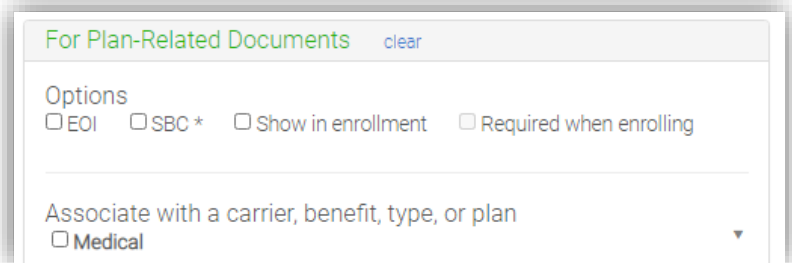
Step 2:

To add a document, click **Add Document**.

- Click the light blue bar to browse your computer for the file or drag the file here from your computer.
- Under Description, title the file whatever you wish.
- Under 'Who can see this document?' you can select 'everyone' for all employees to have access, or filter by things such as class or business unit.
- For plan-related documents, you can select 'Show in enrollment' and then select the plan you want this document assigned to. It will then show in an employee's enrollment flow.



The screenshot shows the 'Add Document' modal. At the top is a blue button labeled 'Add Document +'. Below it is a light blue bar with the text 'click to add files or drop files here' and a download icon. The form contains a 'Description' text field, a 'Who can see this document?' dropdown menu with '--Select--' selected, and a checked 'Active' checkbox. At the bottom are 'Save' and 'Cancel' buttons.



The screenshot shows the 'For Plan-Related Documents' options form. It has a title 'For Plan-Related Documents' with a 'clear' link. Below the title are 'Options' with checkboxes for 'EOI', 'SBC *', 'Show in enrollment', and 'Required when enrolling'. At the bottom is a dropdown menu labeled 'Associate with a carrier, benefit, type, or plan' with 'Medical' selected.

Select **Save**.

Step 3:

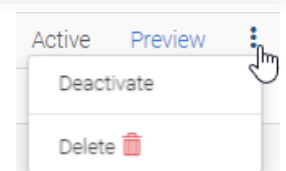
To view a document already on the portal, click **Preview**. This will open the file for you and you can print or save to your computer.



The screenshot shows a document card for '2020 Benefit Guide'. It includes a document icon, the title '2020 Benefit Guide', the date '09/01/2020', and status indicators for 'Views', 'Active', and 'Preview'. A three-dot menu icon is on the far right.

Step 4:

To delete a document (or deactivate it so that it remains on the portal under the inactive filter but will not show anywhere else or for your employees) you can click on the three dots on the far right.



The screenshot shows the three-dot menu for the document card. It contains three options: 'Active', 'Preview', and 'Deactivate'. Below these is a 'Delete' option with a trash can icon.

How to Update an Employee's Beneficiary

Step 1:

Search for your employee and from their **Employee Management** tab, click **Employee Home Page** (under the **Reviews** box on the right-hand side)

Sally Sample ⓘ
Full Time
FT Test
sally@test.com

Status
✓ HRIS required fields complete
✓ Benefits required fields complete
⚡ EE-entered fields for enrollment complete

Tasks
Incomplete 2 ▾
Complete 0 ▾
HR Pending 0 ▾

Manage Enrollments
New Hire Enrollment Employee is not eligible for any new hire benefits.
Modify Current Enrollments You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.
Open Enrollment Open enrollment window has expired.
Newly Eligible Enrollment HR has 1 day left to complete or make changes to newly eligible enrollment.

Notes

Actions ⓘ
Terminate Employment
Manage ACA
View 1095 for 2019
Manage COBRA
Unlock Open Enrollment
Unlock New Hire Enrollment

Reviews ⓘ
Employee Home Page

Step 2:

This enters you into the employee's view of their portal. From here, click **Benefits** at the top right.

🏠 Sally Sample Home Profile **Benefits** Required Tasks Resources

Benefits ▾
→ Summary
Overview
Beneficiaries
Life Events
Benefit Forms ▾
Life Beneficiary

Step 3:

You can click on **Beneficiaries** (to view) and then **Edit Beneficiary**, or click specifically on the benefit beneficiary, such as Life Beneficiary here.

Primary Beneficiaries

+ add a beneficiary

	Name	DOB	Gender	Relationship	Allocation %	
Edit	Spouse Test	01/01/1975	M	Spouse	100.00	remove 🗑️

Edit Percentages

Contingent Beneficiaries

+ add a beneficiary

TIP

All beneficiaries, if allocating funds to more than one person, must equal 100% between them, for both the primary and contingent sets of beneficiaries.

Step 3:

You can remove a beneficiary altogether by clicking on the trash can, or edit their information, or edit percentages. You can add both primary and contingent beneficiaries from this page as well.

How to Run Reports: New Hires/Terms

Step 1:

Click on the **Reports** tab at the very top of your portal and scroll down to the section titled **General Reports**. From here, click on either **New Hire** or **Termination** reports.



Step 2:

For **New Hire** Reports, enter the date for after which you want to display your list of new hires and click Generate. A report will display and you can print or download to Excel.



A form titled 'Employees Hired After' with a date input field containing '08/30/2020' and a calendar icon. Below the form is a green 'Generate' button. A blue arrow points down from the 'Generate' button to the report table below.

A report table with columns: SSN, First Name, Last Name, Gender, DOB, Hire Date, Department, Division, Class, Location. A search bar and download/print options are at the top right.

SSN	First Name	Last Name	Gender	DOB	Hire Date	Department	Division	Class	Location
265-42-4891	Fox	Mulder	M	06/06/1966	09/28/2020			Full Time	

Step 3:

For **Termination** Reports, enter the date range of when you want to see terminations and click Generate. A report will display which you can print or download to Excel.

A form titled 'Employees Terminated' with two date input fields: '08/30/2020' and '09/30/2020', each with a calendar icon. Below the form is a green 'Generate' button. A blue arrow points down from the 'Generate' button to the report table below.

A report table with columns: SSN, First Name, Last Name, Gender, Date Of Birth, Hire Date, Termination Date, Terminated On, Termination Reason, Department, Division, Class, Location, Furloughed, Furloughed Start Date, Furloughed End Date. A search bar and download/print options are at the top right.

SSN	First Name	Last Name	Gender	Date Of Birth	Hire Date	Termination Date	Terminated On	Termination Reason	Department	Division	Class	Location	Furloughed	Furloughed Start Date	Furloughed End Date
009-09-0990	Dana	Scully	F	01/21/1973	08/29/2018	07/21/2020	07/22/2020	Voluntary Termination			Part Time - Ineligible				

Records: 1

How to Run Reports: Payroll Deductions

Step 1:

Click on the **Reports** tab at the very top of your portal and then select **Payroll Deductions** Report (under the **Ad Hoc Reports** section at the top).

The screenshot shows the top navigation bar with tabs: Home, Employees, Reports (circled), Wall, ACA, Tasks, Benefits, Payroll, Documents, and Settings. Below the navigation bar, the 'Ad Hoc Reports' section is visible, listing: Row-Based Report, Column-Based Report, Payroll Deductions Report (highlighted with a mouse cursor), and Voluntary and Group Report. To the right, the 'Fields' section is shown with two dropdown menus: 'Employee' and 'Enrollment'.

Step 2:

Under the **Employee** Fields drop-down, you can select which demographic information you would like to see on the report. Under the **Enrollment** drop down, you can select the plan and benefit information.

The screenshot shows the 'Options' section with the text 'review options and filters'. It includes an 'Effective Date' field with a date picker set to 10/01/2020. Below that, the 'Costs:' section has a checkbox for 'sum dependent costs' which is checked.

Fields

Employee ▼

Profile & Personal

- Select All
- Social Security Number
- First Name
- Middle Name
- Last Name
- Suffix
- Preferred Name
- Display Name
- Full Name
- Gender
- DOB
- Age

Fields

Enrollment ▼

Enrollment

- Select All
- Benefit ▼
- Plan
- Enrollment Type
- Relationship
- EE Cost
- ER Cost
- Coverage Level ▼
- Benefit Amount
- Employee Payroll Code
- Coverage Start Date

Step 2:

Under the **Options** section, select the effective date you desire and check off **sum dependent costs**.

Step 3:

Click View on the left-hand side to generate your report. Then click Download and the report will generate as an excel file

TIP

If you click View and realize you are missing info, just click back to Fields to easily add another. You can also Reorder Selected Fields in order to change the order of column output on the report.

The screenshot shows the report generation options. It includes a 'Fields' dropdown, a 'Found 282' indicator, a 'View' button (with a right arrow), a 'Download' button, and a 'Save' button. Below these, there is a preview of the report output showing columns for 'First Name', 'contact', and 'Gomez'.

How to Set the Portal to Spanish

TIP

This needs to be done from the employee's home page, so if you are an HR user trying to change it for yourself, you will need to pull up your own page first, and then click **Employee Home Page** from the lower right-hand side.

Step 1:

From your employee home screen, click on your name in the upper right-hand corner. From the drop-down, choose **Español**. The site will automatically convert to Spanish.

NOTE: This will only convert text that is part of the system software. Items such as documents or any fields that have had to be filled in specifically (such as for benefit summaries on plans) will not convert.

