Course ID: ESS 202
Course: Employee Self Service - eBenefits
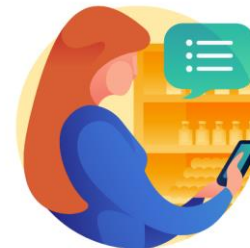
Ground Rules

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	This course provides a comprehensive review of the eBenefits processes. This course consists of the following modules: • Module 1: Course Introduction • Module 2: eBenefits ○ Life Events • Module 3: Course Summary
Training Audiences	• Employee
Prerequisites	• ERP 101 – Overview of ERP • ERP 102 – INFORMS Navigation, Reporting, and Online Help
Other Related Courses	• ESS 201 – Employee Self Service - eProfile, ePay, and ePerformance • ESS 203 –Employee Self Service - Time management
Estimated Duration	• 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 <u>and</u> end of class

Actively participate in class

Ask questions; this is your time to learn
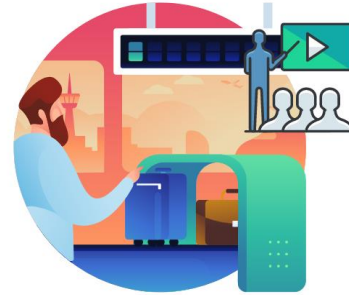
Please turn off your cell phones and refrain from checking email and the Internet while in class

Take Breaks at scheduled times

Be back from Breaks on time

MIAMI-DADE COUNTY

Learning Objectives

- Submit a Life Event

- Adding Dependent Information

- Enroll Employee Dependents to Benefits Plans

MIAMI-DADE COUNTY

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:
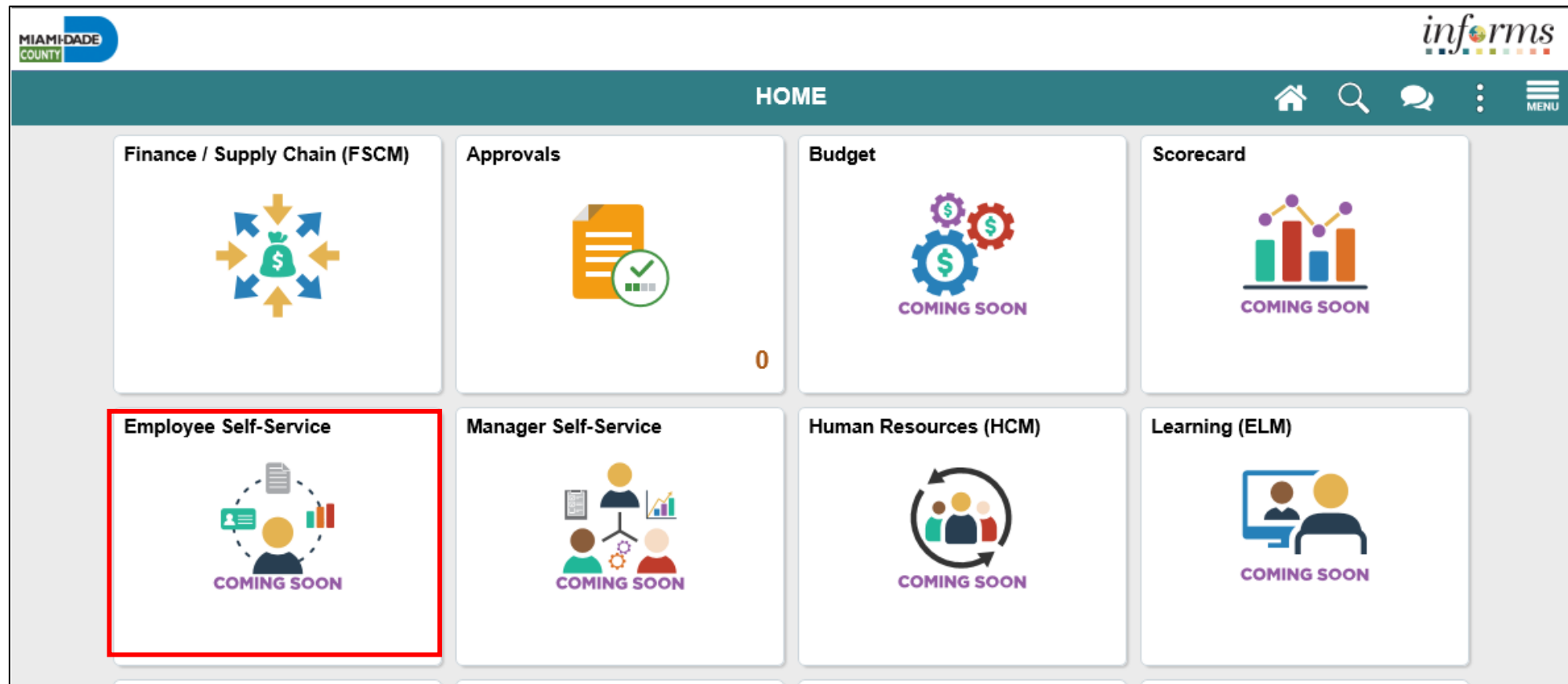
Navigation Continued

2. Click **Benefits Details** to update employee personal records.
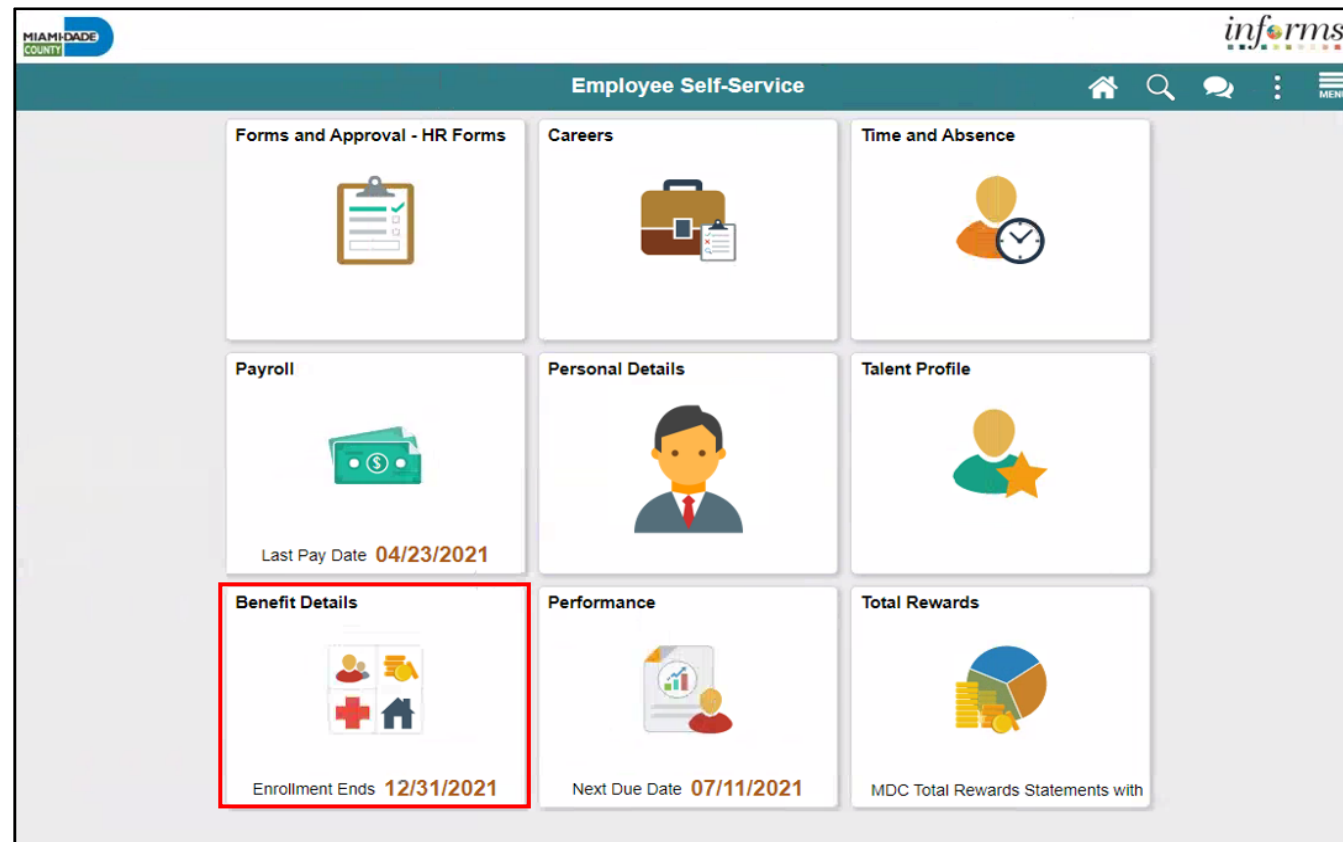
Purpose and Benefits to Business Process

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.
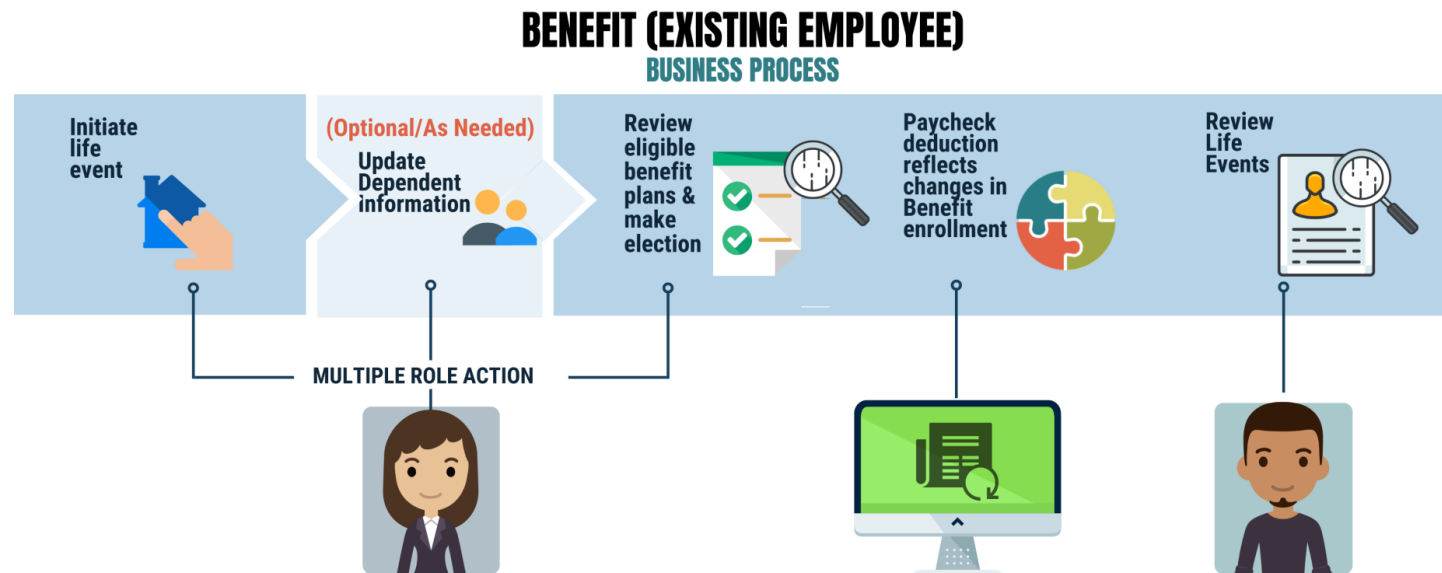
BENEFIT (EXISTING EMPLOYEE)
BUSINESS PROCESS

Initiate life event → (Optional/As Needed) Update Dependent information → Review eligible benefit plans & make election → Paycheck deduction reflects changes in Benefit enrollment → Review Life Events

MULTIPLE ROLE ACTION

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
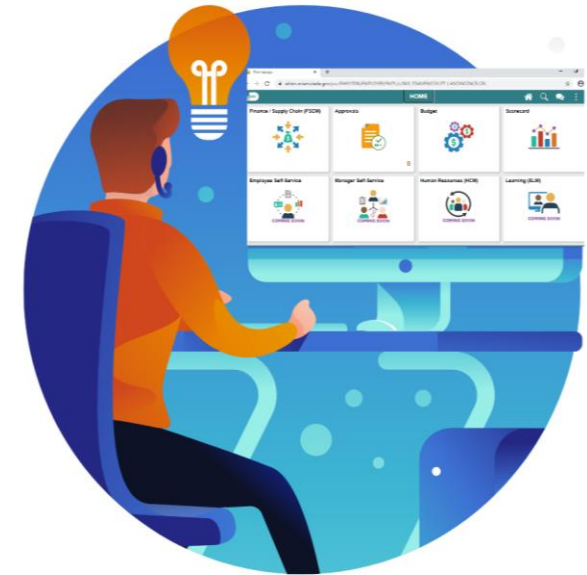
Training Exercises

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
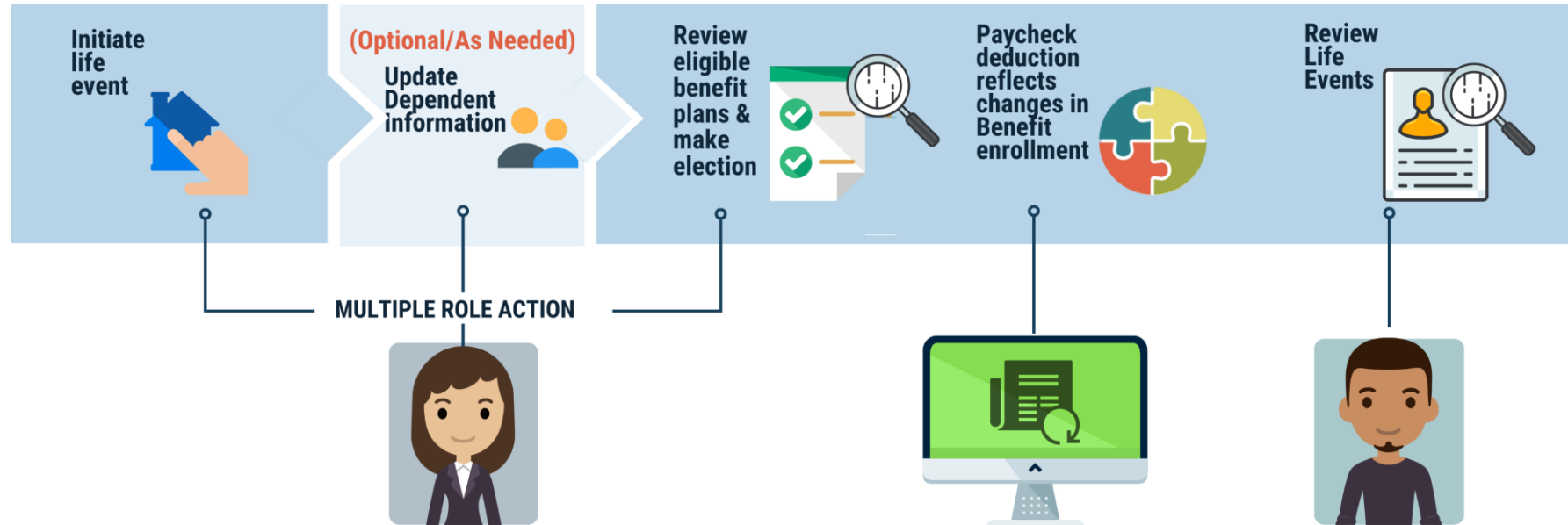
Initiate life event

(Optional/As Needed) Update Dependent information

Review eligible benefit plans & make election

Paycheck deduction reflects changes in Benefit enrollment

Review Life Events

MULTIPLE ROLE ACTION

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

<u>Event Rules</u>

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:
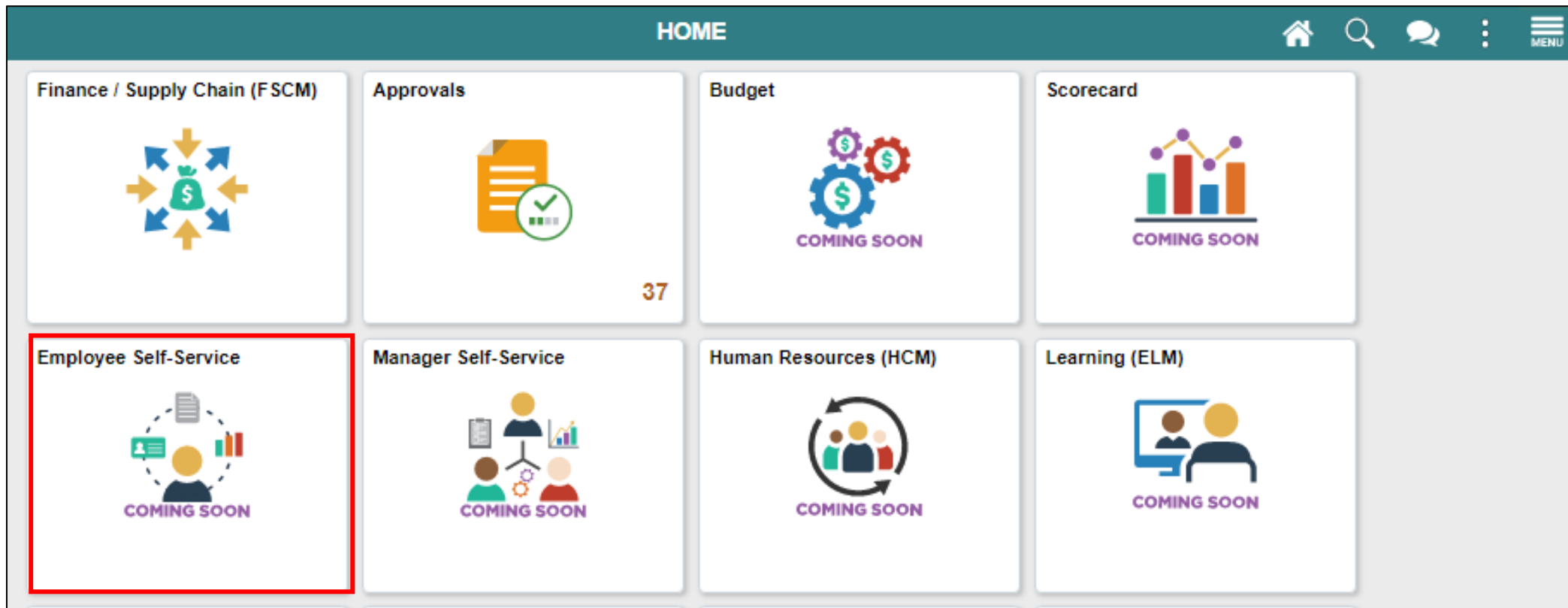
Lesson 1: Life Events, Continued

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

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

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.

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

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

9. Select **Submit**.

Lesson 1: Life Events, Continued

10. Select **OK.**

11. Select **Next.**

Lesson 1: Life Events, Continued

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

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.

Lesson 1: Life Events, Continued

14. Select **Next.**

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued
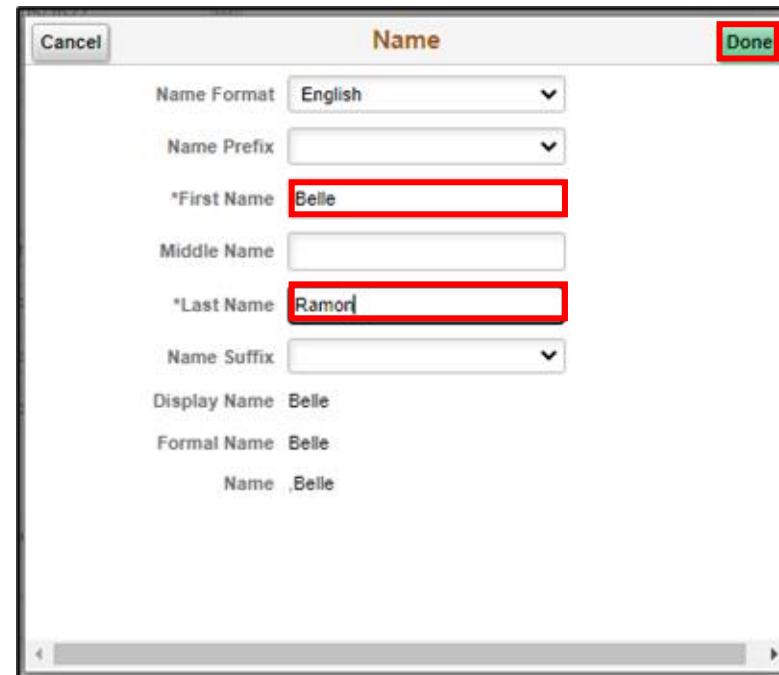
18. Select **Add Name**.

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

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.

Lesson 1: Life Events, Continued

23. Select **Next**.

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

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

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.

Lesson 1: Life Events, Continued

27. Select the **Grid View**.

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

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.

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**.
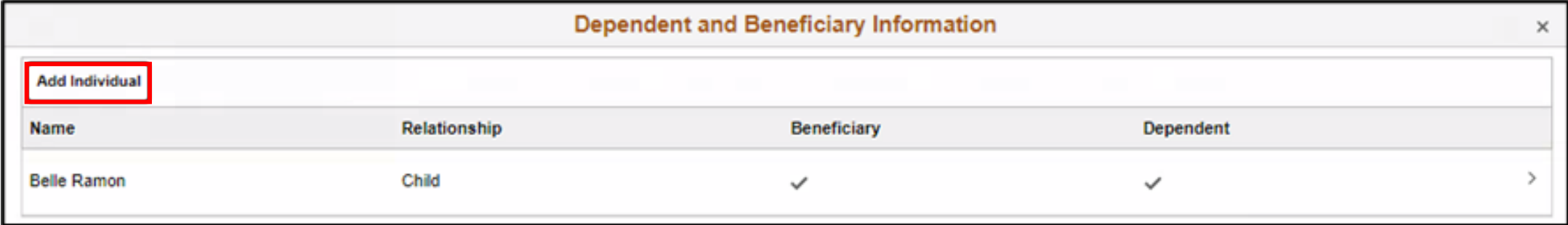
Lesson 1: Life Events, Continued
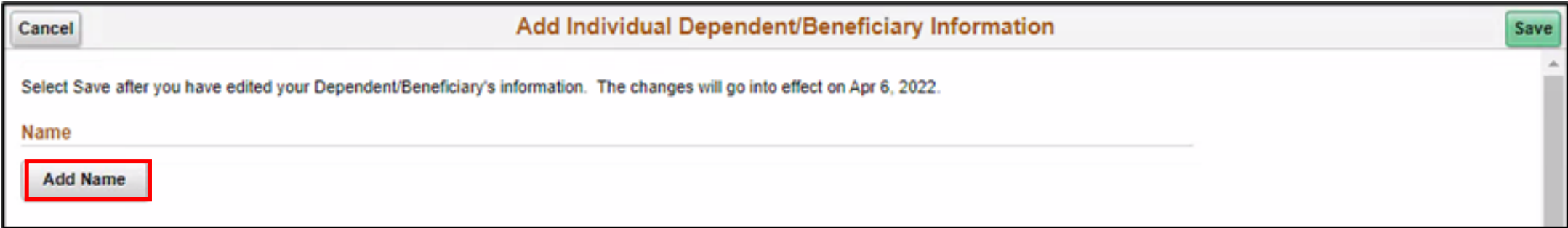
b. Select **Add Individual.**

Dependent and Beneficiary Information				
Add Individual				
Name	Relationship	Beneficiary	Dependent	
Belle Ramon	Child	✓	✓	›

c. Select **Add Name.**

Cancel   Save   **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

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

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

Lesson 1: Life Events, Continued

f. Select **Add National ID**.

g. Select a **Country**.

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

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

Lesson 1: Life Events, Continued
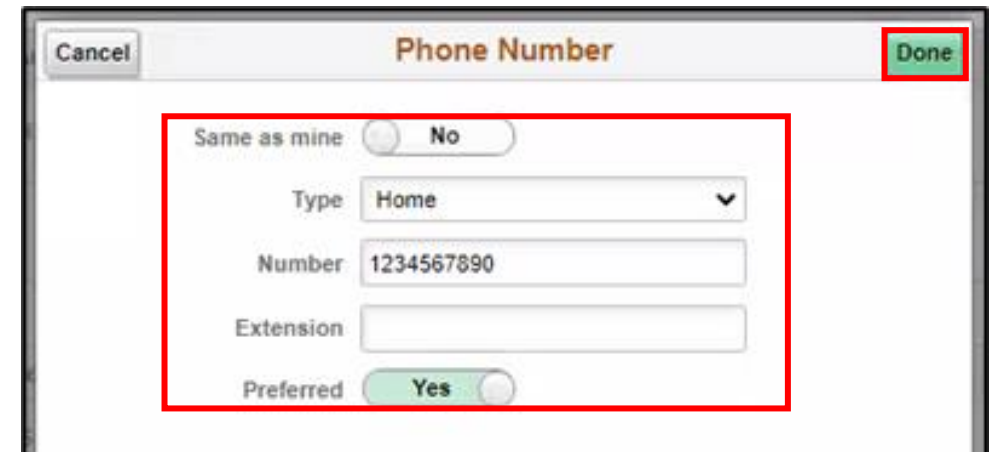
j. Select **Add Phone**.

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.

Lesson 1: Life Events, Continued
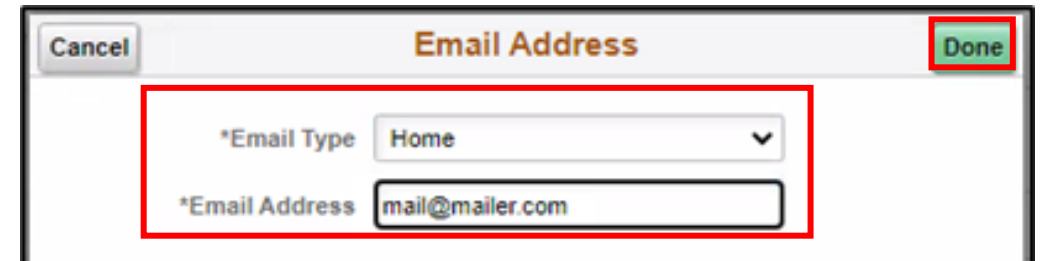
m. Select **Add Email.**

n. Select an **Email Type**.

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

Lesson 1: Life Events, Continued

p. Select **Save**.

Lesson 1: Life Events, Continued

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

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.

Lesson 1: Life Events, Continued

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

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.

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**.

Lesson 1: Life Events, Continued

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

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.

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 on successfully completing the eBenefits course!

ESS 202 - Employee Self Service - eBenefits