

iNavigator

HR Training Manual



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How to add a New Employee:

1. From your “Home” page, select “Add Employee” under “Helpful Tools and Information”.

The screenshot shows the iNavigator Home page. The top navigation bar includes links for HOME, EMPLOYEES, REPORTS, WALL, ACA, PTO, TASKS, BENEFITS, DOCUMENTS, SETTINGS, and GUIDE. A search bar is present with the text 'find employee by last name'. Below the navigation bar, there are several sections: 'INTRODUCING TRAINING FOR' with a 'LEARN MORE' button, 'HELPFUL TOOLS & INFORMATION' with a list of links including 'Employee', 'Enrollment Editor', 'Import Employees & Enrollment', 'Locked Accounts', and 'Login Status Report', 'PENDING HR APPROVAL' with a list of items, and 'STATUS' with a list of items. An arrow points to the 'Employee' link in the 'HELPFUL TOOLS & INFORMATION' section.

2. Enter the Employee’s SSN and press “Next”.

The screenshot shows the 'ADD AN EMPLOYEE' page. On the left, there is a sidebar with links: 'Add SSN', 'Add Personal Info', 'Add Employment Info', 'Onboarding', 'Send an Email', and 'Finish Up'. The main content area is titled 'Start with the SSN' and contains the text: 'Please enter the employee's social security number so we can check to see if the individual already exists in the system.' Below this text, there is a form with three input fields for the SSN and a 'next >' button. An arrow points to the 'Add SSN' link in the sidebar, and another arrow points to the 'next >' button.

3. Enter the Employee’s Personal Info and press “Next”.

The screenshot shows the 'ADD AN EMPLOYEE' page. On the left, there is a sidebar with links: 'Add SSN', 'Add Personal Info', 'Add Employment Info', 'Onboarding', 'Send an Email', and 'Finish Up'. The main content area is titled 'Then add the employee information' and contains the text: 'The following data is required to establish a new employee record'. Below this text, there is a form with various input fields: 'SSN' (000-00-0003), 'First Name' (test), 'Middle Name', 'Last Name' (employee), 'Suffix' (dropdown), 'Gender' (radio buttons for Male and Female), 'Date of Birth' (09/01/1980), 'State' (Texas), 'Payroll Work State' (Texas), 'Work Email' (example@yahoo.com), and 'Personal Email'. A 'next >' button is at the bottom. An arrow points to the 'Add Personal Info' link in the sidebar, and another arrow points to the 'next >' button.

4. Enter the Employee's Employment Info and press "Next".

ADD AN EMPLOYEE

[Add SSN](#)
[Add Personal Info](#)
→ Add Employment Info
[Onboarding](#)
[Send an Email](#)
[Finish Up](#)

Then add the employee information
The following data is required to establish a new employee record

SSN 000-00-0003
Hire Date 09/01/2016
Job Title Admin
Class Full Time Employees
Payroll Group Weekly

Salary fields

Pay Basis Hourly
Hourly Rate 15
Hours Per Week 40.00
Annual Base Salary 31200.00
Annual Benefit Salary

ACA / Statutory Classifications

ACA Classification Eligible (Regularly works more than
Statutory Class --Select--
Is Seasonal ☐ Yes ☒ No

[back](#) [next](#)

5. Select "Finish Up" under "Onboarding" and press "Send" if you would like to send the new employee a registration email. (we suggest you send an email to all full time employees- the employee can use the link in the email to complete their new hire elections.)

ADD AN EMPLOYEE

[Add SSN](#)
[Add Personal Info](#)
[Add Employment Info](#)
[Onboarding](#)
→ Send an Email
[Finish Up](#)

Send test employee a registration email?

Email: example@yahoo.com

[Send](#) [No, not now](#)

How to Terminate an Employee:

1. From the “Employees” tab, search the last name of the employee.

HOME **EMPLOYEES** REPORTS WALL ACA PTO TASKS BENEFITS DOCUMENTS SETTINGS GUIDE

FIND AN EMPLOYEE

Look up an employee to change, view or terminate benefits or dependents

—or—
[Advanced Search](#)

EMPLOYEE ACTIONS

- [Import Employees & Enrollment](#)
- [Add Employee](#)
- [Add Demo Employee](#)
- [Manage Shared Employees](#) ⓘ
- [Delete Employee](#)
- [Delete Dependent](#)

EMPLOYEE STATS

- [Recent hires in last 30 days](#)
- [New hire enrollments completed in the past 60 days](#)
- [Terminations in the past 30 days](#)
- [Recent Events](#)

BENEFIT STATS

- [Enrolled but ineligible](#)
- [Not finished new hire](#) ⓘ
- [Incomplete life events](#)
- [Newly eligible, but not finished](#) ⓘ
- [Coverage changes in the last 60 days](#)
- [Incomplete beneficiary](#)
- [Enrollments missing dependents](#)

2. From the Employee’s Home Page, select “Terminate Employment” under “ACTIONS”.

Demo Employee (demo) [Add a note](#)

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

Demo Employee ⓘ
Full Time Employees
Tester
example@yahoo.com

MANAGE ENROLLMENTS

- [New Hire Enrollment](#) HR has 61 days left to complete or make changes to new hire enrollment.
- [Modify Current Enrollments](#) Link disabled because employee has pending enrollments that require HR approval. Approve pending enrollments to enable link.
- [Open Enrollment](#) Open enrollment window has expired.
- [Newly Eligible Enrollment](#) Employee is not eligible for any newly eligible benefits.

NOTES

Date/Time	Author	Title
No notes found		

TASKS

Task	Count
Incomplete	None
HR Pending	None
Completed	1

ACTIONS

Use the links below to perform actions on the employee record.

- [Payroll](#)
- [Terminate Employment](#)
- [Manage ACA](#)
- [Manage COBRA](#)
- [Rehire](#)
- [Manage Fringe Benefits](#)
- [Unlock Open or New Hire Enrollment](#)
- [Set New Hire Complete](#)

3. Enter the Employee's "Termination Date", select a "Reason for Termination" and press "Terminate". Press "Confirm" on the next pop-up.

The screenshot shows the 'Terminate Employee Tool' for a 'Demo Employee'. It includes a search bar, a title, a warning about termination date restrictions, input fields for 'Termination Date' and 'Reason for Termination', and 'Terminate' and 'Cancel' buttons. To the right is a summary of employee details and a table of dependents. Three arrows point to the 'Termination Date' input, the 'Reason for Termination' dropdown, and the 'Terminate' button.

Terminate Employee Tool

The termination date is restricted to no more than 24 months in the past and 90 days in the future, and cannot be more than 1 day prior to the hire date.

Termination Date:

Reason for Termination: --Select--

Terminate Cancel

Demo Employee
example@yahoo.com
Tester

Employee Class Full Time Employees
Employee Department
Employee Division

Hire Date 08/22/2016
Termination Date
Pay Frequency Weekly (52 Periods)
Home Address 123 Main
Houston, Texas 77058

Current Dependents for Demo Employee

Name	Relation	Plans
Example	Spouse	Medical, Vision
Example	Child	Medical, Accident

****Once you terminate an employee, they lose access to Employee Navigator.****

How to Rehire an Employee:

1. From the “Employees” tab, search the last name of the employee.

The screenshot shows the 'EMPLOYEES' tab selected in the top navigation bar. Below the navigation bar, there are four main sections:

- FIND AN EMPLOYEE**: A search box with the text 'employee' entered. A blue arrow points to the search box. Below the search box is a link for 'Advanced Search'.
- EMPLOYEE ACTIONS**: A list of actions including 'Import Employees & Enrollment', 'Add Employee', 'Add Demo Employee', 'Manage Shared Employees' (with an info icon), 'Delete Employee', and 'Delete Dependent'.
- EMPLOYEE STATS**: A summary of employee statistics with color-coded bars and links for more details: 'Recent hires in last 30 days', 'New hire enrollments completed in the past 60 days', 'Terminations in the past 30 days', and 'Recent Events'.
- BENEFIT STATS**: A summary of benefit statistics with color-coded bars and links for more details: 'Enrolled but ineligible', 'Not finished new hire' (with an info icon), 'Incomplete life events', 'Newly eligible, but not finished' (with an info icon), 'Coverage changes in the last 60 days', 'Incomplete beneficiary', and 'Enrollments missing dependents'.

2. From the Employee’s Home Page, select “Rehire” under “ACTIONS”.

The screenshot shows the 'EMPLOYEE MANAGEMENT' tab selected in the top navigation bar. Below the navigation bar, there are several sections:

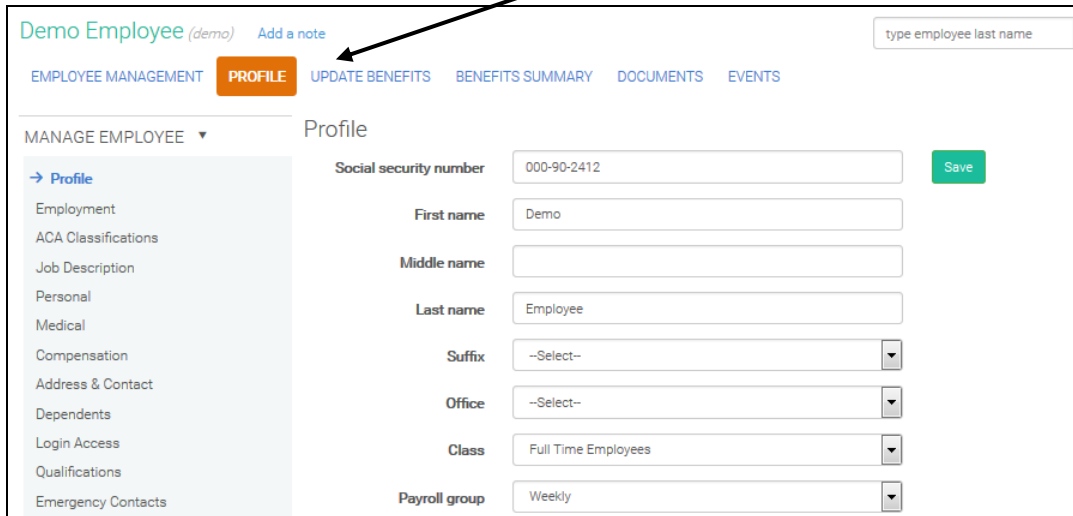
- Full Time Employees**: A section header.
- Employee has been terminated.**: A red message.
- MANAGE ENROLLMENTS**: A section with links for 'New Hire Enrollment', 'Modify Current Enrollments', 'Open Enrollment', and 'Newly Eligible Enrollment'. A note states: 'You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events. Open enrollment window has expired.'
- NOTES**: A table with columns 'Date/Time', 'Author', and 'Title'. It shows 'No notes found'.
- TASKS**: A table with columns 'Task' and 'Status'. It shows 'Incomplete', 'HR Pending', and 'Completed'.
- ACTIONS**: A section with a heading 'Use the links below to perform actions on the employee record.' and a list of links: 'Payroll', 'Terminate Editor' (with a 'beta' tag), 'Manage ACA', 'Manage COBRA', 'Rehire' (highlighted with a blue arrow), 'Manage Fringe Benefits', and 'Unlock Open or New Hire Enrollment'.

3. Enter the Employee's "Rehire Date", and press "Rehire".

The screenshot shows a web interface for rehiring an employee. On the left, a sidebar menu contains the following items: "→ Rehire Employee" (highlighted in blue), "Onboarding", "Send an Email", and "Finish Up". The main content area is titled "REHIRE AN EMPLOYEE" and includes a large letter "A" in the top right corner. Below the title, there is a "Rehire Date" label followed by a text input field and a calendar icon. A black arrow points from the top right towards the calendar icon. Below the input field is a green button labeled "Rehire" with a right-pointing chevron. A second black arrow points from the bottom right towards this button.

How to Change an Employee's Employment Status & Pay:

1. From the Home Page, select "Profile".



Demo Employee (demo) Add a note

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾ Profile

→ Profile

Employment

ACA Classifications

Job Description

Personal

Medical

Compensation

Address & Contact

Dependents

Login Access

Qualifications

Emergency Contacts

Social security number 000-90-2412 Save

First name Demo

Middle name

Last name Employee

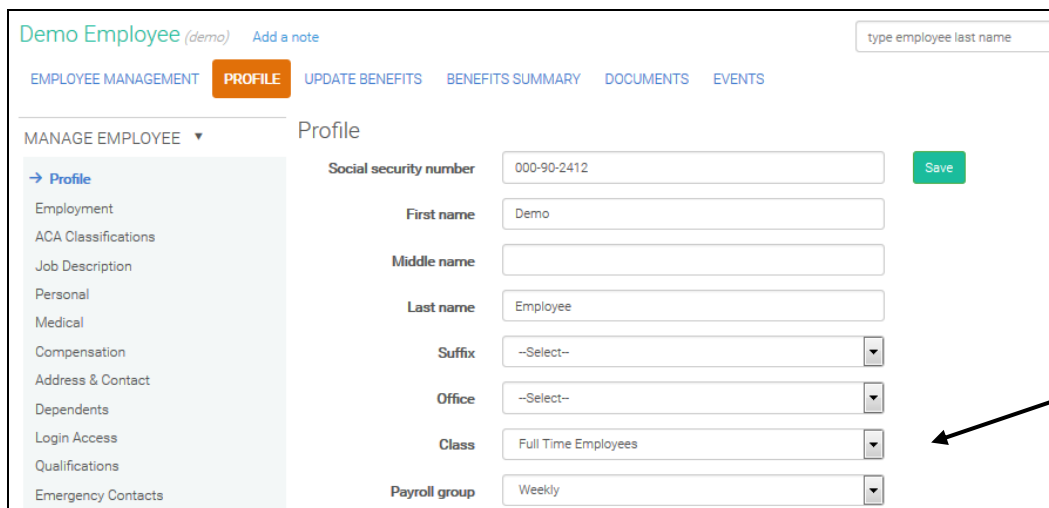
Suffix --Select--

Office --Select--

Class Full Time Employees

Payroll group Weekly

2. To change the Employee to "Full Time" or to "Part Time", select the drop down for "Class" and press "Save".



Demo Employee (demo) Add a note

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾ Profile

→ Profile

Employment

ACA Classifications

Job Description

Personal

Medical

Compensation

Address & Contact

Dependents

Login Access

Qualifications

Emergency Contacts

Social security number 000-90-2412 Save

First name Demo

Middle name

Last name Employee

Suffix --Select--

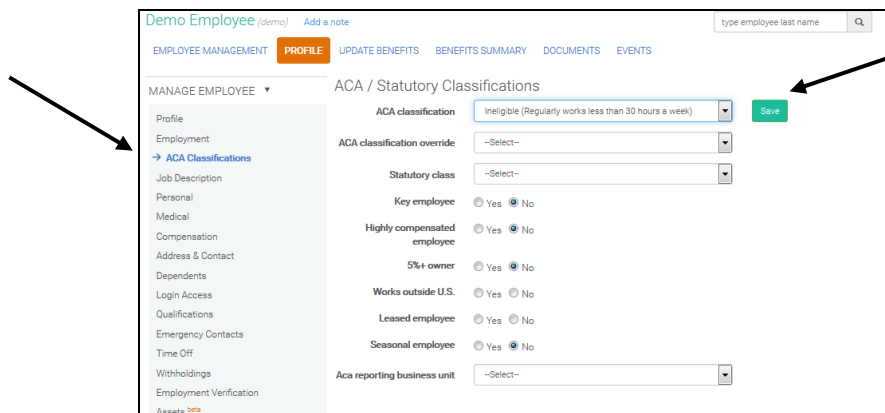
Office --Select--

Class Full Time Employees

Payroll group Weekly

Then, select "ACA Classifications" under "Manage Employee" and change the "ACA Classification" to:

"Ineligible" for Part Time Employees OR "Eligible" for Full Time Employees and press "Save".



Demo Employee (demo) Add a note

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾ Profile

→ Profile

→ ACA Classifications

Job Description

Personal

Medical

Compensation

Address & Contact

Dependents

Login Access

Qualifications

Emergency Contacts

Time Off

Withholdings

Employment Verification

Assets

ACA / Statutory Classifications

ACA classification Ineligible (Regularly works less than 30 hours a week) Save

ACA classification override --Select--

Statutory class --Select--

Key employee Yes No

Highly compensated employee Yes No

5%+ owner Yes No

Works outside U.S. Yes No

Leased employee Yes No

Seasonal employee Yes No

Aca reporting business unit --Select--

3. To change the Employee's "Payroll Group" (if applicable), select the drop down for "Payroll Group", under "Profile", and press "Save".

The screenshot shows the 'Demo Employee' profile page. The 'MANAGE EMPLOYEE' dropdown menu is open, and the 'Profile' option is selected. The 'Payroll group' dropdown menu is also open, showing 'Weekly' as the selected option. A green 'Save' button is visible next to the dropdown. Arrows point to the 'Profile' menu item, the 'Payroll group' dropdown, and the 'Save' button.

EMPLOYEE MANAGEMENT **PROFILE** UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾ Profile

→ Profile

Employment

ACA Classifications

Job Description

Personal

Medical

Compensation

Address & Contact

Dependents

Login Access

Qualifications

Emergency Contacts

Profile

Social security number 000-90-2412

First name Demo

Middle name

Last name Employee

Suffix --Select--

Office --Select--

Class Full Time Employees

Payroll group Weekly

Save

4. To change an Employee's "Division" (if applicable), select the drop down for "Division", under "Profile", and press "Save".

The screenshot shows the 'Demo Employee' profile page. The 'MANAGE EMPLOYEE' dropdown menu is open, and the 'Profile' option is selected. The 'Division' dropdown menu is also open, showing '--Select--' as the selected option. A green 'Save' button is visible next to the dropdown. Arrows point to the 'Profile' menu item, the 'Division' dropdown, and the 'Save' button.

EMPLOYEE MANAGEMENT **PROFILE** UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾ Profile

→ Profile

Employment

ACA Classifications

Job Description

Personal

Medical

Compensation

Address & Contact

Dependents

Login Access

Qualifications

Emergency Contacts

Time Off

Withholdings

Profile

Social security number 000-90-2412

First name Demo

Middle na

Last name Employee

Suffix --Select--

Office --Select--

Class Full Time Employees

Payroll group Weekly

Division --Select--

Save

5. To add an "Employee ID or Payroll ID", select "Employment" under "Manage Employee". Enter the ID number(s) and press "Save".

The screenshot shows the 'Demo Employee' employment page. The 'MANAGE EMPLOYEE' dropdown menu is open, and the 'Employment' option is selected. The 'Employee ID' and 'Payroll ID' fields are visible. A green 'Save' button is visible next to the fields. Arrows point to the 'Employment' menu item, the 'Employee ID' and 'Payroll ID' fields, and the 'Save' button.

EMPLOYEE MANAGEMENT **PROFILE** UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾ Employment

Profile

→ Employment

ACA Classifications

Job Description

Personal

Medical

Compensation

Address & Contact

Employment

Employee ID

Payroll ID

Time clock ID

Employment status Active

Terminate

Hire date 08/22/2016

Save

6. To change an Employee's salary, select "Compensation" under "Manage Employee" and select "Edit."

Demo Employee (demo) Add a note

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

MANAGE EMPLOYEE ▾

Profile
Employment
ACA Classifications
Job Description
Personal
Medical
→ Compensation
Address & Contact
Dependents
Login Access

Compensation

Pay basis Hourly

Salary effective date 08/22/2016

Annual base salary \$41,600.00

Hourly rate \$20.00 edit

Hours per week 40.00

Annual benefit salary \$

Prior year W2 earnings \$

Salary review date

Save

Then, you can change the Employee's "Pay Basis" (ex. Hourly → Salary). If changing to "Hourly", enter the new "Hourly Rate" and the "Effective Date" and press "Save".

Change compensation

Pay basis Hourly

Hourly rate \$

Hours per week 40.00

Effective date

Salary change history

Effective	Pay basis	Compensation	Hours per week	Base salary	Delete
08/22/2016	Hourly	\$20.00	40	\$41,600.00	

If changing to "Salary", enter the new "Annual Base Salary" and the "Effective Date" and press "Save".

Change compensation

Pay basis Salary

Annual base salary \$

Effective date

Salary change history

Effective	Pay basis	Compensation	Hours per week	Base salary	Delete
08/22/2016	Hourly	\$20.00	40	\$41,600.00	

How to make New Hire or Open Enrollment Elections:

You can also view a short video on this topic at: https://youtu.be/Ep3wKmZc5_0

1. From the “Employee’s Profile”, select “New Hire Enrollment” under “MANAGE ENROLLMENTS”. (The “New Hire Enrollment” link will be active up to the employee’s effective date and will go inactive when the employee is not eligible for benefits anymore.)

Demo Employee (demo) Add a note

type employee last name Q

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

Demo Employee ③
Full Time Employees
Tester
example@yahoo.com

MANAGE ENROLLMENTS

New Hire Enrollment Employee is not eligible for any new hire benefits.
Modify Current Enrollments Link disabled because employee has pending enrollments that require HR approval. Approve pending enrollments to enable link.
Open Enrollment Open enrollment window has expired.
Newly Eligible Enrollment Employee is not eligible for any newly eligible benefits.

NOTES

Date/Time	Author	Title
9/7/2016 5:43:57 PM	Brandy Fisher	Enrollment Edit

TASKS

Task	Status	Count
Incomplete	None	
HR Pending	None	
Completed		1

ACTIONS

Use the links below to perform actions on the employee record.

Payroll
Terminate Employment
Manage ACA
Manage COBRA
Rehire
Manage Fringe Benefits
Unlock Open or New Hire Enrollment
Set New Hire Complete

REVIEWS

Use the links below to review employee data.

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

2. Verify and complete any missing personal information and press “Save & Continue” when done.

PROFILE ▾

→ Personal Information
✓ Dependent Information

BENEFITS ▾
FORMS ▾
SUMMARY ▾

Personal Information

First Name Demo
Middle Name
Last Name Employee
Suffix --Select--
Gender ☐ Male ☒ Female
Date of Birth January 1 1980
SSN ***-**-2457
Tobacco User ☐ Yes ☒ No
Address 1 123 Main
Address 2
City Houston
State Texas
County --Select--
Zip Code 77062
Phone Number
Email Address bfish

Save & Continue

3. Next, add any dependents by selecting, “Add Dependents” or edit any current dependents by selecting “Edit” next to the dependent’s name. Any dependent that will be added to a plan MUST be added here. If the employee has no dependents or they are not adding dependents to a plan, just press “Save & Continue”.

iNavigator DEMO EMPLOYEE PROFILE BENEFITS REQUIRED TASKS RESOURCES

PROFILE ▾

- Personal Information
- Dependent Information

BENEFITS ▾

FORMS ▾

SUMMARY ▾

Dependent Information

add dependent +

	Name	DOB	SSN	Relationship
Edit	Example Spouse	02/07/1980	***.	Spouse
Edit	Example Child 4	03/04/2007	***.	Child
Edit	Example Child 2	02/04/2011	***.	Child
Edit	Example Child 3	12/05/2013	***.	Child
Edit	Example Child	06/09/2016	***.	Child

[Save & Continue](#)

4. Go through each “Benefit” selecting into coverage or declining coverage. For each plan, you must select which dependents you would like added to that specific plan- the cost will automatically update.

PROFILE ▾

BENEFITS ▾

- Medical
- Health Savings Account
- Dental
- Vision
- Life
- Long-Term Disability
- Telemedicine
- Accident
- Cancer
- Voluntary Short-Term Disability
- Voluntary Life

FORMS ▾

SUMMARY ▾

Medical

Who am I enrolling?

Myself

- ☒ Example Spouse (Spouse)
- ☒ Example Child 4 (Child)
- ☒ Example Child 2 (Child)
- ☐ Example Child 3 (Child)
- ☐ Example Child (Child)

Which plan do I want?

BASE PLAN - S61

\$418.56 Effective on 10/01/2016
Cost per pay period Employee + Family
[selected](#)

[compare](#) [details](#)

BUY-UP PLAN - G61

\$528.15 Effective on 10/01/2016
Cost per pay period Employee + Family
[select plan](#)

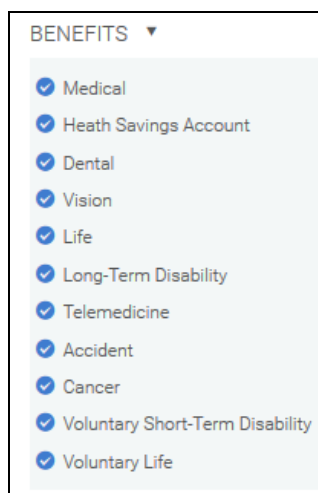
[compare](#) [details](#)

[backdate the election?](#)

[Save & Continue](#)

[Don't want this benefit?](#)

5. Once EACH plan has been elected or declined, there will be a blue check mark next to each plan letting you know you have completed all required items.



6. If applicable, the next screen will ask you to “Add a Beneficiary” for Group Life. You can establish as many beneficiaries as the employee would like (must have at least one).

If establishing multiple “Primary Beneficiaries”, the “Allocation %” must equal 100%.

If establishing any “Contingent Beneficiaries”, the “Allocation %” must equal 100%.

Press “Continue” when done.

A screenshot of the "Life Beneficiary" screen. At the top, it says "Life Beneficiary" with two links: "How Beneficiaries Work" and "Claims Summary Report". Below this is the heading "View Beneficiaries (Group Life and AD&D)". There are two sections: "PRIMARY BENEFICIARIES" and "CONTINGENT BENEFICIARIES". Each section has a link that says "add a beneficiary" followed by a blue plus sign. At the bottom right, there is a blue button labeled "Continue". Three black arrows point to the "add a beneficiary" links and the "Continue" button.

**** If employee elected Voluntary Life Insurance, complete the same steps as above.****

7. To complete or finalize the enrollment, you must press “Agree” after reading the acknowledgment statement. You can review the “Enrolled Plans”, “Total Cost per Pay Period”, “Dependents”, and “Declined Coverages” from this tab. You can also “Print” the enrollment summary for your records.

iNavigator

DEMO EMPLOYEE PROFILE BENEFITS REQUIRED TASKS RESOURCES

PROFILE ▶

BENEFITS ▶

FORMS ▶

SUMMARY ▼

→ Enrollment Summary

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.

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.

Agree

Enrolled Plans

****If you do not see the screen above, an item on the left is incomplete. Go back through each tab on the left and make sure you have a blue check mark.****

After pressing “Agree”, you will see this to know you have submitted everything correctly:

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.

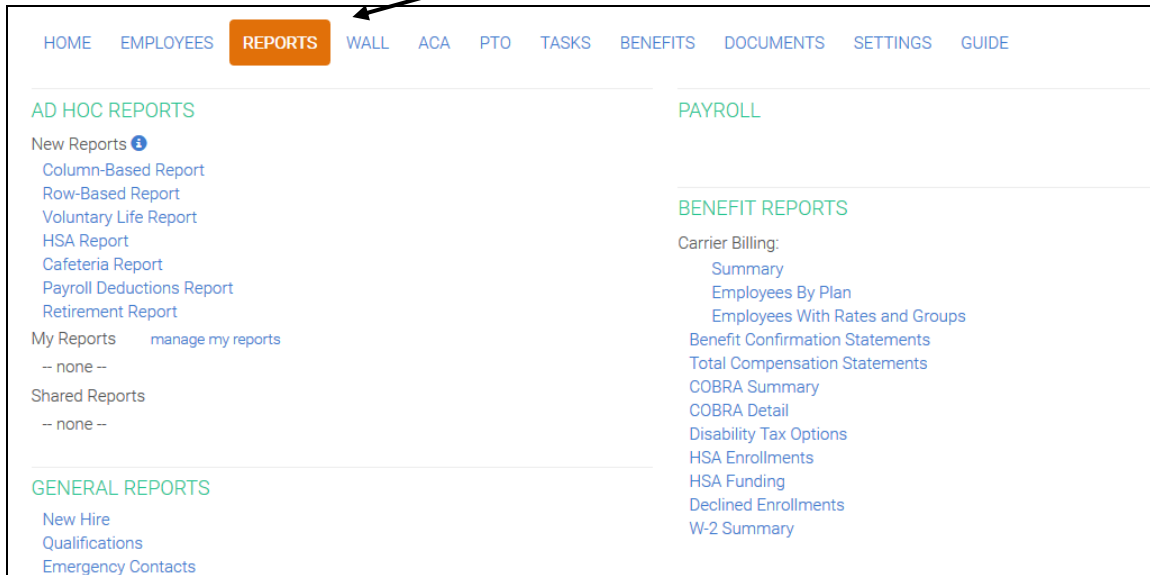
ACKNOWLEDGED AND SUBMITTED

Current Enrollment: Complete Enrollment completed on Thursday, September 08, 2016 1:34 PM

To Employee Management

How to Print Benefit Confirmation Statements:

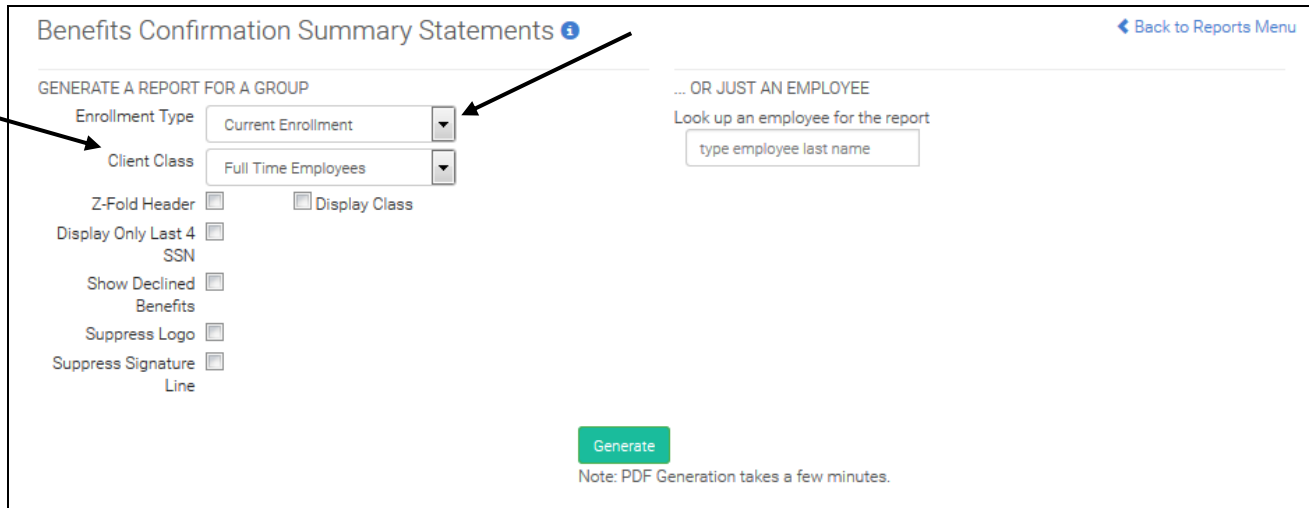
1. From your “Home” page, select “Reports”.



2. Select “Benefit Confirmation Statements” under “Benefit Reports – Carrier Billing”.

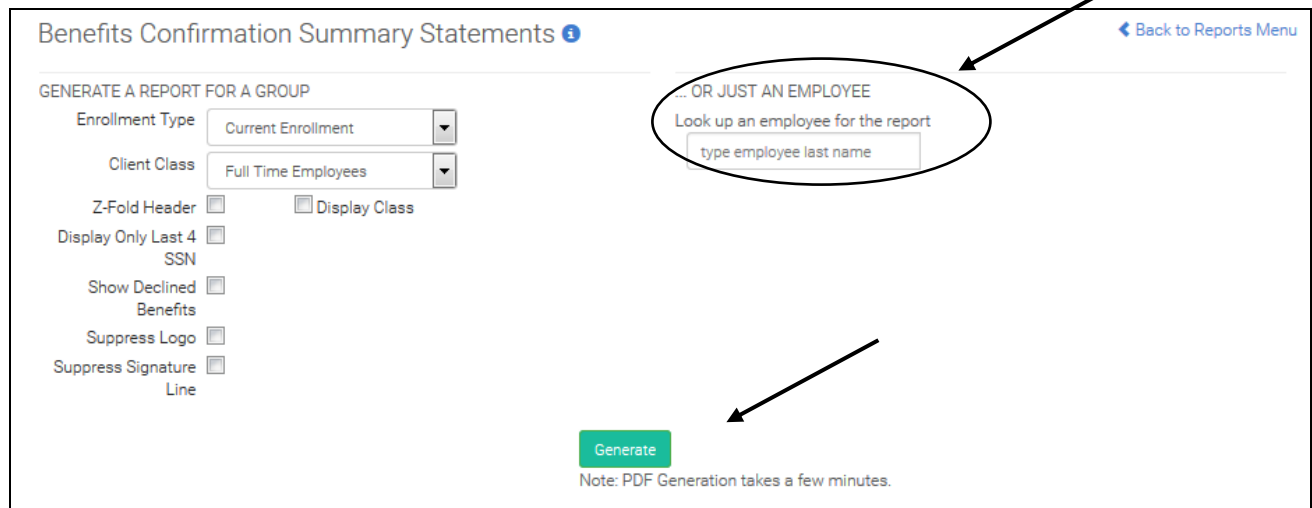


3. Select “Current Enrollment” under “Enrollment Type”, select the “Client Class” of the employee(s).



The screenshot shows the 'Benefits Confirmation Summary Statements' form. On the left, under 'GENERATE A REPORT FOR A GROUP', there are two dropdown menus: 'Enrollment Type' (set to 'Current Enrollment') and 'Client Class' (set to 'Full Time Employees'). Below these are several checkboxes: 'Z-Fold Header', 'Display Class', 'Display Only Last 4 SSN', 'Show Declined Benefits', 'Suppress Logo', and 'Suppress Signature Line'. On the right, under '... OR JUST AN EMPLOYEE', there is a text input field labeled 'Look up an employee for the report' with the placeholder 'type employee last name'. A green 'Generate' button is at the bottom center, with a note below it: 'Note: PDF Generation takes a few minutes.' A blue link 'Back to Reports Menu' is in the top right corner. Two black arrows point to the 'Enrollment Type' and 'Client Class' dropdowns.

4. Type in the employee’s last name in the search box, select the employee’s name and press generate.



This screenshot is similar to the previous one but highlights the search functionality. A black oval encircles the 'Look up an employee for the report' text input field and its placeholder 'type employee last name'. A black arrow points to this oval from the top right. Another black arrow points to the green 'Generate' button at the bottom center. The rest of the form, including the 'GENERATE A REPORT FOR A GROUP' section and the 'Back to Reports Menu' link, remains the same.

The report will generate a PDF summary of the employee and the plans they elected into. You can use this report for information to input into the carriers.

How to check for Pending HR Approval, Incomplete Employees & Review Insurability Requests:

1. From your “Home” page, you can view any items “Pending HR Approval”, any “Incomplete Employees”, and “Review Insurability Requests”.

The screenshot shows the iNavigator Home page. The top navigation bar includes links: HOME, EMPLOYEES, REPORTS, WALL, ACA, PTO, TASKS, BENEFITS, DOCUMENTS, SETTINGS, GUIDE. A search bar says "find employee by last name". On the left, a section titled "INTRODUCING TRAINING FOR" lists ACA Reporting, Onboarding, and Time-off Tracking with a "LEARN MORE" button. Below this is "HELPFUL TOOLS & INFORMATION" with links: Add Employee, Enrollment Editor, Import Employees & Enrollment, Locked Accounts, Login Status Report, Review Insurability Requests (circled with an arrow), and HR 360. On the right, a "PENDING HR APPROVAL" section (circled with an arrow) shows "None" for Profile Changes and Enrollments. Below it, a "STATUS" section (circled with an arrow) shows "Incomplete employees" (circled), "Pay dates created through", "PTO", "Onboarding", "Benefits", and "Employees on COBRA". A legend at the bottom indicates: Urgent Action Required (orange), Action Required (yellow), Active (green), and No Action Required (grey).

“Pending HR Approval” – if any enrollment or profile changes need your approval, click on the link to review the request. Approve or decline as necessary.

“Incomplete Employees” – if any employees are incomplete, click on the link to view the employee(s). Go back to your “Home” page, search the employee and correct what is incomplete.

The screenshot shows the "Incomplete Employees" page. It includes a legend: H = Required by HR for profile | P = Required by plan rules. A "Download to Excel" link is in the top right. The table has columns: SSN, First Name, Last Name, Payroll Group, Gender, DOB, Employee Status, Hire Date, and Client Class. The first row shows "Full Time Employees". At the bottom right, it says "1 employees".

The screenshot shows the "Employee Management" page for a specific employee. It includes a section for "Employee Name" with an "Add a note" link. Below this are three buttons: "EMPLOYEE MANAGEMENT" (orange), "PROFILE" (blue), and "UPDATE BENEFITS" (blue). The employee's details are listed: "Full Time Employees" and "Sales Executive". At the bottom, a red exclamation mark icon indicates a warning: "Profile is missing: Dependent DOB".

“Review Insurability Requests” – click on the link to approve any pending Voluntary Life amounts. Click “Pending” next to the employee’s name to review the Voluntary Life Request.

Insurability Requests

Search

Last Name
Status

Pending

search »

[what are the status definitions?](#)

Results

Last Name	First Name	Who	Employee Name	Plan Title	Requested Date	Approved	Requested	GI
Pending				Voluntary Life and AD&D	08/29/2016	\$150,000.00	\$160,000.00	\$150,000.00

Select the drop down by “Action” and choose the appropriate action. *(Things to think about: does the employee need to complete an Evidence of Insurability Form (EOI)? Has the employee completed the EOI? Has the insurance carrier approved or declined the pending amount?)*

Edit Insurability

(Employee)

Plan Voluntary Life and AD&D

Coverage Started 09/01/2016

Requested 08/29/2016

Requested Amount \$160,000

GI Amount \$150,000

Action

--Select--

Save

Cancel

If the employee has been approved by the insurance carrier, choose “Approved”, enter the “Effective Date” and press “Save”.

Edit Insurability

T

(Employee)

Plan Voluntary Life and AD&D

Coverage Started 09/01/2016

Requested 08/29/2016

Requested Amount \$160,000

GI Amount \$150,000

Action

Approved

Approved Amount

\$160,000.00

Effective Date

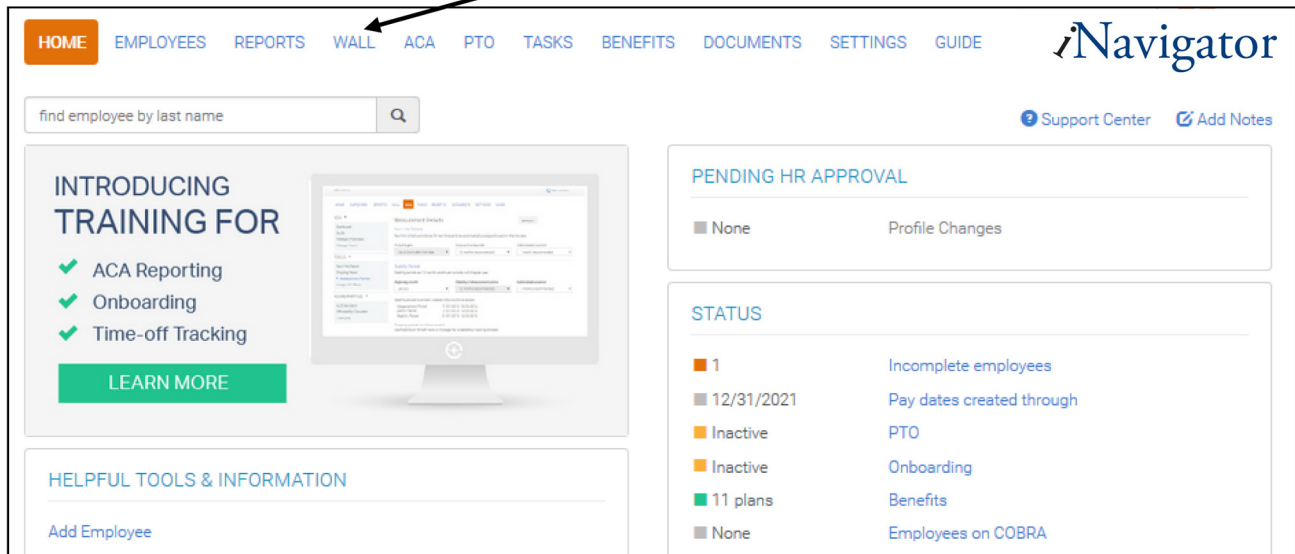
09/01/2016

Save

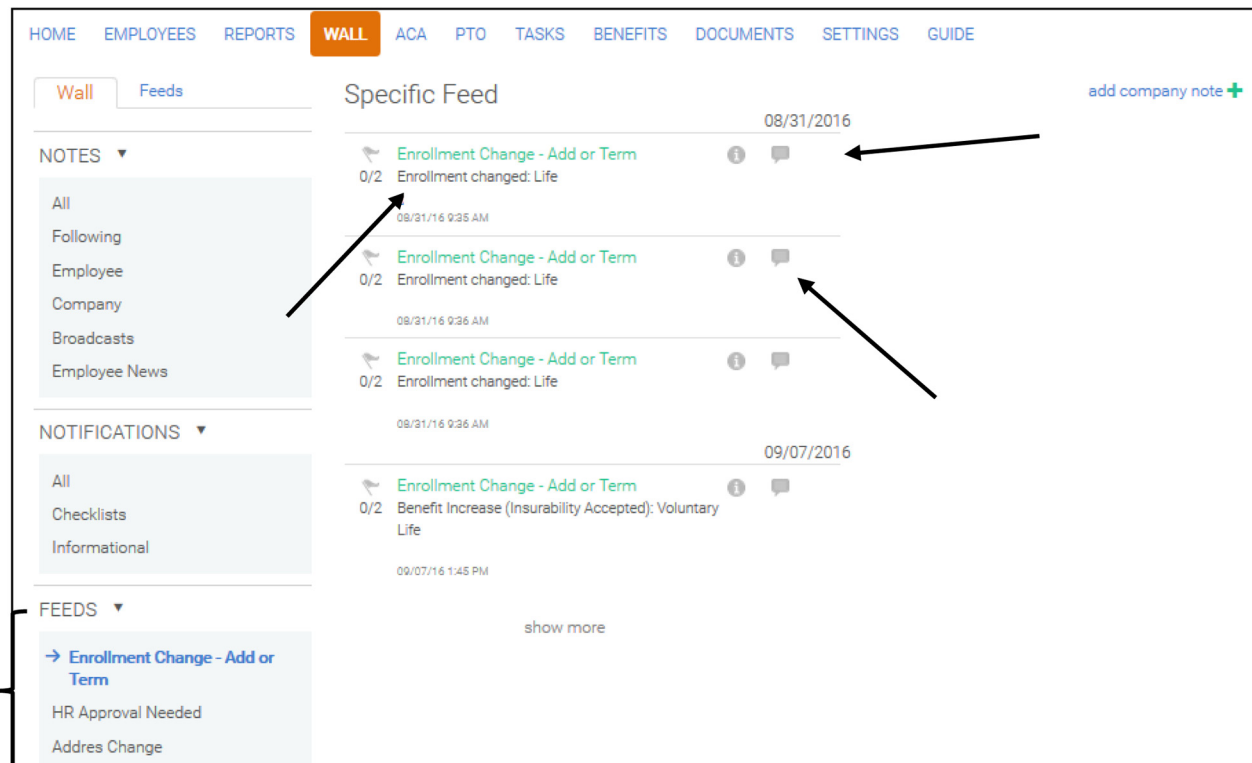
Cancel

How to Check Wall for Updates:

1. From your “Home” page, select “Wall”.



2. You can view all “Feeds” at once or view by each specific “Feed” by selecting the links under “FEEDS”. Example “Wall Feed” is shown below.



Select the numbers (ex. 0/2) under the flag next to each “Feed”, to view a checklist of items that may need to be completed for that “Feed”.

Select the “i” to view information about the “Feed”.

You can add a comment or an update by selecting the speech bubble.

How to view an Employee's Enrollment Summary & Deductions:

1. From the Home Page, select "Employees".

HOME **EMPLOYEES** REPORTS WALL ACA PTO TASKS BENEFITS DOCUMENTS SETTINGS GUIDE

FIND AN EMPLOYEE

Look up an employee to change, view or terminate benefits or dependents

find employee by last name

--or--

[Advanced Search](#)

EMPLOYEE ACTIONS

- [Import Employees & Enrollment](#)
- [Add Employee](#)
- [Add Demo Employee](#)
- [Manage Shared Employees](#)
- [Delete Employee](#)
- [Delete Dependent](#)

EMPLOYEE STATS

- 1 [Recent hires in last 30 days](#)
- None [New hire enrollments completed in the past 60 days](#)
- 2 [Terminations in the past 30 days](#)
- 10+ [Recent Events](#)

BENEFIT STATS

- None [Enrolled but ineligible](#)
- 3 [Not finished new hire](#)
- None [Incomplete life events](#)
- None [Newly eligible, but not finished](#)
- None [Coverage changes in the last 60 days](#)
- 3 [Incomplete beneficiary](#)
- None [Enrollments missing dependents](#)

2. Search the employee by their last name and select the employee's name. It will take you to the employee's profile where you can manage the employee.

Demo Employee (demo) [Add a note](#)

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

Demo Employee [Add a note](#)

Full Time Employees
Tester
example@yahoo.com

MANAGE ENROLLMENTS

- [New Hire Enrollment](#) HR has 61 days left to complete or make changes to new hire enrollment.
- [Modify Current Enrollments](#) Link disabled because employee has pending enrollments that require HR approval. Approve pending enrollments to enable link.
- [Open Enrollment](#) Open enrollment window has expired.
- [Newly Eligible Enrollment](#) Employee is not eligible for any newly eligible benefits.

NOTES

Date/Time	Author	Title
No notes found		

TASKS

Incomplete	None
HR Pending	None
Completed	1

ACTIONS

Use the links below to perform actions on the employee record.

- [Payroll](#)
- [Terminate Employment](#)
- [Manage ACA](#)
- [Manage COBRA](#)
- [Rehire](#)
- [Manage Fringe Benefits](#)
- [Unlock Open or New Hire Enrollment](#)
- [Set New Hire Complete](#)

REVIEWS

Use the links below to review employee data.

- [Employee Home Page](#)
- [Employee Data Sheet](#)
- [Total Compensation Statement](#)
- [Employee Change Request History](#)
- [Change History](#)

3. To view their Enrollment Summary, select the “Benefits Summary” tab. You can view each plan the employee is enrolled in, the effective date of each plan, the cost of each plan per pay, dependents enrolled on which plan, which plans the employee waived, and the total cost per pay period.

Demo Employee *(demo)* [Add a note](#)

[EMPLOYEE MANAGEMENT](#) [PROFILE](#) [UPDATE BENEFITS](#) **[BENEFITS SUMMARY](#)** [DOCUMENTS](#) [EVENTS](#)

[Benefits Summary](#) [Benefits Eligibility](#)

[View Details](#) [print](#)

Enrolled Plans

Plan Type	Carrier	Plan Name	Coverage	Effective	Cost Per Pay	Benefit
Medical			Employee + Family	11/01/2016	\$21	
Vision			Employee + Spouse	11/01/2016	\$3.76	
Life			Employee	11/01/2016	\$0	
Accident			Employee + Child(ren)	11/01/2016	\$7	

Total Cost Per Pay Period

\$267.56

Dependents

Name	Plan Types
Example Spouse (spouse)	Medical Vision
Example Child (child)	Medical Accident

Declined Coverage

Plan Type	Plan Name	Reason
Health Savings Account		Other
Dental		Other
Voluntary Life		Other
Critical Illness	Critical	Other

How to process a Qualified Life Event (HR):

All Qualified Life Events must be processed through Employee Navigator and with the carriers within 30 days of the Life Event.

1. From the Home Page, select “Employees”.

HOME EMPLOYEES REPORTS WALL ACA PTO TASKS BENEFITS DOCUMENTS SETTINGS GUIDE

FIND AN EMPLOYEE

Look up an employee to change, view or terminate benefits or dependents

find employee by last name

--or--

[Advanced Search](#)

EMPLOYEE ACTIONS

- [Import Employees & Enrollment](#)
- [Add Employee](#)
- [Add Demo Employee](#)
- [Manage Shared Employees](#) ⓘ
- [Delete Employee](#)
- [Delete Dependent](#)

EMPLOYEE STATS

1	Recent hires in last 30 days
None	New hire enrollments completed in the past 60 days
2	Terminations in the past 30 days
10+	Recent Events

BENEFIT STATS

None	Enrolled but ineligible
3	Not finished new hire ⓘ
None	Incomplete life events
None	Newly eligible, but not finished ⓘ
None	Coverage changes in the last 60 days
3	Incomplete beneficiary
None	Enrollments missing dependents

2. Search the employee by their last name and select the employee’s name. It will take you to the employee’s profile where you can manage the employee.

Demo Employee (demo) [Add a note](#)

EMPLOYEE MANAGEMENT PROFILE UPDATE BENEFITS BENEFITS SUMMARY DOCUMENTS EVENTS

Demo Employee ⓘ
Full Time Employees
Tester
example@yahoo.com

MANAGE ENROLLMENTS

New Hire Enrollment	HR has 61 days left to complete or make changes to new hire enrollment.
Modify Current Enrollments	Link disabled because employee has pending enrollments that require HR approval. Approve pending enrollments to enable link.
Open Enrollment	Open enrollment window has expired.
Newly Eligible Enrollment	Employee is not eligible for any newly eligible benefits.

NOTES

Date/Time	Author	Title
No notes found		

TASKS

Incomplete	None
HR Pending	None
Completed	1

ACTIONS

Use the links below to perform actions on the employee record.

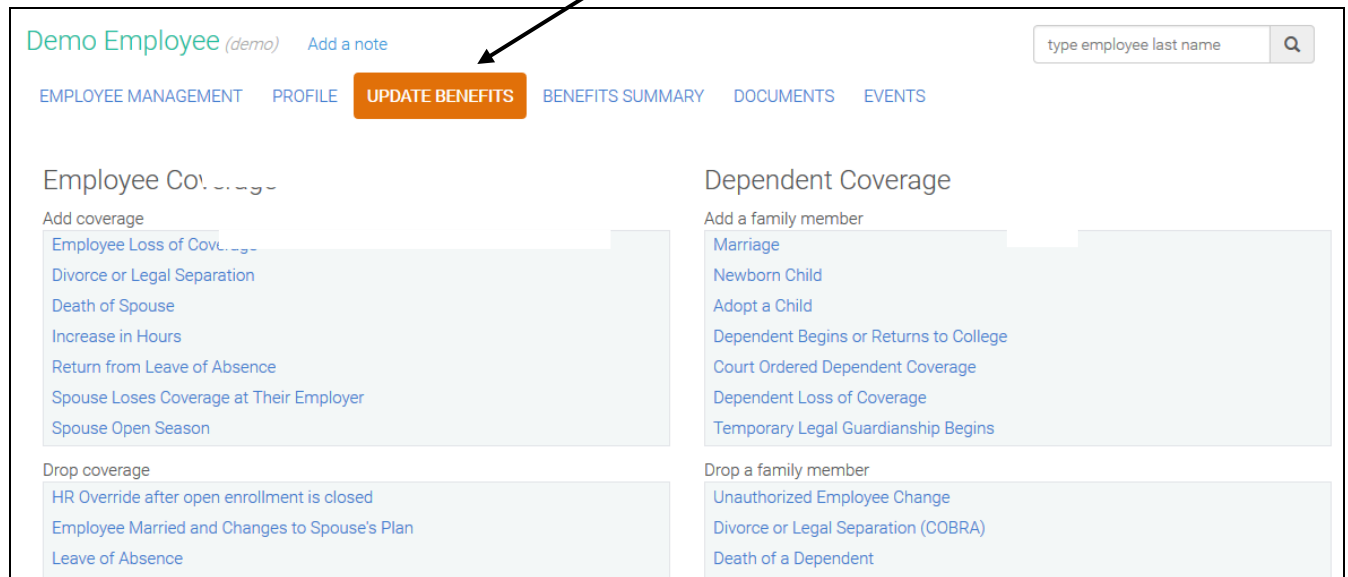
- [Payroll](#)
- [Terminate Employment](#)
- [Manage ACA](#)
- [Manage COBRA](#)
- [Rehire](#)
- [Manage Fringe Benefits](#)
- [Unlock Open or New Hire Enrollment](#)
- [Set New Hire Complete](#)

REVIEWS

Use the links below to review employee data.

- [Employee Home Page](#)
- [Employee Data Sheet](#)
- [Total Compensation Statement](#)
- [Employee Change Request History](#)
- [Change History](#)

3. To update an Employee's elections when they experience a Qualified Life Event (these must be processed with Employee Navigator and the carriers **within 30 days** of the event), select "Update Benefits" from the Employee's Profile.



Demo Employee (demo) [Add a note](#)

type employee last name

[EMPLOYEE MANAGEMENT](#) [PROFILE](#) **[UPDATE BENEFITS](#)** [BENEFITS SUMMARY](#) [DOCUMENTS](#) [EVENTS](#)

Employee Coverage

Add coverage

- Employee Loss of Coverage
- Divorce or Legal Separation
- Death of Spouse
- Increase in Hours
- Return from Leave of Absence
- Spouse Loses Coverage at Their Employer
- Spouse Open Season

Drop coverage

- HR Override after open enrollment is closed
- Employee Married and Changes to Spouse's Plan
- Leave of Absence

Dependent Coverage

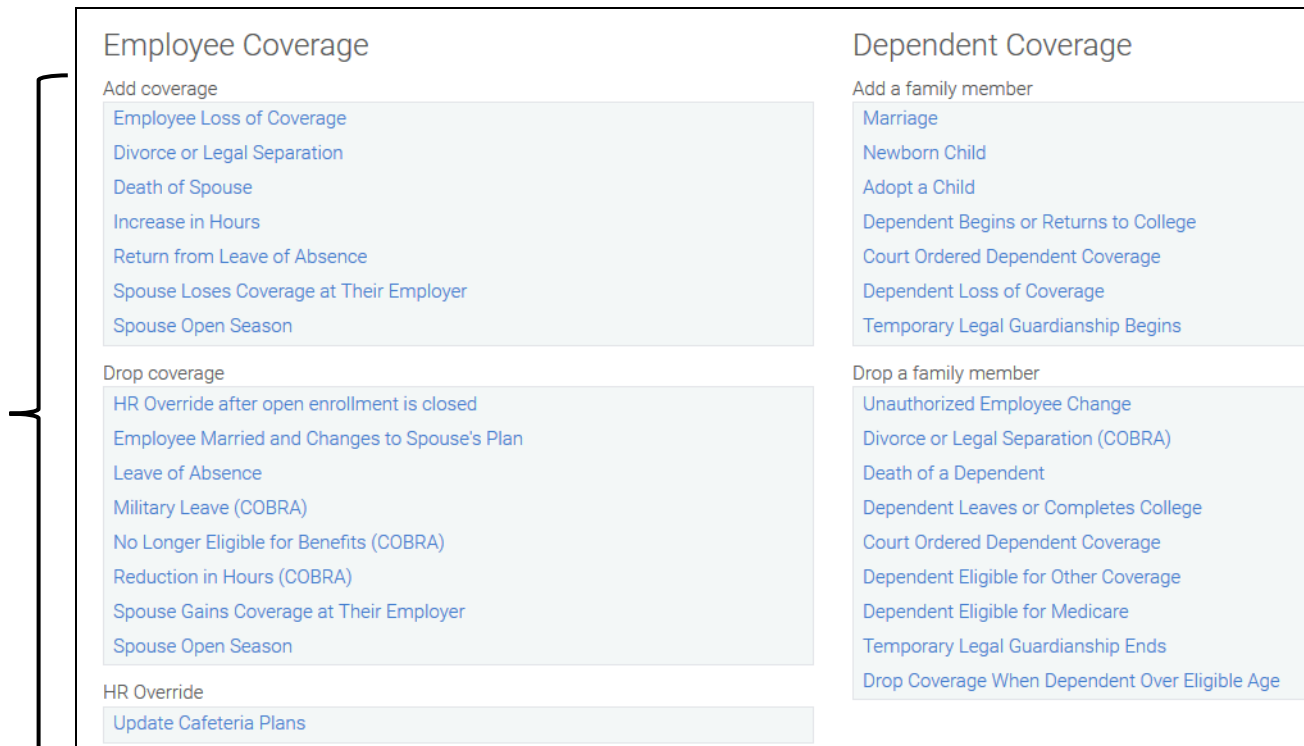
Add a family member

- Marriage
- Newborn Child
- Adopt a Child
- Dependent Begins or Returns to College
- Court Ordered Dependent Coverage
- Dependent Loss of Coverage
- Temporary Legal Guardianship Begins

Drop a family member

- Unauthorized Employee Change
- Divorce or Legal Separation (COBRA)
- Death of a Dependent

4. Select the necessary life event and process the change.



Employee Coverage

Add coverage

- Employee Loss of Coverage
- Divorce or Legal Separation
- Death of Spouse
- Increase in Hours
- Return from Leave of Absence
- Spouse Loses Coverage at Their Employer
- Spouse Open Season

Drop coverage

- HR Override after open enrollment is closed
- Employee Married and Changes to Spouse's Plan
- Leave of Absence
- Military Leave (COBRA)
- No Longer Eligible for Benefits (COBRA)
- Reduction in Hours (COBRA)
- Spouse Gains Coverage at Their Employer
- Spouse Open Season

HR Override

- Update Cafeteria Plans

Dependent Coverage

Add a family member

- Marriage
- Newborn Child
- Adopt a Child
- Dependent Begins or Returns to College
- Court Ordered Dependent Coverage
- Dependent Loss of Coverage
- Temporary Legal Guardianship Begins

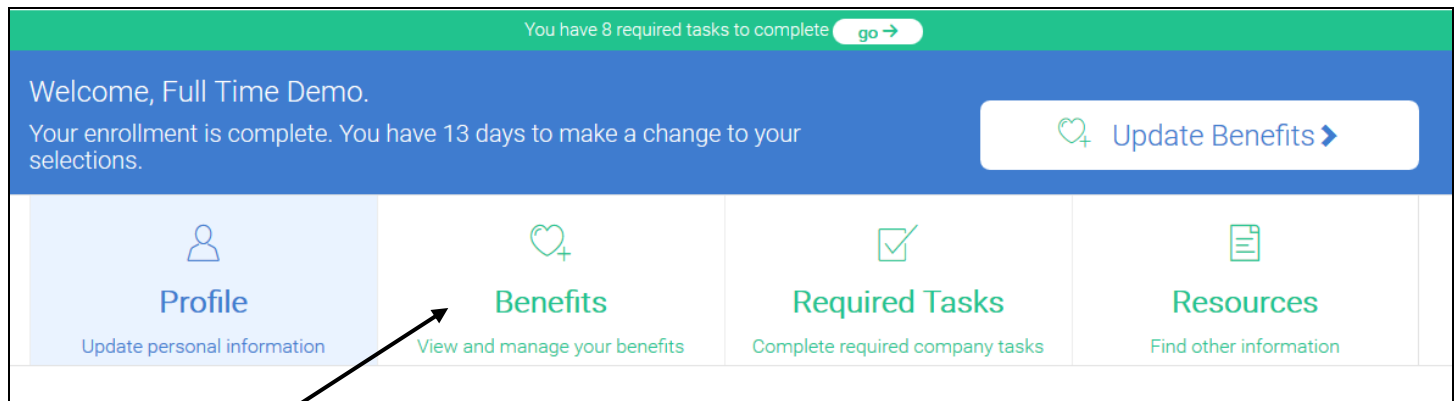
Drop a family member

- Unauthorized Employee Change
- Divorce or Legal Separation (COBRA)
- Death of a Dependent
- Dependent Leaves or Completes College
- Court Ordered Dependent Coverage
- Dependent Eligible for Other Coverage
- Dependent Eligible for Medicare
- Temporary Legal Guardianship Ends
- Drop Coverage When Dependent Over Eligible Age

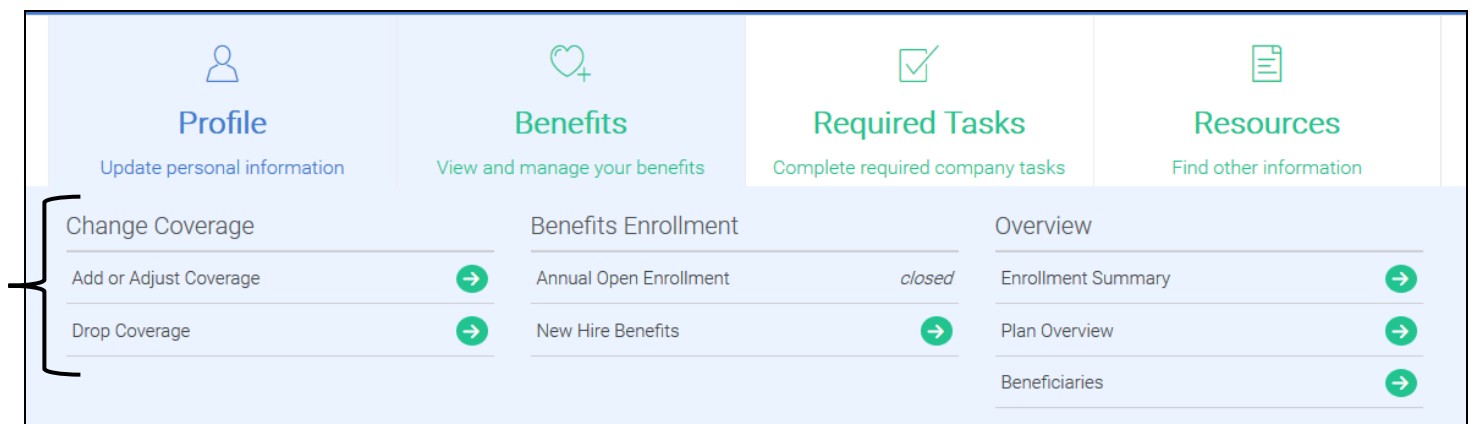
How an Employee processes a Qualified Life Event:

All Qualified Life Events must be processed through Employee Navigator and with the carriers within 30 days of the Life Event.

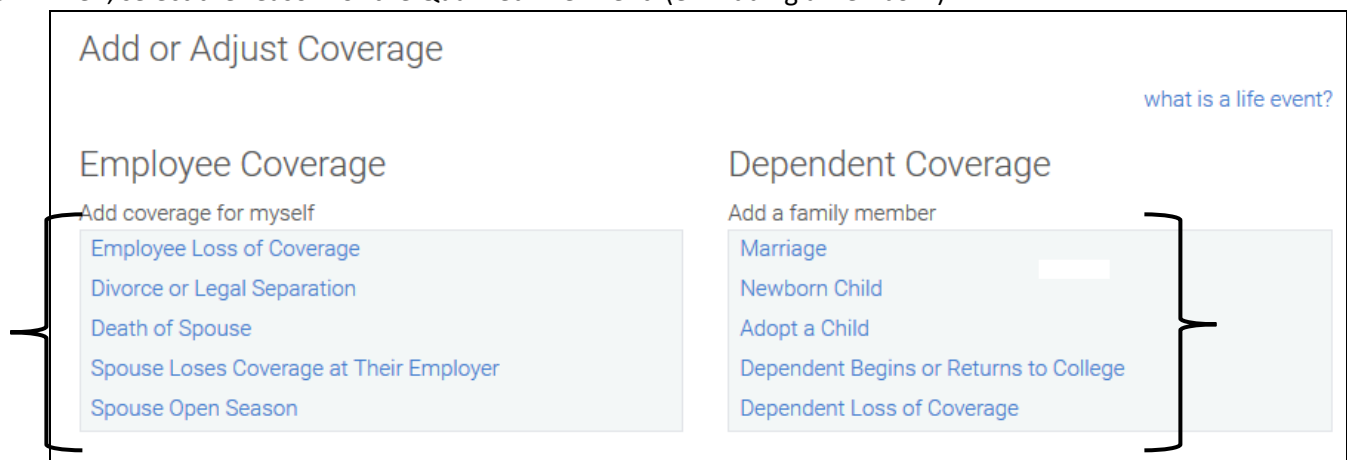
1. Once the Employee is logged in, select, "Benefits".



2. Next, depending on the type of Qualified Life Event, select "Add or Adjust Coverage" OR "Drop Coverage".



3. Then, select the reason for the Qualified Life Event. (ex. Adding a Newborn).




4. Enter the date of the event (ex. the day the child was born), “Add a New” dependent and press “Save”.

Add Dependent Coverage

Newborn Child:

Adding a new baby or child to your family brings change and responsibility as well as joy. Understanding how your benefits can change will help you make informed decisions and be the best parent you can be. **Generally you have a limited number of days after the birth or adoption to change benefits, so don't miss the deadline. Otherwise, you must wait for the next open enrollment.**

Enter the date of this event



Select the dependent you wish to add

-- Select --

or

add a new one+

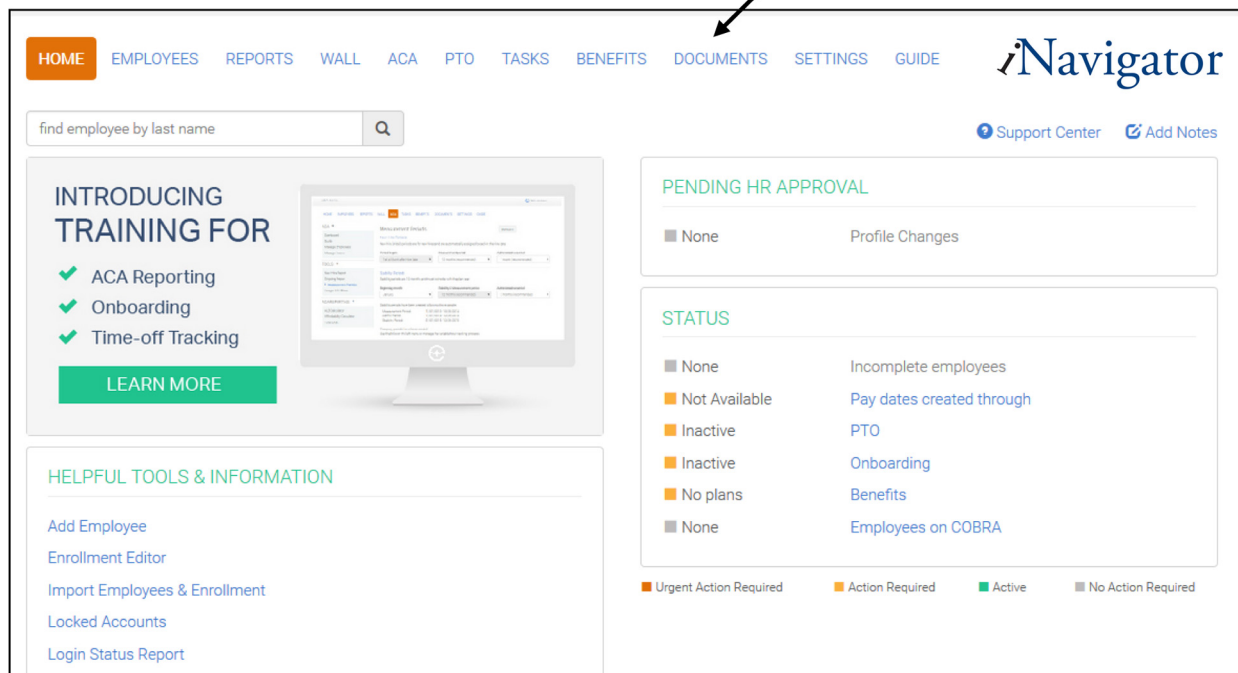
Save

Please submit supporting documentation to your HR for the qualified life event.

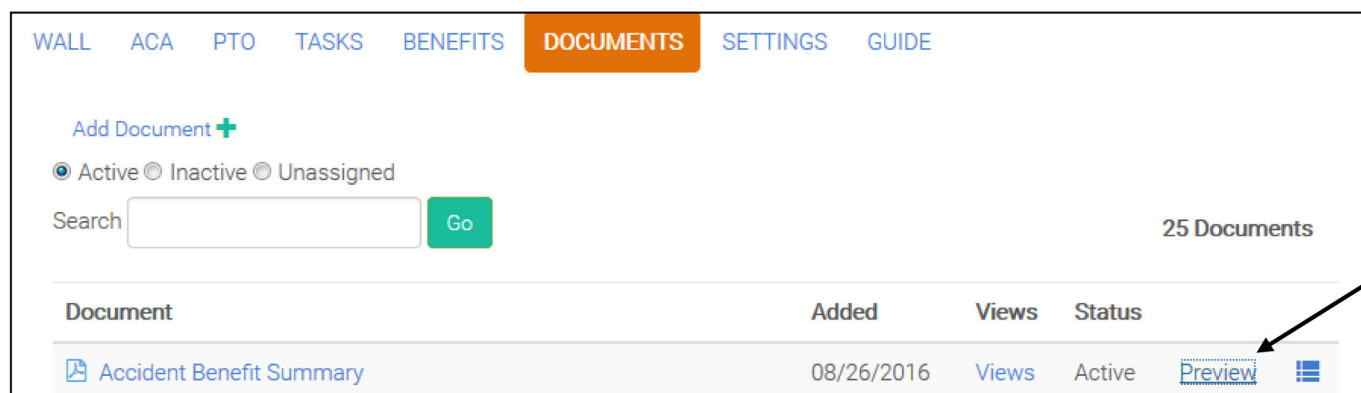
If you are trying to process the qualified life event outside the 30-day window, you will be errored out and will have to wait until next open enrollment to make changes.

How to View and Print Benefit Summaries, Claim Forms, Evidence of Insurability Forms, & other Plan Documents:

1. From the Home Page, select "Documents".



2. You can "Preview" each document to download and print.



How to Update a Beneficiary from the Employee's Home Page:

1. Search the employee and select, "Employee Home Page" under "REVIEWS".

The screenshot shows the 'Demo Employee' home page. At the top, there's a search bar with the placeholder 'type employee last name' and a magnifying glass icon. Below the search bar is a navigation menu with tabs: 'EMPLOYEE MANAGEMENT' (highlighted in orange), 'PROFILE', 'UPDATE BENEFITS', 'BENEFITS SUMMARY', 'DOCUMENTS', and 'EVENTS'. The main content area is divided into three columns. The left column displays employee information: 'Demo Employee' (with an info icon), 'Full Time Employees', 'Tester', and 'example@yahoo.com'. Below this is a 'MANAGE ENROLLMENTS' section with four rows: 'New Hire Enrollment' (Employee is not eligible for any new hire benefits.), 'Modify Current Enrollments' (Link disabled because employee has pending enrollments that require HR approval. Approve pending enrollments to enable link.), 'Open Enrollment' (Open enrollment window has expired.), and 'Newly Eligible Enrollment' (Employee is not eligible for any newly eligible benefits.). Below that is a 'NOTES' section with a table header: 'Date/Time', 'Author', and 'Title'. The table body shows 'No notes found'. The right column has three sections: 'TASKS' with a table showing 'Incomplete' (None), 'HR Pending' (None), and 'Completed' (1); 'ACTIONS' with a description 'Use the links below to perform actions on the employee record.' and a list of links: 'Payroll', 'Terminate Employment', 'Manage ACA', 'Manage COBRA', 'Rehire', 'Manage Fringe Benefits', 'Unlock Open or New Hire Enrollment', and 'Set New Hire Complete'; and 'REVIEWS' with a description 'Use the links below to review employee data.' and a link 'Employee Home Page' which is highlighted with a black arrow pointing to it.

2. Select "Benefits" once you are on the employee's home page.

The screenshot shows the 'Employee Navigator' welcome screen. At the top, there's a blue header with the text 'Welcome, Demo.' and a paragraph: 'Employee Navigator is an online benefit management tool which will allow you to review your benefits anytime day or night. On this site you will be able to report any updates to your demographic information, report life events such as the birth of a child and make eligible benefit enrollment changes. You can also download the mobile app for Apple and Android smart phones to access this information. Welcome to the site!'. Below the header is a navigation bar with four tiles: 'Profile' (with a person icon and subtitle 'Update personal information'), 'Benefits' (with a heart and plus icon, subtitle 'View and manage your benefits', and a black arrow pointing to it), 'Required Tasks' (with a checkmark icon and subtitle 'Complete required company tasks'), and 'Resources' (with a document icon and subtitle 'Find other information').

3. Select "Beneficiaries".

The screenshot shows the 'Benefits Enrollment' page. At the top, there's a navigation bar with four tiles: 'Profile' (with a person icon and subtitle 'Update personal information'), 'Benefits' (with a heart and plus icon and subtitle 'View and manage your benefits'), 'Required Tasks' (with a checkmark icon and subtitle 'Complete required company tasks'), and 'Resources' (with a document icon and subtitle 'Find other information'). Below the navigation bar is a table with three columns: 'Change Coverage', 'Benefits Enrollment', and 'Overview'. The 'Change Coverage' column has two rows: 'Add or Adjust Coverage' and 'Drop Coverage', both with a green arrow icon. The 'Benefits Enrollment' column has three rows: 'Annual Open Enrollment' (closed), 'New Hire Benefits' (closed), and 'Total Compensation Statement' (with a green arrow icon). The 'Overview' column has three rows: 'Enrollment Summary' (with a green arrow icon), 'Plan Overview' (with a green arrow icon), and 'Beneficiaries' (with a green arrow icon and a black arrow pointing to it).

4. Select “Go to Edit Beneficiary” and choose “Life Beneficiary” or “Voluntary Life Beneficiary”.

Beneficiaries

Current beneficiaries ▾


[Go Edit Beneficiary ▾](#)

Benefit	Classification	Percentage	Name	Relationship	DOB	Phone
Life	Primary	100.00%	Example Spouse	Spouse	01/15/1981	

5. “Edit”, “Add a beneficiary” or “Remove” the beneficiary. Press “Finish” when done.

Primary Beneficiaries

[add a beneficiary +](#)

	Name	DOB	Relationship	Allocation %	
Edit	Example Spouse	01/15/1981	Spouse	100.00	remove 

[Edit Primary Allocation Percentages](#)

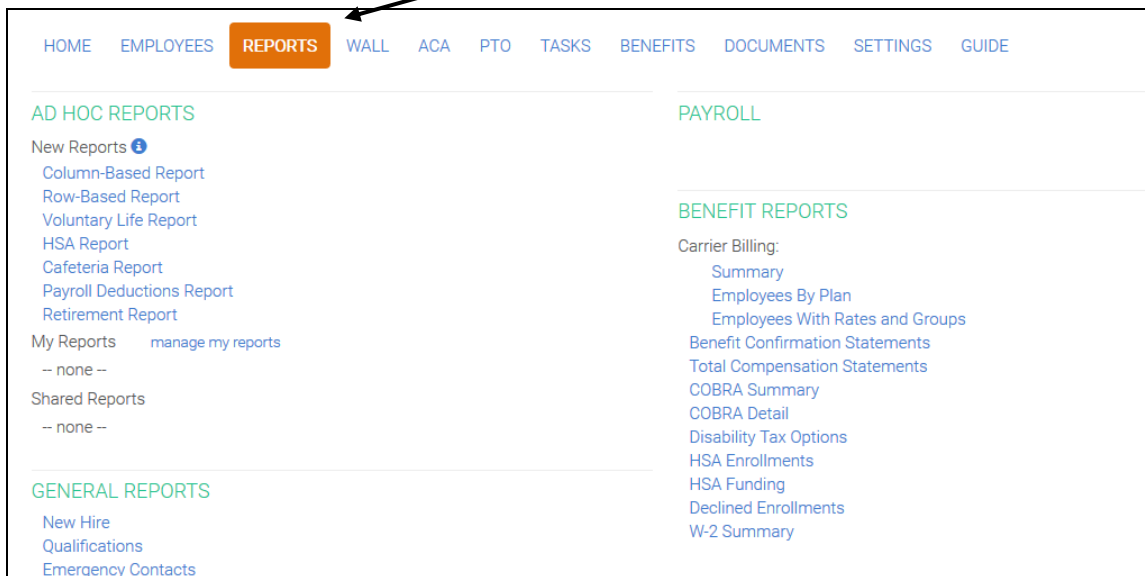
Contingent Beneficiaries

[add a beneficiary +](#)

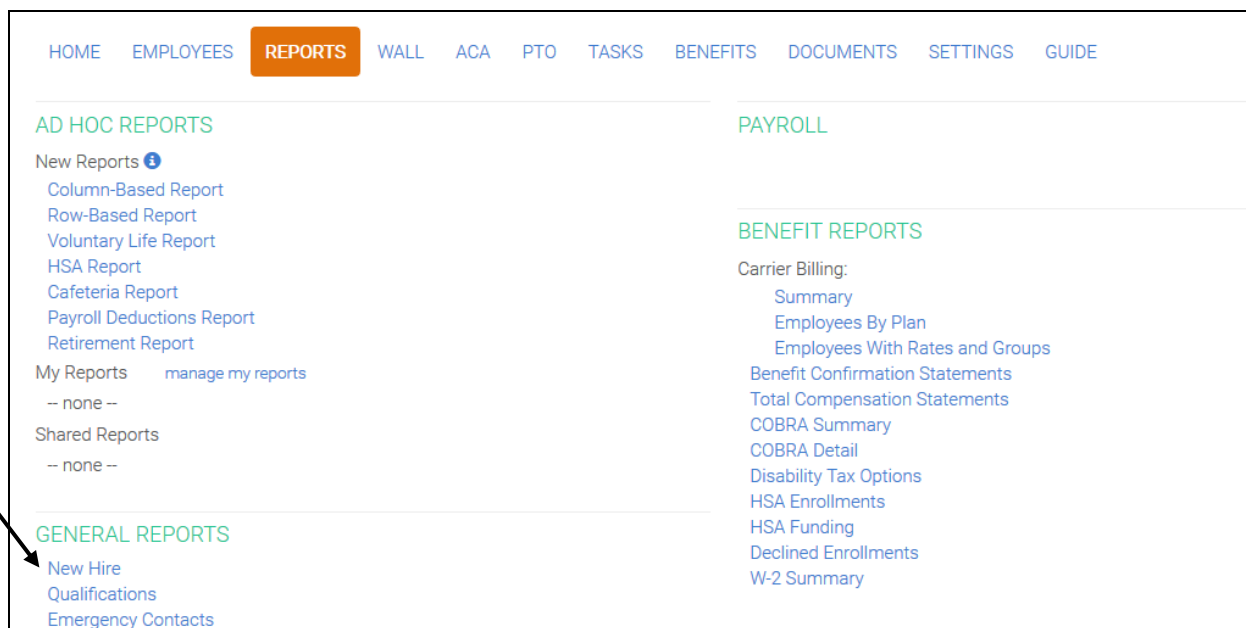
[Finish](#)

How to Run a New Hire Report:

1. From your “Home” page, select “Reports”




2. Select “New Hire” under “General Reports”.



3. Enter the Date in which you would like to search and press “Generate”.


A screenshot of the 'New Hire Report' form. It features a title 'New Hire Report' with an information icon. Below the title, there is a label 'Employees Hired After' followed by a date input field containing '08/07/2016' and a calendar icon. To the right of the date field is a green 'Generate' button. Arrows point to the date field and the 'Generate' button.

4. The report will appear on the next screen. You can “Print” or download as an “Excel” or “PDF”.

New Hire Report 

Employees Hired After

05/07/2016



Generate

Back to Reports Menu

Print

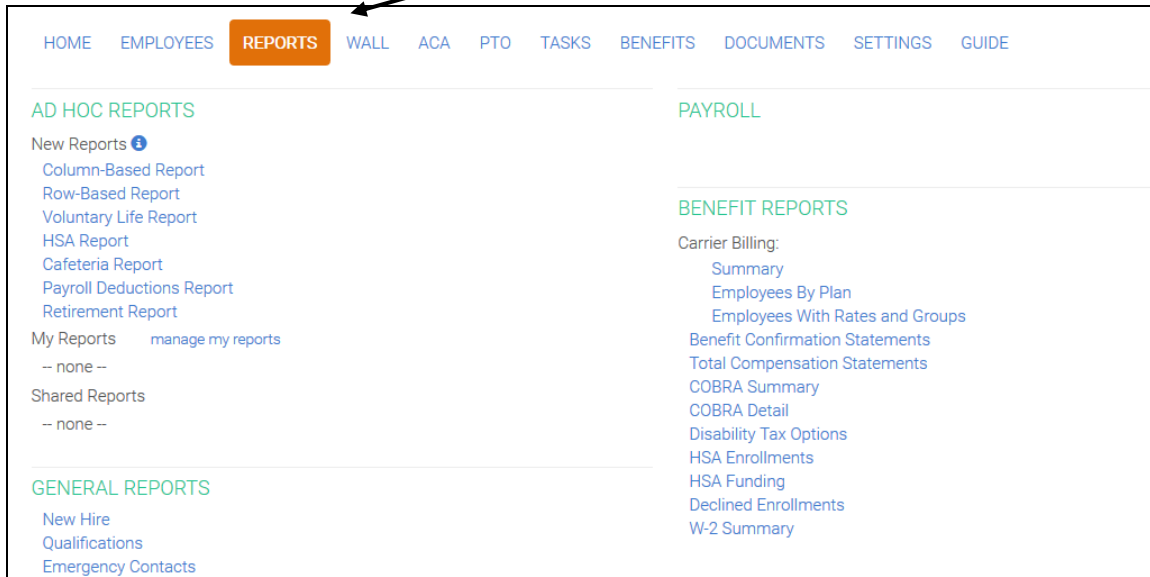
Excel

PDF

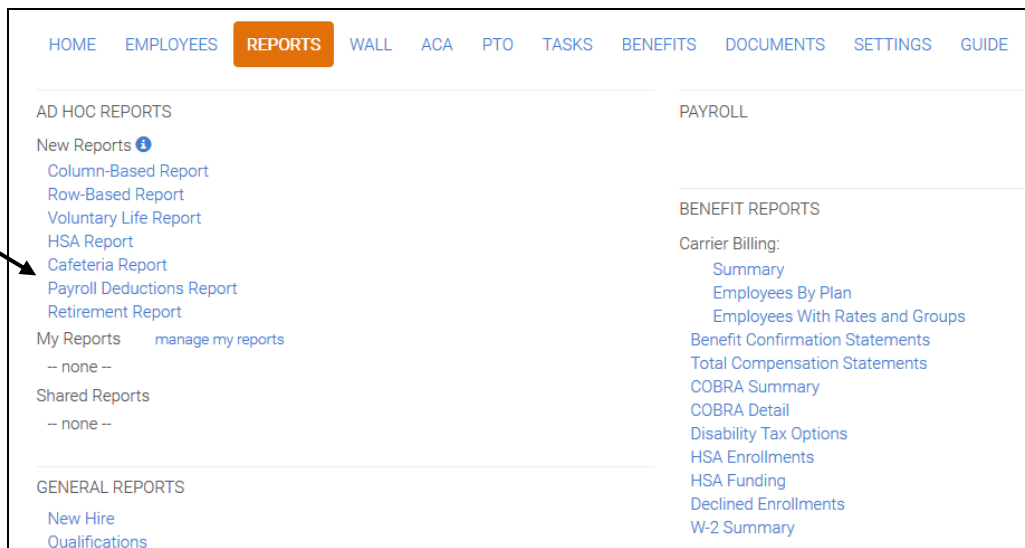
SSN	First Name	Last Name	Gender	Date Of Birth	Hire Date	Department	Division	Class	Location
-----	------------	-----------	--------	---------------	-----------	------------	----------	-------	----------

How to Run a Payroll Deduction Report:

1. From your “Home” page, select “Reports”



2. Select “Payroll Deductions Report” under “New Reports”.



3. Select which fields you would like to see on the report, enter an “Effective Date”, and select “Sum dependent costs”.

Payroll Deductions Report ⓘ

1 Fields **a Fields** view & sort
select the fields to report

2 View

3 Save

Employee | Enrollments

- ☐ SSN
- ☐ Employee Number
- ☐ External Employee Id
- ☐ Payroll ID
- ☐ Payroll Work State
- ☐ Payroll Group
- ☒ Full Name
- ☐ Display Name
- ☐ Last Name
- ☐ First Name
- ☐ Username
- ☐ Sequence Number
- ☐ Job Title
- ☐ Gender
- ☐ DOB
- ☐ Pay Basis
- ☐ Annual Base Salary
- ☐ Salary Effective Date
- ☐ Hourly Rate

b Options
review options and filters

Effective date:
10/01/2016

Costs:
☒ Sum dependent costs

4. Select the “Enrollments” link and select which fields you would like to see on the report.

Payroll Deductions Report ⓘ

1 Fields **a Fields** view & sort
select the fields to report

2 View

3 Save

Employee | Enrollments

- ☒ select all
- ☒ Benefit ▾
- ☒ Plan
- ☒ Enrollment Type
- ☒ Relationship
- ☒ EE Cost
- ☒ ER Cost
- ☒ Employee Payroll Code
- ☒ Coverage Level ▾
- ☒ Coverage Start Date
- ☒ Post Tax
- ☒ Last Updated By

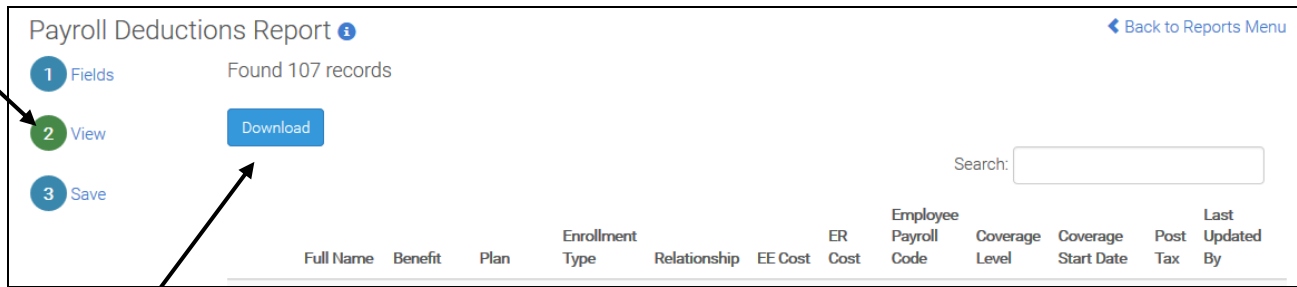
b Options
review options and filters

Effective date:
10/01/2016

Costs:
☒ Sum dependent costs

Column Filters:
Benefit show
Coverage Level show

5. Select “View” on the left side to generate your report. Press “Download” and the report will generate as an excel file.



Payroll Deductions Report ⓘ

Found 107 records

1 Fields

2 View

3 Save

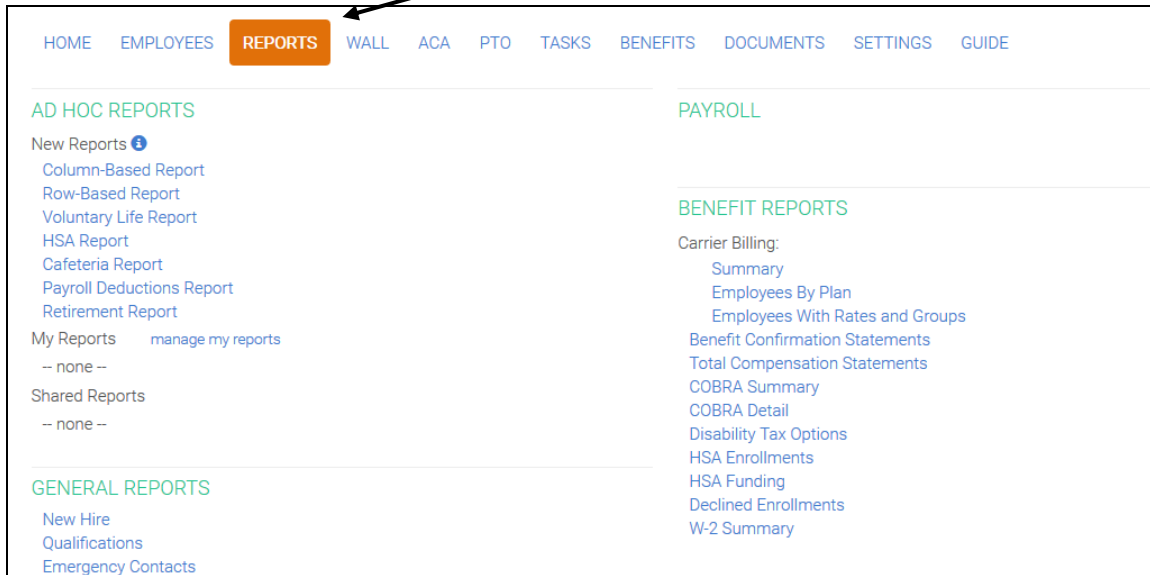
Download

Search:

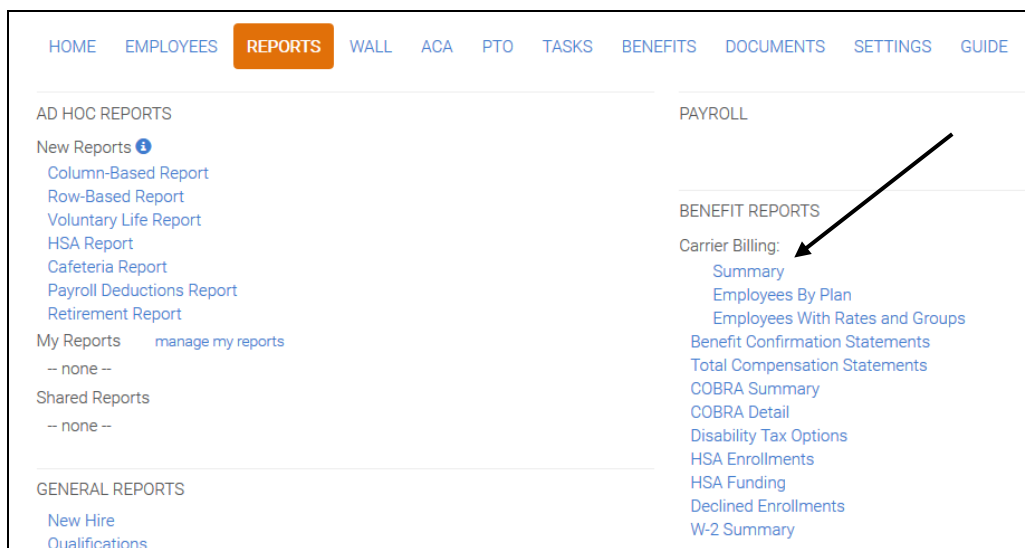
Full Name	Benefit	Plan	Enrollment Type	Relationship	EE Cost	ER Cost	Employee Payroll Code	Coverage Level	Coverage Start Date	Post Tax	Last Updated By
-----------	---------	------	-----------------	--------------	---------	---------	-----------------------	----------------	---------------------	----------	-----------------

How to Run a Premium Report by Carrier for a Bill Audit:

1. From your “Home” page, select “Reports”.



2. Select “Summary” under “Benefit Reports – Carrier Billing”.



3. Select the “Carrier”, enter a date, set your classification parameters (we suggest at least selecting “Class”) and press “Generate”.

A screenshot of the 'Carrier Billing Summary' form. The title 'Carrier Billing Summary' is at the top with an information icon. Below the title, there is a 'Carrier' dropdown menu currently set to '-- All --', a date input field showing '09/07/2016' with a calendar icon, and a green 'Generate' button. Below these fields, there are checkboxes for classification parameters: 'Class' (checked), 'Department', 'Business Unit', 'Division', and 'Office'. Arrows point to the 'Carrier' dropdown, the date field, the 'Generate' button, and the 'Class' checkbox.

4. The report will appear on the next screen. You can “Print” or download as an “Excel” or “PDF”.

Carrier Billing Summary ⓘ

[Back to Reports Menu](#)

Carrier

Mei

09/07/2016

Generate

☒ Class

☐ Department

☐ Business Unit

☐ Division

☐ Office

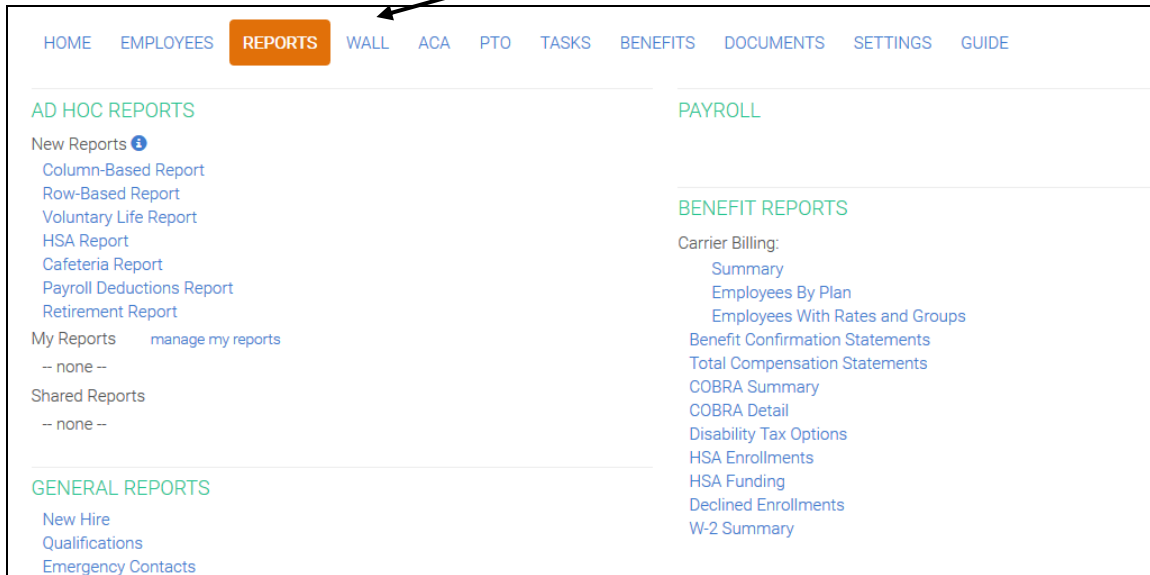
Print

Excel

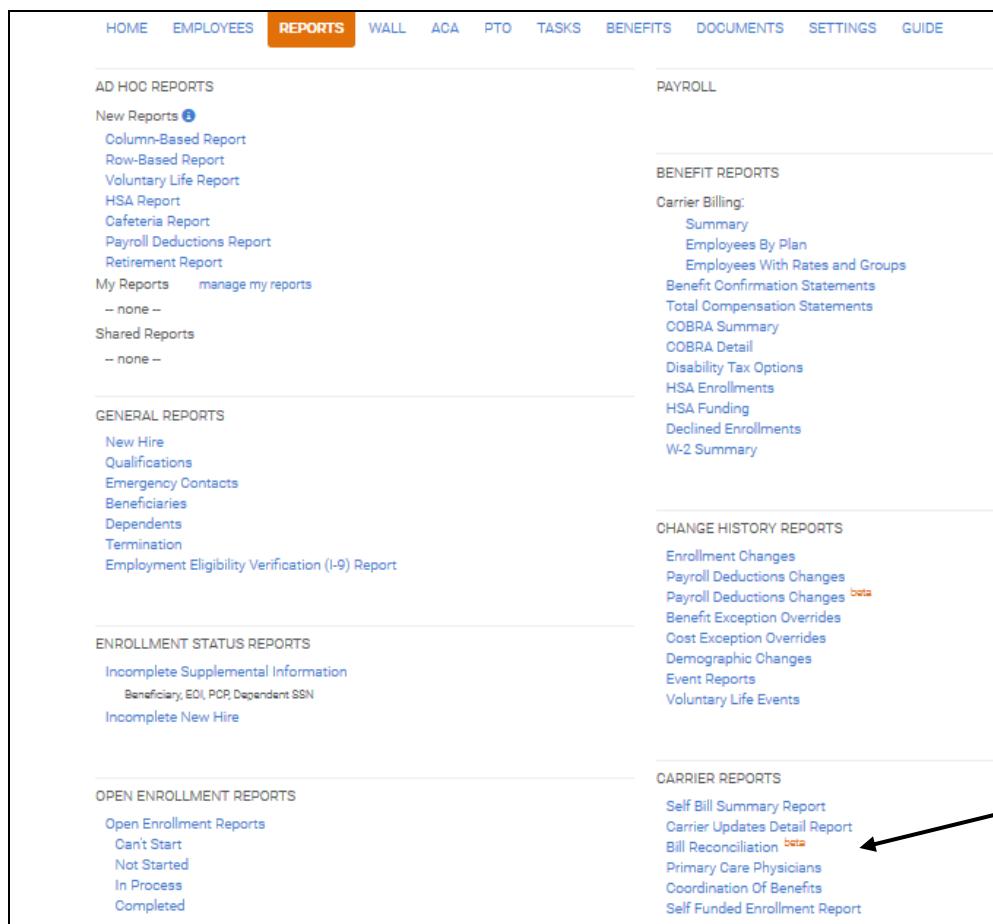
PDF

How to Run a Bill Reconciliation Report:

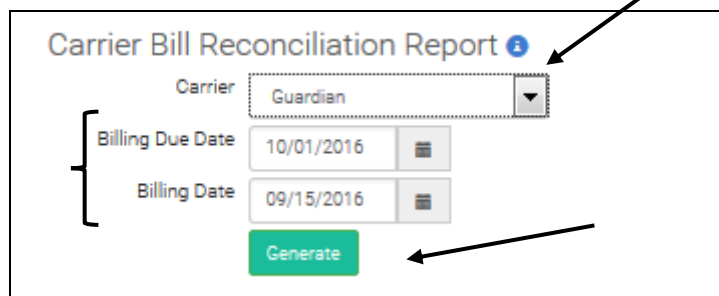
1. From your “Home” page, select “Reports”.



2. Select “Bill Reconciliation” under “Carrier Reports”.



3. Select the "Carrier", enter the "Billing Due Date", enter the date the bill was generated- "Billing Date", and press "Generate".



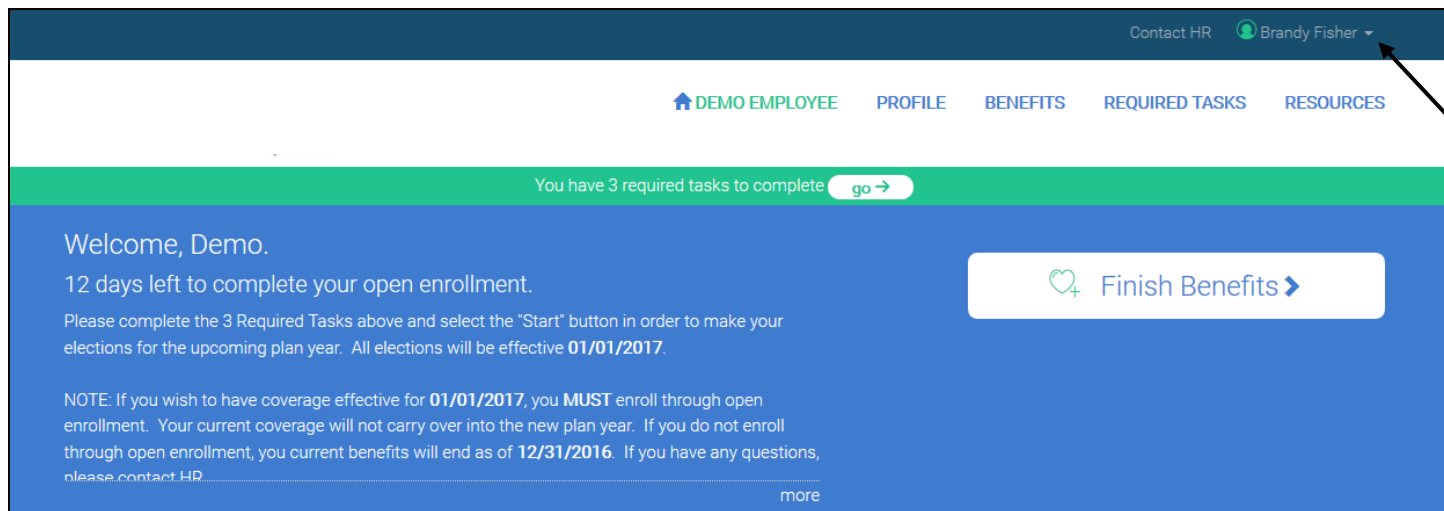
The image shows a web form titled "Carrier Bill Reconciliation Report" with an information icon. The form contains the following fields and controls:

- Carrier:** A dropdown menu with "Guardian" selected. An arrow points to this field from the top right.
- Billing Due Date:** A date input field containing "10/01/2016" with a calendar icon to its right.
- Billing Date:** A date input field containing "09/15/2016" with a calendar icon to its right.
- Generate:** A green button located below the date fields. An arrow points to this button from the bottom right.

A bracket on the left side of the form groups the "Billing Due Date" and "Billing Date" fields.

How to change the portal to Spanish

1. Once you are registered and logged in, select the arrow next to your name in the upper left hand corner.



2. From the drop down menu, select "Español". The portal will then convert to Spanish.

