

Course Overview

Course Description	<p>This course provides a comprehensive review of the eBenefits processes.</p> <p>This course consists of the following modules:</p> <ul style="list-style-type: none">• Module 1: Course Introduction• Module 2: eBenefits<ul style="list-style-type: none">○ Life Events• Module 3: Course Summary
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Training Audiences	<p>The following audience(s), by INFORMS Security role(s), are required to complete this course prior to being granted related INFORMS access:</p> <ul style="list-style-type: none">• Employee
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Prerequisites	<p>Participants are required to complete the following End-User Training courses prior to starting this course:</p> <ul style="list-style-type: none">• ERP 101 – Overview of ERP• ERP 102 – INFORMS Navigation, Reporting, and Online Help• HR 101 – Human Resources Fundamentals
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Other Related Courses	<ul style="list-style-type: none">• ESS 201– Employee Self Service - eProfile, ePay, and ePerformance• ESS 203 –Employee Self Service - Time management
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Delivery Method	<p>This course is intended to be delivered through Instructor-led Training.</p>
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Estimated Duration	<p>The total duration of this course, when delivered through Instructor-led Training, is 5 Hours</p>
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Module 1: Course Introduction

Topics

This module covers the following topics:

- Course Administration and Logistics
- Learning Objectives
- Roles and Responsibilities
- Navigation
- Purpose and Benefits of the Business Process
- The End-to-End Business Process
- Introduction to Demonstrations and Exercises

Module 1: Course Introduction

Course Administration and Logistics

To receive credit for completing this course, which is necessary to be granted INFORMS access for performing related tasks in INFORMS, participants must:

- Actively participate in class, and ask questions as needed
- Please turn off cell phones, and refrain from the use of email and the Internet
- Take breaks as scheduled and return to the classroom promptly

Module 1: Course Introduction

- Course Learning Objectives** At the conclusion of this course, participants will be able to:
- Submit a Life Event
 - Adding Dependent Information
 - Enroll Employee Dependents to Benefits Plans

Module 1: Course Introduction

Training Audience: Roles and Responsibilities

The following roles are associated with this course and will play a part in conducting the related business processes for the County:

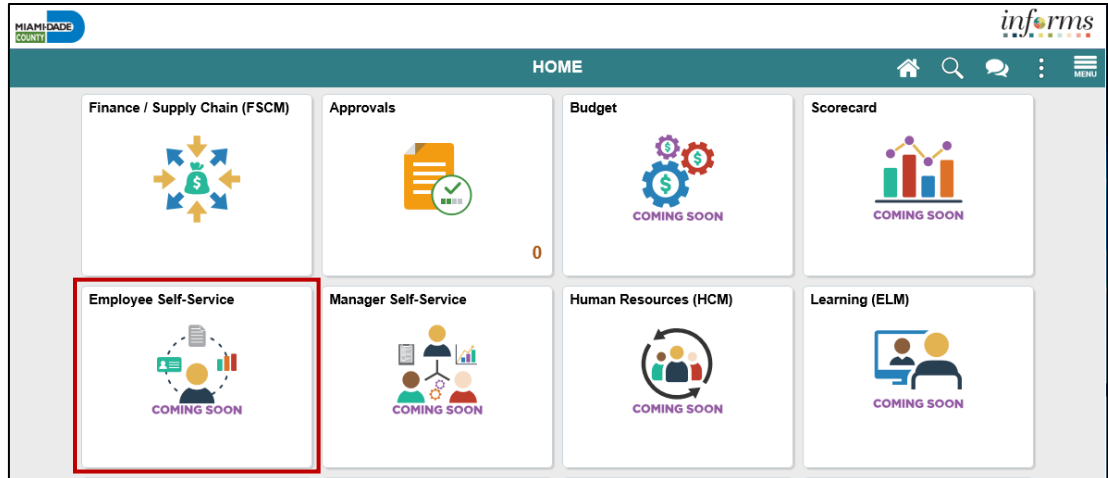
- **Employee:** The Employee is responsible for Self-Service functions (i.e., Life Events, Benefits enrollment, Timesheets, Paycheck, W-4, Direct Deposit, request leave, review evaluations, add accredited Licenses).
- **Benefits Administrator:** The Benefits Administrator is responsible for processing benefit transactions with correction access.

Module 1: Course Introduction

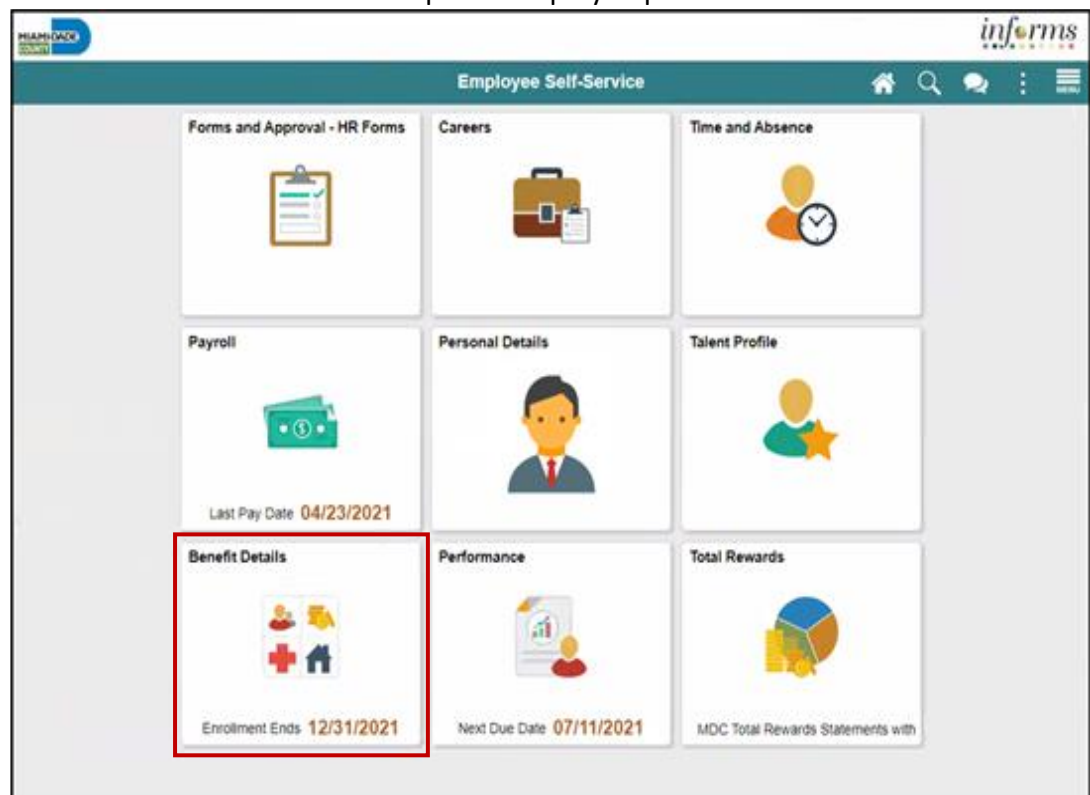
Navigation

Below are the steps to navigate to the Benefits Details page, which will be used for navigation in the rest of this course:

1. Login to INFORMS and select **Employee Self-Service** from the home landing page below:



2. Click **Benefits Details** to update employee personal records.



Module 1: Course Introduction

Purpose and Benefits of the Business Process

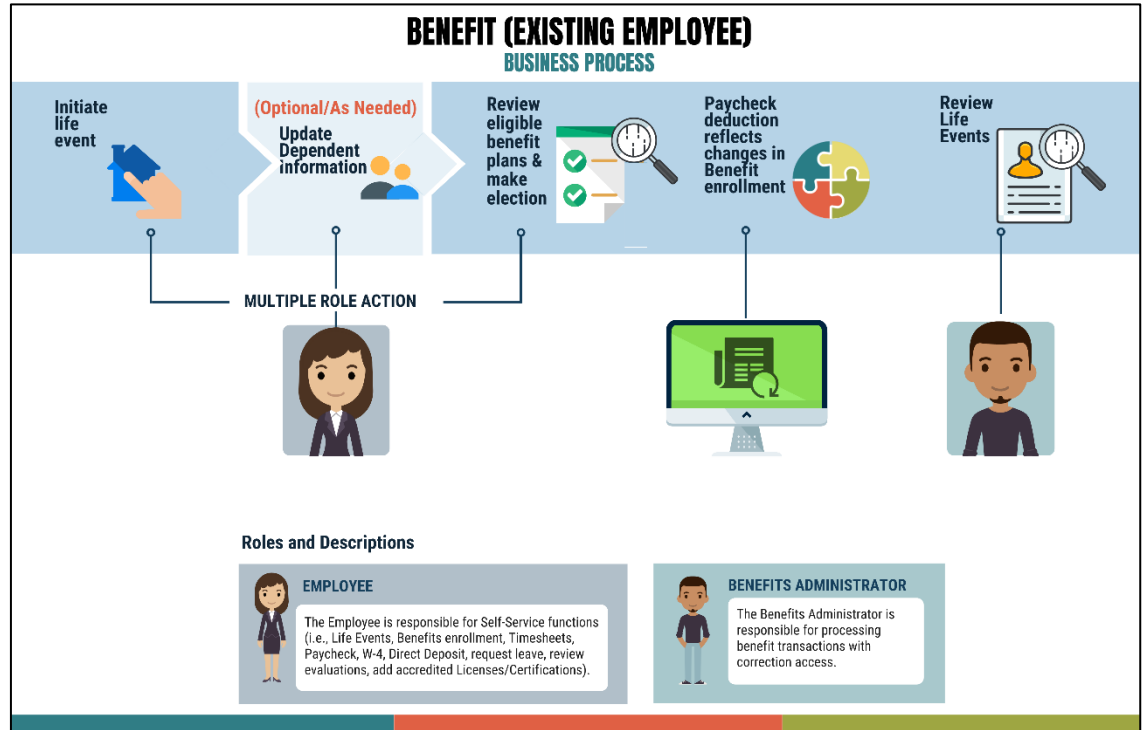
The purpose and benefits of the eBenefits business process include:

- Reduce paper processes (Electronic workflows)
- Employee Empowerment (Employee Self Service and Manager Self Service and mobile capabilities)
- Reduction of processing time
- Enhanced Reporting
- Default Compensation, Add/Remove Components of Pay and Calculate Adjusted Rate
- Integrated payment and accounting for expense reimbursement
- Consolidated Benefit Billing System – Leave of Absence (LOA), retirees, and benefit billing all in one system

Module 1: Course Introduction

The End-to-End Business Process

INFORMS eBenefits allows Employees to initiate benefit changes and upload documentation to support benefits, enrollment, life changes and updates of dependents.



Module 1: Course Introduction

Introduction to Demonstrations and Exercises

Users will take part in three types of hands-on learning throughout this course: Instructor Demonstrations, Training Activities, and Training Exercises. The definitions and descriptions of each are below.

Instructor Demo



Instructor demonstration activities involve a walk-through of tasks and processes in INFORMS. Instructors will demonstrate how to perform these activities while users follow along.

Training Activities



Users will perform tasks and processes in the INFORMS training environment by using the Training Activity and Data Sheet provided, and by using this training guide as a reference.

Training Exercises



The Instructor will ask questions related to the lecture content and training activities, which are used to check users' knowledge and understanding of course content

Module 1: Course Introduction

Module 1: Course Introduction Summary

The following key concepts were covered in this module:

- Initiating a Life Event to enable benefit plan enrollment and elections, or updates based on employee eligibility
- Add or update dependent information to enable benefit enrollment of a dependent(s)
- Enable employees to provide correct and accurate personal information (e.g., home & mailing address, phone number, e-mail address, emergency contacts, marital status, and name)

Module 2: eBenefits

Lessons

This module includes the following lessons:

- Submit a Life Event
- Adding Dependent Information
- Enroll Employee Dependents to Benefits Plans

Lesson 1: Life Events

Lesson 1: Overview

At the conclusion of this lesson, you will be able to:

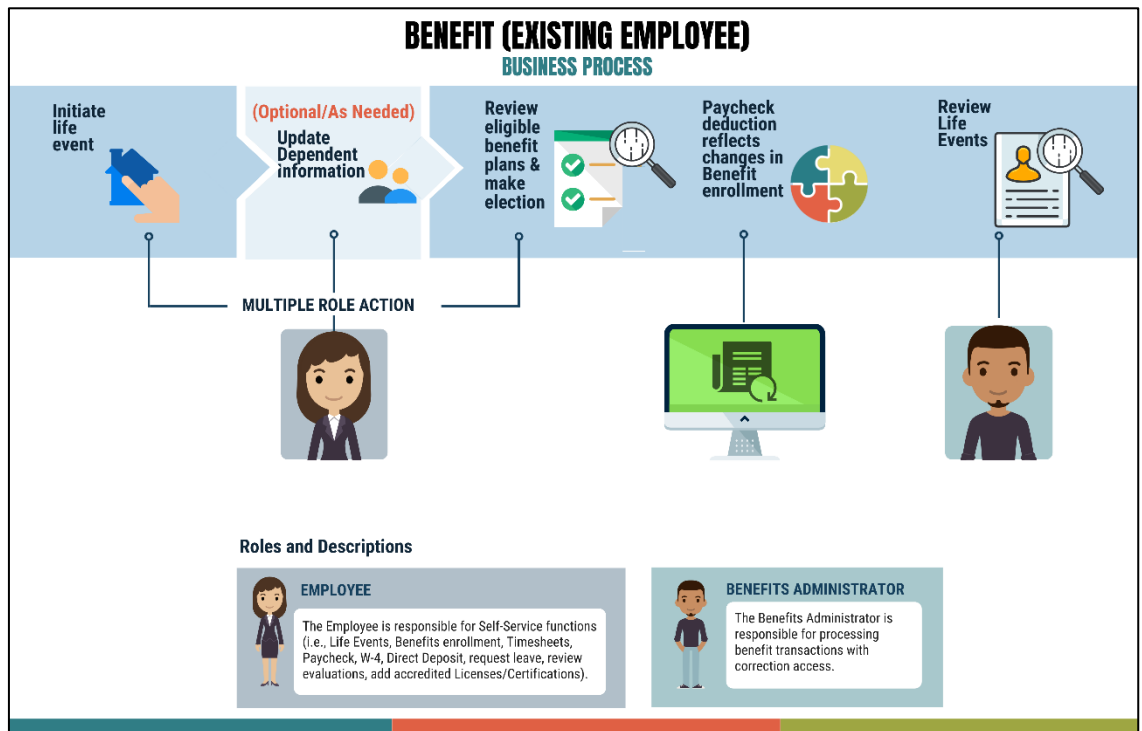
- Submit a Life Event (e.g., Marriage Event, Birth Event, etc.)
- Adding Dependent Information (e.g., home & mailing address, phone number, e-mail address, emergency contacts, marital status, and name)
- Enroll Employee Dependents to Benefits Plans

Lesson 1: Life Events

Lesson 1: Introduction

INFORMS Benefits Details page under the Employee Self-Service page provides an interface called Life Events where employees can enroll to and adjust their benefits in real-time based on a life event such as, but not limited to, getting married, having a baby, adopting a child, change in tax dependents, and so on.

The employee starts, for example, a Marriage Event in Employee Self-Service; indicate the marital status, attach supporting documents, update other personal information, add the spouse as a dependent with beneficiary information, and view a summarized status of all activities performed after recording the Life Event.



Lesson 1: Life Events

Key Terms



The following key terms are used in this Lesson.

Term	Definition
Life Event	Events that involve the employee and/or the employee's family members, which initiates enrollment of a new or update of an existing benefit plan.
Benefit Event	Can be automatically or manually created; evaluated by Benefits Administration to determine if there can/must be a change to benefit enrollments.
Benefit Plan	Specific Benefit Plans within a Benefit Plan Type.
Benefit Plan Type	This is a Benefit category such as Health, Savings, Disability, and Life & Accidental Death.
Benefit Program	Collection of Benefit Plans available to an employee. INFORMS will automatically assign the employee to a Benefit Program based on eligibility criteria.
Benefits Administration	Nightly batch process that determines employee benefits eligibility based on eligibility rules, job changes and life events; also used to automate Open Enrollment.
eBenefits	Allows employees to make benefit elections online. Will only be open to new hires at go-live3.
Employee Class	Type of Employment held by an employee (example – permanent, project, Limited Term Employment....).
Process Instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
Process Request	A single “run request” such as an SERVICE QUERY REQUEST or Crystal report.
Run Control ID	A unique ID, associating each operator with personal run controllable entries.

Lesson 1: Life Events

Lecture 1: Life Events

Manual Benefit Events

An employee can enroll in and/or change benefits elections due to a life event, or if coverage is approved through evidence of insurability. Life events that may affect benefits include:

- Change in your marital status (marriage or divorce)
- Change in number of dependents (birth, adoption/placement for adoption, gain/loss of dependent eligibility, death of dependent)
- Gain or loss of other group health coverage (Medicare/Medicaid/FL Kid Care, expiration of COBRA)
- Court Order
- Change in employment status (beginning/end of employment of a spouse resulting in gain or loss of insurance coverage)
- Unpaid leave of absence
- Change from part-time to full-time employment status or vice versa
- Change in Residence (change in address form, lease, mortgage agreement)
 - **Note:** *Only if the change impacts medical plan eligibility.*
- Armed Forces (Copy Enlistment papers)
- Open Enrollment (Copy of Enrollment) different plan year

Note: Employees can contact central benefits for the type of documentation required for each Live Event.

Live Event	Required Documents
Loss of coverage eligibility for (dependent) child or spouse	Letter of explanation from Employer or insurance company with cancellation date of coverage.
Armed Forces (dependent) child or spouse	Copy of enlistment papers.
Marriage	Marriage license.
Divorce	Divorce decree.
Death (dependent) child or spouse	Death certificate.
Birth of a child (60 days for newborns)	Birth certificate (when it becomes available).

Lesson 1: Life Events

Lecture 1: Life Events

Live Event	Required Documents
Adoption of or placement for adoption of child	Finalized Adoption agreement or letter from placement agency.
Change from FT to PT employment or vice versa	Letter of explanation from employer w/ loss of coverage eligibility or the effective date of insurance.
Unpaid leave of absence	Letter of explanation from employer with effective date of unpaid leave.
Ineligibility of dependent child	Birth certificate, marriage license, or letter from registrar(with insurance effective date).
Beginning or end of employment of spouse/dependent	Letter from employer w/ loss of coverage eligibility and termination date or effective date of insurance and date of full time employment.
Expiration of COBRA (spouse or child)	Letter from employer, plan description or insurance provider.
Court Order	Court Order.
Medicare	Copy of Medicare card showing effective date or another form of documentation showing effective date of coverage.
Medicaid	Copy of Medicaid card or relevant letter indicating effective date.
Change in Residence	Utility Bill, change in address form, lease, mortgage agreement.

Lesson 1: Life Events

Lecture 1: Life Events

Events Generated by Employee Self-Service Actions

Events generated by employee self-service actions are events that are created when an employee takes specific action through self-service. At go-live, self-service access to events will be limited.

Event Rules

For every event (ex. hire, marriage, birth), there are event rules that tell INFORMS what to do when that event occurs. The rule links a benefit event (ex. birth) to a benefit plan type (ex. health insurance). The rule defines what benefit actions can be taken for a specific benefit event.

An event rule defines the following:

- Whether or not any changes can be made to a specific benefit plan.
- How changes can be made? Are the changes available through eBenefits or must the employee complete a paper application that must be entered manually by a Benefits Specialist?
- How long the event will be open?
 - An event will auto close after a certain number of days if no action is taken on the event (i.e., no benefit elections are made against the event). If elections are submitted against the event, the event will close the night the elections are submitted.
- The effective date of the change to coverage.
 - This could be the effective date of new coverage or the coverage end date.

Given the complex nature of the County Benefit rules, there are situations where not all rules can be programmed for a specific benefit event. In this case, additional action may be necessary.

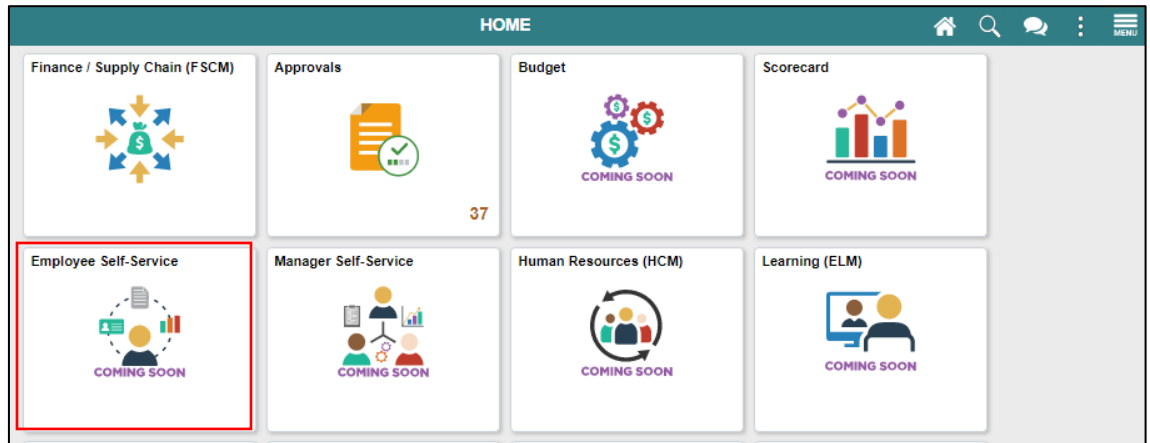
Important Note: Only one event can be open at any time. Open events must be monitored and processed as soon as possible.

Note: A complete list of events and associated event rules will be available prior to go-live.

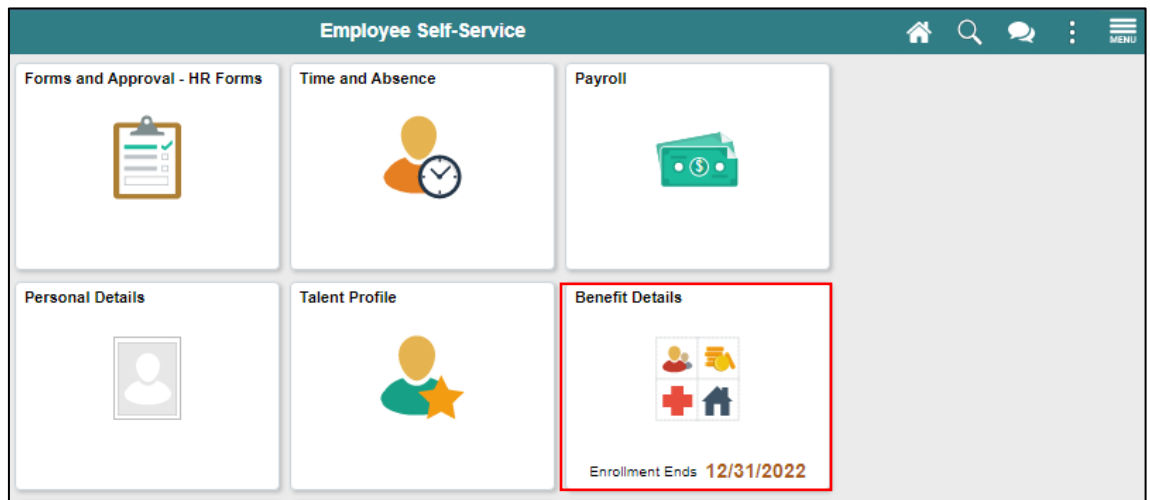
Lesson 1: Life Events

Lecture 1: Life Events

1. Login to INFORMS and select **Employee Self-Service** from the home landing page below:



2. Select **Benefits Details** to access the **Benefits Details** page and view the employee benefits.
Note: The **Benefits Summary** tab is displayed by default.



Lesson 1: Life Events

Lecture 1: Life Events

3. Select **Life Events** to record a Life Event that applies to you.

For this course, submit a **Birth Event** as the Life Event in INFORMS as an example.

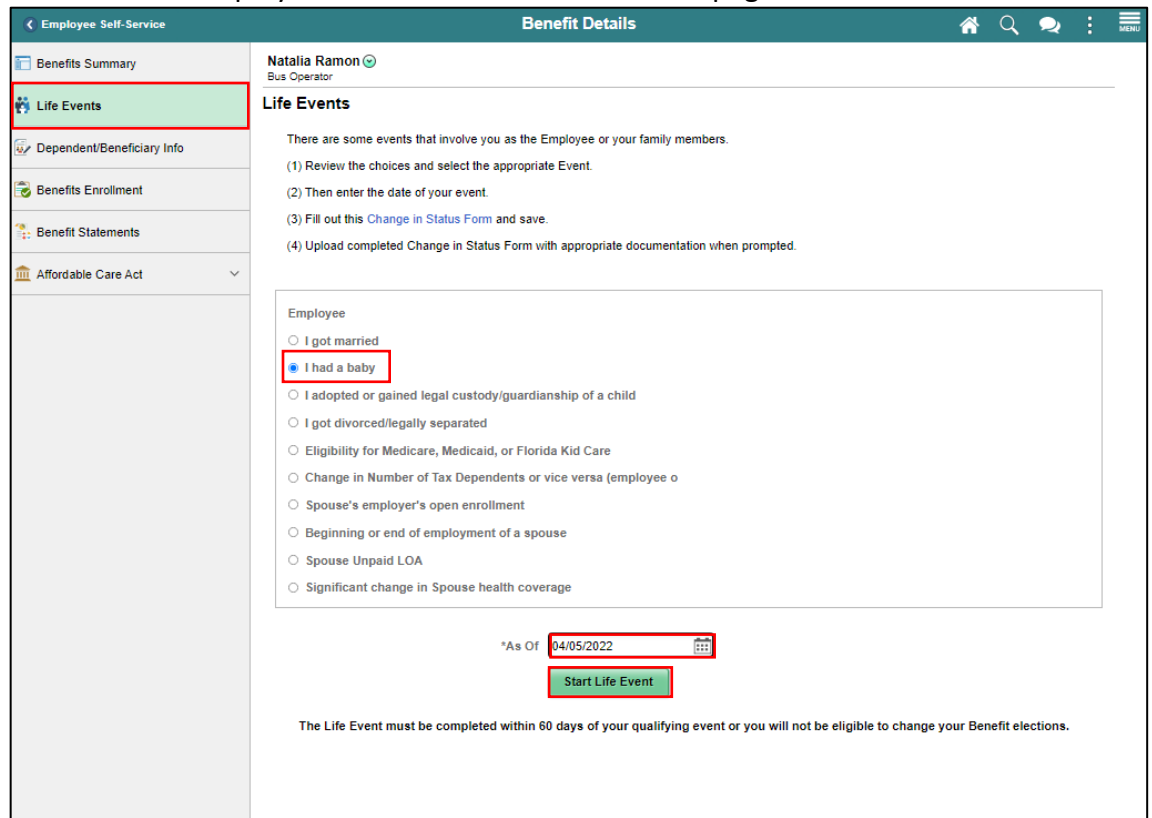
Note: The required documentation to be submitted differs depending on the selected Live Event.

4. Select **I had a baby** to initiate a **Birth Event**.

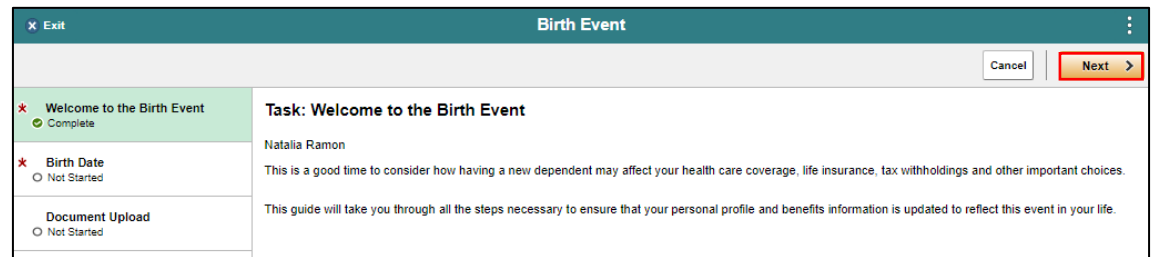
5. Provide the date of birth in the **As Of** calendar field.

6. Select **Start Life Event**.

Note: The employee is directed to the **Birth Event** page.



7. On the **Welcome to the Birth Event** tab, select **Next**.



Lesson 1: Life Events

Lecture 1: Life Events

8. On the **Birth Date** tab, confirm the **Date of Birth**.
9. Select **Submit**.

The screenshot shows the 'Birth Event' form with the 'Birth Date' tab selected. The 'Date of Birth' field contains '04/05/2022'. A red box highlights the 'Submit' button at the bottom of the form.

10. Select **OK**.

The screenshot shows the 'Submit Confirmation' screen. A message with a checkmark icon says 'The Submit was successful.' A red box highlights the 'OK' button at the bottom of the form.

11. Select **Next**.

The screenshot shows the 'Birth Event' form with the 'Birth Date' tab selected. The 'Date of Birth' field contains '04/05/2022'. A red box highlights the 'Next' button in the top right navigation area.

12. On the **Document Upload** tab, select **Add Attachments** to provide supporting documents that corresponds to the Life Event.

The screenshot shows the 'Life Events - Document Upload' screen. It includes instructions for document submission and a list of 'Life Event Documents' with 'Birth Certificate' listed. A red box highlights the 'Add Attachment' button at the bottom.

Lesson 1: Life Events

Lecture 1: Life Events

13. Provide the **Subject** of the attachment, then select **Add Attachment**, then locate and select your file(s) from your desktop, then select **Upload**, and then select **Save**.
Note: Repeat the same steps when adding another document.

Birth Event

Cancel | < Previous | Next >

★ Welcome to the Birth Event
 Complete

★ Birth Date
 Complete

Document Upload
 Visited

Benefits Summary
 Not Started

Dependent/Beneficiary Coverage
 Not Started

Dependent/Beneficiary Info
 Not Started

Pay and Compensation
 Not Started

Document Definition - New Attachment

Instructions
 You have chosen to enter a new attachment.

Selection Criteria

Description	Birth Certificate
*Subject	Birth Certificate
Attachment	<input type="button" value="Add Attachment"/>

GoLife Events - Document Upload To

14. Select Next.

Birth Event

Cancel | < Previous | **Next** >

★ Welcome to the Birth Event
 Complete

★ Birth Date
 Complete

Document Upload
 Complete

Benefits Summary
 Not Started

Dependent/Beneficiary Coverage
 Not Started

Dependent/Beneficiary Info
 Not Started

Pay and Compensation
 Not Started

Direct Deposit
 Not Started

Benefit Enrollment
 Not Started

Benefits Statements
 Not Started

Summary

Life Events - Document Upload

Instructions
 You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

Life Event Documents

Birth Certificate

Attachments

Select	Sequence	Created	Author	Entry ID	Subject	Status
<input type="checkbox"/>	1	04/05/2022 3:30AM	Natalia Ramon	Birth Certificate	Birth Certificate	Submitted

Select All | Deselect All

Lesson 1: Life Events

Lecture 1: Life Events

15. On the **Benefits Summary** tab, view the current **Benefit Plans**, and then select **Next**.

16. On the **Dependent/Beneficiary Coverage** tab, select **Next**.

Lesson 1: Life Events

Lecture 1: Life Events

17. On the **Dependent/Beneficiary Info** tab, select the **Add Individual**.

The screenshot shows a 'Birth Event' window for 'Natalia Ramon', a Bus Operator. On the left is a progress bar with steps: Welcome to the Birth Event (Complete), Birth Date (Complete), Document Upload (Complete), Benefits Summary (Visited), Dependent/Beneficiary Coverage (Visited), and Dependent/Beneficiary Info (Visited). The main content area is titled 'Task: Dependent/Beneficiary Info' and 'Dependent and Beneficiary Information'. It states 'No data exists' and features a red-bordered 'Add Individual' button.

18. Select **Add Name**.

The screenshot shows a dialog box titled 'Add Individual Dependent/Beneficiary Information'. It includes a 'Cancel' button on the left and a 'Save' button on the right. Below the title bar, there is a message: 'Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Apr 5, 2022.' Under the 'Name' section, there is a red-bordered 'Add Name' button.

19. Provide the **First Name** and **Last Name**, and then select **Done**.

The screenshot shows a 'Name' dialog box with a 'Cancel' button on the left and a 'Done' button on the right. The fields are: Name Format (English), Name Prefix (empty), *First Name (Belle), Middle Name (empty), *Last Name (Ramon), and Name Suffix (empty). Below these fields, the system-generated names are shown: Display Name (Belle), Formal Name (Belle), and Name (,Belle). The 'Done' button is highlighted with a red box.

Lesson 1: Life Events

Lecture 1: Life Events

20. Select a **Gender**.
21. Select the **Relationship to Employee**.
22. Select **Save** to save the dependent or beneficiary information and navigate back to the **Dependent/Beneficiary Info** tab.

Cancel
Add Individual Dependent/Beneficiary Information
Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Apr 5, 2022.

Name

Belle Ramon >

Personal Information

Date of Birth

*Gender Female ▼

*Relationship to Employee Child ▼

Dependent Yes

Beneficiary Yes

23. Select **Next**.

✕ Exit
Birth Event
⋮

Cancel
< Previous
Next >

- ✖ Welcome to the Birth Event
✔ Complete
- ✖ Birth Date
✔ Complete
- Document Upload
✔ Complete
- Benefits Summary
● Visited
- Dependent/Beneficiary Coverage
● Visited
- Dependent/Beneficiary Info
✔ Complete

Natalia Ramon

Bus Operator

Task: Dependent/Beneficiary Info

Add Individual

Name	Relationship	Beneficiary	Dependent
Belle Ramon	Child	✔	✔

24. On the **Pay and Compensation** tab, select **Next**.

✕ Exit
Birth Event
⋮

Cancel
< Previous
Next >

- ✖ Welcome to the Birth Event
✔ Complete
- ✖ Birth Date
✔ Complete
- Document Upload
✔ Complete
- Benefits Summary
● Visited
- Dependent/Beneficiary Coverage
● Visited
- Dependent/Beneficiary Info
✔ Complete
- 4 Pay and Compensation
● Visited
- Tax Withholding
● Visited

Task: Pay and Compensation - Tax Withholding

Company Miami Dade County

Status Active

Form Type	Jurisdiction	Withholding Details	
Federal	Federal	Tax Status	Single
		Withholding Allowances	0
		Additional Amount	0.00
		Additional Percentage	Other
State	Florida	Tax Status	N/A
		Withholding Allowances	0
		Additional Amount	0.00
		Additional Percentage	Other

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Lesson 1: Life Events

Lecture 1: Life Events

25. On the **Direct Deposit** tab, select **Next**.

Order	Nickname	Payment Method	Routing Number	Account Number	Account Type	Amount/ Percent
Last	Checking999	Direct Deposit	87654321	XXXX5678	Checking	Remaining Balance

26. On the **Benefit Enrollment** tab, select **Start My Enrollment**.

Note: To enroll in Optional Life Insurance, please go to the Minesota Life website using the link in the enrollment form.

27. Select the **Grid View**.

28. Select the **Review** button that's adjacent to the **Medical** benefit plan.

Plan Type	Current	New	Dependents or Beneficiaries	Pay Period Cost	Status	Actions
Medical	HMO Advantage	HMO Advantage	0 Dependents	\$75.00	Visited	Review
Dental	Delta Dental PPO Enriched	Delta Dental PPO Enriched	0 Dependents	\$5.46	Pending Review	Review

Lesson 1: Life Events

Lecture 1: Life Events

29. Select a dependent to enroll to the **Medical** benefit plan and then select **Done**.

Note: Deselect a dependent to unenroll from the benefit plan.

Cancel
Medical
Done

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured. Enrollment in this benefit may require proof of coverage.

Enroll Your Dependents

Dependents that the employee has registered are listed here. Select the Add/Update Dependent button to view, update or add a new dependent.

Dependents	Relationship
<input checked="" type="checkbox"/> Belle Ramon	Child

Add/Update Dependent

Enroll in Your Plan

The cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Plan Name	Proof of Coverage	Before Tax Cost	After Tax Cost	Pay Period Cost
✓ HMO Advantage	i	\$180.17		\$180.17

Overview of All Plans

- A dependent/beneficiary information can be added while on any benefit plan (e.g., Medical, Dental, or Vision) page.
 - a. Select **Add/Update Dependent**.

Enroll Your Dependents

Dependents that the employee has registered are listed here. Select the Add/Update Dependent button to view, update or add a new dependent.

Dependents	Relationship
<input type="checkbox"/> Belle Ramon	Child

Add/Update Dependent

Enroll in Your Plan

The Employee Only cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

- b. Select **Add Individual**.

Dependent and Beneficiary Information
×

Add Individual

Name	Relationship	Beneficiary	Dependent
Belle Ramon	Child	✓	✓

Lesson 1: Life Events

Lecture 1: Life Events

c. Select **Add Name**.

Cancel Add Individual Dependent/Beneficiary Information Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Apr 6, 2022.

Name

Add Name

d. Populate the fields of the **Name** form with the relevant information.

Cancel Name Done

Name Format English

Name Prefix

*First Name John

Middle Name

*Last Name Ramon

Name Suffix

Display Name John

Formal Name John

Name ,John

e. Populate the fields of the **Personal Information** form with the relevant information.

Cancel Add Individual Dependent/Beneficiary Information Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Apr 6, 2022.

Name

John Ramon

Personal Information

Date of Birth 04/06/2010

*Gender Male

*Relationship to Employee Child

Dependent Yes

Beneficiary Yes

*Marital Status Single

*Student Yes

*Disabled No

*Smoker Non Smoker

Address

Address	Address Type	Same as mine
1st Avenue APT 001 Miami, FL 33132	Home	Same as mine

Lesson 1: Life Events

Lecture 1: Life Events

f. Select **Add National ID**.

National ID

No data exists

g. Select a **Country**.

h. Select a **National ID Type**.

i. Provide the **National ID** and then select **Done**.

National ID

Cancel

*Country

*National ID Type

*National ID

Primary Yes

j. Select **Add Phone**.

Phone

No data exists

k. Select a **Type**.

l. Provide the **Number** and then select **Done**.

Note: Select **Same as mine** to use the phone number of the employee if their dependent does not have a dedicated phone number.

Phone Number

Cancel

Same as mine No

Type

Number

Extension

Preferred Yes

m. Select **Add Email**.

Email

No data exists

n. Select an **Email Type**.

o. Provide the **Email Address** and then select **Done**.

Email Address

Cancel

*Email Type

*Email Address

Lesson 1: Life Events

Lecture 1: Life Events

p. Select **Save**.

Cancel
Add Individual Dependent/Beneficiary Information
Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Apr 6, 2022.

Name

John Ramon

Personal Information

Date of Birth: 04/06/2010

*Gender: Male

*Relationship to Employee: Child

Dependent: Yes

30. Select the **Review** button that's adjacent to the **Dental** benefit plan.

Plan Type	Benefit Plans		Dependents or Beneficiaries	Pay Period Cost	Status	Actions
	Current	New				
Medical	HMO Advantage	HMO Advantage	1 Dependents	\$180.17	Changed	Review
Dental	Delta Dental PPO Enriched	Delta Dental PPO Enriched	0 Dependents	\$5.46	Pending Review	Review

31. Select a dependent to enroll to the **Dental** benefit plan and then select **Done**.

Note: Deselect a dependent to unenroll from the benefit plan.

Cancel
Dental
Done

Dental coverage allows you and your dependents to have routine cleaning visits and receive services such as the installation of fillings and crowns.

Enroll Your Dependents

Dependents that the employee has registered are listed here. Select the Add/Update Dependent button to view, update or add a new dependent.

Dependents	Relationship
<input checked="" type="checkbox"/> Belle Ramon	Child

Add/Update Dependent

Enroll in Your Plan

The Employee + 1 (Couple) cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Plan Name	Before Tax Cost	After Tax Cost	Pay Period Cost
✓ Delta Dental PPO Enriched	\$23.89		\$23.89

Overview of All Plans

- A dependent/beneficiary information can be added while on any benefit plan (e.g., Medical, Dental, or Vision) page. Follow sub-steps a to p from **Step 29** in adding a dependent information.

Lesson 1: Life Events

Lecture 1: Life Events

32. Select the **Review** button that's adjacent to the **Vision** benefit plan.

Plan Type	Current	New	Dependents or Beneficiaries	Pay Period Cost	Status	Actions
Medical	HMO Advantage	HMO Advantage	1 Dependents	\$180.17	Changed	Review
Dental	Delta Dental PPO Enriched	Delta Dental PPO Enriched	1 Dependents	\$23.89	Changed	Review
Vision	Humana Vision Standard	Humana Vision Standard	0 Dependents	\$3.40	Pending Review	Review

33. Select a dependent to enroll to the **Vision** benefit plan and then select **Done**.

Note: Deselect a dependent to unenroll from the benefit plan.

Vision

Vision coverage allows you and your dependents to see an ophthalmologist, optometrist, or optician to assist you with your eye care needs.

Enroll Your Dependents

Dependents that the employee has registered are listed here. Select the Add/Update Dependent button to view, update or add a new dependent.

Dependents	Relationship
<input checked="" type="checkbox"/> Belle Ramon	Child

Enroll in Your Plan

Plan Name	Before Tax Cost	After Tax Cost	Pay Period Cost
✓ Humana Vision Standard	\$6.79	\$6.79	\$6.79

- A dependent/beneficiary information can be added while on any benefit plan (e.g., Medical, Dental, or Vision) page. Follow sub-steps **a** to **p** from **Step 29** in adding a dependent information.

34. Select **Next**.

Birth Event

Cancel | < Previous | **Next** >

✖ Welcome to the Birth Event
✔ Complete

✖ Birth Date
✔ Complete

✔ Document Upload
✔ Complete

● Benefits Summary
● Visited

● Dependent/Beneficiary Coverage
● Visited

Task: Benefit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost: **\$233.82** Full Cost: \$233.82

Status: **Pending Review**

Lesson 1: Life Events

Lecture 1: Life Events

35. On the **Benefits Statements** tab, select **Next**.

The screenshot shows the 'Birth Event' page with the 'Benefits Statements' task selected. The 'Next' button is highlighted in red. The page includes a 'Statement Type' dropdown menu and a message: 'There are no statements available at this time. Please try again later.'

36. On the **Summary** tab, view the itemized steps and their corresponding status of the **Birth Event**, and then click **Complete**.

Note: Click **Go to Step** of the adjacent step of the Life Event to go back to a specific step and make updates or corrections.

The screenshot shows the 'Birth Event' page with the 'Summary' task selected. The 'Complete' button is highlighted in red. Below the task description is a table of steps:

Step	Status	Date Completed	Required	Go to Step
Welcome to the Birth Event	Complete	04/05/2022	Yes	Go to Step
Birth Date	Complete	04/05/2022	Yes	Go to Step
Document Upload	Complete	04/05/2022	No	Go to Step
Benefits Summary	Visited		No	Go to Step
Dependent/Beneficiary Coverage	Visited		No	Go to Step
Dependent/Beneficiary Info	Complete	04/05/2022	No	Go to Step
Tax Withholding	Visited		No	Go to Step
Direct Deposit	Visited		No	Go to Step
Benefit Enrollment	Visited		No	Go to Step
Benefits Statements	Visited		No	Go to Step

Lesson 1: Training Activity 1

Demonstration The Instructor will now demonstrate how to execute the business process through the INFORMS training environment.

Scenario Submit a Birth Event and enroll a dependent to available benefit plans.

Instructions This activity is will be performed individually; you must complete it on your classroom workstation using the INFORMS training environment. Your Instructor will tell you how to log into INFORMS.

You will determine how to perform the activity by following the datasheet, and by using the training materials as reference tools.

There are Instructors in the room to assist if you have questions.

Lesson 1: Training Exercise

Debrief



1. In which benefit plan can a dependent be added?
 - a) Medical
 - b) Dental
 - c) Vision
 - d) All of the Above.

2. I can change my dependents benefit plan at any time.
 - a) True
 - b) False

Lesson 1: Lesson Summary

Objectives Achieved



Now that you have completed the Life Events lesson, you should be able to:

- Submit a Life Event (e.g., Marriage Event, Birth Event, etc.)
- Adding Dependent Information (e.g., home & mailing address, phone number, e-mail address, emergency contacts, marital status, and name)
- Enroll Employee Dependents to Benefits Plans

Module 3: Course Summary

Objectives Achieved



Congratulations! You have completed the eBenefits course. You now should be able to:

- Submit a Life Event (e.g., Marriage Event, Birth Event, etc.)
- Adding Dependent Information (e.g., home & mailing address, phone number, e-mail address, emergency contacts, marital status, and name)
- Enroll Employee Dependents to Benefits Plans

Next Steps

Now that you have completed the course, please make sure to complete the following tasks:

- Course assessment (tests your knowledge of the content)
- Course evaluation (collects course feedback)
- Log off your workstation

Reference Materials

Reference Materials



If you have further questions about any of the topics presented in this course, use the following resources:

User Productivity Kits

- Submit a Life Event
- Adding Dependent Information from a Benefit Plan

Reference Materials

Reference Materials



For additional Information:

- www.miamidade.gov/informs

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Benefit Event	Can be automatically or manually created; evaluated by Benefits Administration to determine if there can/must be a change to benefit enrollments.
Benefit Plan	Specific Benefit Plans within a Benefit Plan Type.
Benefit Plan Type	This is a Benefit category such as Health, Savings, Disability, and Life & Accidental Death.
Benefit Program	Collection of Benefit Plans available to an employee. INFORMS will automatically assign the employee to a Benefit Program based on eligibility criteria.
Benefits Administration	Nightly batch process that determines employee benefits eligibility based on eligibility rules, job changes and life events; also used to automate Open Enrollment.
eBenefits	Allows employees to make benefit elections online. Will only be open to new hires at go-live.
Employee Class	Type of Employment held by an employee (example – permanent, project, Limited Term Employment....).
Process Instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
Process Request	A single “run request” such as a Service Query Request or Crystal report.
Run Control ID	A unique ID, associating each operator with personal controllable entries.

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Benefit Deduction	Deductions set up in Benefits Module (Med, WRS, ICI, and others.) are referred to as Benefit Deductions.
Comp Rate Code	Comp Rate Code indicates components of pay for an employee in addition to the employee's base wage.
Earning Code	An Earning Code is an identifier for Earnings that designates settings for taxation, calculation, and others. This code links to a Time Reporting Code (TRC) generated in Time and Labor.
Benefit Deduction	Deductions set up in Benefits Module (Med, WRS, ICI, and others.) are referred to as Benefit Deductions.
Comp Rate Code	Comp Rate Code indicates components of pay for an employee in addition to the employee's base wage.
Absence Event	The period for which an employee is absent for the same reason.
Absence Take	The element which represents the reason for the Absence Event.
Entitlement	The amount of paid time off an employee is entitled to take for an Absence Take.
Entitlement Balance	The amount of unused entitlement.
Adjustment	A deduction or addition made from/into the Absence Entitlement balance.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically in hours or partial

Glossary

Key Terms



The following key terms are used in this course:

Term	Definition
Delegation Proxy	Delegation proxy is the process used to assign a backup Supervisor for time approval responsibilities.
Entitlement	The amount of paid time off an employee is entitled to take for an Absence Take.
Entitlement Balance	The amount of unused entitlement.
Finalize Absences	Finalize absence is the process of closing absences for the current payroll period.
Payable Time	Payable time is time after it has been processed, and the rules have been applied to create differentials, premiums and overtime. A Supervisor approves payable time.
Reported Time	The reported time is the time that is entered on a timesheet.
Speed Type	A speed type is a shortcut to look up or enter valid combo codes.
Timesheet Page	A timesheet page enables a supervisor to work with an employee's reported time in more detail.
Units	The period of time in which entitlement, take, adjustments and balances are measured. Typically in hours or partial hours.