People First User Guide for the Benefits Enrollment Process

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Change My Benefits Overview

Introduction   This guide contains information about the insurance benefits enrollment process.
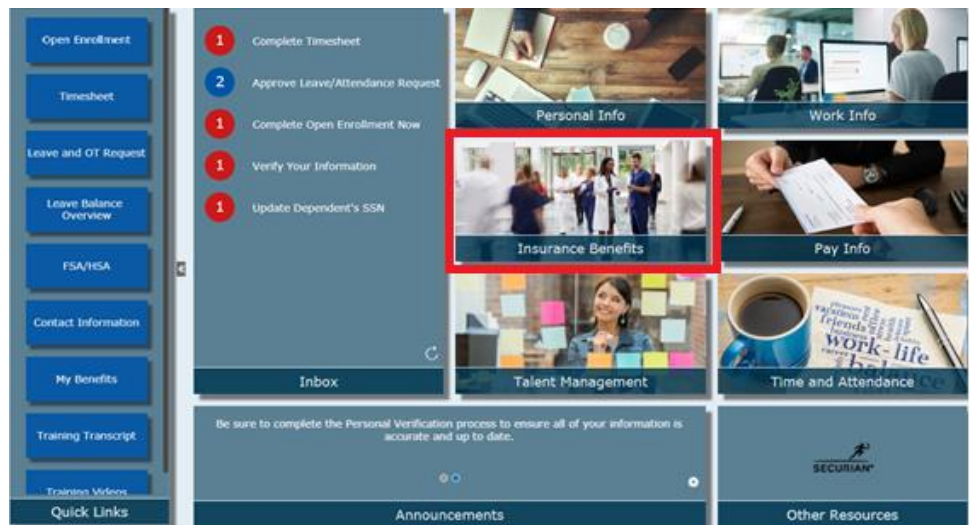
Getting Started   Follow the path to access the Change My Benefits screen.

Your path is…
People First login screen > Employee landing Page > Insurance Benefits > Change My Benefits

| Steps	
1.	When employees log in, they will be directed to either the Employee landing page or the Manager landing page (employees are directed to the Manager landing page only if they are a manager or human resource professional). From the Employee landing page, select the Insurance Benefits tile.
2.	After selecting the Insurance Benefits tile, the insurance benefits navigation menu will be presented. Select Change My Benefits. a
3.	After selecting Change My Benefits, the employee will be directed to the Change My Benefits screen.

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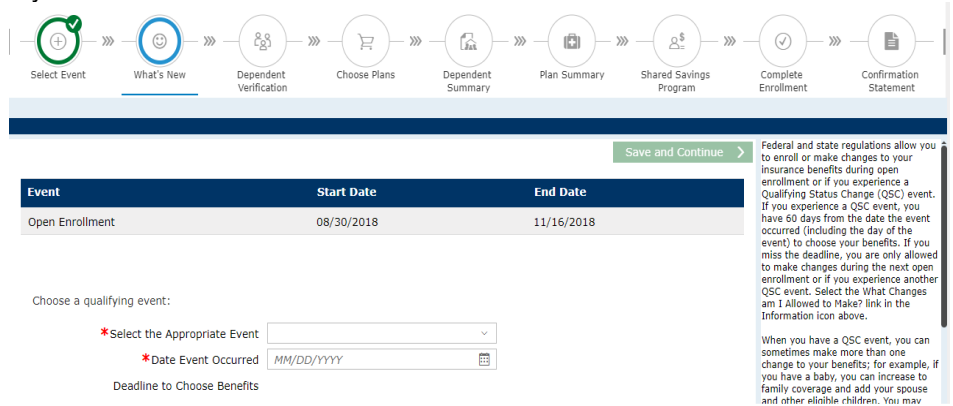
Change My Benefits

Introduction

There are three types of events:

1. Open Enrollment occurs each year in late October through early November and is automatically presented to eligible employees during the Open Enrollment period.

2. Life events are events in the life of the employee that affect benefits eligibility (e.g., birth or adoption of a child, marriage, divorce, death of a dependent). Life events for birth and marriage can be created by the employee while most other life events require the employee to work through the People First Service Center to process.

3. Work events are automatically generated by a change in an employee's work status (e.g., new hire employee, dual hired employee, increase or decrease in expected hours of work, leave with or without pay, position change which results in a new job classification).

- Employees can only have one event open at a time, except for Open Enrollment.

- During Open Enrollment, a separate Inbox task and a quick link are available for eligible employees to navigate directly to the Open Enrollment event; both are available only during the Open Enrollment period.

- Once a life or work event is created, an Inbox task is created and can be used to navigate directly to the event; the task is presented to the employee for the length of the event's enrollment period.

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

Getting Started

Follow the path to access the Change My Benefits page.

Your path is…
People First login screen > Employee landing page > Insurance Benefits tile > Change My Benefits

Creating and Selecting an Event Step

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

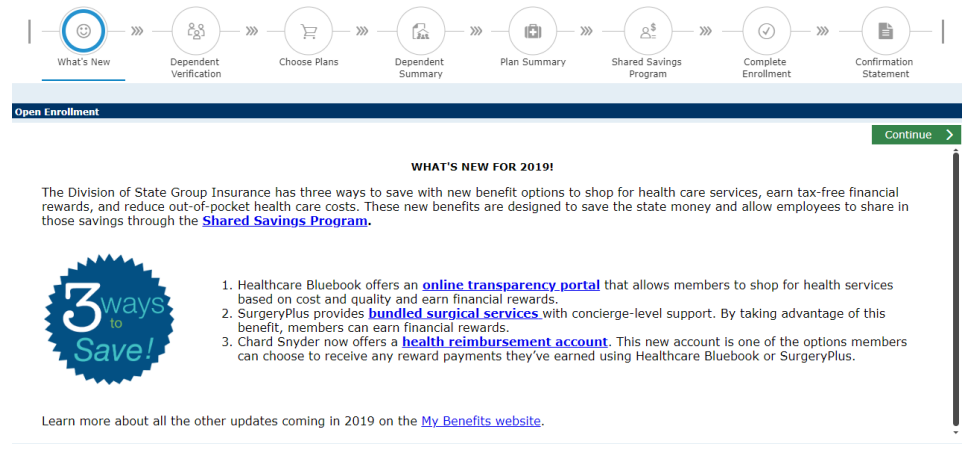| Steps	
1.	If Open Enrollment is active or if there is an active work or life event, that event will appear in the event table.
		Event	Start Date	End Date
---	---	---
Open Enrollment	04/01/2017	12/01/2017	 Note: If Open Enrollment is not active and there is no work or life event available, then no event will be displayed in the event table.
2.	To create a new life event, start by selecting the event.

	Choose a qualifying event: ***Select the Appropriate Event** [dropdown ▾] ***Date Event Occurred** Birth or Adoption Deadline to Choose Benefits Marriage - Acquire eligible dependents Marriage - Dependents added to spouse's coverage	
3.	Select the date the event occurred. To select the date, click the Calendar 🗓 icon on the right side of the input field and select the date within the calendar. Notes: • Once the employee enters the date, the Deadline to Choose Benefits field will update to reflect the last date the employee can make benefits changes. • Employees have 60 days, starting with the date the event occurred, to complete their insurance benefits elections.	
4.	Select **Save and Continue >** to go to the next step in the enrollment process, What's New.	

What's New Step

The What's New step displays information about changes to Insurance Benefits options. The contents of this screen are subject to change based on changes to employee benefits or enrollment processes. This screen may not always be active within the enrollment process.

Follow the steps below to complete the What's New step.

Steps	
1.	The What's New step displays information about changes to insurance benefits or the enrollment process. As changes occur, the contents of this screen are subject to change.
2.	After reviewing the information in the What's New step, select **Continue >** to go to the next step in the enrollment process, Dependent Verification.

Dependent Verification Step

The Dependent Verification step allows employees to add eligible dependents, remove dependents who are no longer eligible (e.g., stepchild from a previous marriage), and update limited information (SSN/TIN) for an existing dependent. If other information for a dependent is incorrect, contact the People First Service Center at 1-866-663-4735 to update.

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

Steps

1.	Review and update existing dependents.
	Open Enrollment
	Verify the information below is correct:
		Certify	Dependent Name	Relationship	Date Of Birth	Gender	SSN	Change	Remove	
	|---|---|---|---|---|---|---|---|
		☐	TEST CHILD	Child	01/01/2017	Male		✏	🗑	
	Step 1: Click REGISTER DEPENDENT to enter your eligible dependent's information. Repeat for all of your eligible dependents. Note: registering dependents does <u>not</u> add them to your benefit plans. See Step 2.
	Step 2: Click GO TO NEXT STEP to make changes to your benefits <u>and</u> to add your eligible dependents to each plan. You must remove all ineligible dependents from each plan.
	You must make all allowable changes-- enrolling, changing plans, canceling coverage, and adding or dropping dependents--through People First.
2.	To add an eligible dependent, click the Register a new dependent ➕ icon located at the bottom left of the screen. If the employee is adding a new dependent, they will be taken to the Register Dependent page.
	Open Enrollment
	Add the dependent information
	✱Relationship 2 Child
	✱First Name
	Middle Initial
	✱Last Name
	✱Date Of Birth MM/DD/YYYY
	Social Security Number
	✱Gender unknown
	Your child is defined as: the enrollee's own biological offspring; a child legally adopted by the enrollee or placed in the enrollee's home for purpose of adoption in accordance with Chapter 63, F.S.
	Please call the People First Service Center at 1-866-663-4735 to determine if this dependent is eligible for over-aged health insurance coverage or as a dependent with a disability.
	Note: The definition for each dependent type is presented next to the Relationship field. Review the definition to ensure you have selected the correct relationship type. Remember that you can register only your legal dependents.
3.	After entering the information for the dependent(s), the employee must select **Register Dependent >** to complete the process.
	Note: Registering a dependent does NOT enroll the dependent in any insurance benefit plan(s). Employees must complete the entire enrollment process to add dependent(s) to their insurance benefit plan(s).
4.	Once the new dependent has been added, the dependent table will be updated. Repeat steps 2 through 3 to register additional dependents.
		Certify	Dependent Name	Relationship	Date Of Birth	Gender	SSN	Change	Remove	
	|---|---|---|---|---|---|---|---|
		☐	TEST CHILD	Child	01/01/2017	Male		✏	🗑	
		☐	Test Adopted Child	Adopted Child	05/01/2012	Male		✏	🗑	
5.	To remove a dependent, click the Delete 🗑 icon located to the right of the dependent. You will be asked to confirm that you want to remove the

		dependent. If you confirm, this dependent will be removed from all insurance benefits plans.
6.		Once the dependent is removed, his or her record will display with strikethrough text to show that the dependent has been removed.
		Notes:
		• The Certify box (which is detailed in a later step) is also grayed out. The employee will be unable to certify this dependent, once removed.
		• If you selected to remove the incorrect dependent, click the Undo icon to undo the deletion.
7.		To update an existing dependent's information, click the Change Plan ✏ icon located to the right of the dependent. Once this is selected, the dependent's information will be presented.
		Note: The employee can change only the dependent's SSN. To change any other fields, the employee must contact the People First Service Center.
8.		After updating the dependent's SSN, select **Register Dependent >**. If you are not making any updates, select **Cancel ✕** to return to the dependent table.
9.		To complete the Dependent Verification process, select the Certify checkbox ☐ to the left of each eligible dependent. After all dependents have been marked as certified or have been marked as not eligible (deleted), **Save and Continue >** will be available. Select this to go to the next step in the enrollment process, Choose Plans.
		Note: All dependents must either be marked as not eligible (deleted) or certified in order for you to continue.

Choose Plans Step

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

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

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

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Open Enrollment

Back < Save and Continue >

Verify your new elections. Total Cost: $83.33

Plan Type	Plan Name	Coverage	Monthly Cost	Dependents	Change
Health					⊕
Basic Life	Basic Life Securian	$25,000	$ 0.00		✎
Optional Life					⊕
Spouse Life					⊕
Child Life					⊕
Dental					⊕
Vision					⊕
Health Care FSA					⊕
DCA	Dependent Care FSA	$1,000	$ 83.33		✎
HSA					

Notes:

- The Change Plan ✎ icon is displayed for the employee to update or cancel coverage for plans in which he or she is currently enrolled.

- If the employee is eligible to enroll in a plan and is not currently enrolled in the plan, the Add Plan ⊕ icon is displayed for the employee to enroll in the plan. If no icon is displayed, the employee is not eligible to enroll in that plan based on current plan selections.

- Since there are more plan offerings than can be displayed within the summary table, use the scroll bar on the right side of the table to view additional plan types.

- To enroll in the HSA plan, the employee must be enrolled in a high deductible health plan.

- To enroll in the healthcare FSA plan, the employee must NOT be enrolled in a high deductible health plan. However, if enrolled in a high deductible health plan, the employee can enroll in a limited purpose healthcare FSA plan.

2. Once the Change Plan ✎ or Add Plan ⊕ icon is selected for a plan type, the employee is directed to the plan details screen for that plan type to make elections for that plan. This screen is divided into two parts, Current Election and New Election. The Current Election (view only) section displays information for the plan in which the employee is currently enrolled. The New Election section allows the employee to enroll in or change current enrollment in the plan.

Open Enrollment

Cancel ✕ Save >

Health

If you enroll in a plan that covers dependents, put a check next to the name of each eligible dependent you want to add to the plan. Remove all ineligible dependents from your plan.

Current Election: **New Election:**

Plan Name Cancel/Waive Insurance
Coverage Level No Coverage
Monthly Cost $0.00 $
Covered Dependents N/A N/A

3.	The New Election section is based on a hierarchal scheme, where the employee must first select the plan, then the coverage level. If a coverage level allows coverage for dependents, the employee must then select the dependents he or she wants to cover for the plan. **New Election:** State PPO Plan ⌄ Family ⌄ $30.00 ☐ TEST SPOUSE ☐ TEST CHILD ☐ TEST ADOPTED CHILD Once all selections are made for the plan, the employee must select **Save >**. If the employee wants to go back to the summary screen without making changes, the employee must select **Cancel ✕**. Notes: • When selecting coverage designed to carry dependents, the employee must select which dependents he or she wants to cover by checking each box next to the dependent. • The exception to the hierarchal scheme is disability coverage. The employee selects if he or she wants coverage, the benefit option, and then the coverage level. • Selecting a plan type does NOT enroll you in the coverage or cover the dependent. The employee must complete the entire enrollment process to complete enrollment in the insurance benefit plan(s).
4.	After the employee makes elections and selects Save, the employee will return to the summary table. If dependents are covered under the plan, then a number will appear under the Dependents column. The employee can click the number to see who he or she has elected to cover.

	Verify your new elections. Back < Save and Continue > **Total Cost: $131.68**

Plan Type	Plan Name	Coverage	Monthly Cost	Dependents	Change
Health	State PPO Plan	Family	$ 30.00	3	✏
Basic Life	Basic Life Securian	$25,000	$ 0.00		✏
Optional Life					⊕
Spouse Life					⊕
Child Life	Child Life	$10,000	$ 0.85	2	✏
Dental					⊕
Vision					⊕
Health Care FSA					⊕
DCA	Dependent Care FSA	$1,000	$ 83.33		✏
HSA					

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

5.	Once the employee has made all elections, he or she must select **Save and Continue >** to go to the next step in the enrollment process, Dependent Summary. If the employee wants to return to the previous step, Dependent Verification, without making changes, the employee must select **Back <**.

Dependent Summary Step

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

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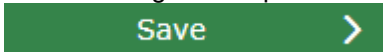
Steps
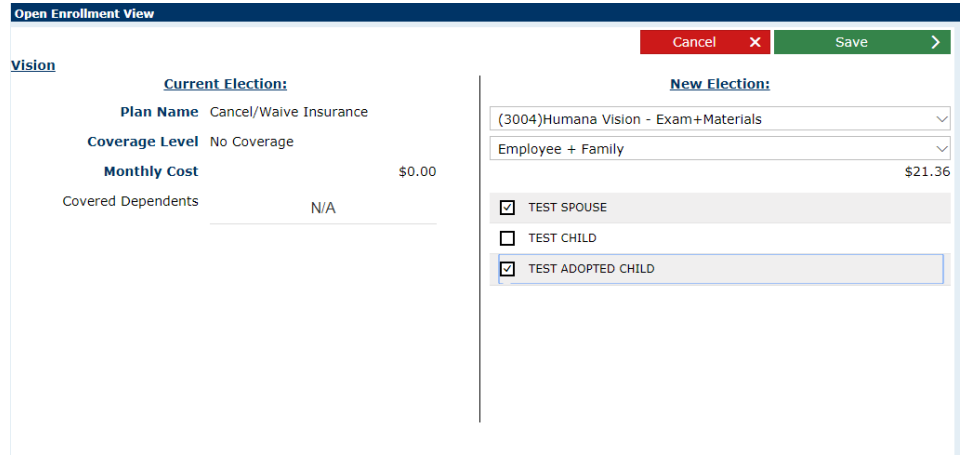
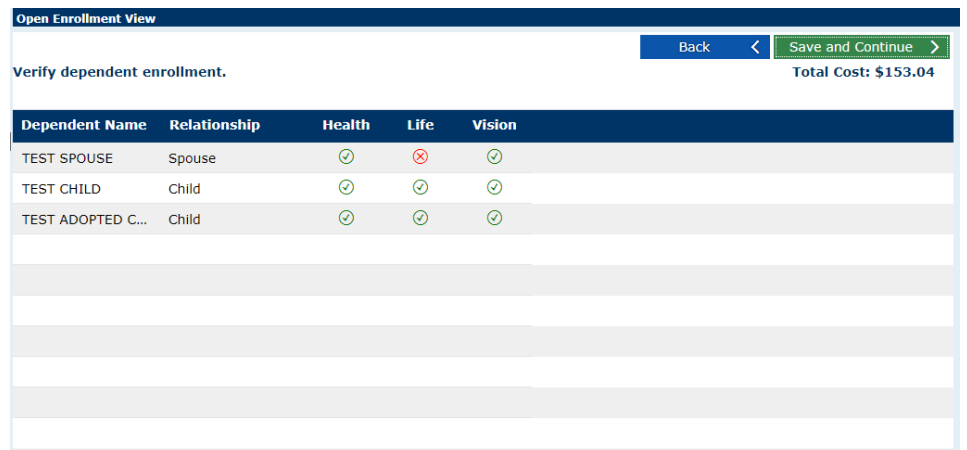|	
1.	The Dependent Summary screen displays a table that lists the employee's dependents and the status of each dependent for the plans the employee is electing to enroll in. If the dependent is enrolled in the plan, the green check ✅ icon is displayed. If the dependent is not enrolled in the plan, the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

Open Enrollment

Back <   Save and Continue >

Verify dependent enrollment.   **Total Cost: $153.04**

Dependent Name	Relationship	Health	Life	Vision
TEST SPOUSE	Spouse	✅	❌	✅
TEST CHILD	Child	✅	✅	❌
TEST ADOPTED C...	Child	✅	✅	✅

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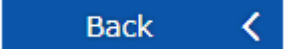We serve those who serve Florida

2.	If the employee wants to change dependent coverage under a plan for which the employee is enrolled, the employee must select the ✓ or ✕ icon. Selecting either of these icons will take the employee to the plan detail screen, where he or she can change the dependent's coverage. Once changes are made, select **Save >**. If the employee does not want to make changes, select **Cancel ✕**.

Open Enrollment View

		Cancel ✕	Save >
Vision			
	Current Election:		**New Election:**
Plan Name	Cancel/Waive Insurance		(3004)Humana Vision - Exam+Materials ∨
Coverage Level	No Coverage		Employee + Family ∨
Monthly Cost	$0.00		$21.36
Covered Dependents	N/A		☑ TEST SPOUSE
			☐ TEST CHILD
			☑ TEST ADOPTED CHILD	
3.	By selecting Save or Cancel, the employee is directed back to the Dependent Summary screen, where the elections have been updated. In the example below, Test Child was added to vision insurance.

Open Enrollment View

	Back ‹	Save and Continue ›
Verify dependent enrollment.		**Total Cost: $153.04**
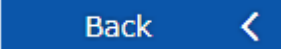
Dependent Name	Relationship	Health	Life	Vision
TEST SPOUSE	Spouse	✓	✕	✓
TEST CHILD	Child	✓	✓	✓
TEST ADOPTED C...	Child	✓	✓	✓	
4.	Once all dependent coverage has been reviewed (and updated if necessary), the employee must select **Save and Continue >** to go to the next step in the enrollment process, Plan Summary. If the employee wants to return to the previous step, Choose Plans, without making changes, the employee must select **Back ‹**.

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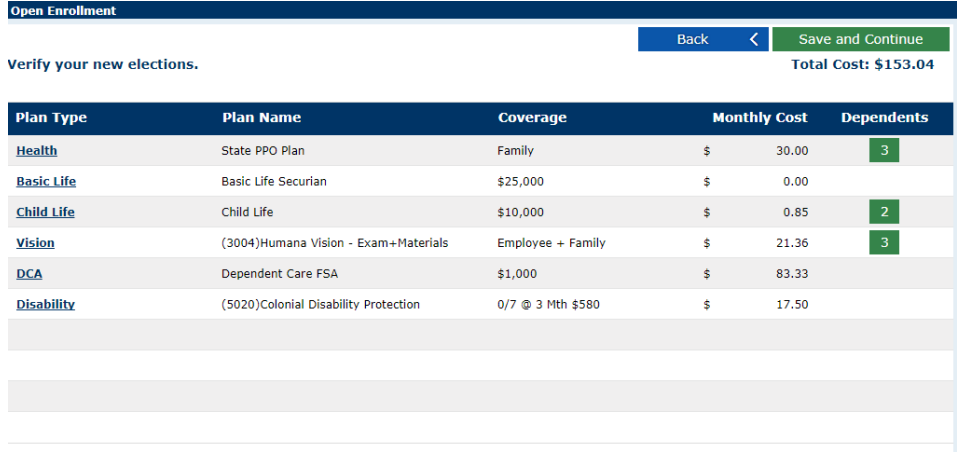people first
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Plan Summary Step

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

Follow the steps below to complete the Plan Summary step.

Steps	
1.	The Plan Summary step displays a table that shows only the plans the employee is choosing to enroll in. If the plan is not listed, the employee will not be enrolled in the plan. As this is a view-only screen, the employee cannot make any changes to his or her elections from this screen. If the employee wants to make further elections, he or she must select **Back** to return to previous steps.
2.	Once the employee is satisfied with his or her election choices, he or she must select **Save and Continue** to go to the next step in the enrollment process, Shared Savings Program step.

Shared Savings Program Step

The Shared Savings Program allows the user to choose where their rewards will be deposited through the Shared Savings Program.

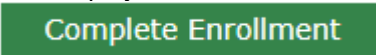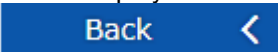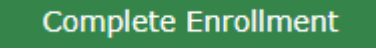Follow the steps below to complete the Shared Savings Program step.

Steps	
1.	The Shared Savings Program step displays the Shared Savings Program choices the user has currently selected, a description of the Shared Savings Program and dropdown options which allow the enrollee to choose where they would like to deposit their Shared Savings rewards. The description and dropdown options depend on the health plan the user has elected and their HSA eligibility. If you select to initially fund an account other than an HRA or Post-Deductible HRA, you will be prompted to select an additional account(s) and prioritize the accounts. If you select multiple accounts, those accounts will be credited in priority order once annual maximum contribution limits have been met.

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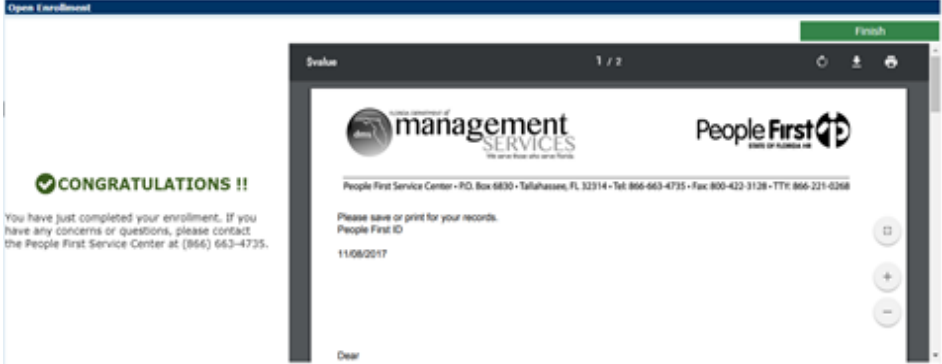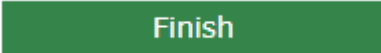| 2. | Once the employee is satisfied with his or her Shared Savings Program choices, he or she must select to go to the final step in the enrollment process, Complete Enrollment. |

Complete Enrollment Step

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

Follow the steps below to finish the Complete Enrollment step.

Steps
1.	The Complete Enrollment screen includes certification language the employee must review to complete his or her elections.
2.	The employee must enter his or her People First password and select to complete the enrollment process. If the employee wants to return to a previous step, he or she must select . Notes: • is not available for selection until the employee enters his or her password. • Enrollment changes are not final until the employee completes this certification step. • Once the employee successfully completes the enrollment process, a confirmation statement will be presented. Note that it may take up to a minute to present the confirmation statement. Once it's presented, review it to ensure everything is accurate.

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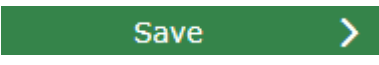
The employee's confirmation statement will be presented after the employee has successfully completed the enrollment process.

Follow the steps below to review the Confirmation Statement.

Steps	
1.	After completing an enrollment, the confirmation statement will be presented to the employee. The employee may scroll through the statement to review, print ![printer icon], or download ![download icon]. Note: Icons may vary based on which PDF viewer is installed on the employee's computer. Note: The confirmation statement is available for future reference in the Confirmation Statement screen. The Confirmation Statement screen can be accessed from the Insurance Benefits tile on the Employee landing page.
2.	The employee must select **Finish** to return to the Employee landing page.

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Appendix

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

	The **process flow** is shown at the top of the enrollment process and displays the employee's progress in completing the enrollment process. The current step that employee is on is underlined.
	In the process flow, the icon for the step is circled in green with a checkmark when the employee has completed that step in the enrollment process.
	In the process flow, the icon for the step is circled in blue when the employee is the next step that needs to be completed to complete enrollment.
	In the process flow, the icon for the step is not circled when the employee has not reached that step.
Save and Continue ⟩	The **Save and Continue** button saves the employee's progress and advances the employee to the next step in the enrollment process.
Continue ⟩	The **Continue** button advances the employee to the next step in the enrollment process.
Back ⟨	The **Back** button returns the employee to the previous step in the enrollment process without saving any updates made in the current step.
Save ⟩	The **Save** button saves the employee's progress in the enrollment process and returns the employee to the Summary screen. This is different from the Save and Continue button as it does not move the employee to the next step.
Cancel ✕	The **Cancel** button returns the employee to the previous step in the enrollment process without saving any updates made in the current step. This is different from the Back button as it does not return the employee to the previous step.
✓ Remove	The **Remove** button is used to acknowledge that the employee wishes to remove a dependent from his or her coverage.
➕	The **Add Dependent** button is used to add a dependent to the table on the Dependent Verification screen.
Register Dependent ⟩	The **Register Dependent** button is used to acknowledge that the employee wishes to add a dependent to his or her coverage. Button is also used to save the update to an existing dependents Social Security number.
⊕	The **Add Plan** icon on the Choose Plans screen is used to add a plan in which an employee is not currently enrolled.
✎	The **Change Plan** icon on the Choose Plans screen is used to change or remove coverage in which the employee is currently enrolled.