

People First User Guide for the Benefits Enrollment Process

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Change My Benefits Overview

Introduction

This guide contains information about the insurance benefits enrollment process.

Getting Started

Follow the path to access the Change My Benefits screen.

Your path is...

People First login screen > Employee landing Page > Insurance Benefits > Change My Benefits

Steps

1. When employees log in, they will be directed to either the Employee landing page or the Manager landing page (employees are directed to the Manager landing page only if they are a manager or human resource professional). From the Employee landing page, select the Insurance Benefits tile.



2. After selecting the Insurance Benefits tile, the insurance benefits navigation menu will be presented. Select Change My Benefits.





After selecting Change My Benefits, the employee will be directed to the Change My Benefits screen.

| Save and Continue | Sav



Change My Benefits

Introduction

There are three types of events:

- Open Enrollment occurs each year in late October through early November and is automatically presented to eligible employees during the Open Enrollment period.
- Life events are events in the life of the employee that affect benefits eligibility (e.g., birth or adoption of a child, marriage, divorce, death of a dependent). Life events for birth and marriage can be created by the employee while most other life events require the employee to work through the People First Service Center to process.
- Work events are automatically generated by a change in an employee's work status (e.g., new hire employee, dual hired employee, increase or decrease in expected hours of work, leave with or without pay, position change which results in a new job classification).
- Employees can have only two simultaneous events open at one time.
- During Open Enrollment, a separate Inbox task and a quick link are available for eligible employees to navigate directly to the Open Enrollment event; both are available only during the Open Enrollment period.
- Once a life or work event is created, an Inbox task is created and can be used to
 navigate directly to the event; the task is presented to the employee for the length of
 the event's enrollment period.

The detailed steps below will guide the employee through the benefits enrollment process.

Getting Started

Follow the path to access the Change My Benefits page.

Your path is...

People First login screen > Employee landing page > Insurance Benefits tile > Change My Benefits

Creating and Selecting an Event Step

Follow the steps below to create and/or select an event.

Steps

Event
Open Enrollment

1. If Open Enrollment is active or if there is an active work event, that event will appear in the event table.

Start Date

04/01/2017

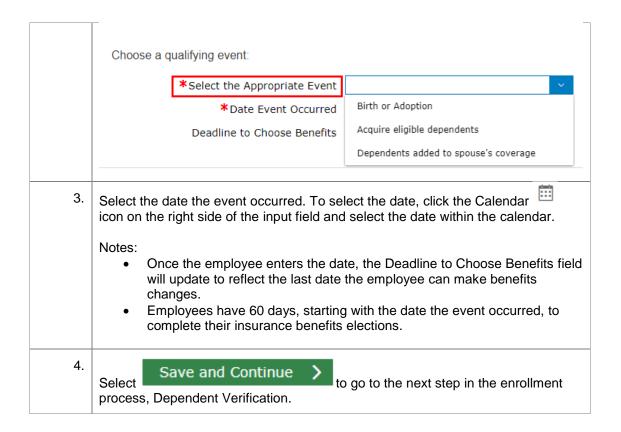
Note: If Open Enrollment is not active and there is no work or life event available,
then no event will be displayed in the event table.

End Date

12/01/2017

2. To create a new life event, start by selecting the event.

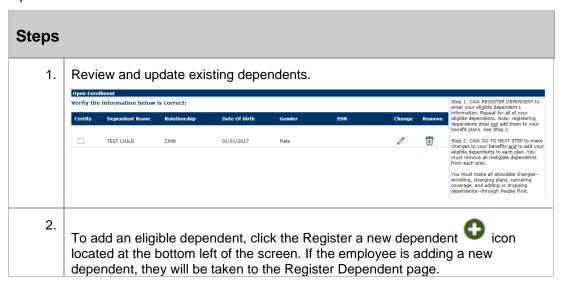




Dependent Verification Step

The Dependent Verification step allows employees to add eligible dependents, remove dependents who are no longer eligible (e.g., stepchild from a previous marriage), and update limited information for an existing dependent.

Follow the steps below to add, remove, and update dependent information as well as certify dependents.





	Open Enrollment			
	Add the dependent information *Relationship 2 Child Your child is defined as: the enrollee's own biological offspring; a child legally adopted by the enrollee or placed in the enrollee's home for purpose of adoption in accordance with Chapter 63, F.S. *Date Of Birth MM/DD/YYYY *Social Security Number *Content at 1.85-65-631-473 to determine if this dependent is eligible for over-aped health insurance coverage or as a dependent with a disability.			
	Note: The definition for each dependent type is presented next to the Relationship field. Review the definition to ensure you have selected the correct relationship type. Remember that you can register only your legal dependents.			
3.	After entering the information for the dependent(s), the employee must select Register Dependent > to complete the process. Note: Registering a dependent does NOT enroll the dependent in any insurance benefit plan(s). Employees must complete the entire enrollment process to add dependent(s) to their insurance benefit plan(s).			
4.	Once the new dependent has been added, the dependent table will be updated. Repeat steps 2 through 3 to register additional dependents. Certify Dependent Name Relationship Date of Birth Gender SSN Change Remove			
	☐ TEST CHILD Child 01/01/2017 Male ☐ Ⅲ ☐ Test Adopted Child Adopted Child 05/01/2012 Male ☐ Ⅲ			
5.	To remove a dependent, click the Delete icon located to the right of the dependent. You will be asked to confirm that you want to remove the dependent. If you confirm, this dependent will be removed from all insurance benefits plans.			
6.	Once the dependent is removed, his or her record will display with strikethrough text to show that the dependent has been removed. Certify Dependent Name Relationship Date of Birth Gender SSN Change Remove			
7.	icon to undo the deletion. To update an existing dependent's information, click the Change Plan icon located to the right of the dependent. Once this is selected, the dependent's information will be presented. Note: The employee can change only the dependent's SSN. To change any other fields, the employee must contact the People First Service Center.			
8.	After updating the dependent's SSN, select You are not making any updates, select dependent table. Register Dependent > . If to return to the dependent table.			



9. To complete the Dependent Verification process, select the Certify checkbox to the left of each eligible dependent. After all dependents have been marked as certified or have been marked as not eligible (deleted),

Save and Continue will be available. Select this to go to the next step, Choose Plans.

Note: All dependents must either be marked as not eligible (deleted) or certified in order for you to continue.

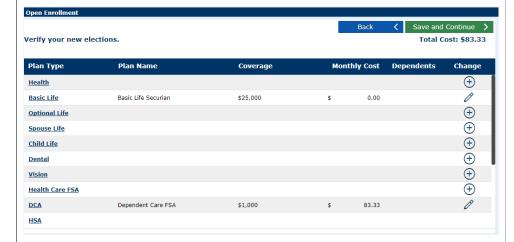
Choose Plans Step

The Choose Plans step allows employees to select the insurance plans they need to update (e.g., enroll in a plan, add the dependent you just registered, change your coverage in a plan, or cancel your enrollment in a plan).

Follow the steps below to make new elections and to update the plans you are currently enrolled in.

Steps

1. The Choose Plans step displays a list of plans the employee may enroll in. If the employee is currently enrolled in a plan, the information for the current election will be displayed within the summary table. The total cost for the currently enrolled plans appears at the top right of the screen (this is updated as the employee changes elections).



Notes:

- The Change Plan icon is displayed for the employee to update or cancel coverage for plans in which he or she is currently enrolled.
- If the employee is eligible to enroll in a plan and is not currently enrolled in the plan, the Add Plan icon is displayed for the employee to enroll in the plan. If no icon is displayed, the employee is not eligible to enroll in that plan based on current plan selections.
- Since there are more plan offerings than can be displayed within the summary table, use the scroll bar on the right side of the table to view additional plan types.



	 To enroll in the HSA plan, the employee must be enrolled in a high deductible health plan. To enroll in the healthcare FSA plan, the employee must NOT be enrolled in a high deductible health plan. However, if enrolled in a high deductible health plan, the employee can enroll in a limited purpose healthcare FSA plan. 			
2.	Once the Change Plan or Add Plan icon is selected for a plan type, the employee is directed to the plan details screen for that plan type to make elections for that plan. This screen is divided into two parts, Current Election and New Election. The Current Election (view only) section displays information for the plan in which the employee is currently enrolled. The New Election section allows the employee to enroll in or change current enrollment in the plan. Compared Solve Solve			
3.	3. The New Election section is based on a hierarchal scheme, where the employee must first select the plan, then the coverage level. If a coverage level allows coverage for dependents, the employee must then select the dependents he or she wants to cover for the plan. New Election:			
	State PPO Plan			
	Family			
	\$30.00			
	☐ TEST SPOUSE			
	☐ TEST CHILD			
	☐ TEST ADOPTED CHILD			
	Once all selections are made for the plan, the employee must select Save If the employee wants to go back to the			
	summary screen without making changes, the employee must select Cancel X			



Notes:

- When selecting coverage designed to carry dependents, the employee must select which dependents he or she wants to cover by checking each box next to the dependent.
- The exception to the hierarchal scheme is disability coverage. The employee selects whether or not he or she wants coverage, the benefit option, and then the coverage level.
- Selecting a plan type does NOT enroll you in the coverage or cover the dependent. The employee must complete the entire enrollment process to complete enrollment in the insurance benefit plan(s).
- 4. After the employee makes elections and selects Save, the employee will return to the summary table. If dependents are covered under the plan, then a number will appear under the Dependents column. The employee can click the number to see who he or she has elected to cover.



Note: Your enrollment elections are not complete yet. You must complete the entire enrollment process to complete enrollment in your insurance benefit plan(s).

Once the employee has made all elections, he or she must select

Save and Continue

to go to the next step in the enrollment process, Dependent Summary. If the employee wants to return to the previous step, Dependent Verification, without making changes, the employee must select

Back

Dependent Summary Step

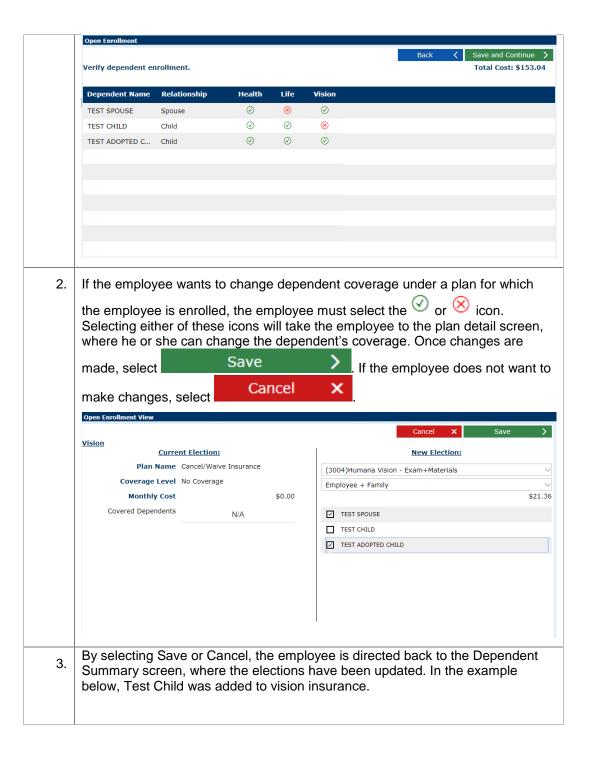
The Dependent Summary step provides the employee a final preview that shows what plans his or her dependents will be enrolled in once enrollment is complete.

Follow the steps below to complete the Dependent Summary step.

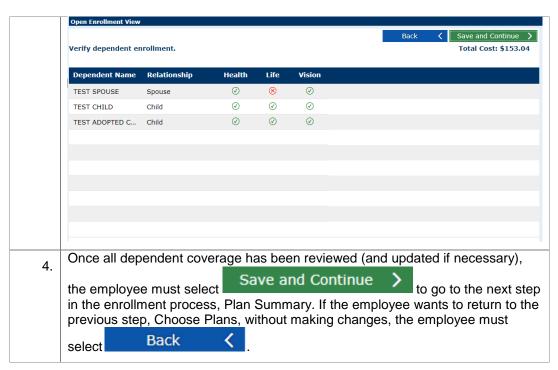
Steps

1. The Dependent Summary screen displays a table that lists the employee's dependents and the status of each dependent for the plans the employee is electing to enroll in. If the dependent is enrolled in the plan, the green check icon is displayed. If the dependent is not enrolled in the plan, the red X icon is displayed.





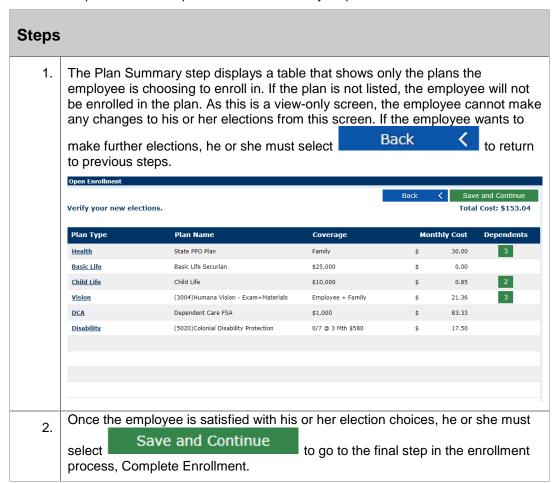




Plan Summary Step

The Plan Summary step displays a table that shows only the plans the employee is choosing to enroll in.

Follow the steps below to complete the Plan Summary step.

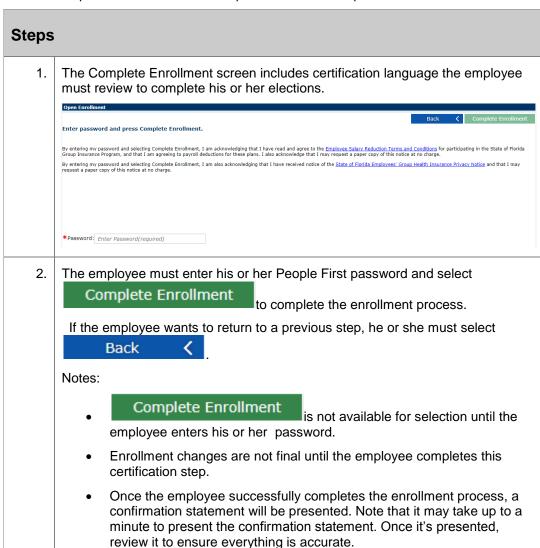




Complete Enrollment Step

The Complete Enrollment step is the final step in the enrollment process.

Follow the steps below to finish the Complete Enrollment step.



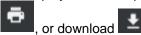
Confirmation Statement

The employee's confirmation statement will be presented after the employee has successfully completed the enrollment process.

Follow the steps below to review the Confirmation Statement.

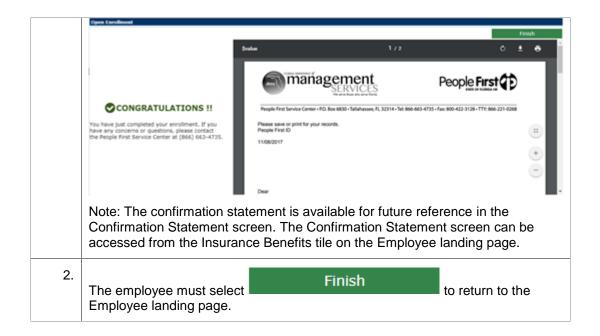
Steps

1. After completing an enrollment, the confirmation statement will be presented to the employee. The employee may scroll through the statement to review, print



Note: Icons may vary based on which PDF viewer is installed on the employee's computer.







Appendix

The following are descriptions of various items included in the benefits enrollment process.

- Colore Team 20 - Colore Flare Dependent Summary Res Summary Complete Extrainment Confinuation Estatement	The process flow is shown at the top of the enrollment process and displays the employee's progress in completing the enrollment process.
	In the process flow, the icon for the step is circled in green with a checkmark when the employee has completed that step in the enrollment process.
— <u>&</u>	In the process flow, the icon for the step is circled in blue when the employee is currently on that step in the enrollment process.
-(F)-	In the process flow, the icon for the step is not circled when the employee has not reached that step.
Save and Continue	The Save and Continue button saves the employee's progress and advances the employee to the next step in the enrollment process.
Back 〈	The Back button returns the employee to the previous step in the enrollment process without saving any updates made in the current step.
Save >	The Save button saves the employee's progress in the enrollment process and returns the employee to the Summary screen. This is different from the Save and Continue button as it does not move the employee to the next step.
Cancel X	The Cancel button returns the employee to the previous step in the enrollment process without saving any updates made in the current step. This is different from the Back button as it does not return the employee to the previous step.
✓ Remove	The Remove button is used to acknowledge that the employee wishes to remove a dependent from his or her coverage.
•	The Add Dependent button is used to add a dependent to the table on the Dependent Verification screen.
Register Dependent >	The Register Dependent button is used to acknowledge that the employee wishes to add a dependent to his or her coverage. Button is also used to save the update to an existing dependents Social Security number.
(+)	The Add Plan icon on the Choose Plans screen is used to add a plan in which an employee is not currently enrolled.
	The Change Plan icon on the Choose Plans screen is used to change or remove coverage in which the employee is currently enrolled.

