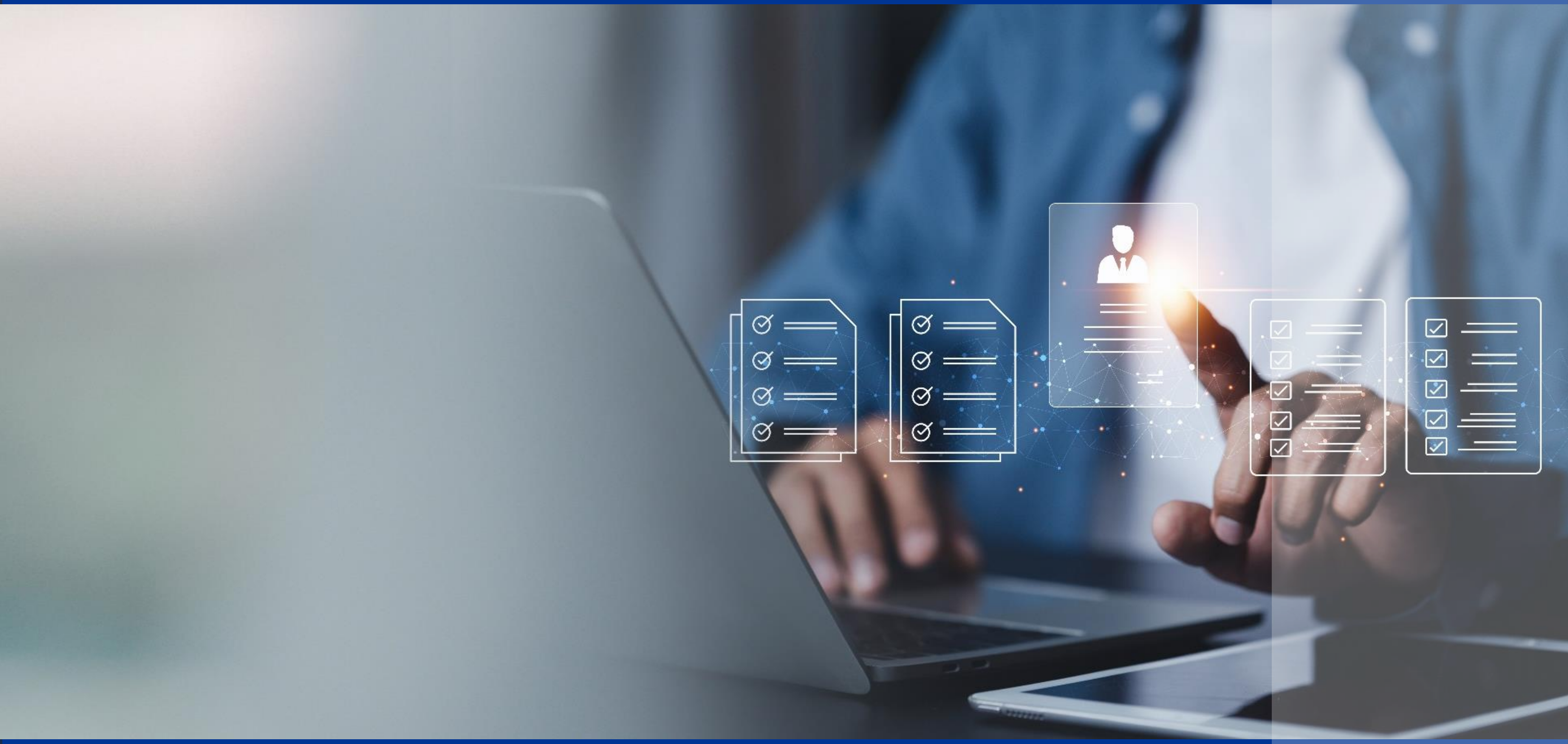
EMPLOYEE BENEFIT SOLUTIONS

iNavigator HR User Manual



MARSHALL + STERLING

Click here to watch a recorded HR User Training!
Passcode: pRJ@7kN&

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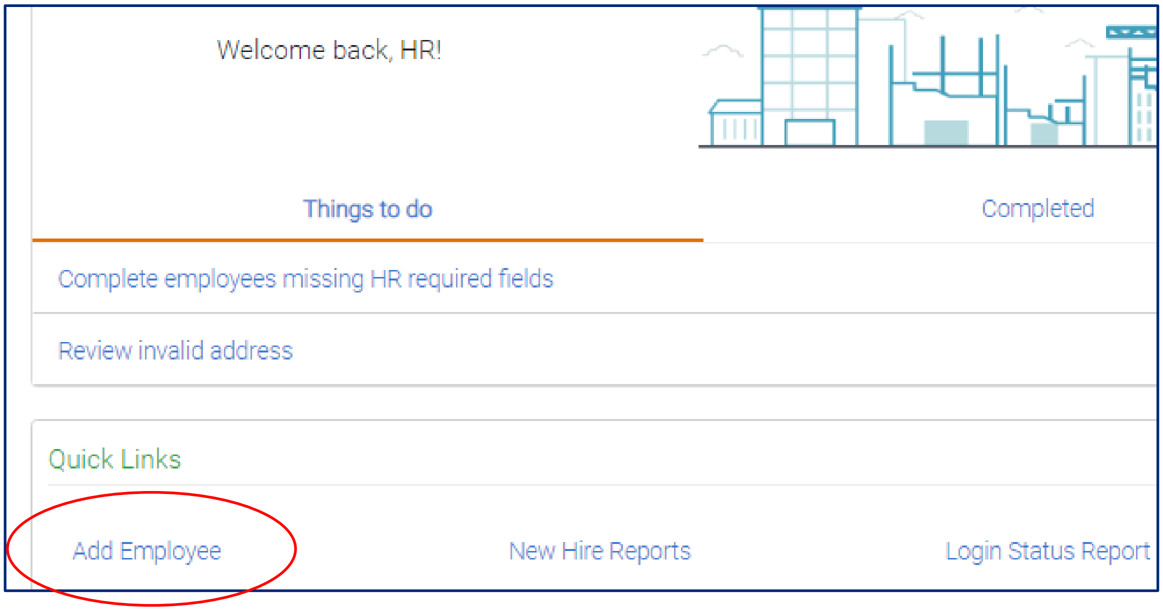
iNavigator

How to Add a New Employee

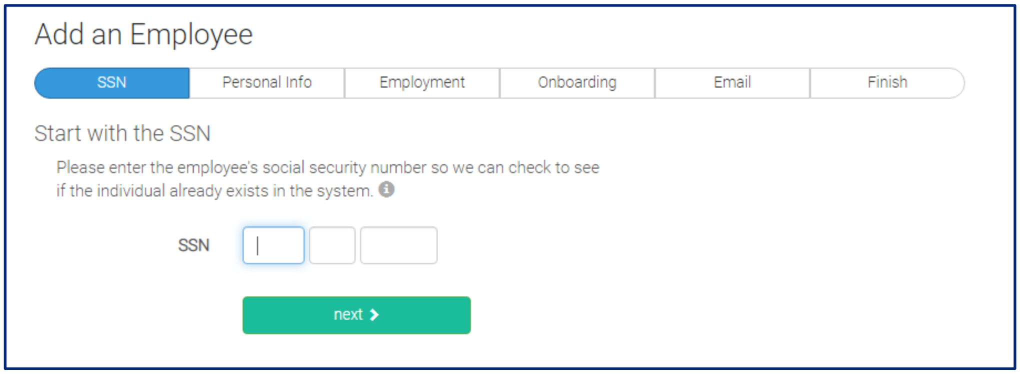
Step 1:

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



Step 2:

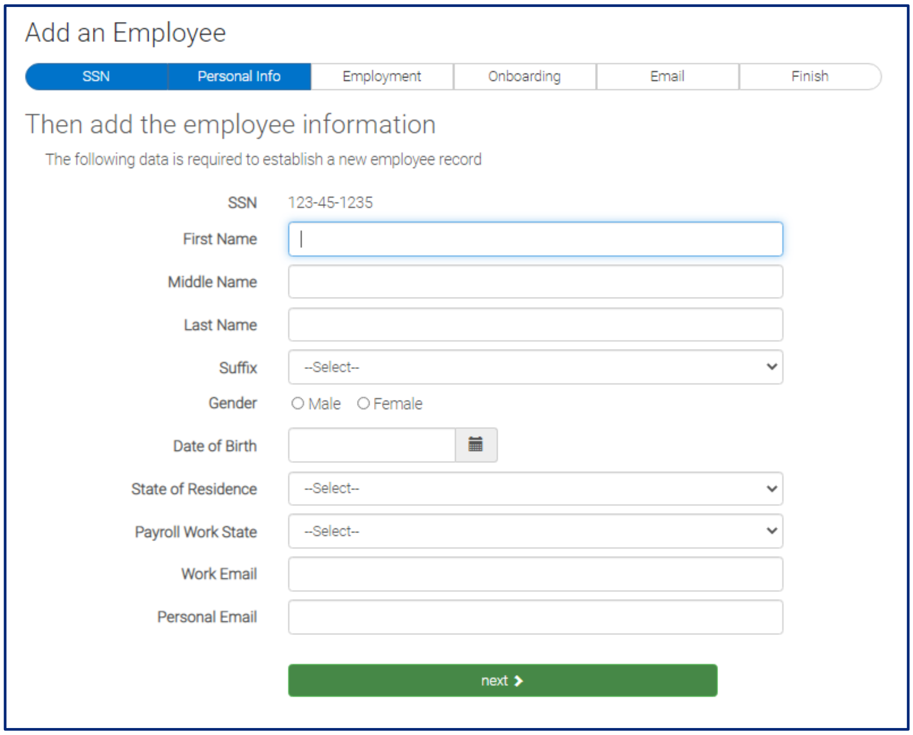
Enter the employee's SSN and click **Next**.

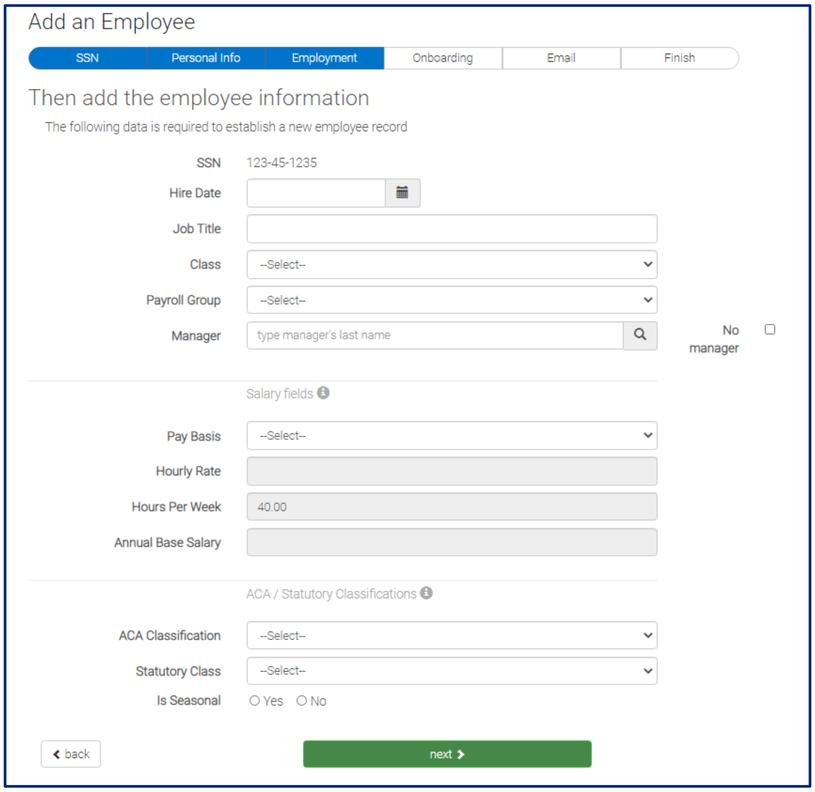


How to Add a New Employee (con't)

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.

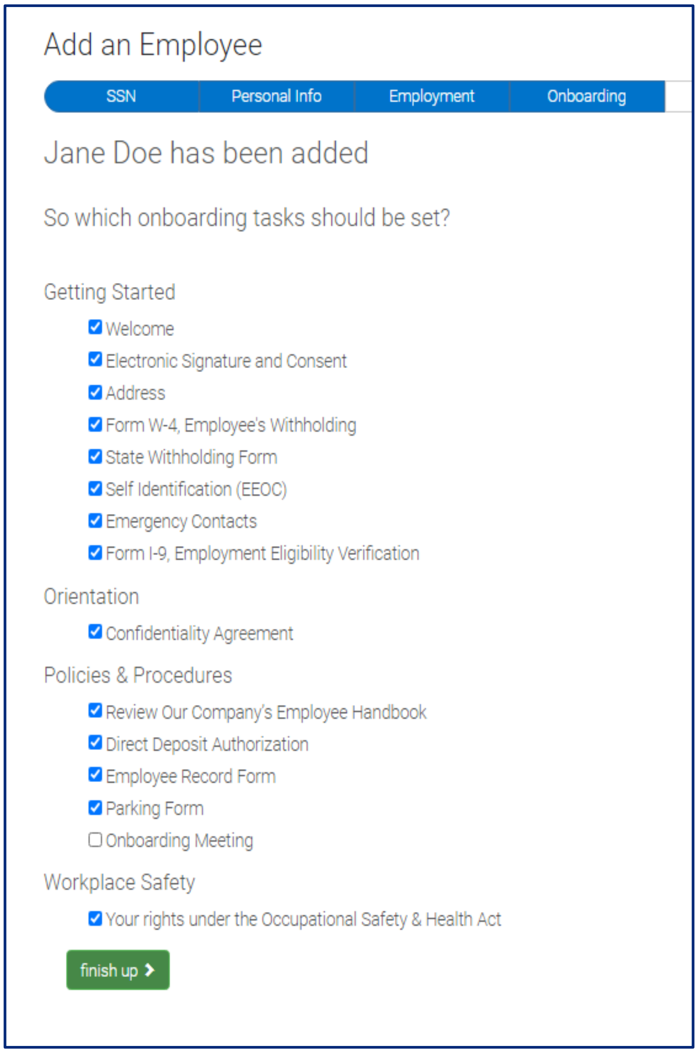




Step 4:
Enter the employee's employment information and click **Next**.

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)



Step 5:

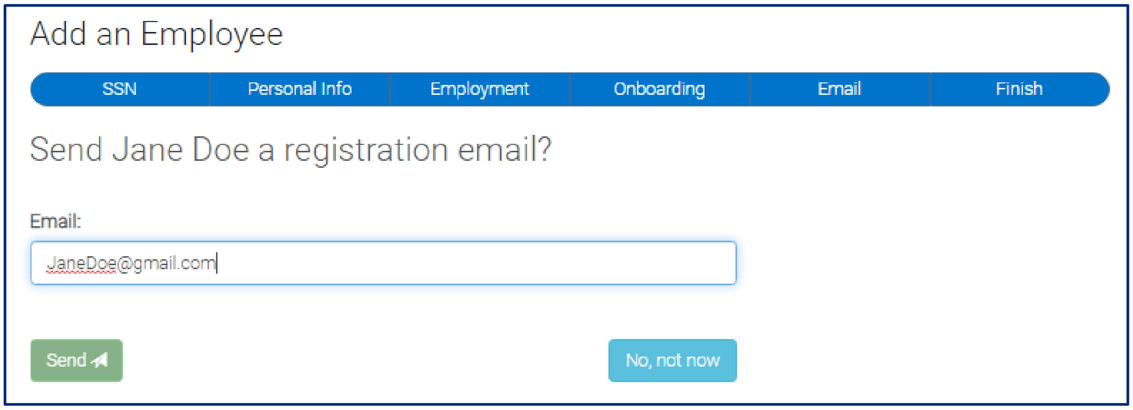
Select (or deselect) the appropriate onboarding tasks that should be assigned to your employee. Click **Finish Up**.

TIP

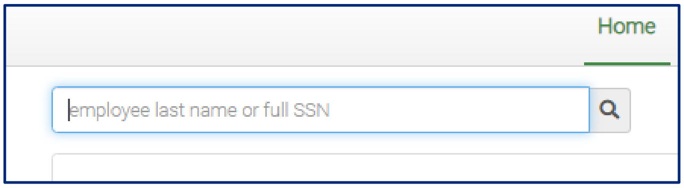
Electronic Signature and Consent should be assigned to every employee.

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*).

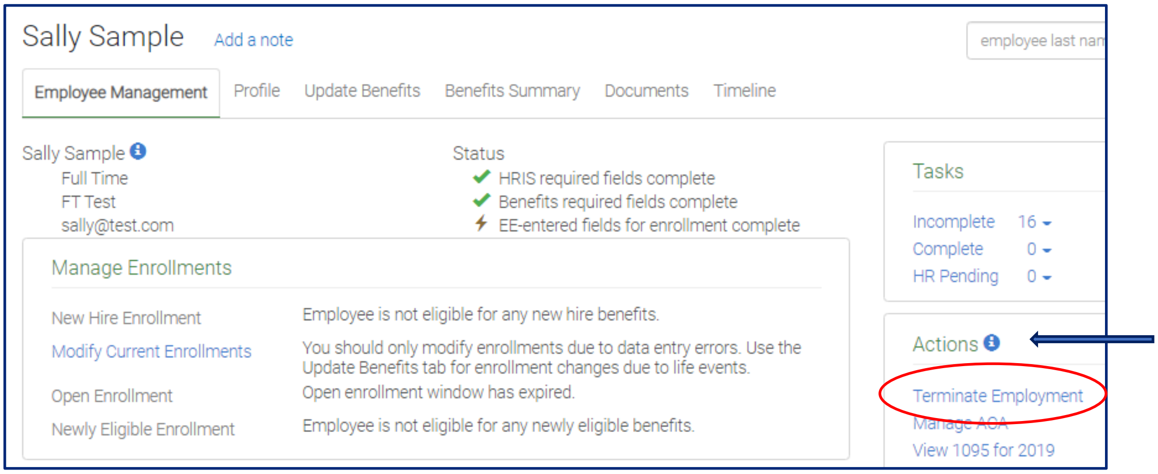


How to Terminate an Employee



Step 1:

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

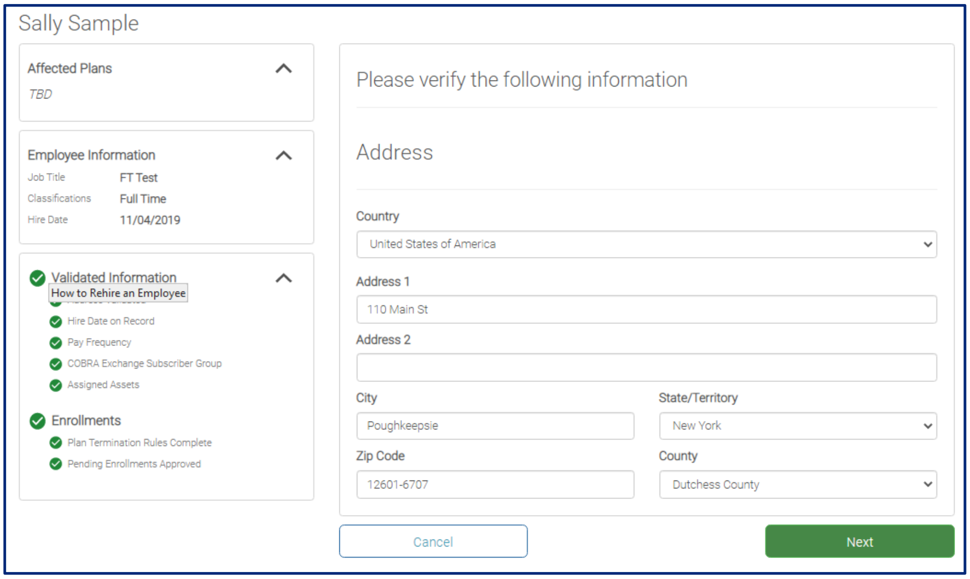


Step 2:

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

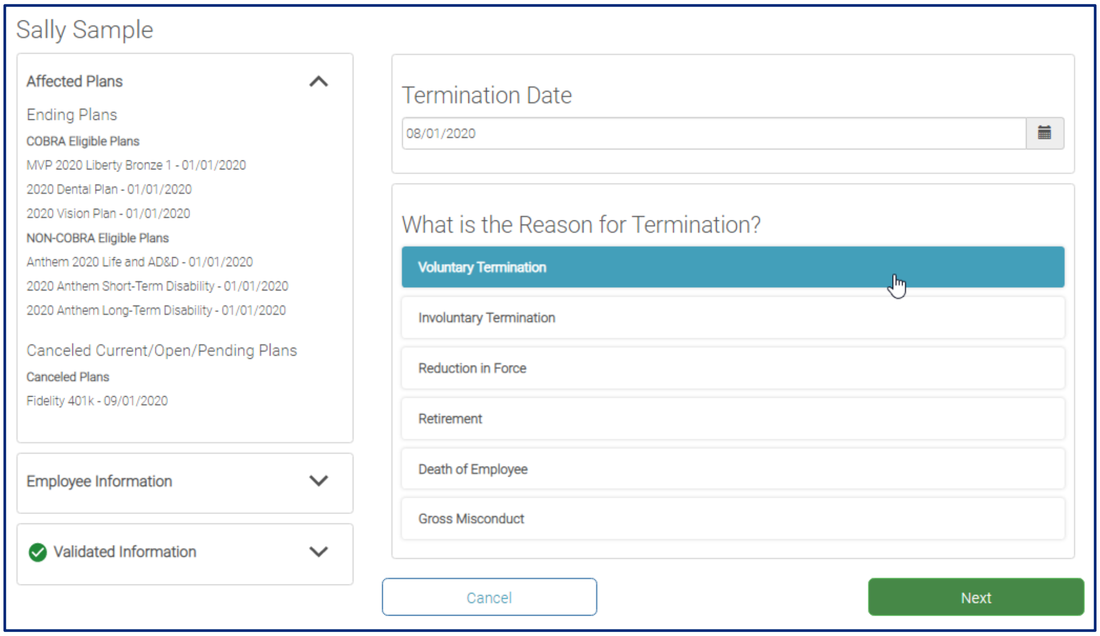
Step 3:

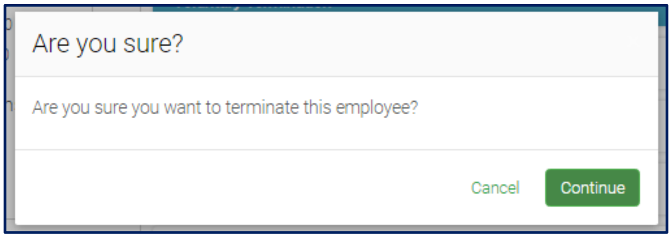
You will have the opportunity here to review some basic information and update/verify the employee address. When done, click **Next**.



How to Terminate an Employee (con’t)

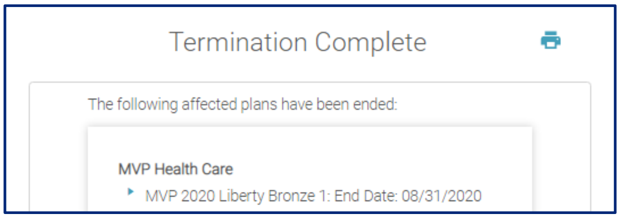
Step 4:
Enter the termination date – you will see the list of affected enrollments generate on the left-hand side after doing so. Select the termination reason and then click **Next**.





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 Mange** to return to the employee’s profile.



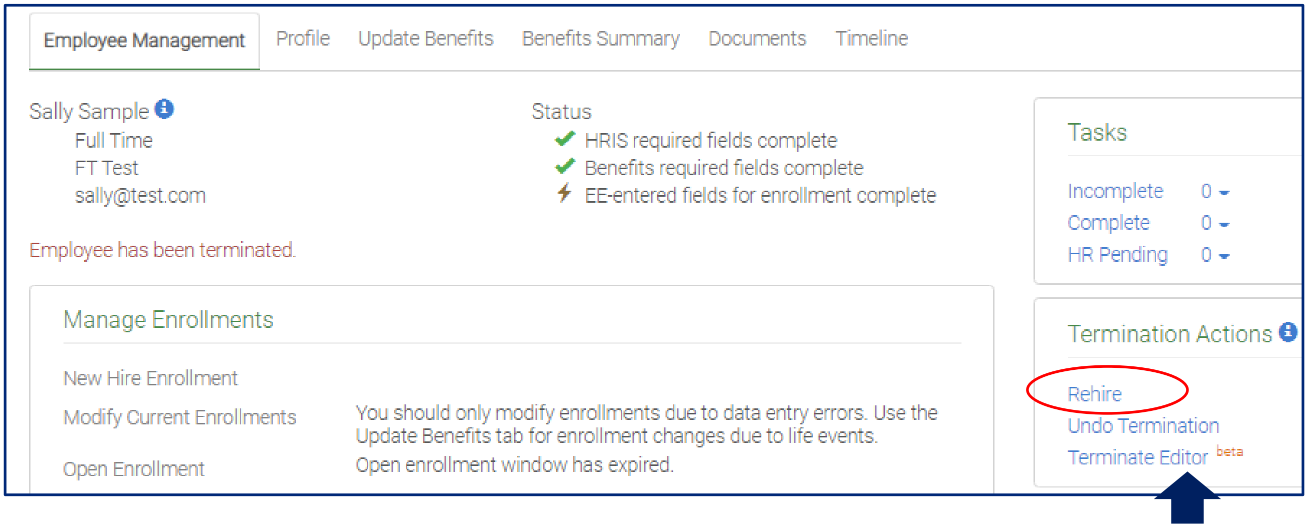
TIP

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.



Step 1:

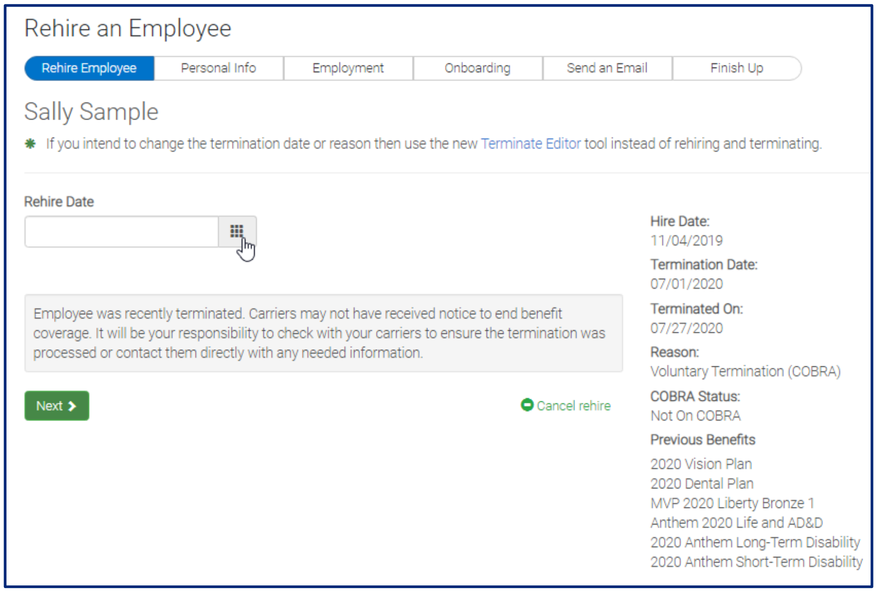
Pull up the employee's page. You will see Employee has been terminated under their name. On the right side, under **Termination Actions**, select **Rehire**.

TIP

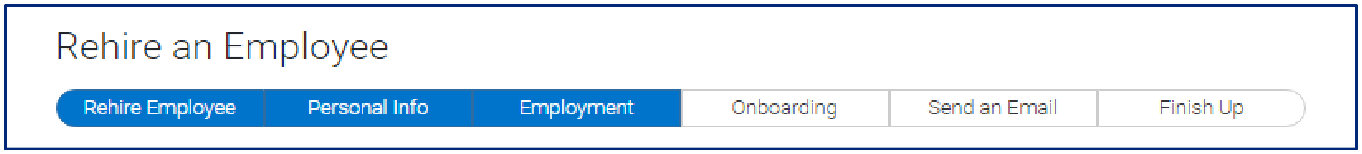
You can use the Terminate Editor if an incorrect termination date was entered for an employee. Just click here, update the termination date (and/or reason), and click Save.

Step 2:

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

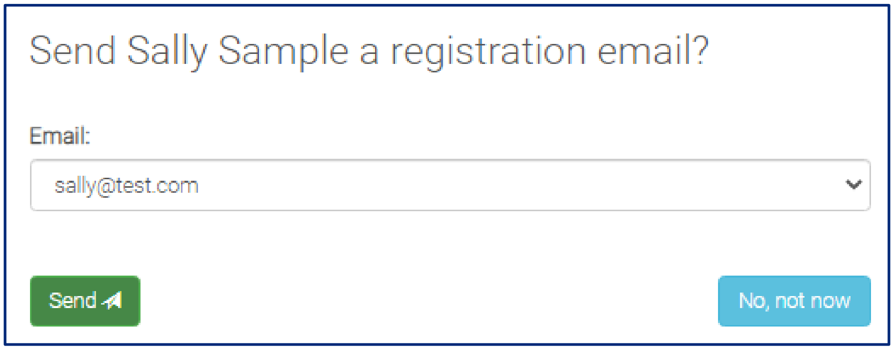


How to Rehire an Employee (con't)



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).

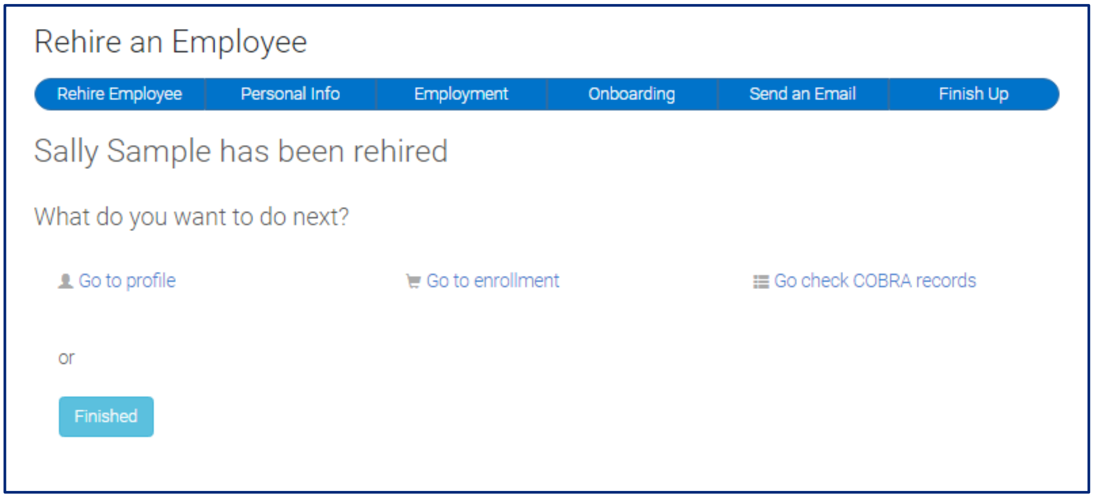


Step 4:

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

Step 5:

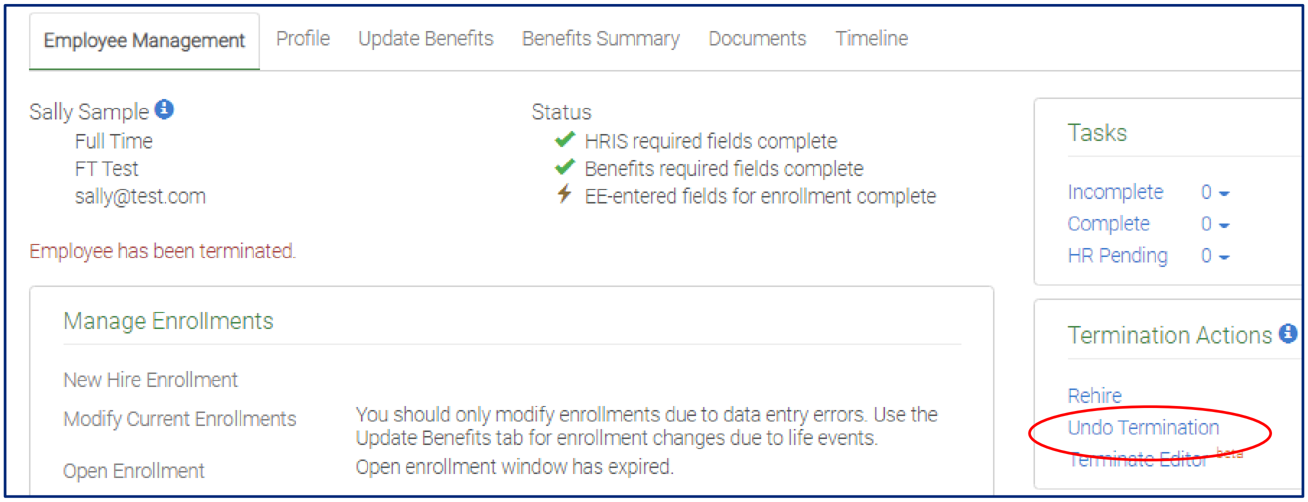
This completes the rehire process. You will see a screen where you have several options for the employee, such as going to their profile, or you can just click **Finished**.



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 I not what you want, please follow the steps for Rehiring an employee instead.

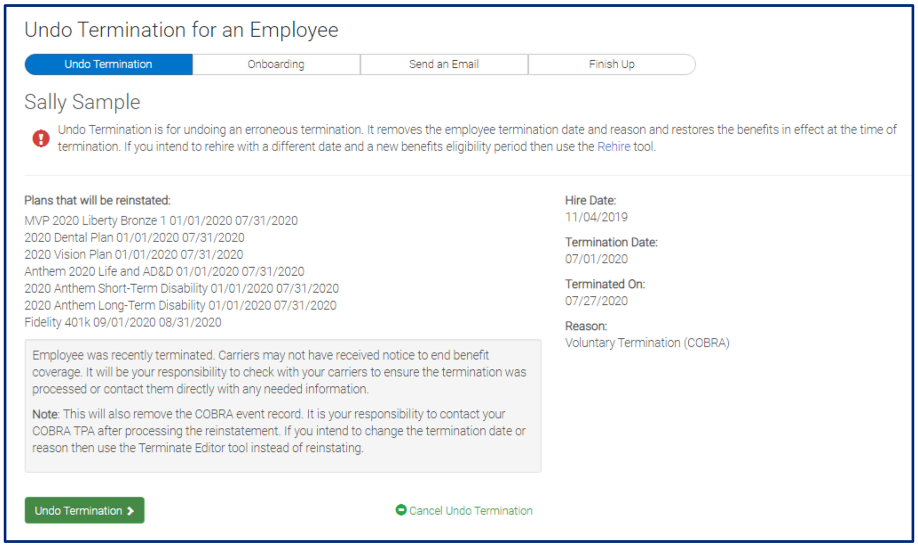


Step 1:

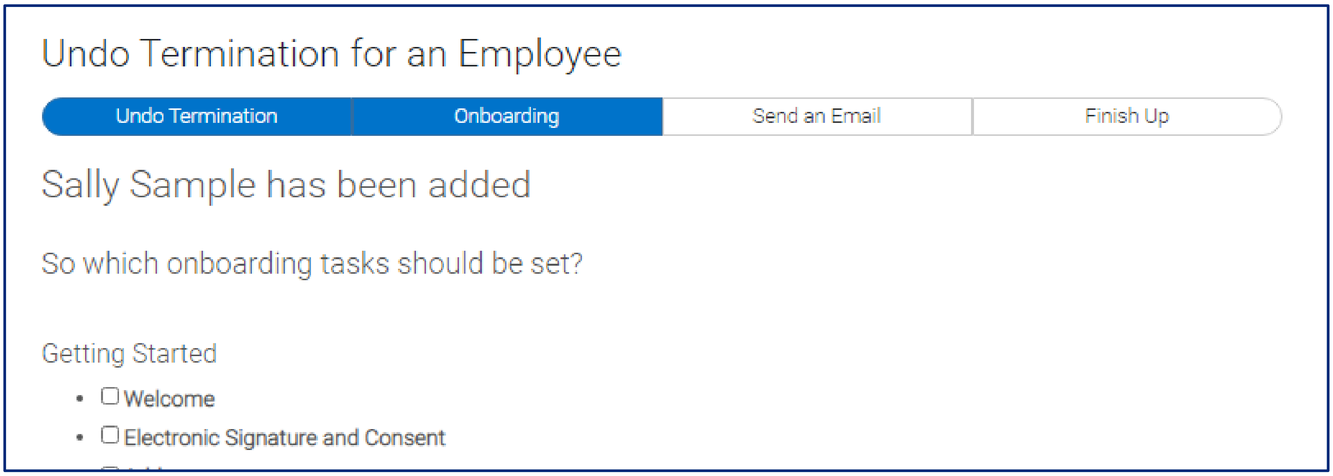
Pull up the employee's page. You will see Employee has been terminated under their name. On the right side, under **Termination Actions**, select **Undo Termination**.

Step 2:

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

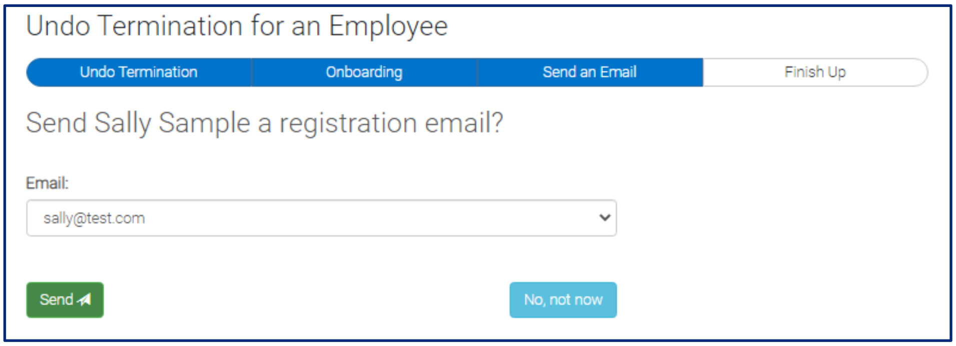


How to Undo an Employee Termination (con't)



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**.

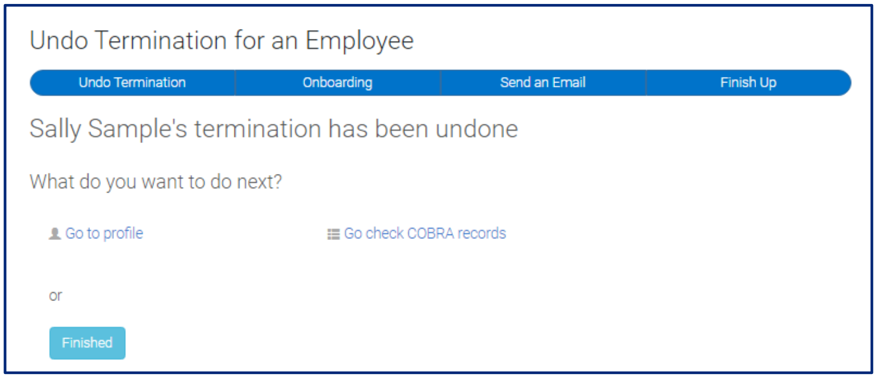


Step 4:

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

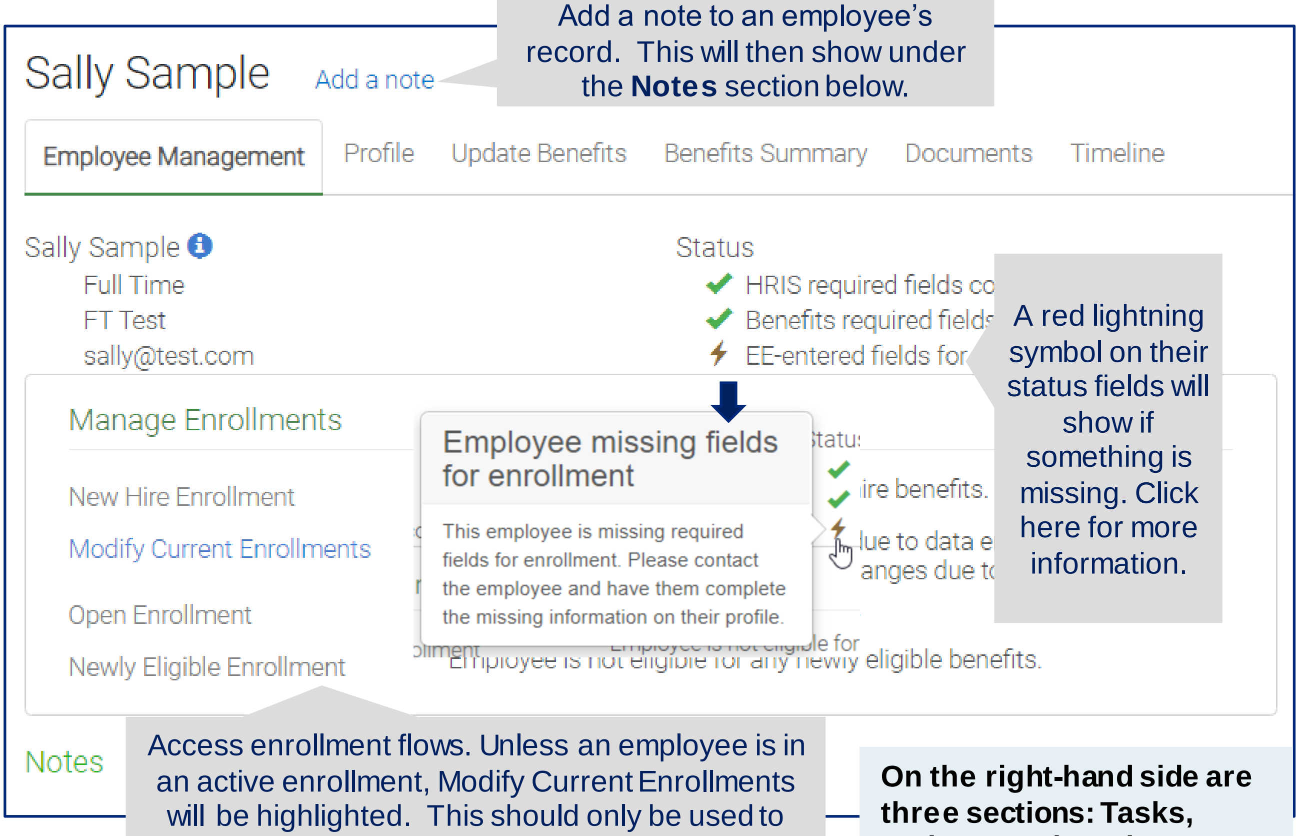
Step 5:

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**.



Managing Employee Records: Employee Management

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

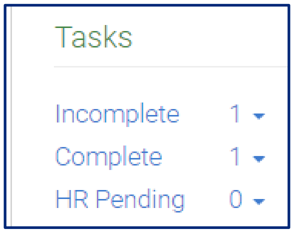


Add a note to an employee's record. This will then show under the **Notes** section below.

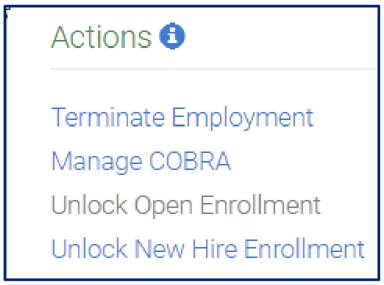
A red lightning symbol on their status fields will show if something is missing. Click here for more information.

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:



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



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

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.

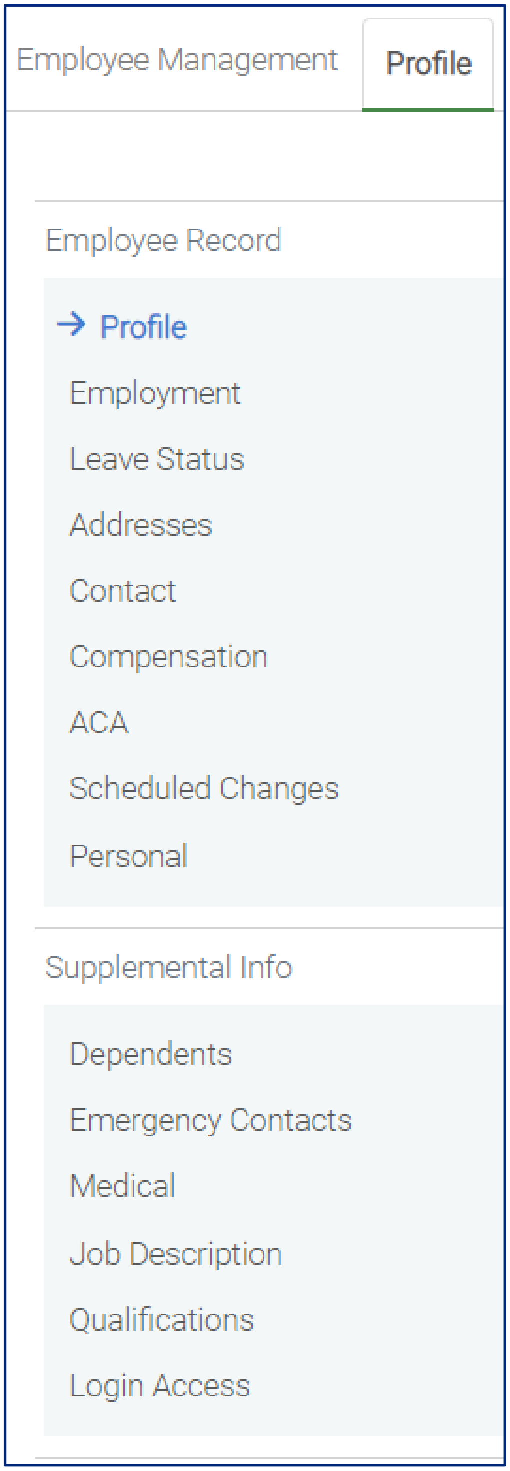
Leave Status can be used to track a leave or furlough – this affects reporting only, NOT enrollments.

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

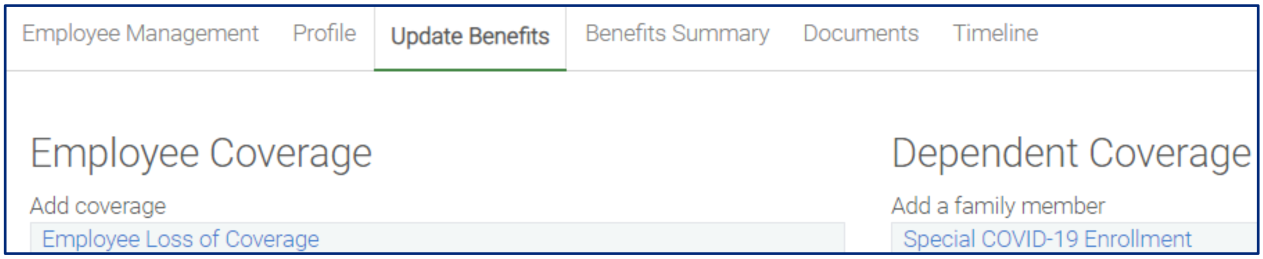
Personal houses an ee's demographic info such as DOB, Gender, EEOC, etc.

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

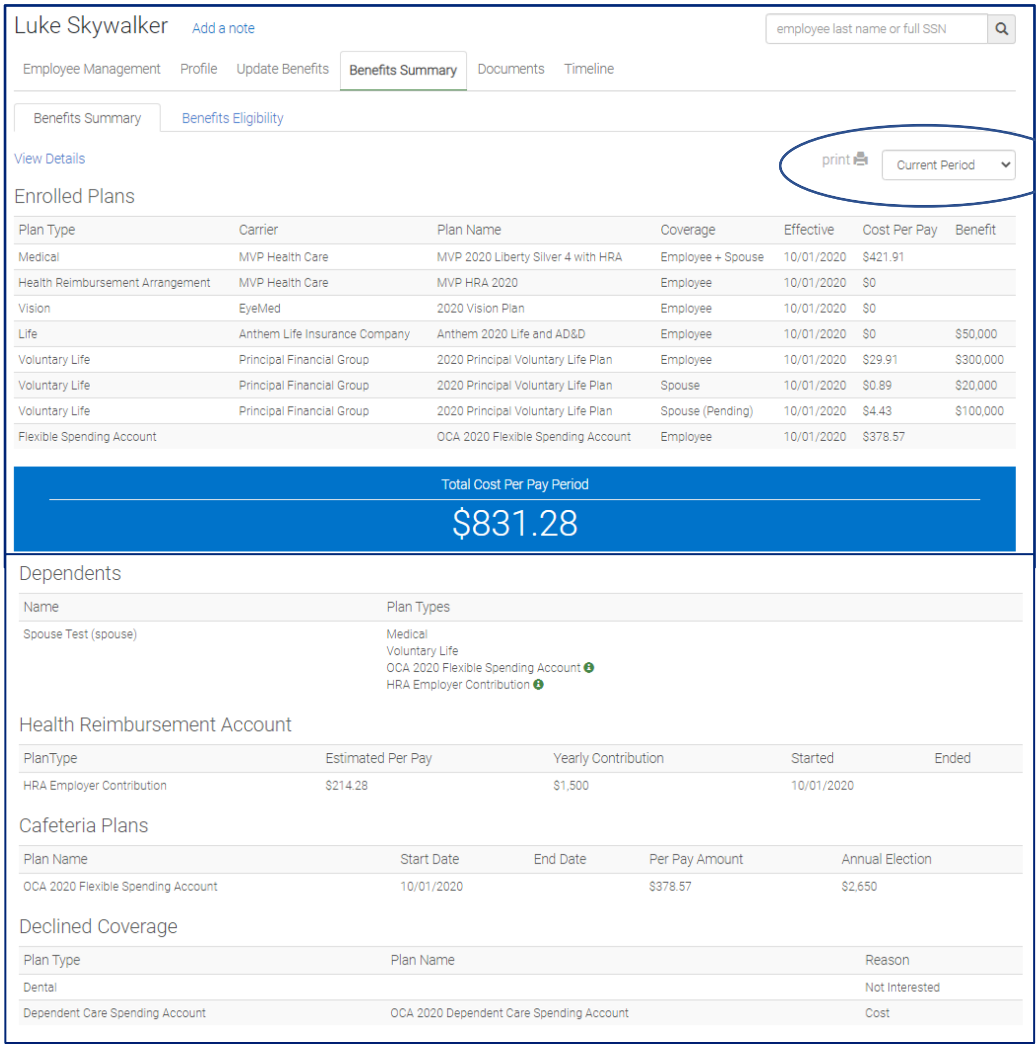
Personal houses an ee's demographic info such as DOB, Gender, EEOC, etc.

Managing Employee Records: Update Benefits/Benefit Summary

The Updates Benefits tab allows you to process Life Events for your employee. See page 35 for detailed instructions.



The Benefits Summary tab shows all of your employee enrollments:


Luke Skywalker Add a note

employee last name or full SSN

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

Benefits Summary | Benefits Eligibility

View Details

print | Current Period

Enrolled Plans

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

Dependents

Name	Plan Types
Spouse Test (spouse)	Medical Voluntary Life OCA 2020 Flexible Spending Account HRA Employer Contribution

Health Reimbursement Account

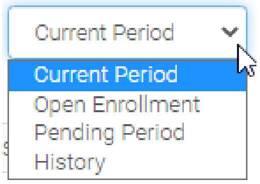
PlanType	Estimated Per Pay	Yearly Contribution	Started	Ended
HRA Employer Contribution	$214.28	$1,500	10/01/2020	

Cafeteria Plans

Plan Name	Start Date	End Date	Per Pay Amount	Annual Election
OCA 2020 Flexible Spending Account	10/01/2020		$378.57	$2,650

Declined Coverage

Plan Type	Plan Name	Reason
Dental		Not Interested
Dependent Care Spending Account	OCA 2020 Dependent Care Spending Account	Cost



TIP

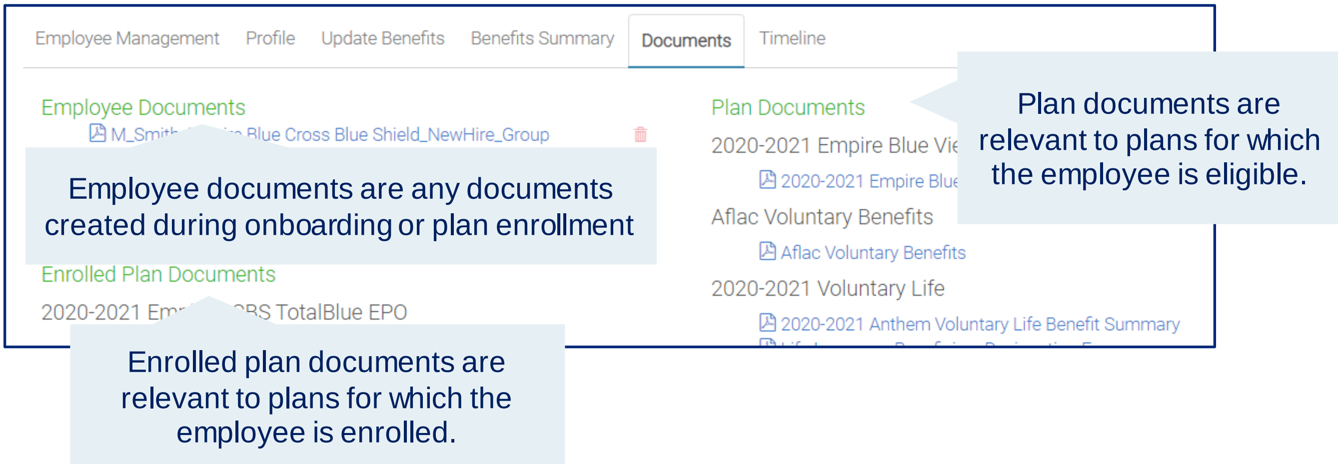
You can print the summary by clicking on the printer icon.

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

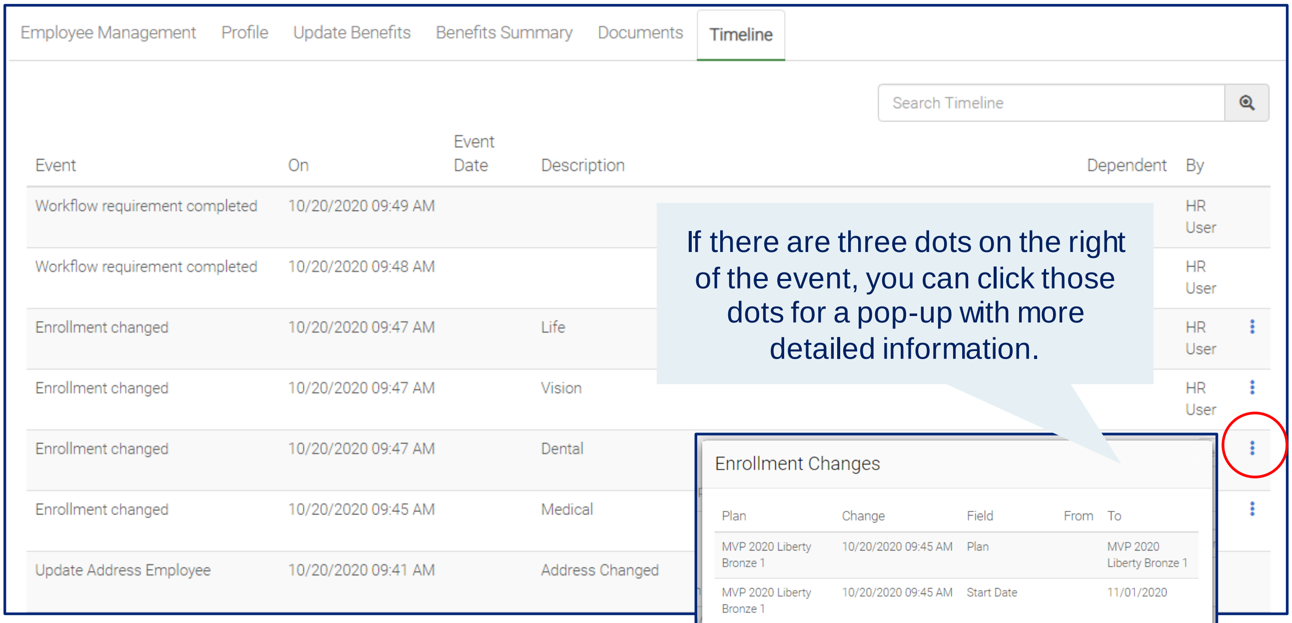
You can view which plan(s) the employee is enrolled in, their costs for each and total cost per pay, dependents and which plans they are on, any flex accounts, as well as declined coverages.

Managing Employee Records: Documents/Timeline

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



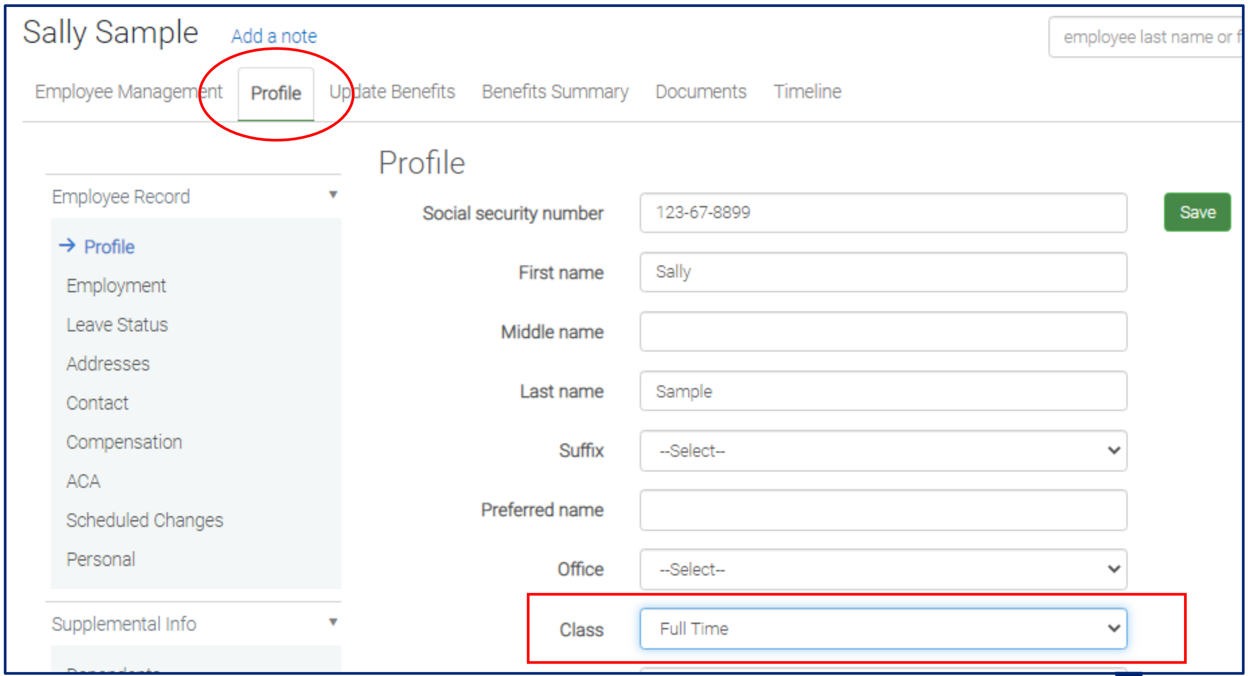
The employee Timeline is a list of every action made in an employee's record since their original hire date:



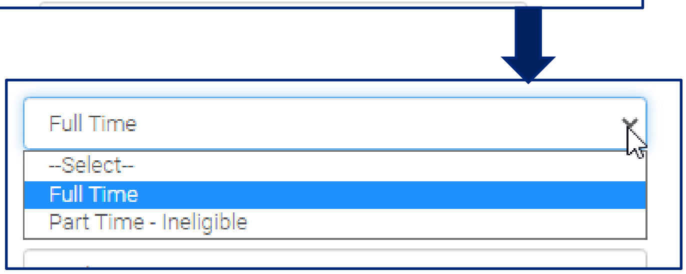
From left to right, you can see the Event, when the change was made in the system, the effective "Event" date, if applicable, a description, as well as who completed the change, whether it be the employee, automatically generated by the system, or a Broker or HR User.

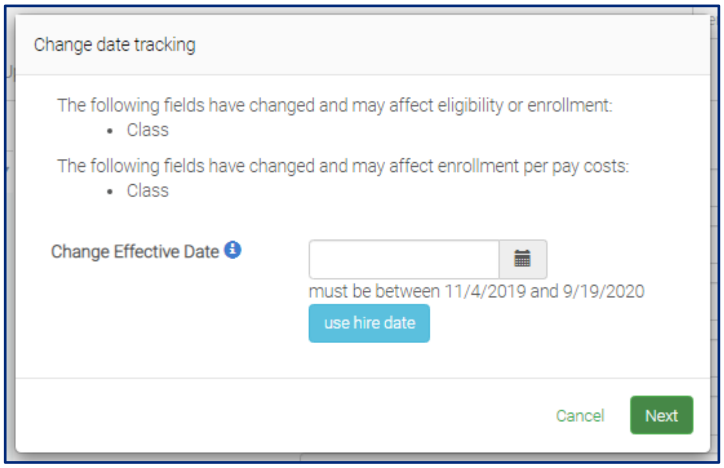
How to Change an Employee's Classification

Step 1:
From the employee's home page, click the **Profile** tab.



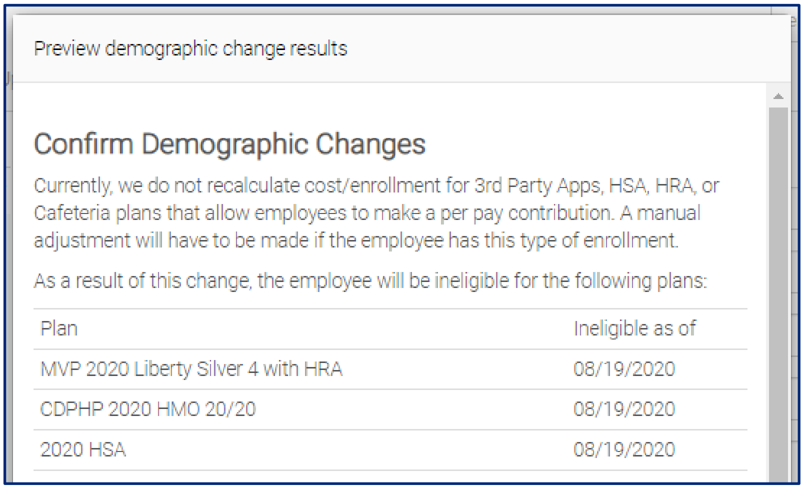
Step 2:
Click the drop-down menu next to **Class** and choose the new class from the list (remember, classes are tailored specific to your company). Click **Save**.





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**.

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



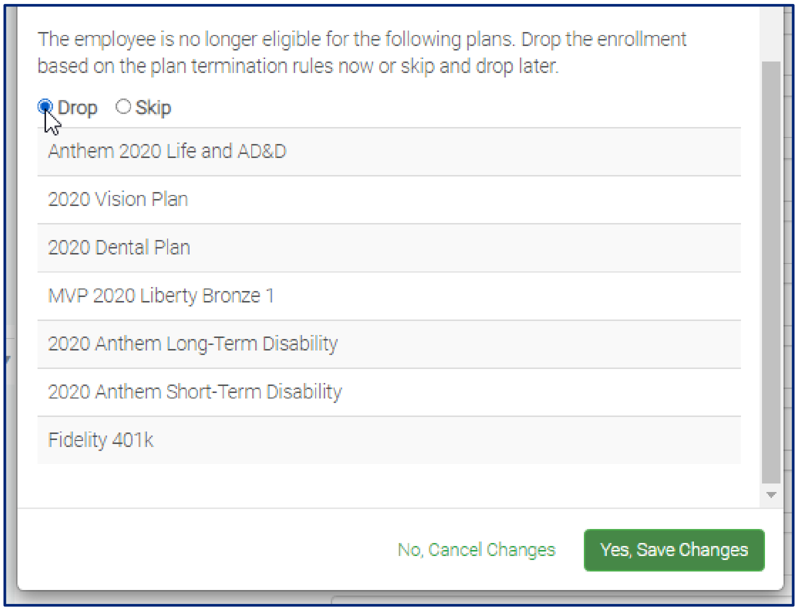
Preview demographic change results

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 Yes, Save 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.

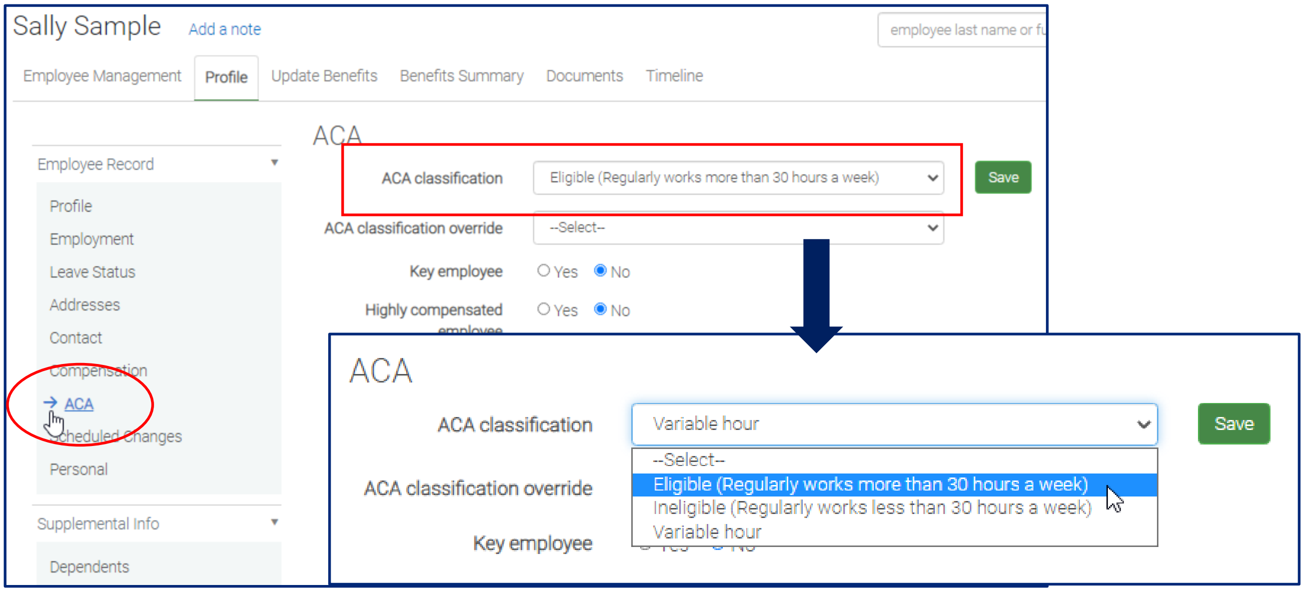
Step 5 (ACA only):

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

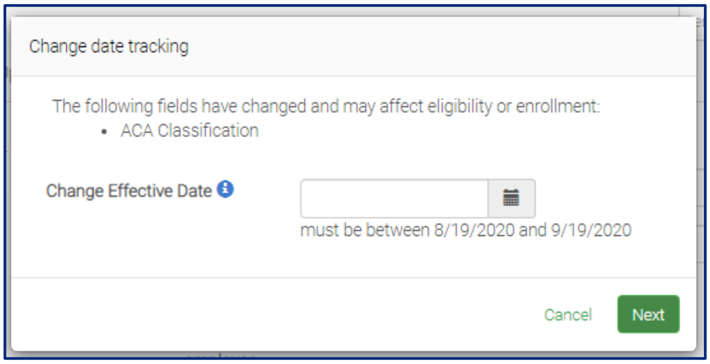
Step 1:

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



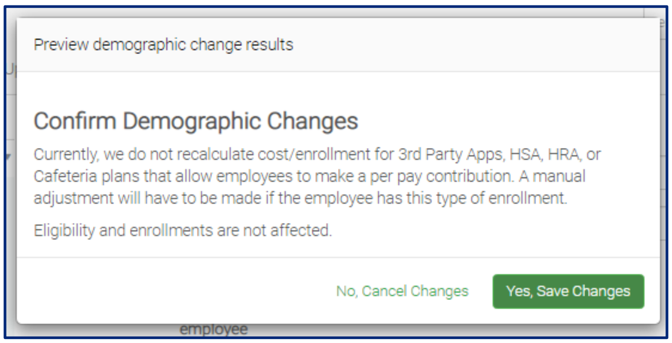
Step 2:

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



Step 3:

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



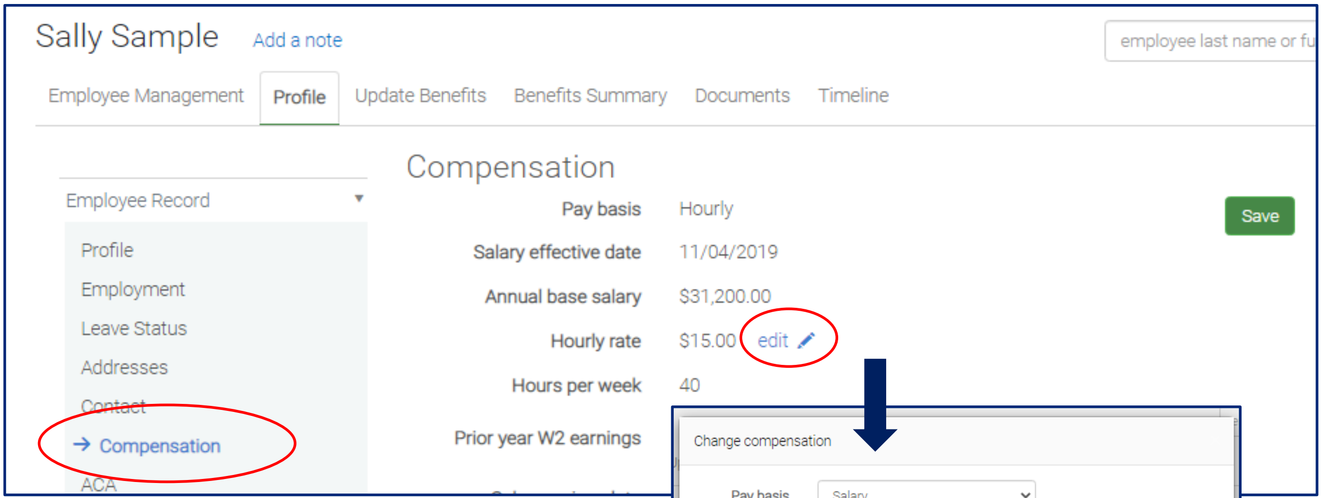
Step 4:

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

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**.

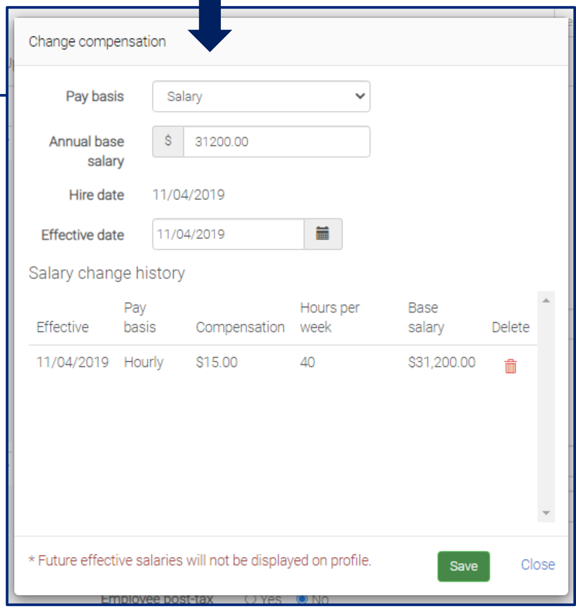


Step 2:

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**.



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.

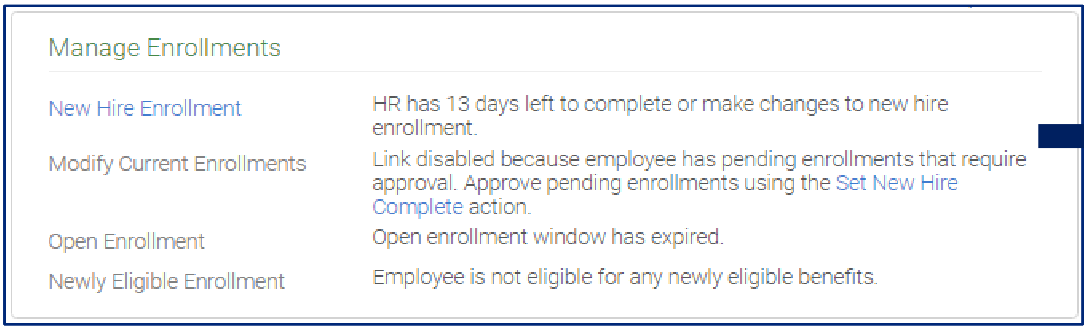
How to Make New Hire or OE Elections

TIP

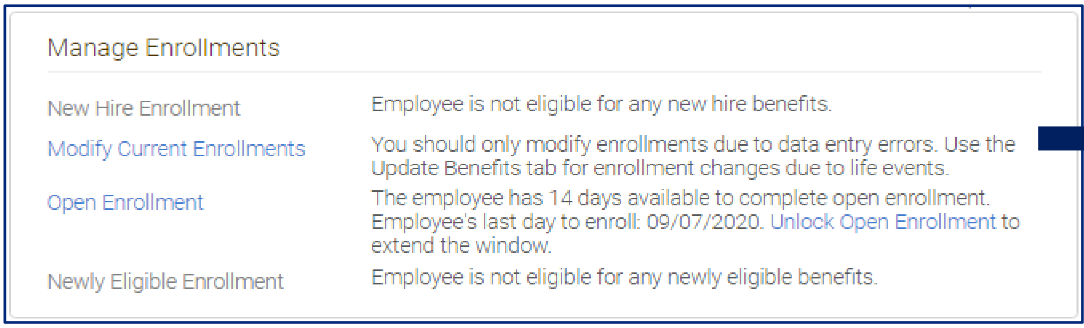
You can also view a short video on this topic at:
https://www.brainshark.com/1/player/marshallsterling?pi=zHrzVRgo3zVOxPz0&r3f1=&fb=0

Step 1:

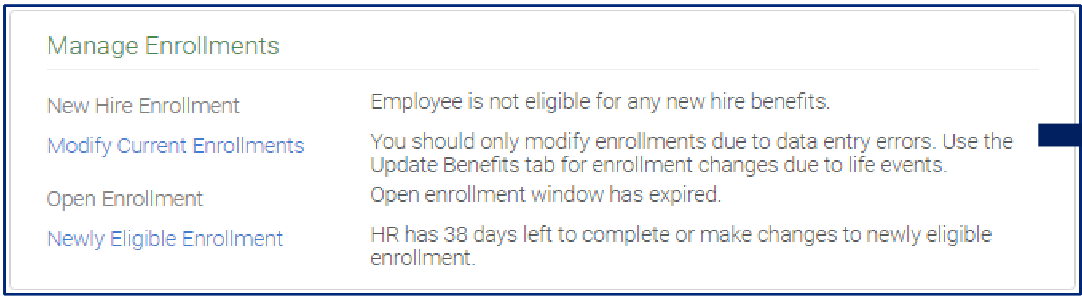
As an HR User, you can make elections for your employees from their **Employee Management** tab. Your employee will be in one of the three enrollment windows: New Hire, Open Enrollment, or Newly Eligible Enrollment. All of the enrollment flows work the same way after clicking the links.



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

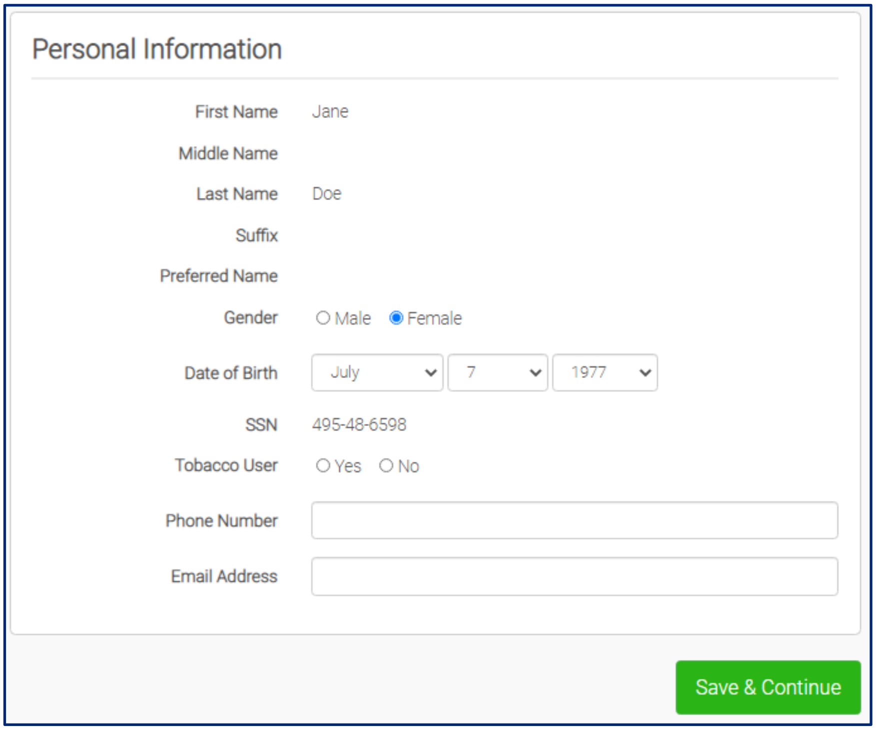


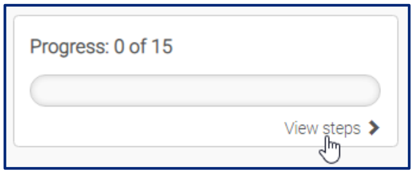
Open Enrollment is for all current and new employees when your company is in an open enrollment period.



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)





TIP

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

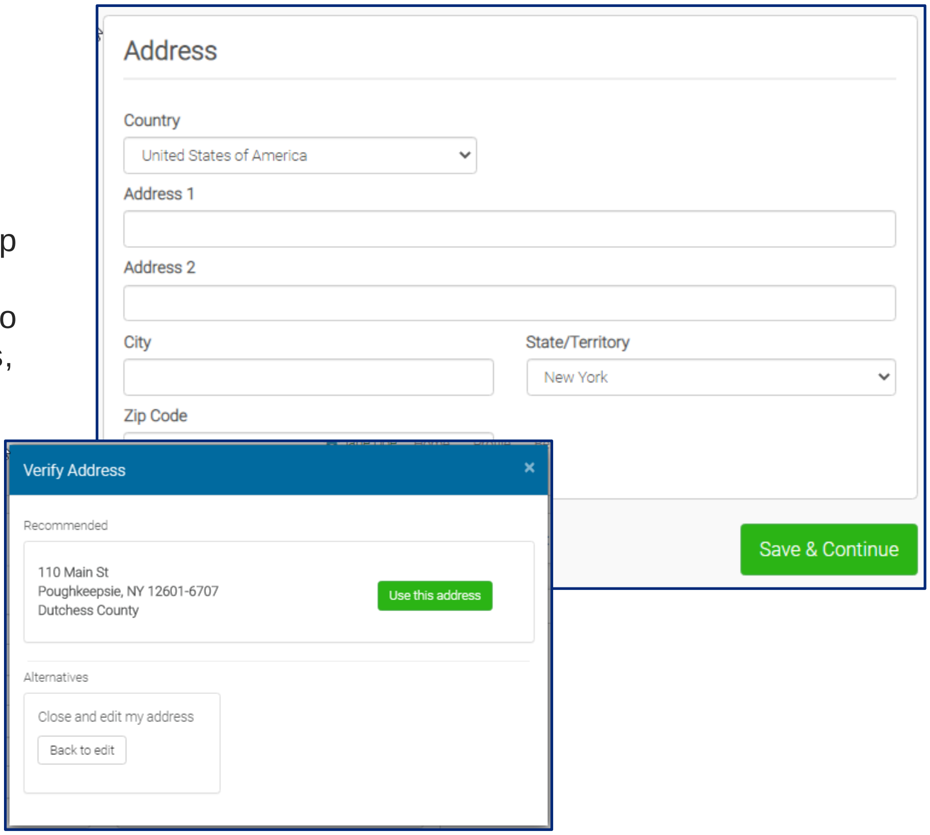
Step 2:

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

Step 3:

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

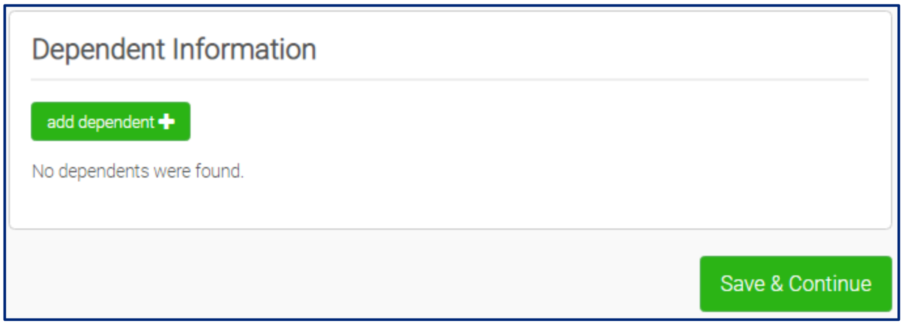
You will be presented with a pop-up box to verify the employee's address. Click **Use this address** to go with the recommended address, or you can go back and edit what was entered.



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

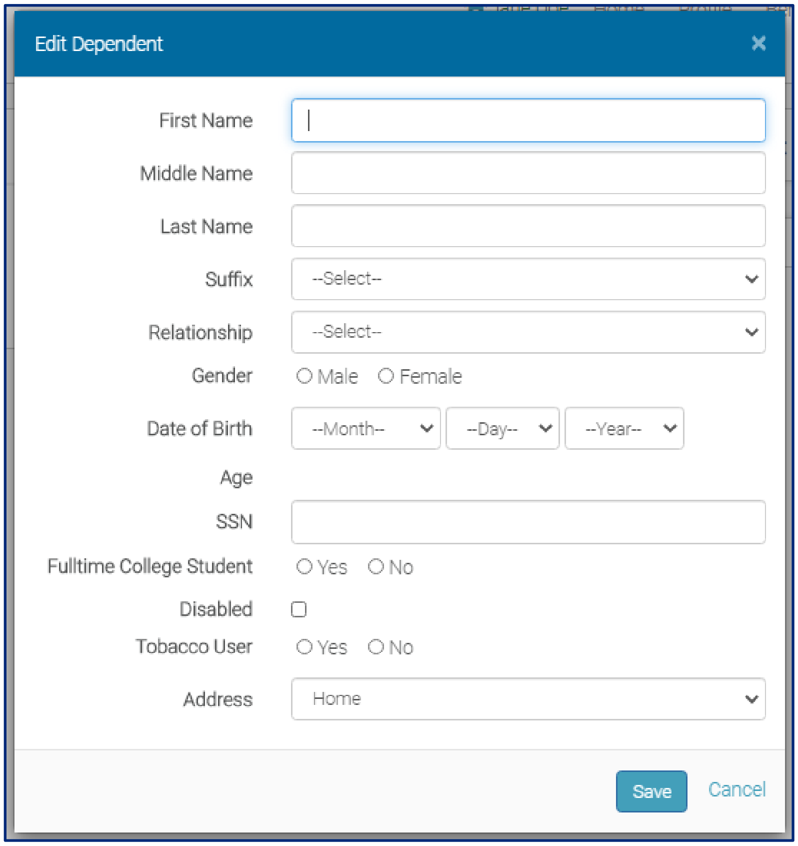
Step 4:

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.**



TIP

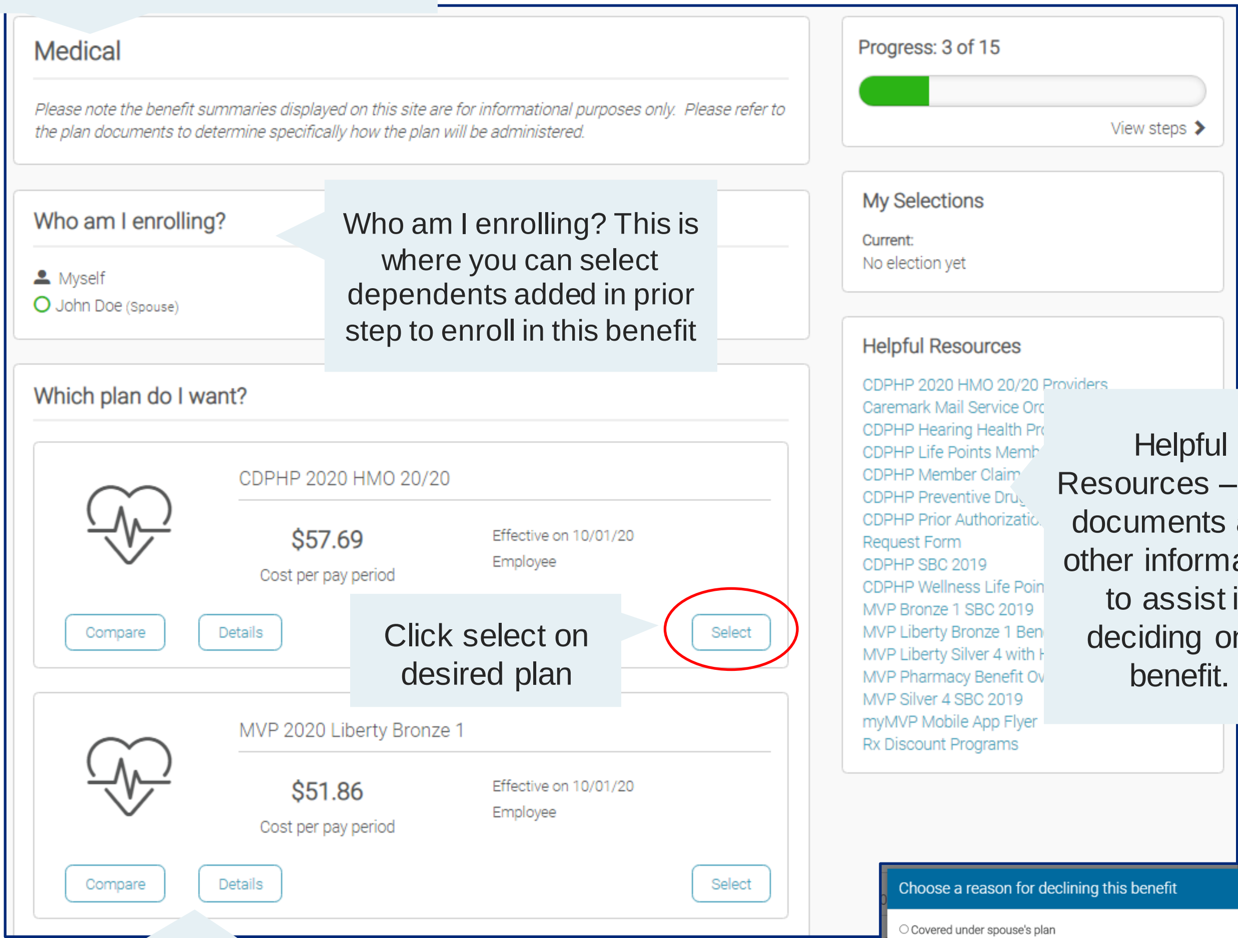
Adding dependents to this step does NOT add dependents to any benefits. Each benefit will have a space to add which dependents should be covered.

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



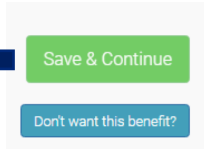
Who am I enrolling? This is where you can select dependents added in prior step to enroll in this benefit

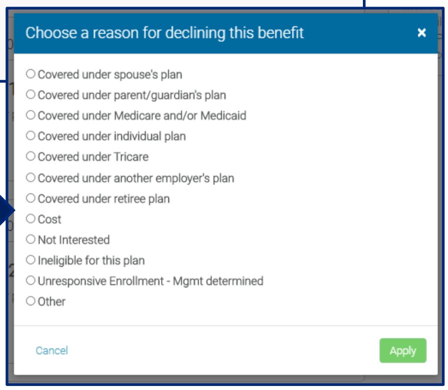
Click select on desired plan

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

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.

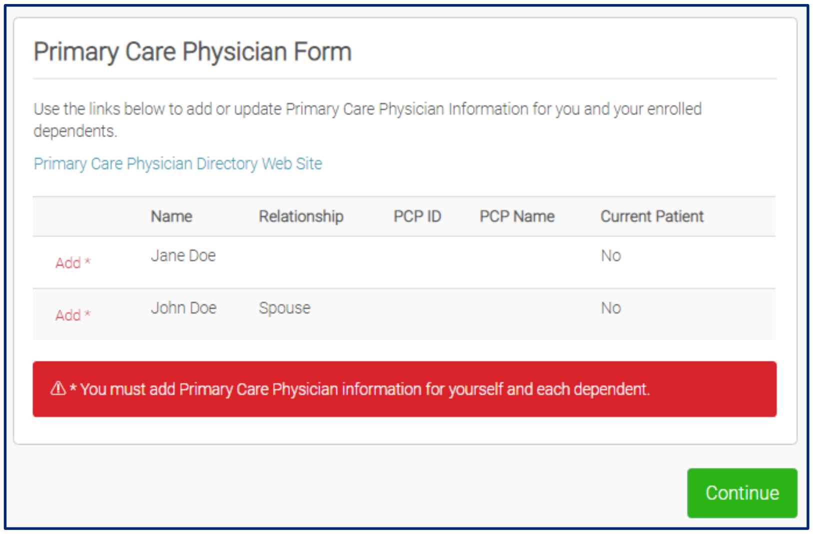




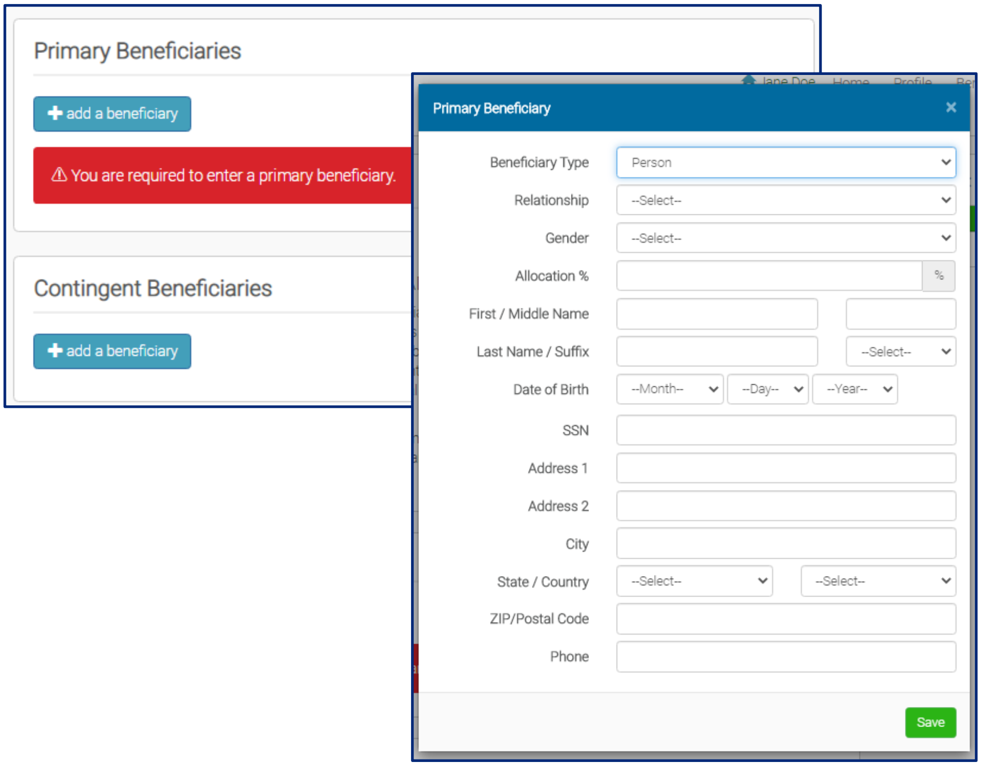
How to Make New Hire or OE Elections (con't)

Step 6:

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

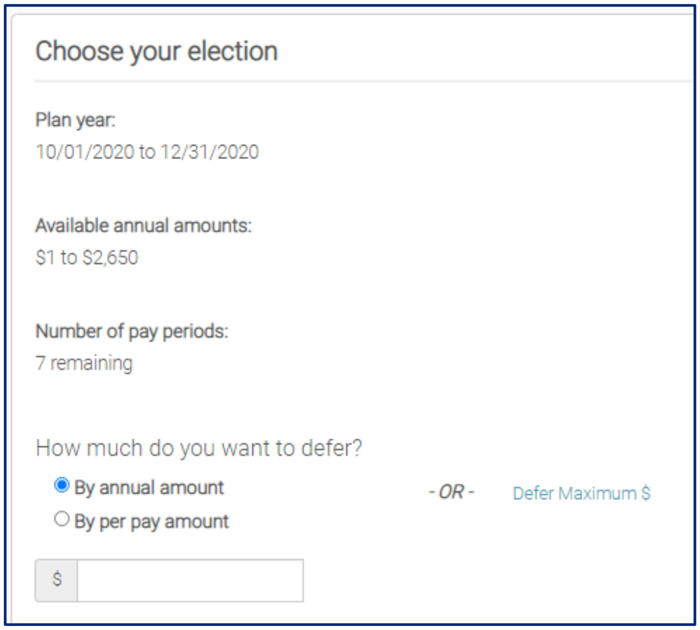


Selecting an HMO plan will take you to this next step, where you will have to fill in your Primary Care Physician's information.

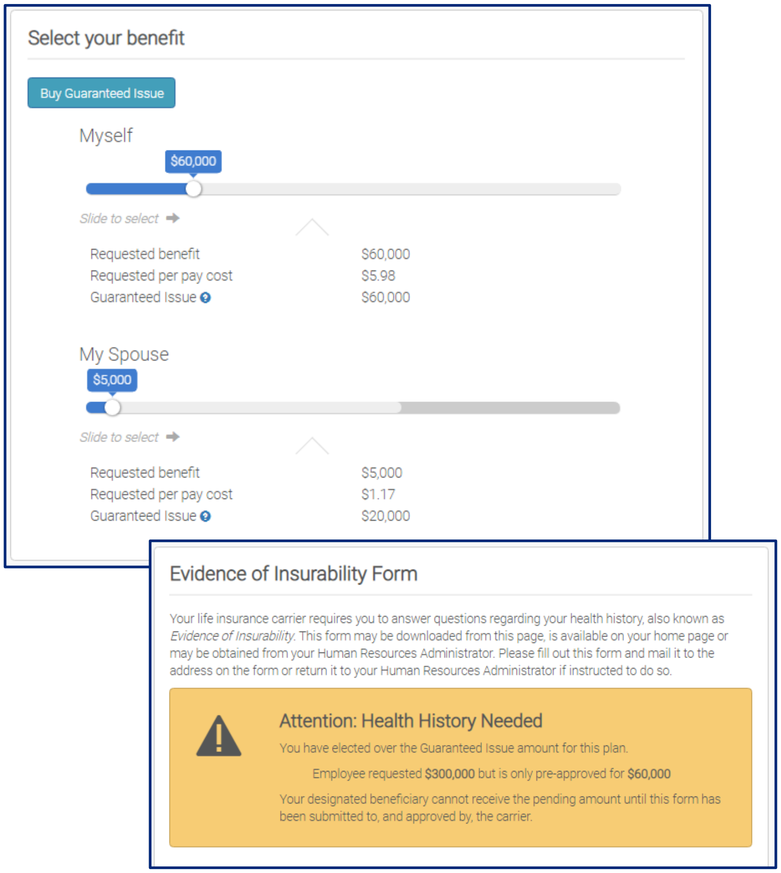


Both Life and Voluntary Life plans require beneficiaries to be entered. You can enter primary and contingent beneficiaries. You can also enter multiple beneficiaries for both, however, amounts for each need to equal 100% between the beneficiaries.

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

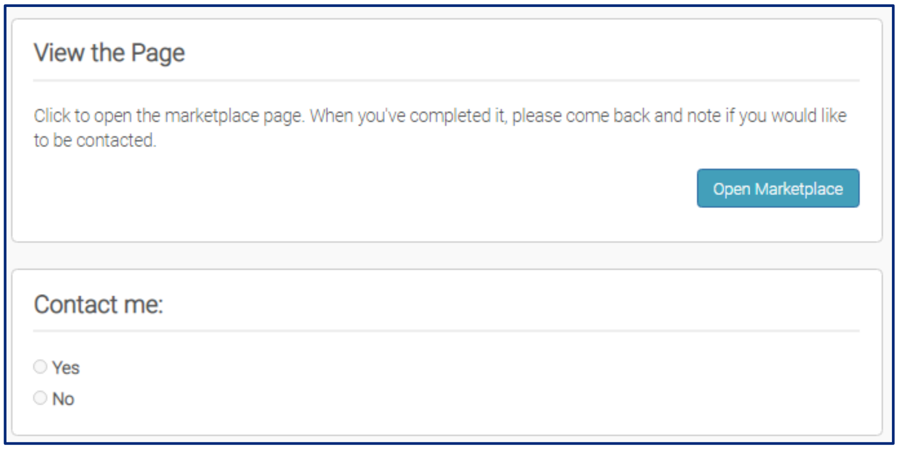


Cafeteria Plans (FSA, DCA, Parking, and Transit) allow you to enter the amount you want deducted, either by entering an annual or per pay amount. You can also click **Defer Maximum** to have the maximum election.



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.

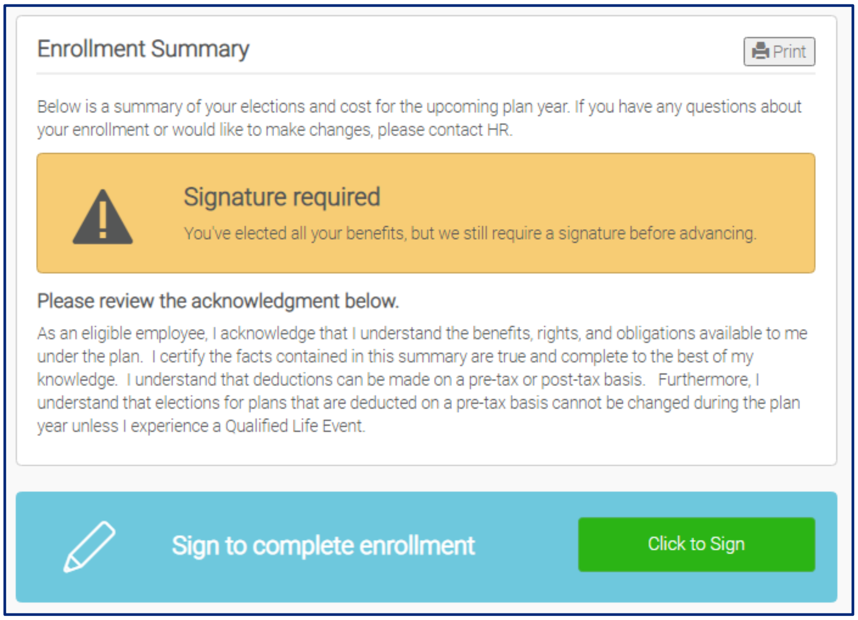
How to Make New Hire or OE Elections (con't)



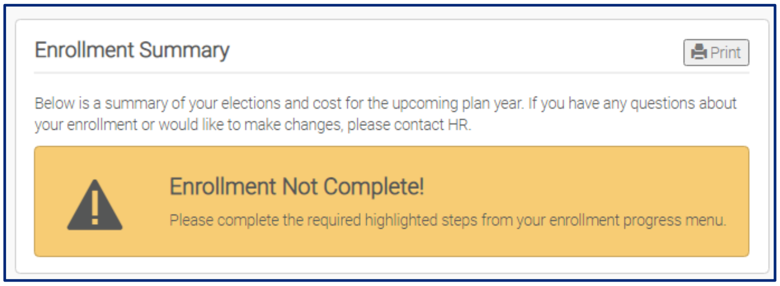
Marketplace plans, such as for Aflac voluntary benefits, require the **Open Marketplace** button to be clicked and then offers a choice on being contacted by the rep for more information/enrollment.

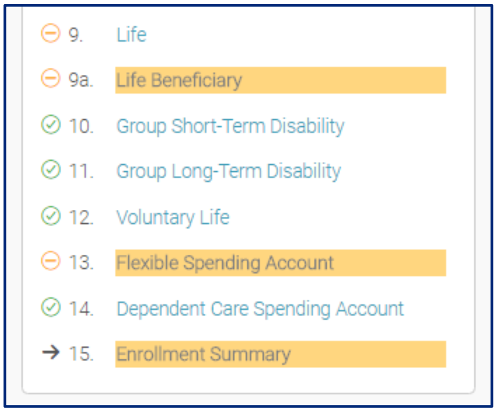
Step 7:

When all elections are made, the enrollment summary must be signed by clicking the green **Click to Sign** button. <u>Enrollments are not complete until this is done!</u>



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.

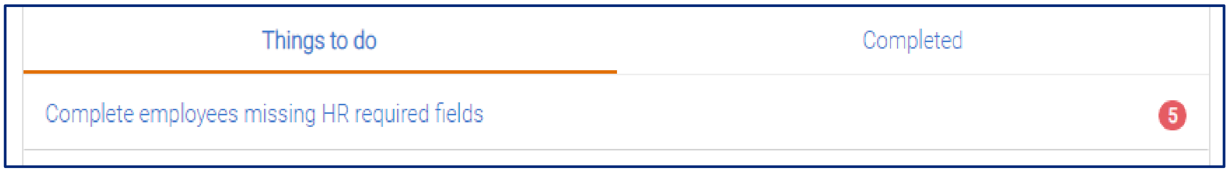




Managing “Things to Do”: Incomplete Employees

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:

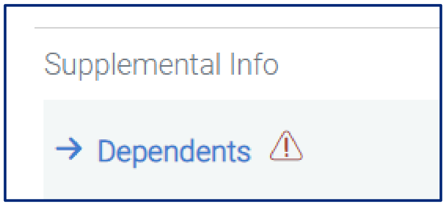
Click **Complete Employees Missing HR required fields** to see a list of employees missing items.

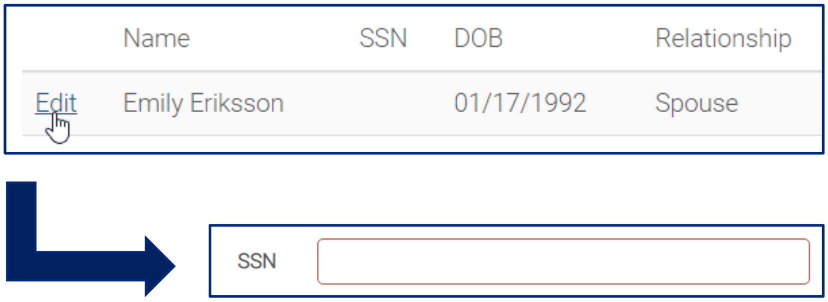
	First Name	Last Name	Gender	DOB	Class	Employment Status	Hire Date
Edit Profile Complete Hire	Christopher	Columbus	M	08/01/1962	Part Time - Ineligible	Active	07/12/2005
Edit Profile	Leif	Eriksson	M	04/08/1990	Full Time	Active	08/14/2014
Edit Profile	Franklin	John	M	08/25/1986	Full Time	Active	06/01/2015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





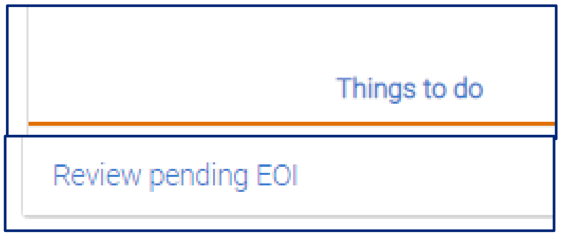
Step 4:

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

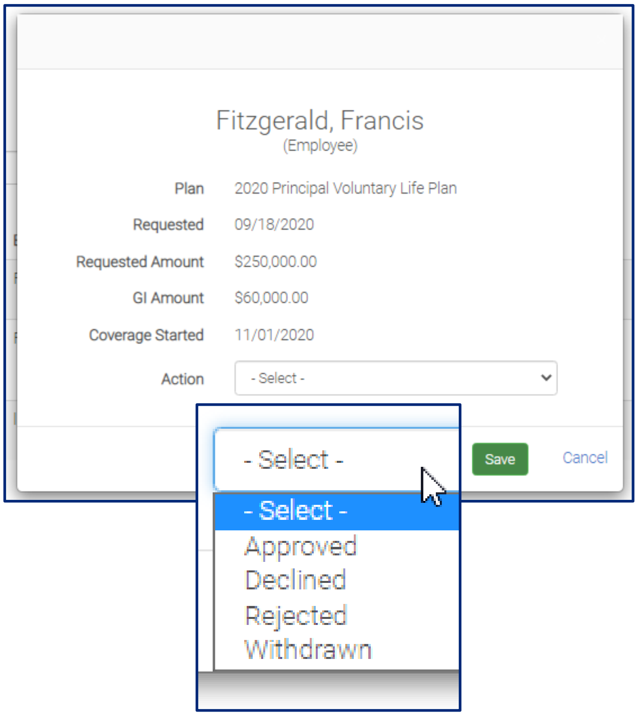
Managing "Things to Do": EOI (Evidence of Insurability)

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:

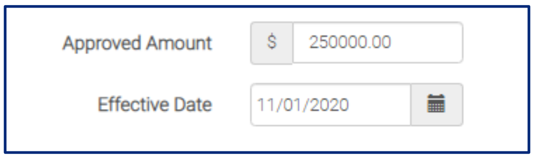
Click **Pending** and you will be given a pop-up box with an Action drop-down. From here you can approve, decline, reject, or withdraw the pending enrollment.

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:

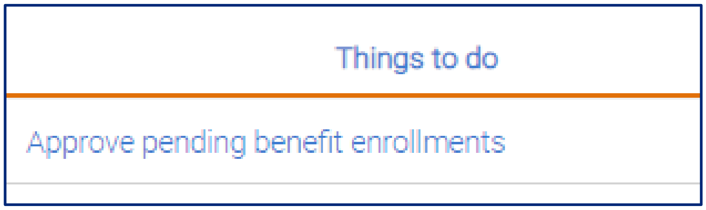
If you choose **Approved**, enter approved amount and effective date from carrier. Then click **Save**. or other options, choose from drop-down and select **Save**.

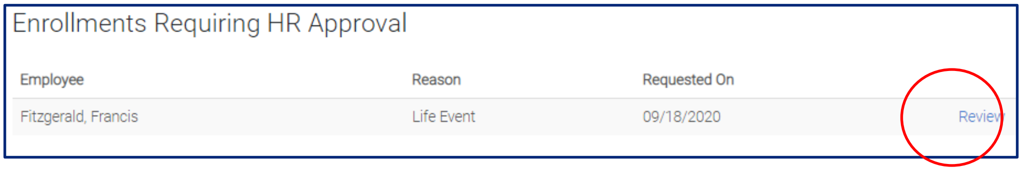


Managing “Things to Do”: Approve benefit enrollments

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.



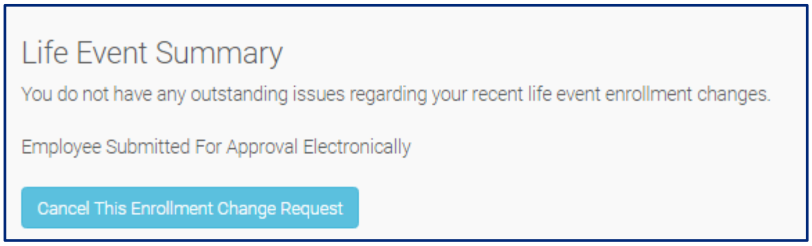


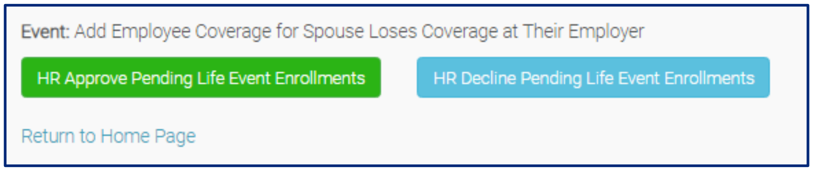
Enrollments Requiring HR Approval

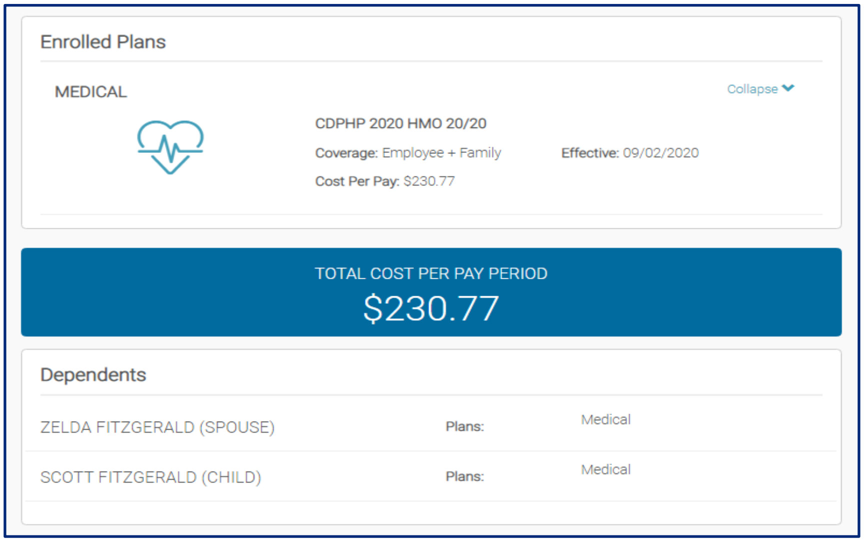
Employee	Reason	Requested On	
Fitzgerald, Francis	Life Event	09/18/2020	Review

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 talks to your employees about why this was cancelled/denied.*







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.

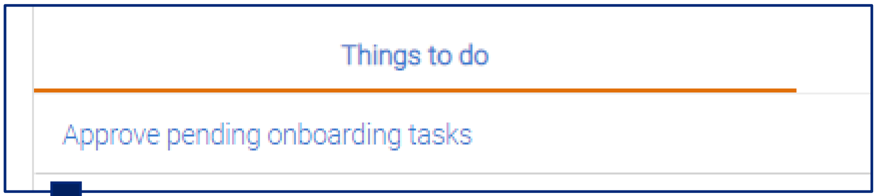
Managing "Things to Do": Approve onboarding tasks

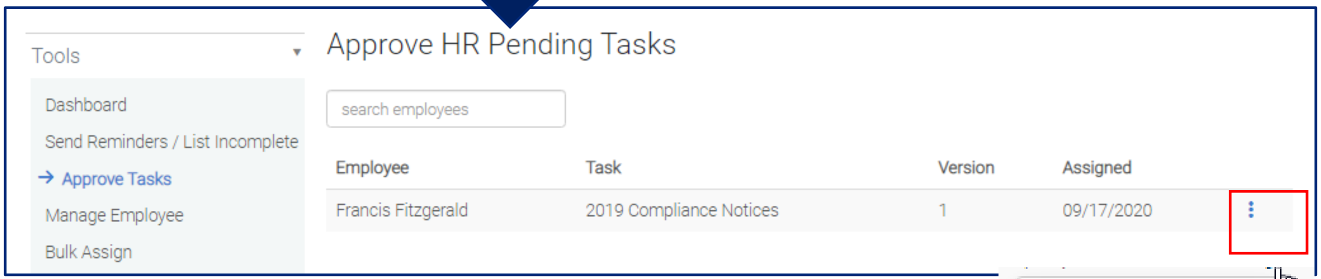
Step 1:

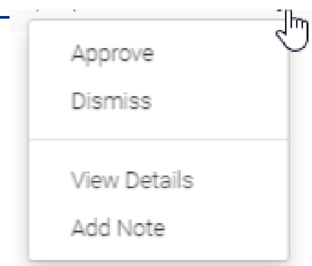
If you have onboarding tasks set up for your company that pend for HR approval, when your employee completes this task you will see the following under your Things to do:

Step 2:

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



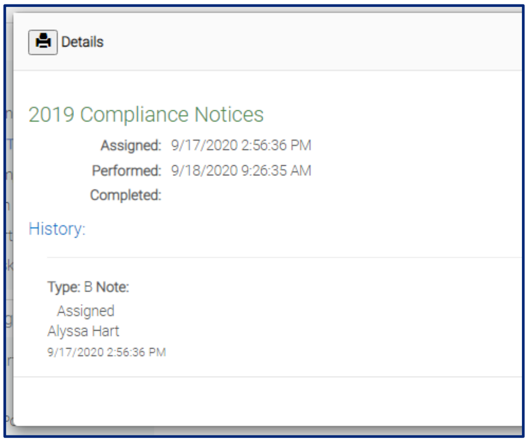




Step 3:

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.



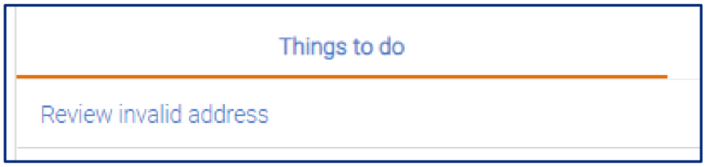
Managing “Things to Do”: Review invalid address

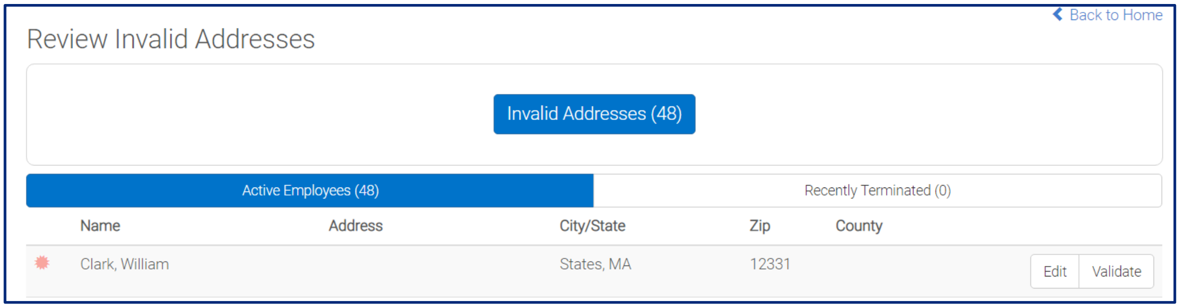
TIP

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:

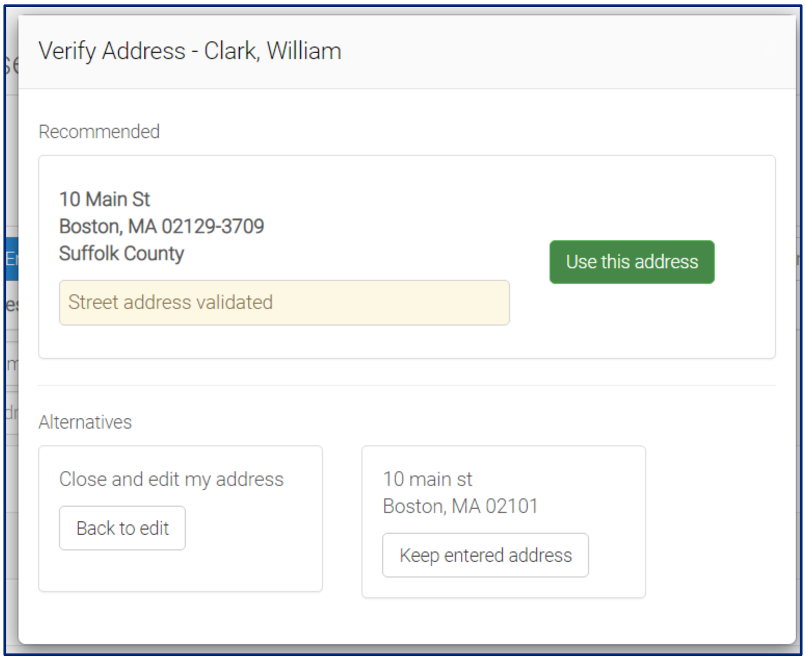
If you see the following flagged under your “Things to do section” of your home page you can validate your employees addresses, if desired, by first clicking **Review invalid address**.



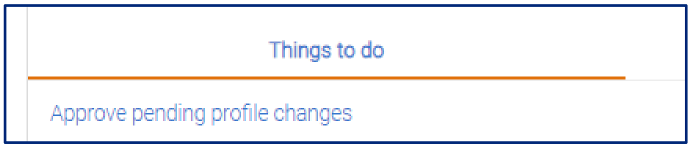


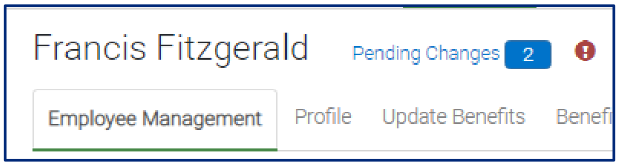
Step 2:

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.



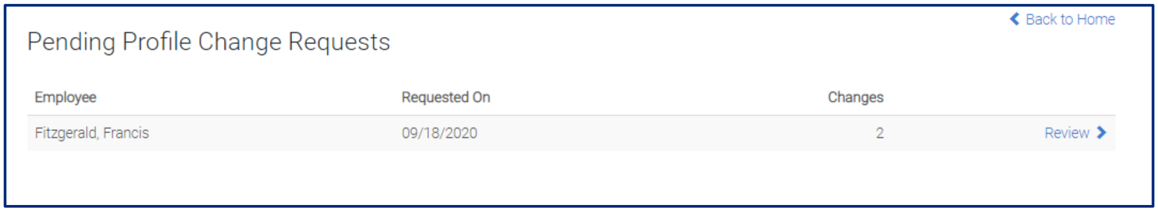
Managing “Things to Do”: Approve profile changes





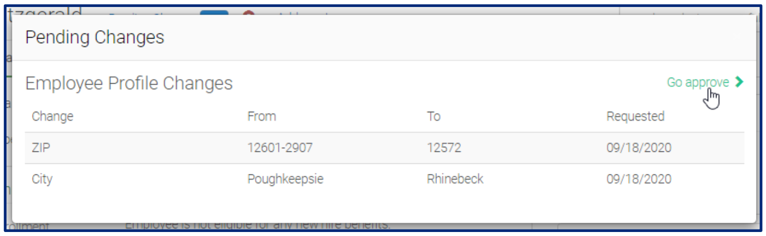
Step 1:

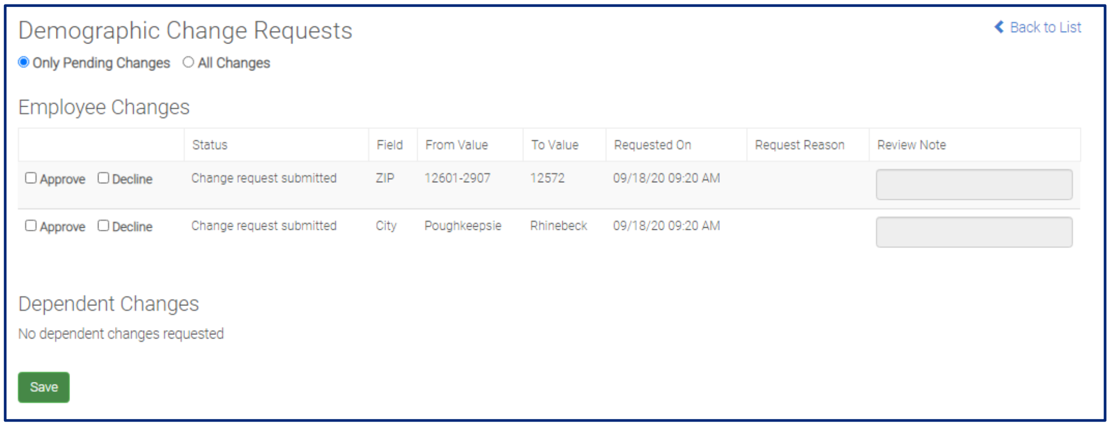
When your employee makes changes to something on their profile, such as their name or address, this will pend for your approval. You will see this under your Things to do, but also next to their name when you pull up their employee page.



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:





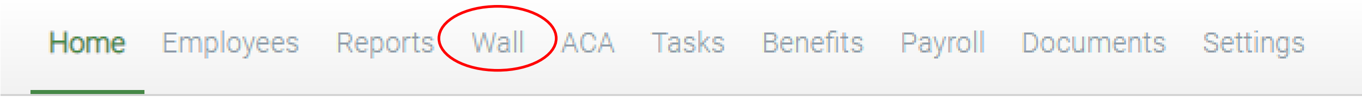
Step 3:

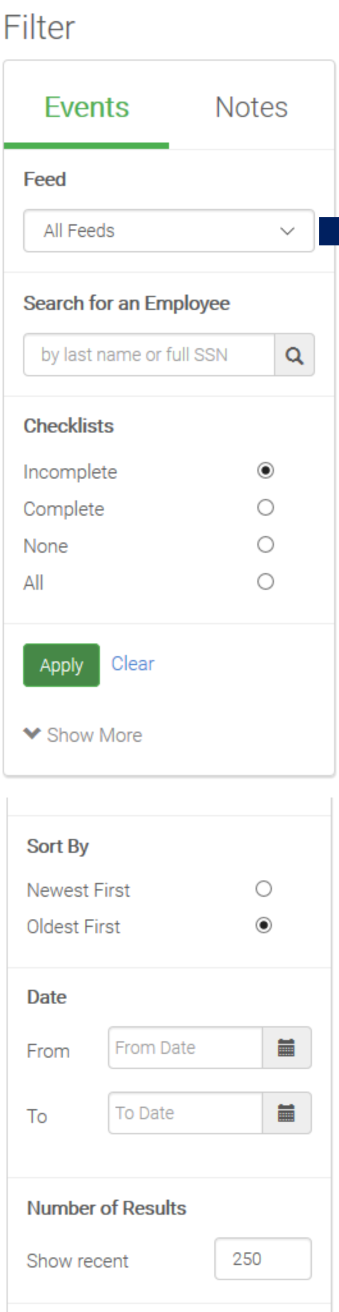
From here you can review what changes were made (From value -> To Value), when the change was requested, and any note the employee might have added to the request. Dependent changes are listed separately. Click **Approve** or **Decline** next to each line item, then **Save**.

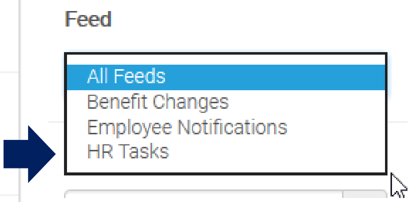
How to Check the Wall for Updates

Step 1:

Click the Wall tab at the top of your screen.





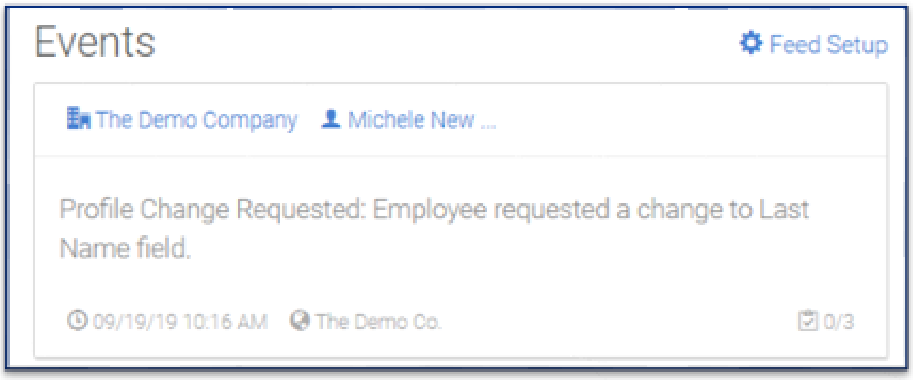


Step 2:

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

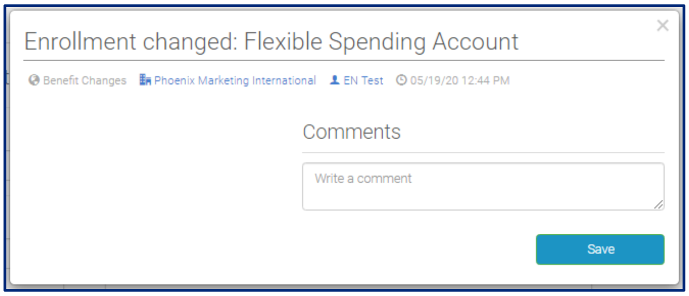
Step 3:

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



Step 4:

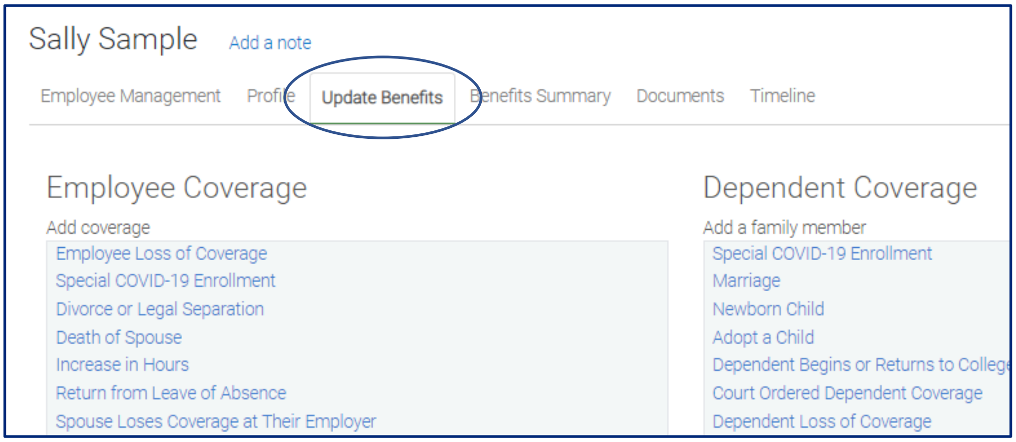
Click anywhere on the event to see a pop-up with more details and to add Comments, if desired.



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.



TIP

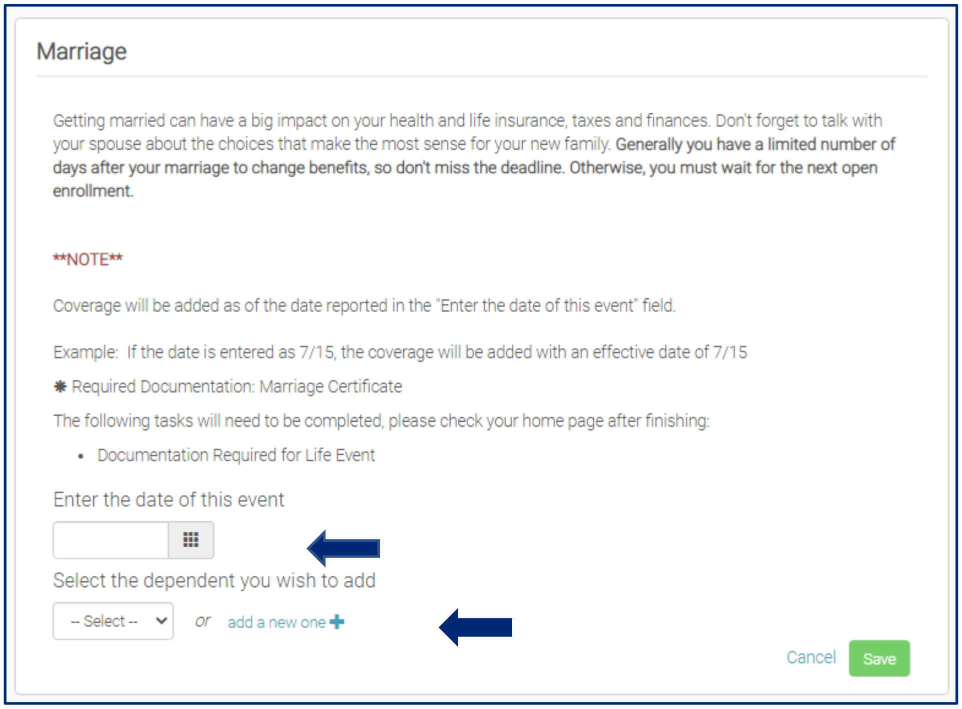
*All Qualifying Life Events must be processed through iNavigator and with the carriers within **30 days** of the life event.*

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:

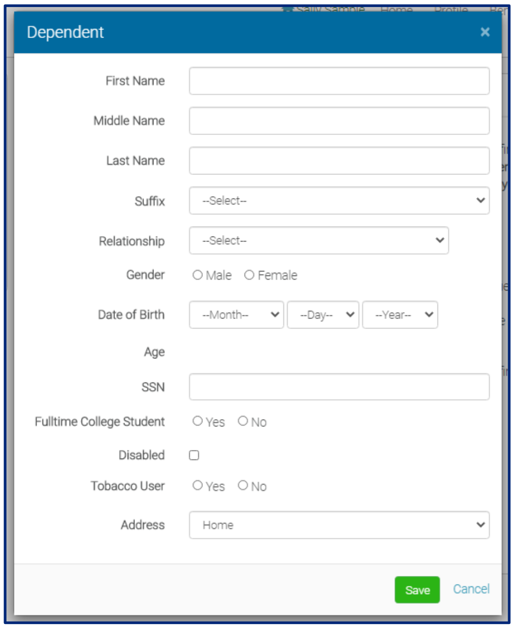
What you are presented with in the life event flow depends on which type of event you are processing, but most typically ask for the date of the event and who it is affecting. If plans are to be dropped, you would be presented with the list of enrolled plans to choose from. In our marriage scenario,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



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

TIP

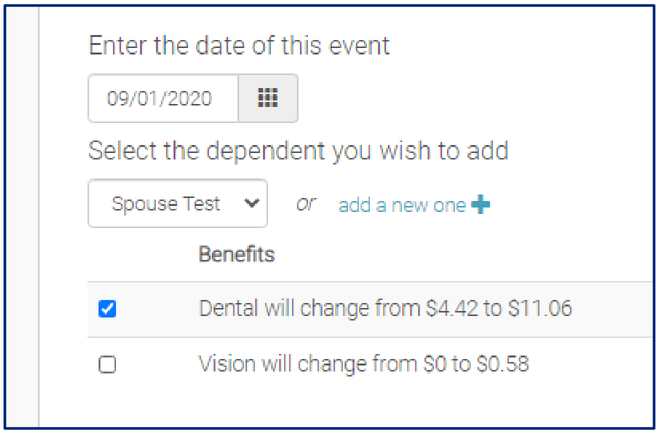
When you process a qualifying life event on behalf of your employee, it skips over the necessity for HR approval and will automatically complete the enrollment.



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.

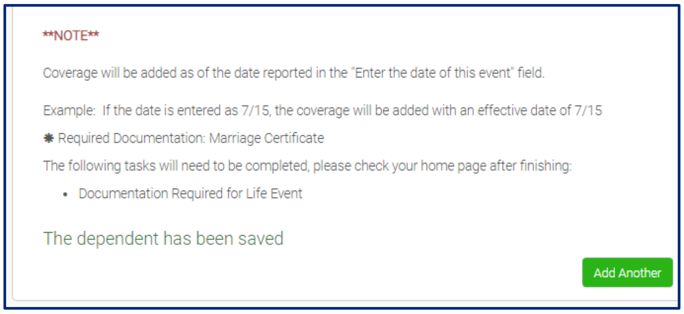


Step 5:

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**.

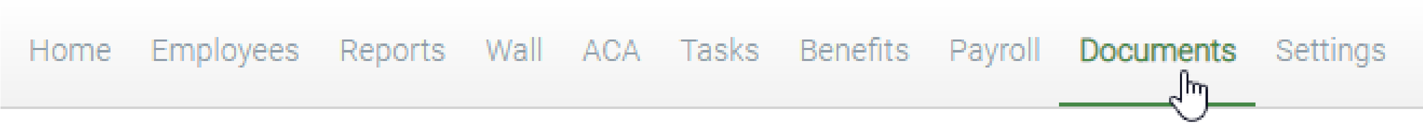
Step 6:

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

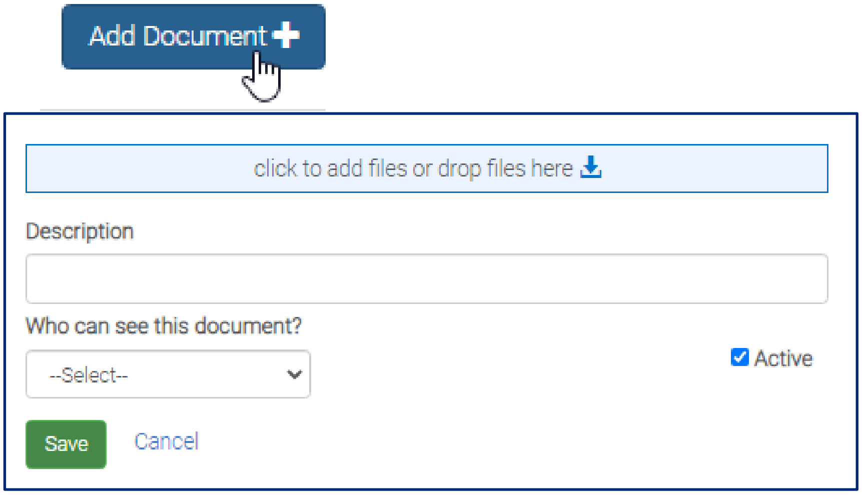
Step 1:
From your company home page, click the **Documents** tab.

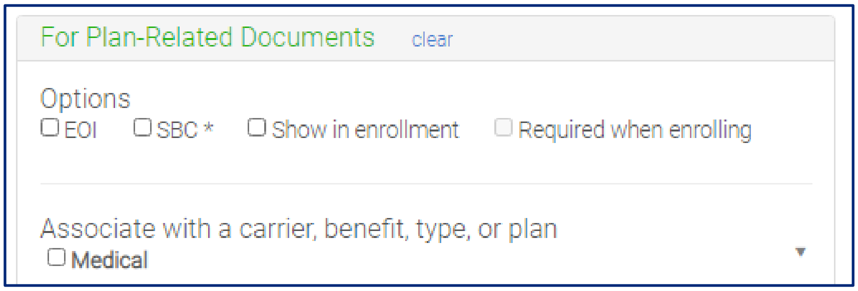


Step 2:
To add a document, click **Add Document**.

- 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.

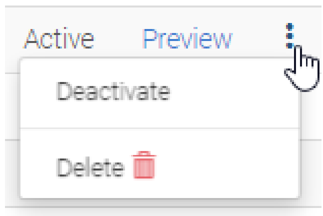
Select **Save**.





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.

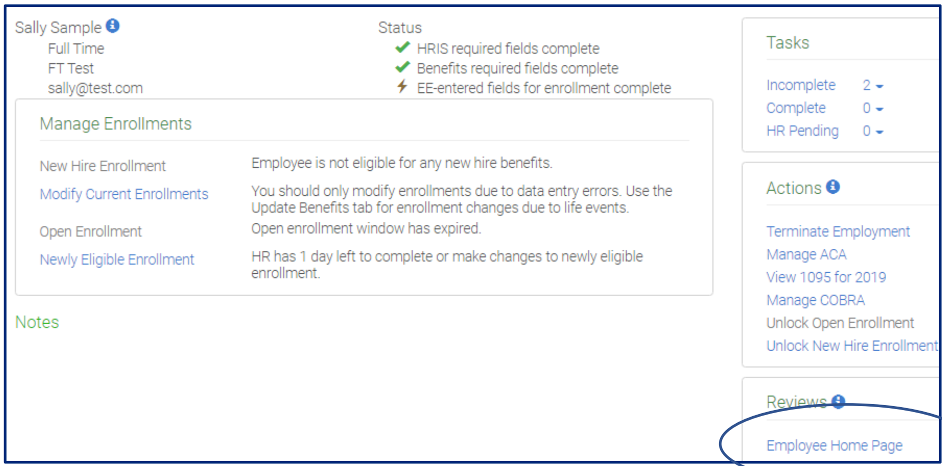
Step 4:
To delete a document (or deactivate it so that it remains on the portal under the inactive filter but will not show anywhere else or for your employees) you can click on the three dots on the far right.



How to Update an Employee's Beneficiary

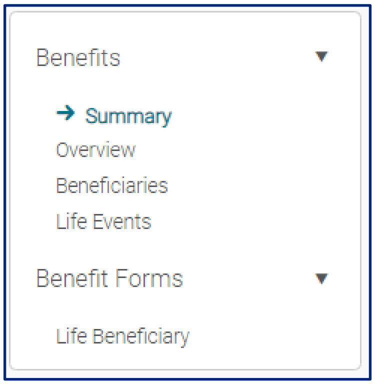
Step 1:

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



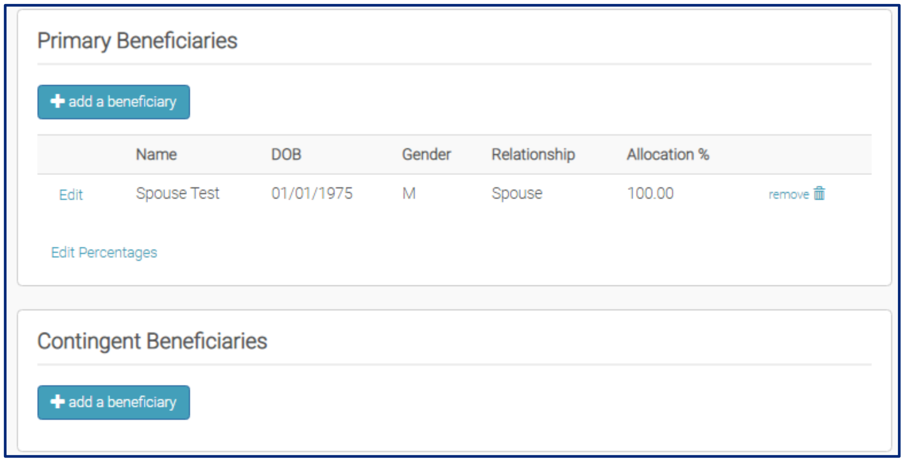
Step 2:

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



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.



Step 4:

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.

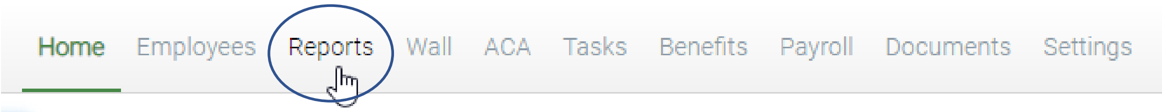
TIP

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

How to Run Reports: New Hires/Terminations

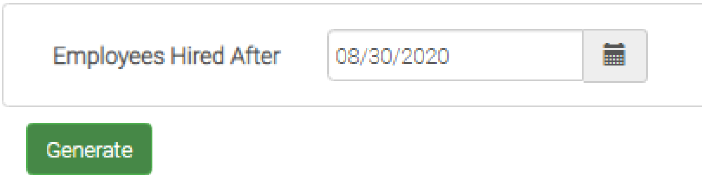
Step 1:

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.

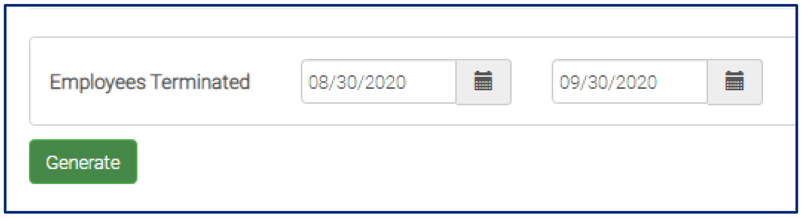


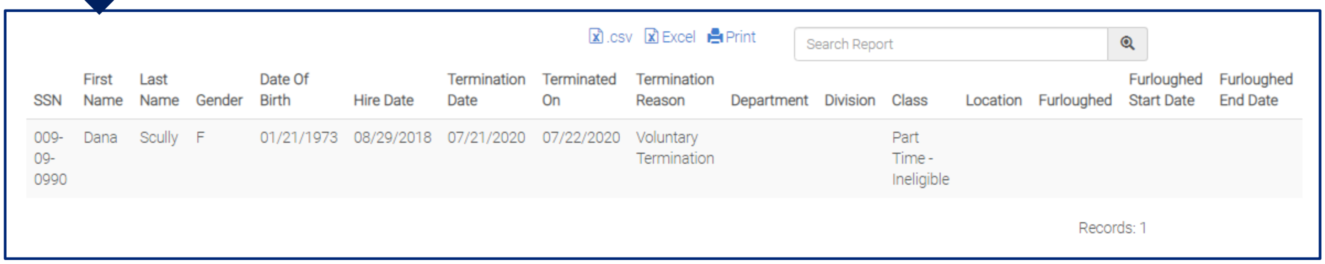

.csv Excel Print
Search Report

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.




.csv Excel Print
Search Report

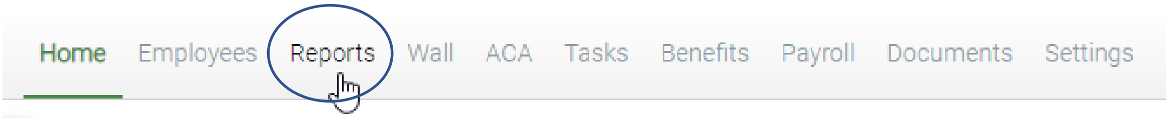
SSN	First Name	Last Name	Gender	Date Of Birth	Hire Date	Termination Date	Terminated On	Termination Reason	Department	Division	Class	Location	Furloughed	Furloughed Start Date	Furloughed End Date
009-09-0990	Dana	Scully	F	01/21/1973	08/29/2018	07/21/2020	07/22/2020	Voluntary Termination			Part Time - Ineligible				

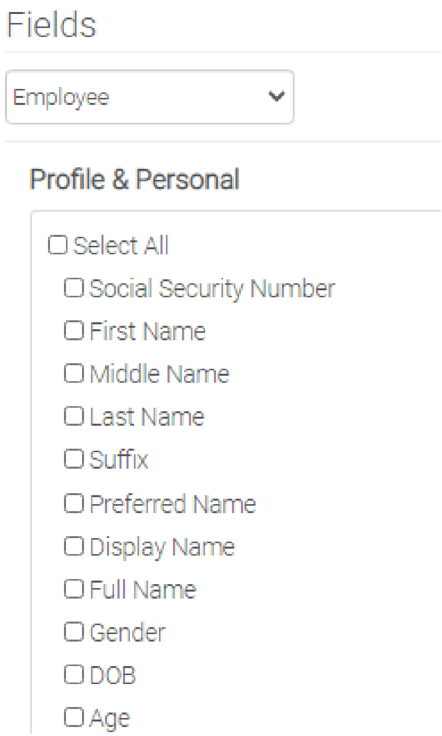
Records: 1

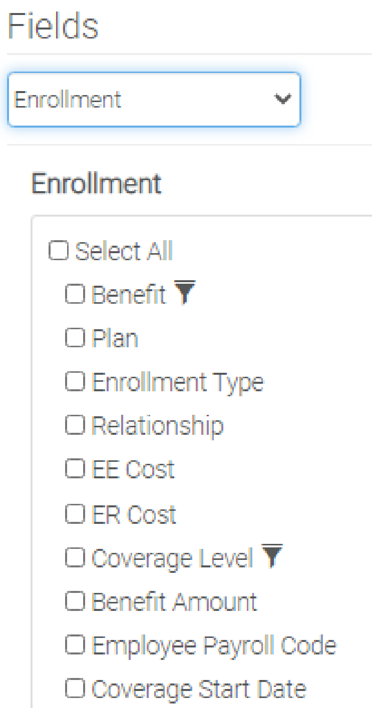
How to Run Reports: Payroll Deductions

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).

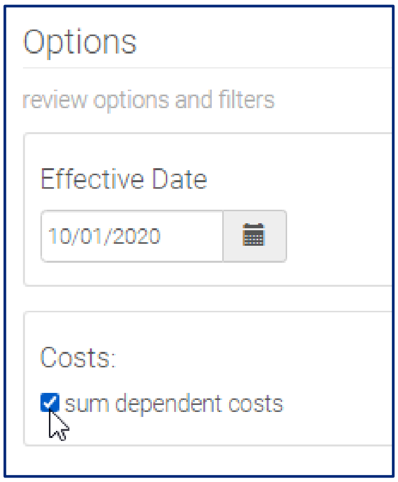






Step 2:

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.

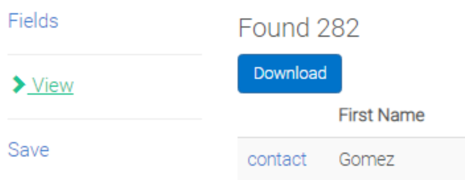


Step 3:

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

Step 4:

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.

How to Set the Portal in Spanish

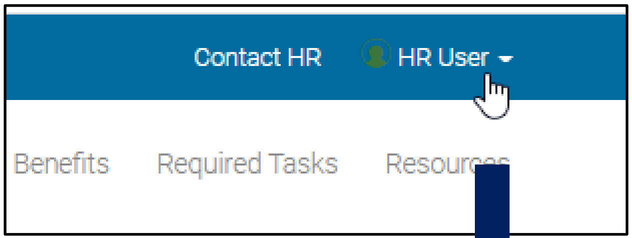
TIP

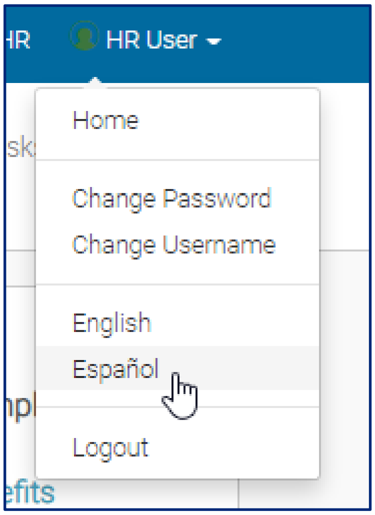
This needs to be done from the employee's home page, so if you are an HR user trying to change it for yourself, you will need to pull up your own page first, and then click ***Employee Home Page*** *from the lower right-hand side.*

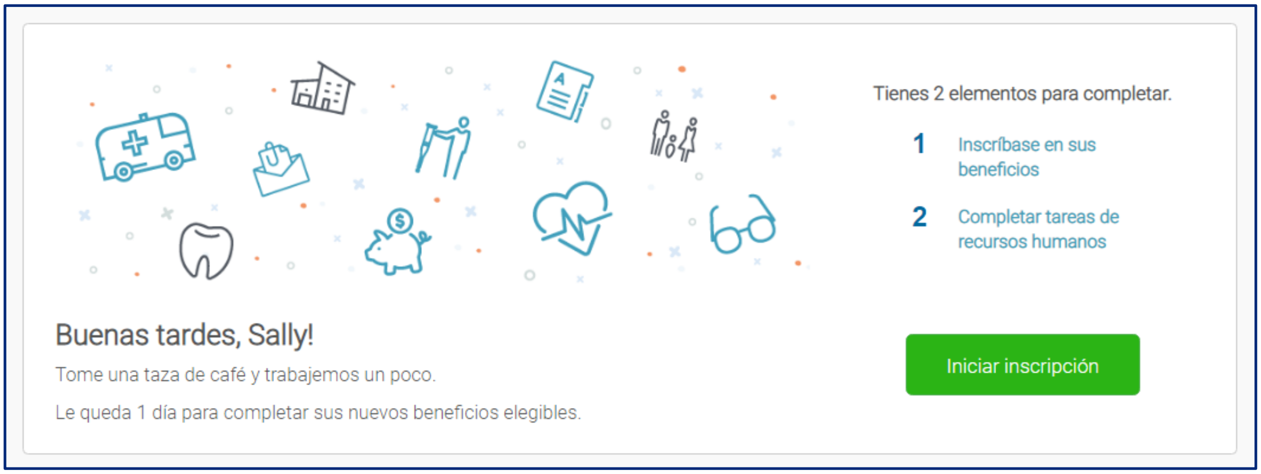
Step 1:

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.







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