

Course ID: ESS 202

Course: Employee Self Service - eBenefits

Ground Rules



Be on time



Attendance



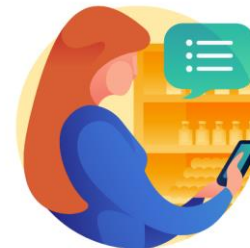
Turn off your cell phones when in class



Take breaks as needed



Participate actively in class; refrain from email and internet use



Feel free to ask questions

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
Training Audiences	<ul style="list-style-type: none">● Employee
Prerequisites	<ul style="list-style-type: none">● ERP 101 – Overview of ERP● ERP 102 – INFORMS Navigation, Reporting, and Online Help
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
Estimated Duration	<ul style="list-style-type: none">● 5 Hours

Module 1: Course Introduction

Module Topics

Course Administration and Logistics

Learning Objectives

Roles and Responsibilities

Navigation

Purpose and Benefits of the Business Process

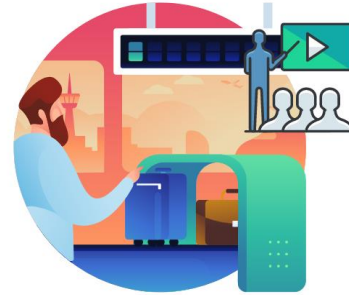
The End-to-End Business Process

Introduction to Demonstration and Exercises

Course Administration and Logistics



To receive credit for completing this course, Users must record your attendance at the beginning and end of class



Please turn off your cell phones and refrain from checking email and the Internet while in class



Actively participate in class



Take Breaks at scheduled times



Ask questions; this is your time to learn



Be back from Breaks on time

Learning Objectives

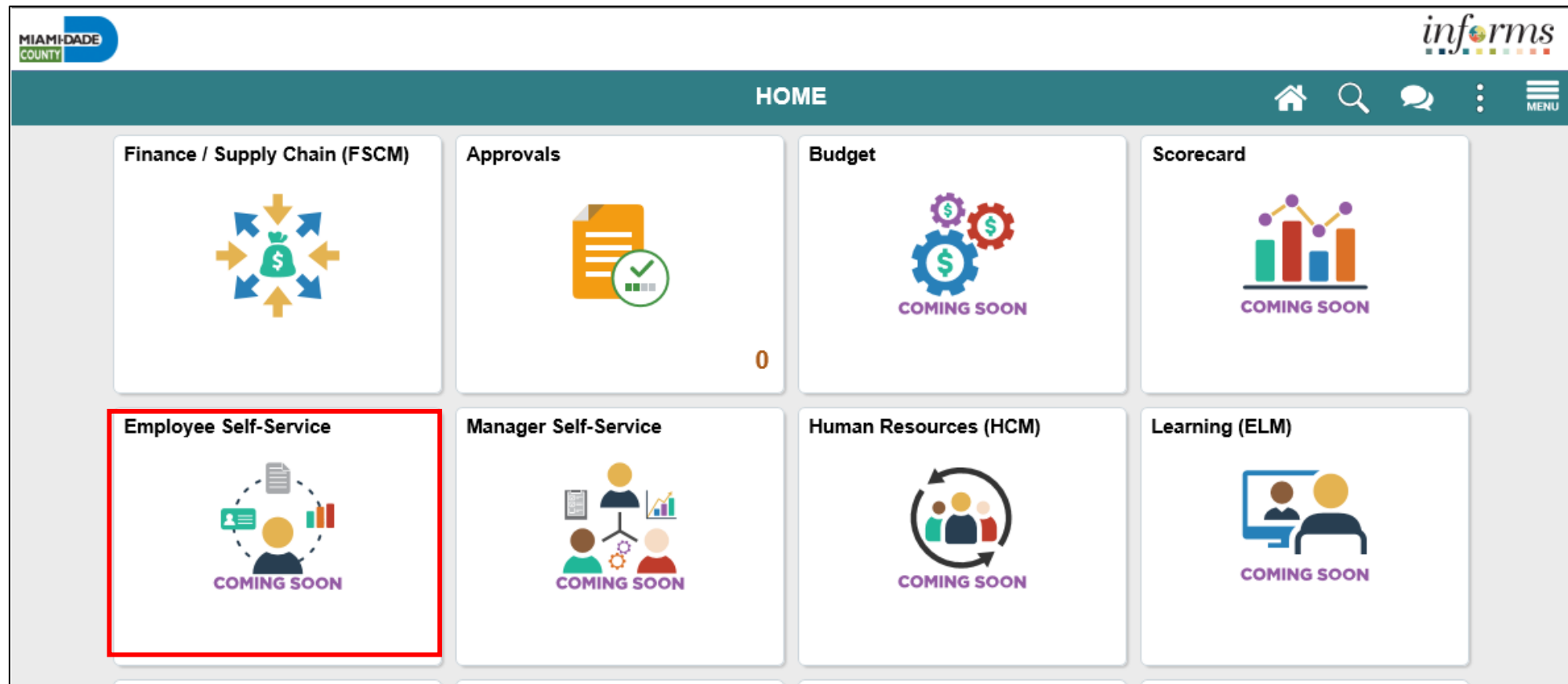
- Submit a Life Event
- Adding Dependent Information
- Enroll Employee Dependents to Benefits Plans

Roles and Responsibilities

Role	Responsibilities
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 and has correction access.

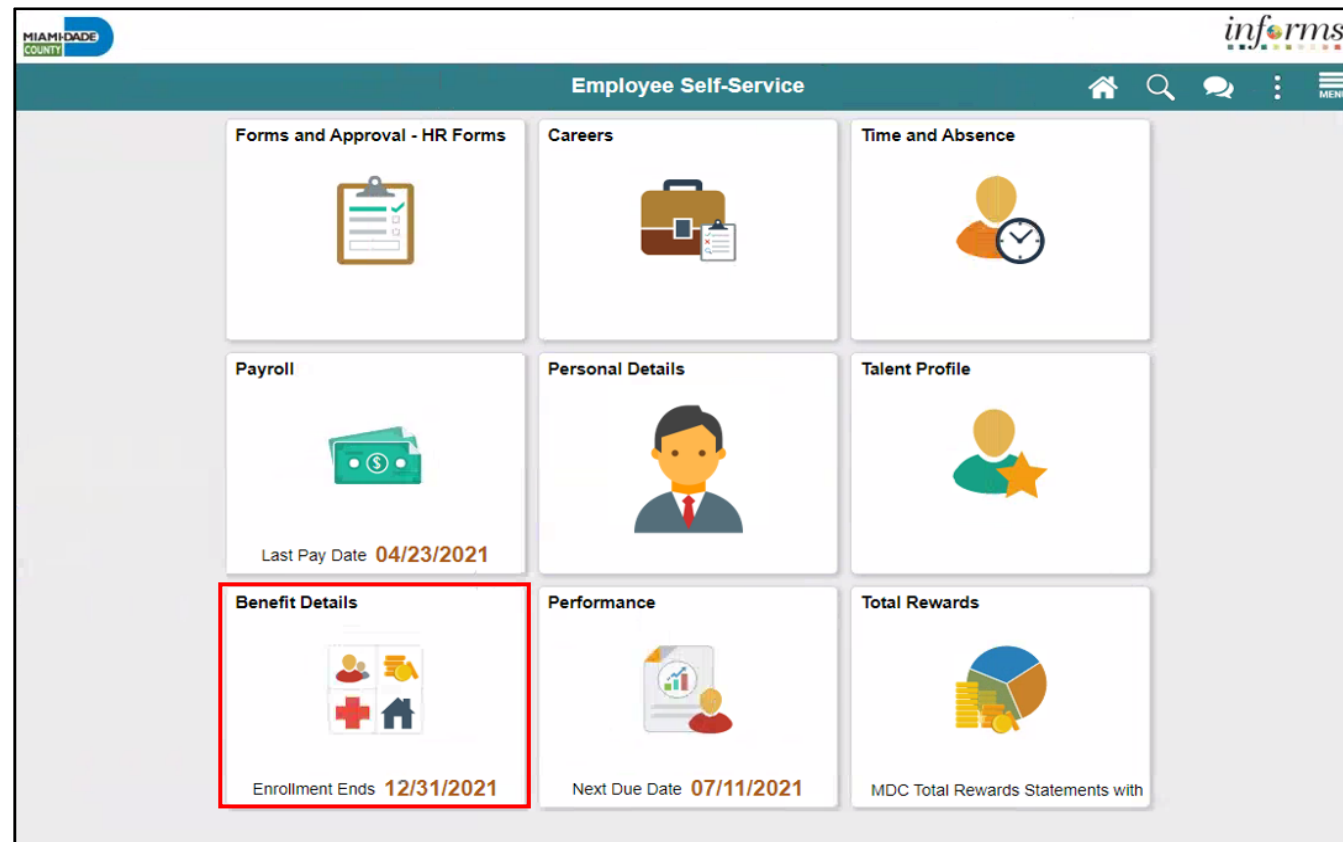
Navigation

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



Navigation Continued

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



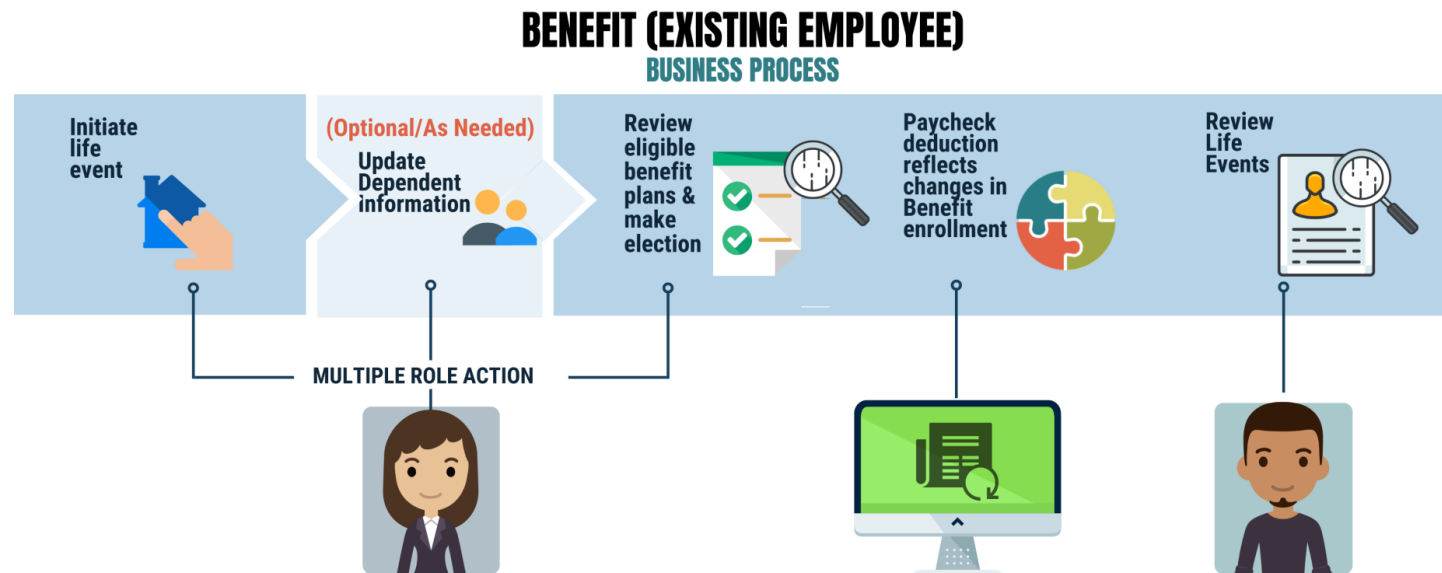
Purpose and Benefits to Business Process

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

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.



Roles and Descriptions



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/Certifications).



BENEFITS ADMINISTRATOR

The Benefits Administrator is responsible for processing benefit transactions with correction access.

Introduction to Activities and Exercises

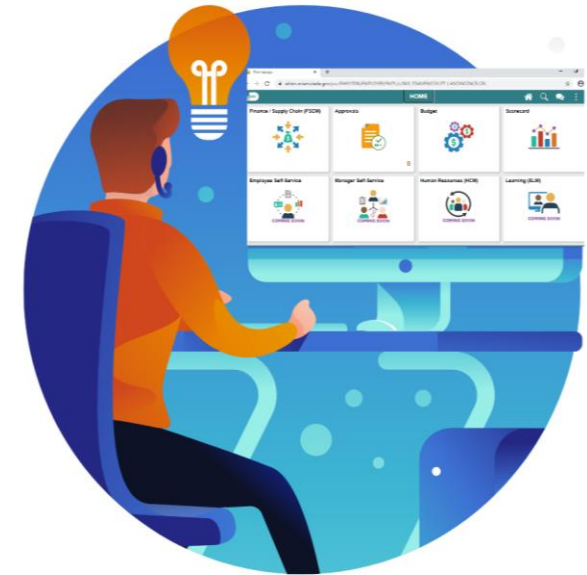
- You will take part in three types of hands-on learning throughout this course.



Instructor
Demo



Training
Activities



Training
Exercises

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

Module Topics

Module Introduction

Submit a Life Event

Adding Dependent Information

Enroll Employee Dependents to Benefits Plans

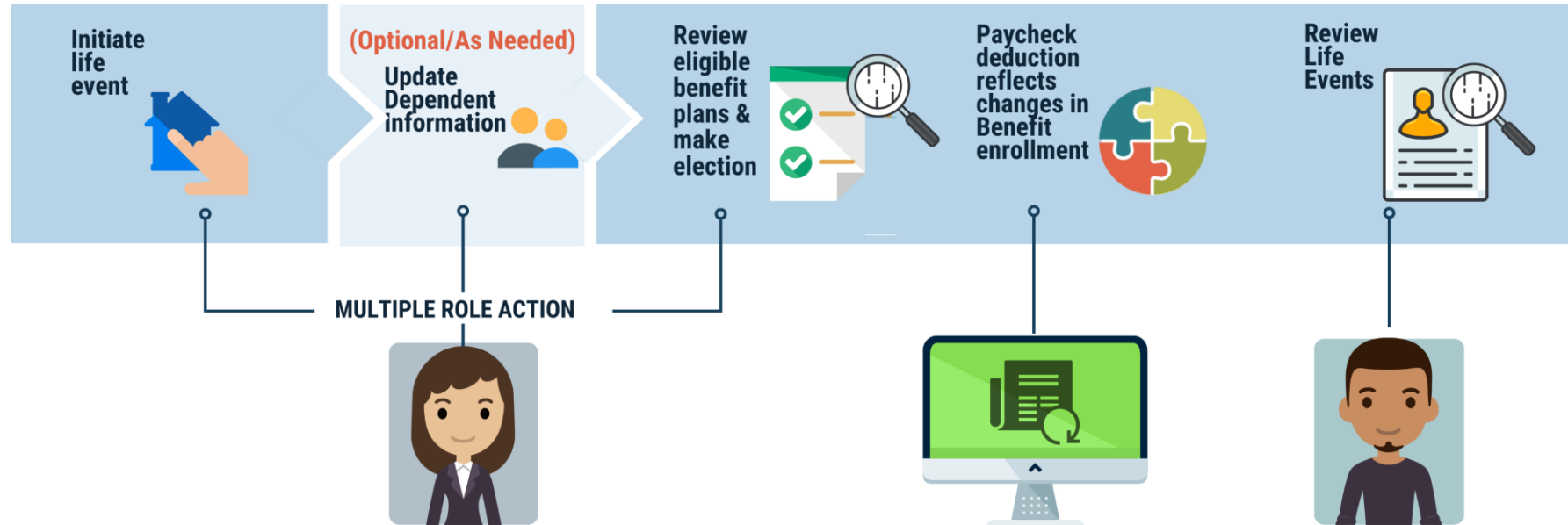
Lesson 1: Life Events

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 Continued

BENEFIT (EXISTING EMPLOYEE) BUSINESS PROCESS



Roles and Descriptions



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/Certifications).



BENEFITS ADMINISTRATOR

The Benefits Administrator is responsible for processing benefit transactions with correction access.

Lesson 1: Key Terms

Term	Definition
Life Event	Events that involve the employee and/or the employees 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.

Lesson 1: Key Terms, Continued

Term	Definition
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 a Service Query Request or Crystal report.
Run Control ID	A unique ID, associating each operator with personal run controllable entries.

Lesson 1: Life Events

Manual Benefit Events

Examples of 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

Lesson 1: Life Events

Manual Benefit Events

Examples of life events that may affect benefits include:

- 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

Lesson 1: Life Events, Continued

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

Life 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).
Adoption of or placement for adoption of child	Finalized Adoption agreement or letter from placement agency.

Lesson 1: Life Events, Continued

Life Event	Required Documents
Change from FT to PT employment or vice versa	Letter of explanation from employer with 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 with 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, Continued

Events Generated by Employee Self-Service Actions

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

Lesson 3: Life Events, Continued

Event Rules

For every event (e.g. hire, marriage, birth), there are event rules that tell INFORMS what to do when that event occurs. The rule links a benefit event (e.g. birth) to a benefit plan type (e.g. 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
- How long the event will be open
- The effective date of the coverage change

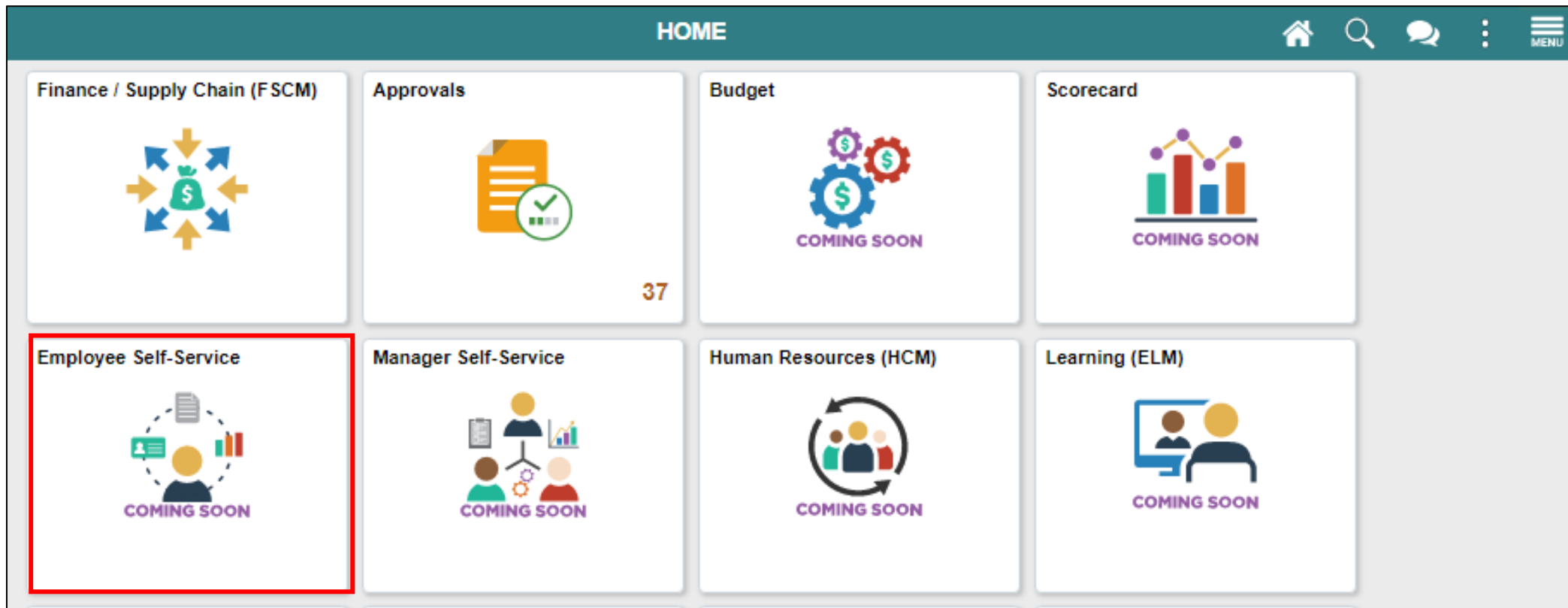
Lesson 1: Life Events, Continued

Key items to remember:

- Only one event can be open at any time
- A complete list of events and associated event rules will be available prior to go-live

Lesson 1: Life Events, Continued

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



Lesson 1: Life Events, Continued

2. Click **Benefits Details** to access the **Benefits Details** page and view the employee benefits.

Note: The **Benefits Summary** tab is displayed by default

The screenshot displays the 'Employee Self-Service' portal. The header includes the 'MIAMI DADE COUNTY' logo on the left and the 'informatics' logo on the right. Below the header is a navigation bar with icons for home, search, chat, and menu. The main content area is a grid of tiles:

- Forms and Approval - HR Forms**: Represented by a clipboard icon.
- Careers**: Represented by a briefcase icon.
- Time and Absence**: Represented by a person icon and a clock icon.
- Payroll**: Represented by a stack of money icon. Below the icon, it says 'Last Pay Date 04/23/2021'.
- Personal Details**: Represented by a person icon.
- Talent Profile**: Represented by a person icon and a star icon.
- Benefit Details**: Represented by an icon showing a person, a plus sign, and a house. This tile is highlighted with a red border. Below the icon, it says 'Enrollment Ends 12/31/2021'.
- Performance**: Represented by a document icon with a bar chart. Below the icon, it says 'Next Due Date 07/11/2021'.
- Total Rewards**: Represented by a pie chart and coins icon. Below the icon, it says 'MDC Total Rewards Statements with'.

Lesson 1: Life Events, Continued

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.

The screenshot shows the 'Employee Self-Service' interface for 'Benefit Details'. The user is identified as Natalia Ramon, a Bus Operator. The left sidebar contains a menu with 'Life Events' highlighted in red. The main content area is titled 'Life Events' and includes instructions: 'There are some events that involve you as the Employee or your family members. (1) Review the choices and select the appropriate Event. (2) Then enter the date of your event. (3) Fill out this Change in Status Form and save. (4) Upload completed Change in Status Form with appropriate documentation when prompted.' Below this, a list of events is shown under the heading 'Employee'. The 'I had a baby' option is selected and highlighted in red. Other options include 'I got married', 'I adopted or gained legal custody/guardianship of a child', 'I got divorced/legally separated', 'Eligibility for Medicare, Medicaid, or Florida Kid Care', 'Change in Number of Tax Dependents or vice versa (employee o', 'Spouse's employer's open enrollment', 'Beginning or end of employment of a spouse', 'Spouse Unpaid LOA', and 'Significant change in Spouse health coverage'. At the bottom, the '*As Of' date is set to 04/05/2022 and highlighted in red, with a 'Start Life Event' button also highlighted in red. A note at the bottom states: 'The Life Event must be completed within 60 days of your qualifying event or you will not be eligible to change your Benefit elections.'

Lesson 1: Life Events, Continued

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

The screenshot shows a software interface for a 'Birth Event'. At the top, there is a teal header bar with 'Exit' on the left and 'Birth Event' in the center. On the right side of the header, there are two buttons: 'Cancel' and 'Next >'. The 'Next >' button is highlighted with a red rectangular box. Below the header, the main content area is divided into two columns. The left column contains a list of tasks: 'Welcome to the Birth Event' with a green checkmark and 'Complete' status, 'Birth Date' with a red asterisk and 'Not Started' status, and 'Document Upload' with a red asterisk and 'Not Started' status. The right column displays the details for the selected task, 'Task: Welcome to the Birth Event', including the name 'Natalia Ramon' and two paragraphs of instructional text.

Birth Event	
<p>Cancel Next ></p>	
<p>★ Welcome to the Birth Event ✔ Complete</p>	<p>Task: Welcome to the Birth Event</p> <p>Natalia Ramon</p> <p>This is a good time to consider how having a new dependent may affect your health care coverage, life insurance, tax withholdings and other important choices.</p>
<p>★ Birth Date ○ Not Started</p>	
<p>Document Upload ○ Not Started</p>	<p>This guide will take you through all the steps necessary to ensure that your personal profile and benefits information is updated to reflect this event in your life.</p>

Lesson 1: Life Events, Continued

8. On the **Birth Date** tab, confirm the **Date of Birth**.

9. Select **Submit**.

The screenshot shows a web application window titled "Birth Event". The window has a teal header bar with an "Exit" button on the left and a menu icon on the right. Below the header, there are navigation buttons: "Cancel", "< Previous", and "Next >". The main content area is divided into two columns. The left column contains a progress indicator with four steps: "Welcome to the Birth Event" (Complete), "Birth Date" (In Progress), "Document Upload" (Not Started), and "Benefits Summary" (Not Started). The right column is titled "Birth Date" and contains a paragraph of text: "A birth event may require a change to your benefit enrollment. You'll have an opportunity to have the system prepare your new benefit options during the Benefit Enrollment step. Once your new options are prepared, you may change your benefit enrollment." Below this text is a "Date of Birth:" label followed by a date input field containing "04/05/2022" and a calendar icon. A "Submit" button is located below the date field.

Lesson 1: Life Events, Continued

10. Select **OK**.

Birth Event

Cancel < Previous Next >

- ★ Welcome to the Birth Event
✔ Complete
- ★ Birth Date
✔ Complete
- Document Upload
○ Not Started
- Benefits Summary
○ Not Started

Birth Date
Submit Confirmation

✔ The Submit was successful.

OK

11. Select **Next**.

Birth Event

Cancel < Previous Next >

- ★ Welcome to the Birth Event
✔ Complete
- ★ Birth Date
✔ Complete
- Document Upload
○ Not Started

Birth Date

A birth event may require a change to your benefit enrollment. You'll have an opportunity to have the system prepare your new benefit options during the Benefit Enrollment step. Once your new options are prepared, you may change your benefit enrollment.

Date of Birth: 04/05/2022

Lesson 1: Life Events, Continued

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

The screenshot shows a web application window titled "Birth Event". The interface is divided into a left sidebar and a main content area. The sidebar contains a list of steps: "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), and "Pay and Compensation" (Not Started). The "Document Upload" step is highlighted in green. The main content area is titled "Life Events - Document Upload" and includes a "Help" link. Below the title, there are "Instructions" stating that users must submit documents listed here and select the "Add Attachment" button. A section titled "Life Event Documents" contains a text input field with "Birth Certificate" entered. At the bottom, there are two buttons: "Add Attachment" (highlighted with a red border) and "Add Note". Navigation buttons "Cancel", "< Previous", and "Next >" are located at the top right of the main content area.

Lesson 1: Life Events, Continued

13. Provide the **Subject** of the attachment, then select **Add Attachment**, then locate and select your file(s) from your desktop, then select **Upload**, then select **Save**.

Note: Repeat the same steps when adding another document.

The screenshot displays the 'Birth Event' document upload interface. The sidebar on the left contains the following items:

- 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)

The main content area is titled 'Document Definition - New Attachment' and includes the following sections:

- Instructions:** You have chosen to enter a new attachment.
- Selection Criteria:**
 - Description: Birth Certificate
 - *Subject: Birth Certificate (highlighted with a red box)
 - Attachment: Add Attachment (highlighted with a red box)
- Save (highlighted with a red box)

At the bottom left, the text 'GoLife Events - Document Upload To' is visible. At the top right, there are 'Cancel', '< Previous', and 'Next >' buttons. A 'Help' link is also present in the top right corner.

Lesson 1: Life Events, Continued

14. Select Next.

The screenshot shows a web application window titled "Birth Event". The interface is divided into a left sidebar and a main content area. The sidebar contains a list of steps: "Welcome to the Birth Event" (Complete), "Birth Date" (Complete), "Document Upload" (Complete and highlighted in green), "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), and "Summary". The main content area is titled "Life Events - Document Upload" and includes instructions, a section for "Life Event Documents" with a text input field containing "Birth Certificate", and two buttons: "Add Attachment" and "Add Note". Below this is an "Attachments" table with one row of data.

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

Add Attachment Add Note

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
Delete

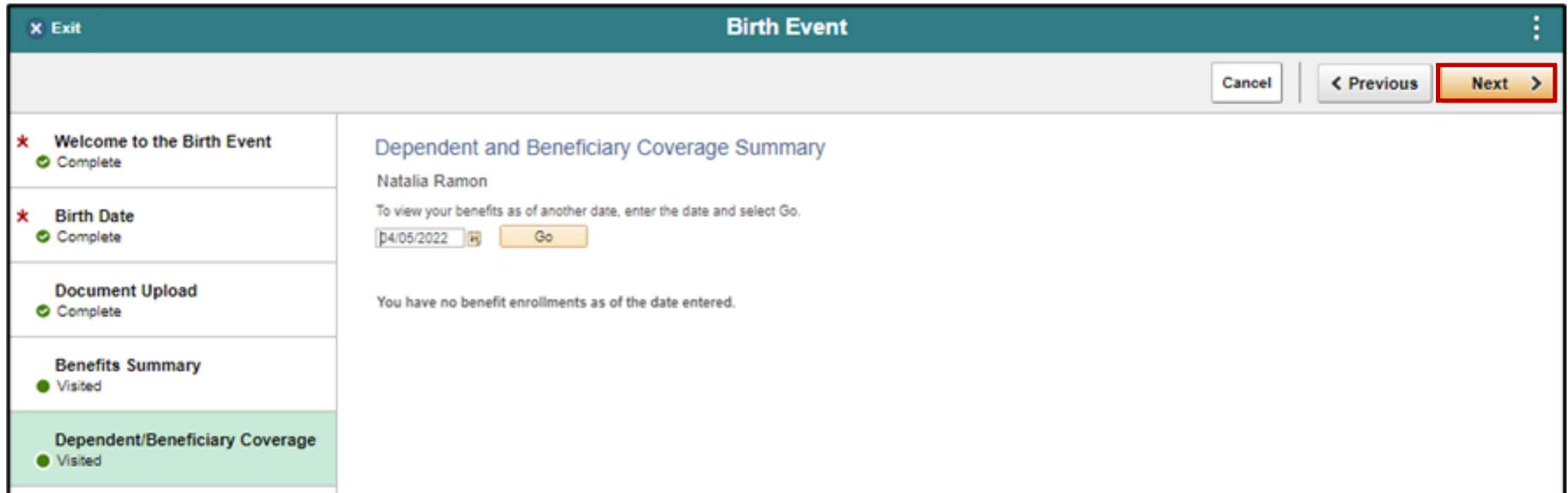
Lesson 1: Life Events, Continued

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

The screenshot displays the 'Birth Event' web application interface. The top navigation bar includes an 'Exit' button, the title 'Birth Event', and navigation buttons: 'Cancel', '< Previous', and 'Next >'. The 'Next >' button is highlighted with a red border. The main content area is divided into a left sidebar and a main panel. The sidebar contains a list of steps: 'Welcome to the Birth Event' (Complete), 'Birth Date' (Complete), 'Document Upload' (Complete), 'Benefits Summary' (Visited), 'Dependent/Beneficiary Coverage' (Not Started), 'Dependent/Beneficiary Info' (Not Started), 'Pay and Compensation' (Not Started), 'Direct Deposit' (Not Started), and 'Benefit Enrollment' (Not Started). The main panel shows the user's name 'Natalia Ramon' (Bus Operator) and the current task 'Task: Benefits Summary'. Below this, there is a section for viewing benefits as of another date, with a date selector set to '04/05/2022' and a 'Refresh' button. The 'Benefit Plans' section is displayed in a grid view, showing two plans: 'Medical' (Plan: HMO Advantage, Coverage: Employee Only, 0 Dependents) and 'Dental' (Plan: Delta Dental PPO Enriched, Coverage: Employee Only, 0 Dependents). Each plan has a 'Review' button at the bottom.

Lesson 1: Life Events, Continued

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



The screenshot shows a web application window titled "Birth Event". The window has a teal header bar with "Exit" on the left and a menu icon on the right. Below the header, there are navigation buttons: "Cancel", "< Previous", and "Next >". The "Next >" button is highlighted with a red border. The main content area is split into two columns. The left column is a sidebar with a list of steps: "Welcome to the Birth Event" (Complete), "Birth Date" (Complete), "Document Upload" (Complete), "Benefits Summary" (Visited), and "Dependent/Beneficiary Coverage" (Visited). The "Dependent/Beneficiary Coverage" step is highlighted in green. The right column displays the "Dependent and Beneficiary Coverage Summary" for "Natalia Ramon". It includes a date selector set to "04/05/2022" and a "Go" button. Below this, it states "You have no benefit enrollments as of the date entered."

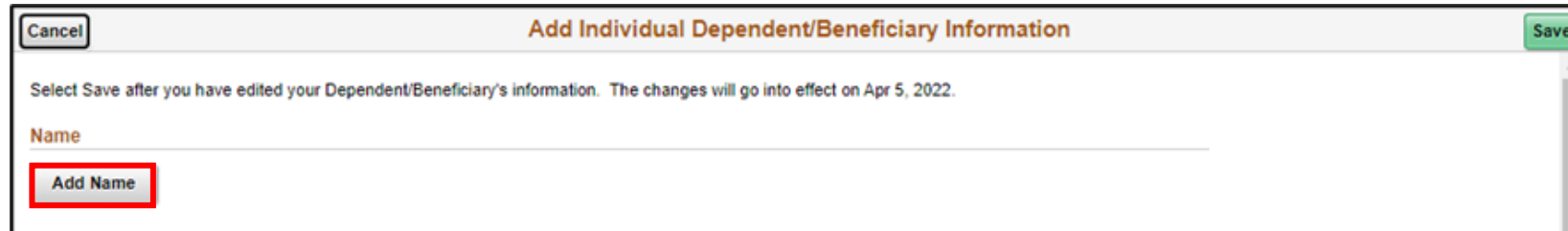
Lesson 1: Life Events, Continued

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

The screenshot shows a web application window titled "Birth Event" for "Natalia Ramon" (Bus Operator). The interface includes a navigation bar with "Cancel", "Previous", and "Next" buttons. A sidebar on the left lists several 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 displays the "Task: Dependent/Beneficiary Info" section, which currently shows "No data exists" and a red-bordered "Add Individual" button.

Lesson 1: Life Events, Continued

18. Select **Add Name**.



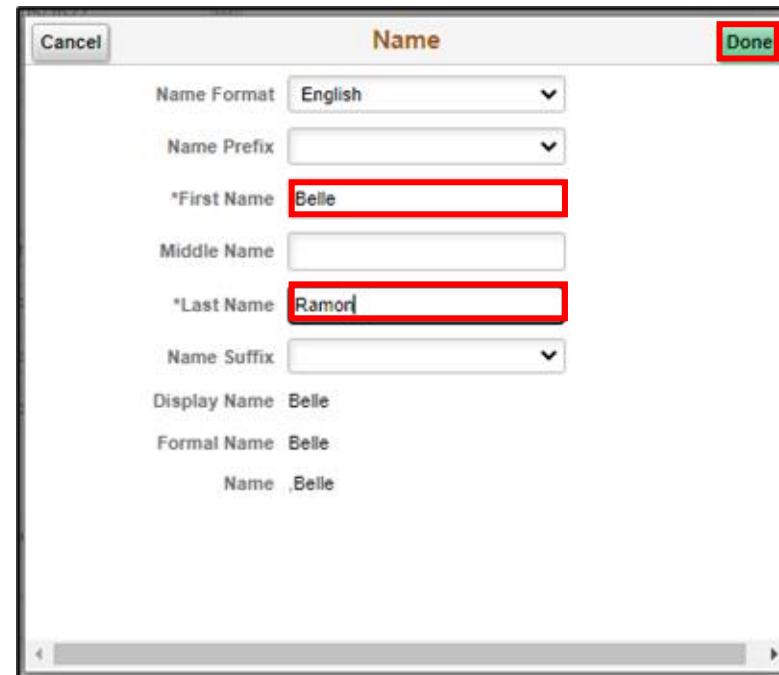
Cancel Add Individual Dependent/Beneficiary Information Save

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

Name

Add Name

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



Cancel Name Done

Name Format English

Name Prefix

*First Name **Belle**

Middle Name

*Last Name **Ramor**

Name Suffix

Display Name Belle

Formal Name Belle

Name ,Belle

Lesson 1: Life Events, Continued

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 04/05/2022

*Gender Female

*Relationship to Employee Child

Dependent Yes

Beneficiary Yes

Lesson 1: Life Events, Continued

23. 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

Dependent/Beneficiary Info
✔ Complete

Natalia Ramon ☺
Bus Operator

Task: Dependent/Beneficiary Info

Add Individual

Name	Relationship	Beneficiary	Dependent	
Belle Ramon	Child	✔	✔	>

Lesson 1: Life Events, Continued

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

The screenshot shows a software window titled "Birth Event" with a teal header. In the top right corner, there are three buttons: "Cancel", "< Previous", and "Next >". The "Next >" button is highlighted with a red border. On the left side, there is a vertical navigation menu with several items, each with a status indicator (a star and a circle):

- Welcome to the Birth Event (Complete)
- Birth Date (Complete)
- Document Upload (Complete)
- Benefits Summary (Visited)
- Dependent/Beneficiary Coverage (Visited)
- Dependent/Beneficiary Info (Complete)
- Pay and Compensation (Visited)
- Tax Withholding (Visited)

The main content area is titled "Task: Pay and Compensation - Tax Withholding". It shows the following information:

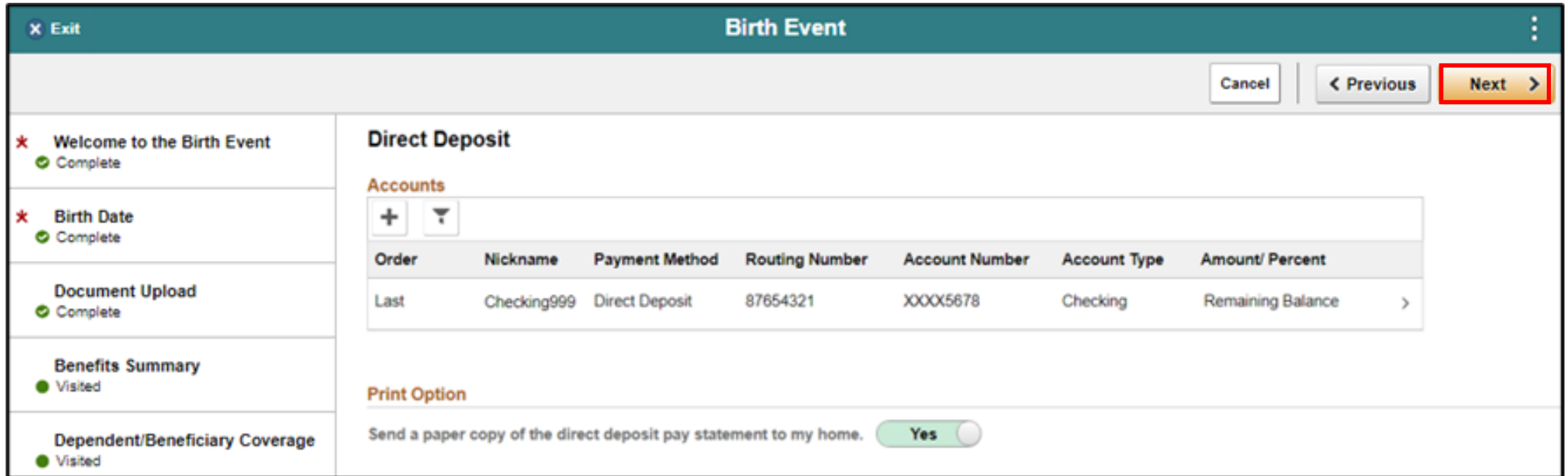
- Company: Miami Dade County
- Status: Active

Below this is a table with the following structure:

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

Lesson 1: Life Events, Continued

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



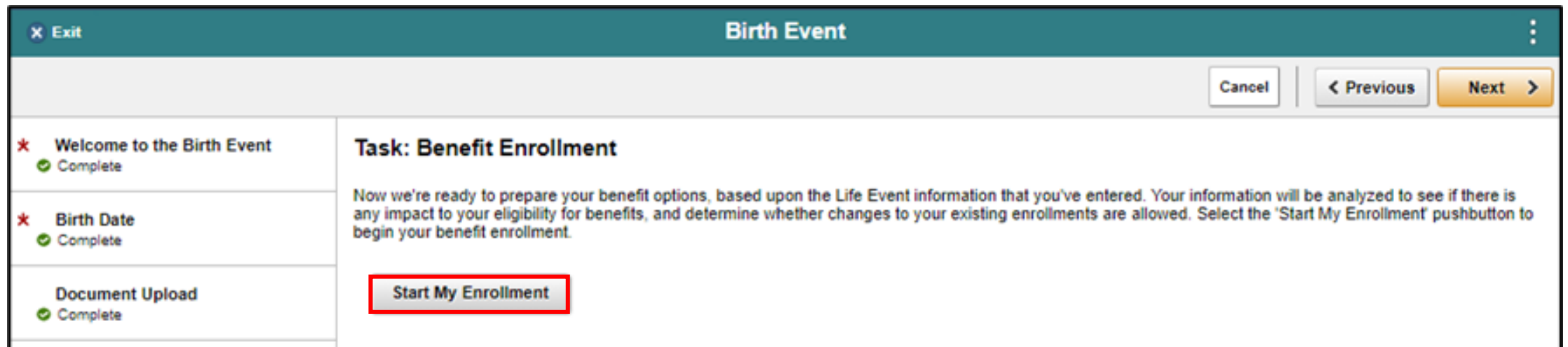
The screenshot shows a web interface for a 'Birth Event'. The top navigation bar includes an 'Exit' button, the title 'Birth Event', and three buttons: 'Cancel', '< Previous', and 'Next >'. The 'Next >' button is highlighted with a red border. On the left, a sidebar lists several sections: 'Welcome to the Birth Event' (Complete), 'Birth Date' (Complete), 'Document Upload' (Complete), 'Benefits Summary' (Visited), and 'Dependent/Beneficiary Coverage' (Visited). The main content area is titled 'Direct Deposit' and contains an 'Accounts' table with one entry. Below the table is a 'Print Option' section with a toggle switch set to 'Yes'.

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

Lesson 1: Life Events, Continued

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.



The screenshot shows a web interface for a 'Birth Event'. At the top, there is a teal header bar with 'Exit' on the left and a menu icon on the right. Below the header, there are navigation buttons: 'Cancel', '< Previous', and 'Next >'. The main content area is divided into two columns. The left column contains a list of steps: 'Welcome to the Birth Event' (marked with a red asterisk and 'Complete'), 'Birth Date' (marked with a red asterisk and 'Complete'), and 'Document Upload' (marked with a green checkmark and 'Complete'). The right column is titled 'Task: Benefit Enrollment' and contains the text: 'Now we're ready to prepare your benefit options, based upon the Life Event information that you've entered. Your information will be analyzed to see if there is any impact to your eligibility for benefits, and determine whether changes to your existing enrollments are allowed. Select the 'Start My Enrollment' pushbutton to begin your benefit enrollment.' Below this text is a red-bordered button labeled 'Start My Enrollment'.

Lesson 1: Life Events, Continued

27. Select the **Grid View**.

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

The screenshot shows a web application interface for a 'Birth Event'. The main content area is titled 'Task: Benefit Enrollment' and includes an 'Enrollment Summary' section. This summary displays 'Your Pay Period Cost' as \$106.83 and 'Full Cost' as \$106.83, with a status of 'Pending Review'. A pie chart shows the cost breakdown: Medical (largest), Legal Svcs LTD, and STD. Below the summary are 'Review Enrollment' and 'Submit Enrollment' buttons. A 'Benefit Plans' section is visible, with a grid view icon highlighted by a red box. The table below lists various benefit plans, with the 'Medical' plan row having a 'Review' button highlighted by a red box.

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
	Humana Vision	Humana Vision				

Lesson 1: Life Events, Continued

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
Select First Choice Advantage HMO			\$112.02	\$112.02
Select Select Advantage HMO		\$141.00		\$141.00
✓ HMO Advantage		\$180.17		\$180.17
Select POS Advantage		\$285.86		\$285.86
Select Waive	Proof Required			\$0.00

Lesson 1: Life Events, Continued

- A dependent/beneficiary's 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

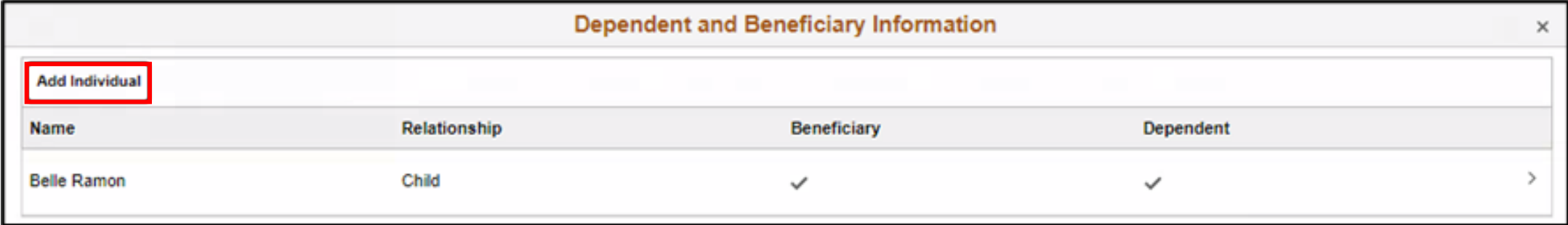
Add/Update Dependent

▼ 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.

Lesson 1: Life Events, Continued

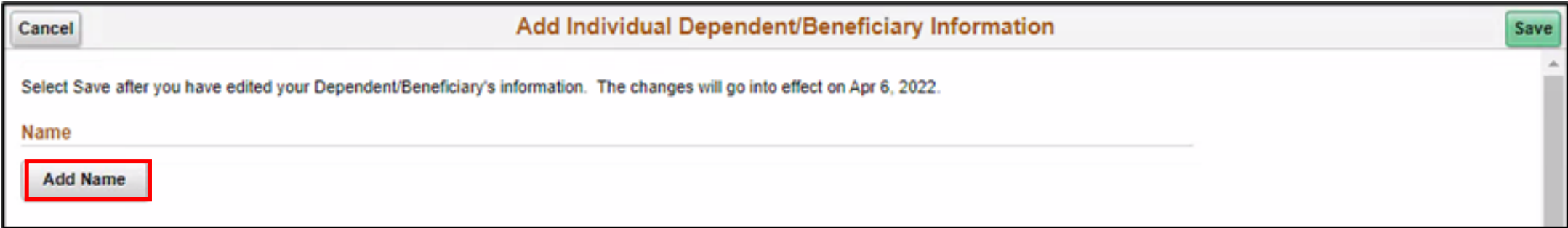
b. Select **Add Individual**.



The screenshot shows a window titled "Dependent and Beneficiary Information" with a close button (X) in the top right corner. Inside the window, there is a button labeled "Add Individual" which is highlighted with a red box. Below the button is a table with the following structure:

Name	Relationship	Beneficiary	Dependent
Belle Ramon	Child	✓	✓

c. Select **Add Name**.



The screenshot shows a window titled "Add Individual Dependent/Beneficiary Information" with "Cancel" and "Save" buttons in the top left and right corners, respectively. 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 6, 2022." Below the message is a text input field labeled "Name". At the bottom left of the window, there is a button labeled "Add Name" which is highlighted with a red box.

Lesson 1: Life Events, Continued

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

The screenshot shows a 'Name' form with the following fields and values:

- Name Format: English
- Name Prefix: (empty)
- *First Name: John
- Middle Name: (empty)
- *Last Name: Ramon
- Name Suffix: (empty)

Below the input fields, the following information is displayed:

- Display Name: John
- Formal Name: John
- Name: ,John

A red rectangular box highlights the *First Name and *Last Name input fields.

Lesson 1: Life Events, Continued

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 As of

*Student Yes As of

*Disabled No As of

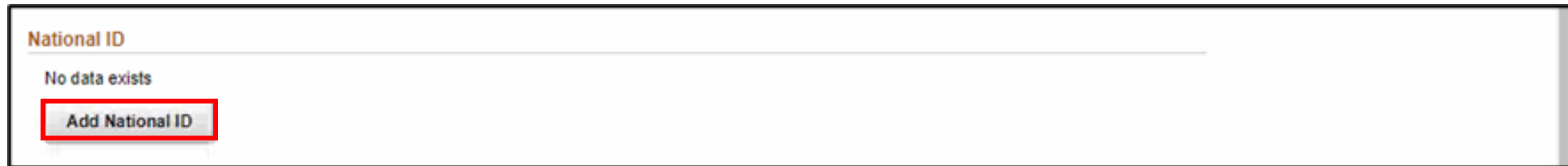
*Smoker Non Smoker As of

Address

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

Lesson 1: Life Events, Continued

f. Select **Add National ID**.



National ID

No data exists

Add National ID

g. Select a **Country**.

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

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



Cancel National ID Done

*Country United States

*National ID Type Last 5 Digits of SS#

*National ID 12345

Primary Yes

Lesson 1: Life Events, Continued

j. Select **Add Phone**.



Phone

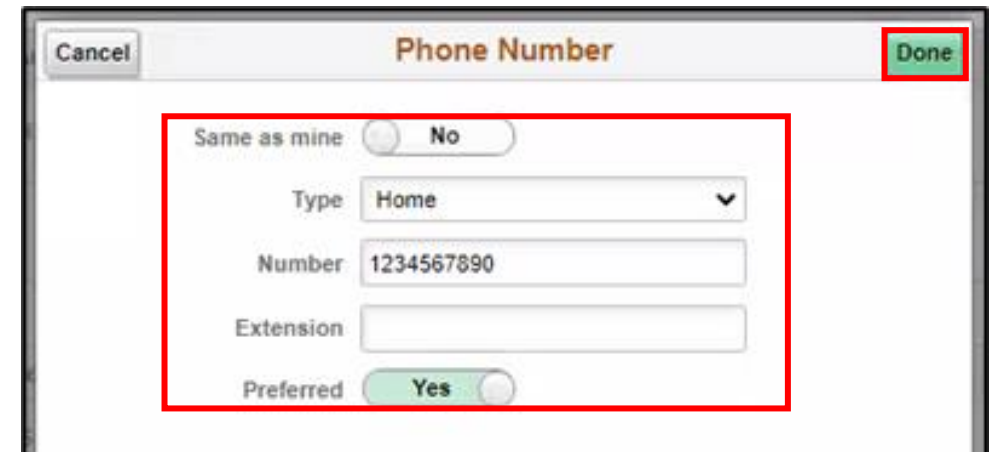
No data exists

Add Phone

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.



Cancel Phone Number Done

Same as mine No

Type Home

Number 1234567890

Extension

Preferred Yes

Lesson 1: Life Events, Continued

m. Select **Add Email**.



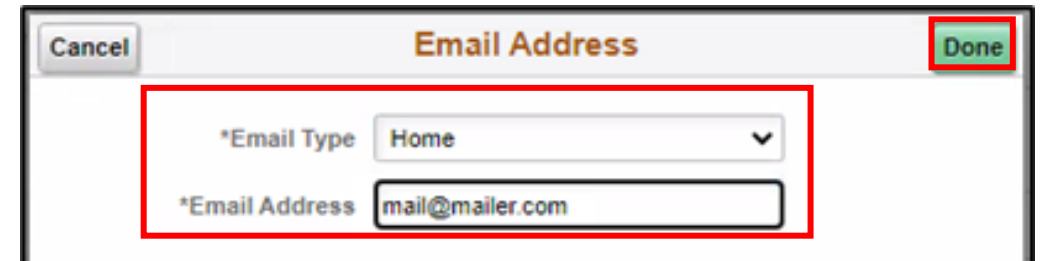
Email

No data exists

Add Email

n. Select an **Email Type**.

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



Cancel Email Address Done

*Email Type Home

*Email Address mail@mail.com

Lesson 1: Life Events, Continued

p. Select **Save**.

Add Individual Dependent/Beneficiary Information

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

*Gender ▼

*Relationship to Employee ▼

Dependent Yes

Lesson 1: Life Events, Continued

30. Select the **Review** button that's adjacent to the **Dental** 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	0 Dependents	\$5.46	Pending Review	Review

Lesson 1: Life Events, Continued

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.

- 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.

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
<input type="checkbox"/> Waive			\$0.00
<input type="checkbox"/> Delta Dental PPO Standard	\$13.11		\$13.11
<input type="checkbox"/> DeltaCare USA DHMO Enriched	\$3.99		\$3.99
<input type="checkbox"/> DeltaCare DHMO Standard	\$3.03		\$3.03
<input checked="" type="checkbox"/> Delta Dental PPO Enriched	\$23.89		\$23.89

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

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.

Cancel Done

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

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
<input type="button" value="Select"/> Waive			\$0.00
<input checked="" type="checkbox"/> Humana Vision Standard <input type="button" value="i"/>	\$6.79		\$6.79
<input type="button" value="Select"/> Humana Vision Enriched <input type="button" value="i"/>	\$8.38		\$8.38
<input type="button" value="Select"/> Humana Vision Standard PT <input type="button" value="i"/>		\$6.79	\$6.79
<input type="button" value="Select"/> Humana Vision Enriched PT <input type="button" value="i"/>		\$8.38	\$8.38

Lesson 1: Life Events, Continued

- A dependent/beneficiary's 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**.

The screenshot shows a web interface for a 'Birth Event'. The top navigation bar includes a 'Back' button, the title 'Birth Event', and a menu icon. Below the navigation bar are three buttons: 'Cancel', '< Previous', and 'Next >', with the 'Next >' button highlighted in red. The main content area is divided into a left sidebar and a main panel. The sidebar contains a progress list with five items: 'Welcome to the Birth Event' (Complete), 'Birth Date' (Complete), 'Document Upload' (Complete), 'Benefits Summary' (Visited), and 'Dependent/Beneficiary Coverage' (Visited). The main panel is titled 'Task: Benefit Enrollment' and contains a description: '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.' Below this is an 'Enrollment Summary' section showing 'Your Pay Period Cost \$233.82' and 'Full Cost \$233.82'. The status is 'Pending Review'. There are two buttons: 'Review Enrollment' and 'Submit Enrollment'. To the right is a pie chart showing the cost breakdown: Medical (the largest slice), Legal S... LTD, and other smaller slices.

Lesson 1: Life Events, Continued

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

The screenshot shows a web interface for a 'Birth Event'. The top navigation bar includes a 'Back' button, the title 'Birth Event', and a menu icon. Below the navigation bar are three buttons: 'Cancel', '< Previous', and 'Next >', with the 'Next >' button highlighted in red. The main content area is divided into two columns. The left column contains a progress list with three items: 'Welcome to the Birth Event' (Complete), 'Birth Date' (Complete), and 'Document Upload' (Complete). The right column is titled 'Task: Benefits Statements' and contains a 'Statement Type' dropdown menu. Below the dropdown, a message reads: 'There are no statements available at this time. Please try again later.'

Lesson 1: Life Events, Continued

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 displays the 'Birth Event' summary page. On the left, a sidebar lists various steps with their completion status: Welcome to the Birth Event (Complete), Birth Date (Complete), Document Upload (Complete), Benefits Summary (Visited), Dependent/Beneficiary Coverage (Visited), Dependent/Beneficiary Info (Complete), Pay and Compensation (Visited), Direct Deposit (Visited), Benefit Enrollment (Visited), Benefits Statements (Visited), and Summary (Visited). The 'Summary' step is currently selected. The main content area shows a 'Task: Summary' section with a 'Complete' button highlighted in a red box. Below this is a 'Steps' table with 10 rows, listing each step, its status, the date completed, whether it is required, and a 'Go to Step' button.

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: Activities and Exercises



Course Content Summary

Congratulations on completing the eBenefits. You now understand:

- 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

Additional Training and Job Aids

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

For additional information, be sure to visit:

- www.miamidade.gov/informs



CONGRATULATIONS

Congratulations on successfully completing the eBenefits course!

ESS 202 - Employee Self Service - eBenefits