

Benefits Administration Guide

new world ERP – Human Resources: Benefits Administration



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INTRODUCTION

Welcome to the new world ERP Benefit Administration Guide. This manual will guide you through the setup and processing aspects of the Benefits Administration module.

Benefits Administration enables users to create benefit plans that can be used in open enrollment every year. By using Benefits Administration, municipalities will be able to set up benefits, deductions, coverage options, and rule sets to apply to a benefit plan. Benefit plans can be updated every year in batch and updated either through Benefits Open Enrollment in new world ERP or through Benefit Enrollment in eSuite. This guide will focus more on the new world ERP Benefits Open Enrollment.

The guide is divided into two sections:

The **System Administrator's Guide** and the **End User's Guide**.

This document is available in Microsoft Word format to allow for customization to your organization's particular needs and procedures.

SYSTEM ADMINISTRATOR'S GUIDE

SET UP ELIGIBILITY

Navigate to Maintenance > Human Resources > Event Maintenance > Employment Status Events.

Check the open enrollment checkboxes for the appropriate employment statuses. This defines the status events that are eligible for Human Resources batch processing. Click **Save**.

Employment Status	Status Event	Open Enrollment	Payroll Initialization	Accruals	Terminated	Mass/Step Rate Increase	Retro Pay
Active		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	New Hire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	Rehire	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active	Return From Leave	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delete Testing		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FMLA		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leave of Absence		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leave of Absence	FMLA Extended	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leave of Absence	Long Term Disability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leave of Absence	Military	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leave of Absence	Short Term Disability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Leave of Absence	Sick Time Supplemental (AF)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SET UP VALIDATION SETS

Navigate to Maintenance > new world ERP Suite > System > Validation Sets > Validation Set List.

Click **New** to create Validation Set #88 – Benefit Plan Option with the applicable values:

- Single
- Single + One
- Family
- Retirement
- Life Insurance

SET UP DEDUCTIONS AND BENEFITS

Navigate to Maintenance > HR > Deductions and Benefits > Deductions.

Click **New** to create a deduction code for the city-paid portion of any benefit plans you need to create.

Deduction List
Deduction

<div style="margin-bottom: 5px;">Code <input style="width: 100px;" type="text"/></div> <div style="margin-bottom: 5px;">Description <input style="width: 150px;" type="text"/></div> <div style="margin-bottom: 5px;">Active <input checked="" type="checkbox"/></div> <div style="margin-bottom: 5px;">Include in Benefit Plan <input type="checkbox"/></div> <div style="margin-bottom: 5px;">Last Processed Date NOT USED</div> <div style="margin-bottom: 5px;">Effective Date <input type="text" value="G"/> <input type="text" value="D"/></div> <div style="margin-bottom: 5px;">Start Date <input type="text" value="G"/></div> <div style="margin-bottom: 5px;">Deduction Type <input type="text" value="Standard"/></div> <div style="margin-bottom: 5px;">Vendor <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Default Sequence <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Default Frequency <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Credit Distribution [Select One]</div> <div style="margin-bottom: 5px;">Account <input type="text" value=""/></div> <div style="margin-bottom: 5px;">G/L Account <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Do Not Create Disbursement <input type="checkbox"/></div>	<div style="margin-bottom: 5px;">Calculation Method <input type="text" value="Amount per Hour"/></div> <div style="margin-bottom: 5px;">Amount <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Maximum <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Net Pay Minimum <input type="text" value=""/></div> <div style="margin-bottom: 5px;">Limit Type <input type="text" value="Year-To-Date"/></div> <div style="margin-bottom: 5px;">Limit Amount <input type="text" value=""/></div> <div style="margin-bottom: 5px;">User Defined Start Date <input type="text" value="G"/></div> <div style="margin-bottom: 5px;">User Defined End Date <input type="text" value="G"/></div> <div style="margin-bottom: 5px;">Garnishment <input type="checkbox"/></div> <div style="margin-bottom: 5px;">Child Support ACH <input type="checkbox"/></div>
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Save
Save/New
Reset
Copy
Calculation

Be sure to check the *Include in Benefit Plan* checkbox. Make sure that this is marked so it can be used later when creating the benefit plan. Also, make sure that the vendor is accurate. These two items tell the system which deductions and benefits to look for when you create options. Click **Save**.

Navigate to **Maintenance > HR > Benefits and Deductions > Benefits**.

Click **New** to create a new benefit code for any employer-paid portion of any benefit plans you need to create.

Benefit List
Benefit

Code

Description

Active ☒

Include in Benefit Plan ☐

Include on Pay Stub ☒

Last Processed Date NOT USED

Effective Date

Start Date

Benefit Type

Vendor

Default Frequency

Calculation Method

Amount

Maximum

Year-to-Date Limit

Life-to-Date Limit

Credit Distribution [Select One]

Account

G/L Account

Debit Distribution [Select One]

Account

G/L Account

Split Between Fiscal Years ☐

Distribute Cost To Override ☒

Do Not Create Disbursement ☐

Save

Save/New

Reset

Copy

Calculation

The same two items that were important for deduction setup are also important for benefit setup. Be sure to check the box titled *Include in Benefit Plan*. Also, make sure that your vendor matches what you have entered for the deduction. Click **Save**.

SET UP COVERAGE OPTIONS

Navigate to Maintenance> HR > Benefits Administration > Coverage Options.

Click into the last empty row in the grid to create a new coverage option code. Then enter the minimum and maximum number of dependents. These options will be available when you go to make the benefit plan. Click **Save**.

Coverage Option Listing

Coverage Options

	Coverage Option Code	Minimum Dependents	Maximum Dependents
✗	Option 12	0	99
✗	option 13	0	99
✗	Option 14	0	99
✗	Option 15	0	99
✗	Option 16	0	99
✗	Option 17	0	99
✗	Option 18	0	99
✗	Option 19	0	99
✗	Option 20	0	99
✗	HSA	0	99
✗	Supp Life	0	99
✗	Pension	0	99
✗	Option 21	0	99
✗	Option 22	0	9
✗	Option 23	0	99
✗	Option 24	0	99
✗	Option 25	0	99

Save Refresh Export Options

SET UP RULE SETS

Navigate to Maintenance > HR > Benefits Administration > Rule Sets.

Click **New** to create a new rule set code that will be available for a benefit plan.

Rule sets establish the eligibility and rate rules for benefit categories.

of a category may not be changed to a date later than the first date the category was used in a payroll.

Use the arrow buttons on either side of the Coverage Effective Dates field to navigate between the different effective date ranges of a category. All related plans, options and rule sets will remain in sync with the date range selected.

On first opening this page from the Benefits Administration Categories page, the currently effective record for the category will display.

Coverage Start Date

Required. First date the coverage for this category is effective. You may edit this date, as long as the associated plan has not been used.

Plan Year

If filled in, forces a YTD (year-to-date) limit based on annual employee and employer amounts in the benefit plan options. If the field is NULL, no limit is set.

Payroll Start Date

Required. Determines the actual start of payroll deductions for the selected coverage.

Note: Once a benefit plan has been used in payroll, it cannot be edited. You must create a new event on the plan. Also, anything you want to see in open enrollment, you must make a category for.

Once you have created a category, click **Save** to create a new benefit plan.

Click **New** at the bottom of the screen for the tabs below to appear. If the plan is under a medical, dental, or vision category, this is the screen you will see:

Benefits Administration Categories > Benefits Administration Category

Benefits Administration Plan Entry

General Options Payment Frequency Replaced Plans

Plan Name

Description

Benefit Plan Category **Medical**

Last Used Date

Status **Active**

YTD Limit Start Month

Provider

Calculation Method **Flat Amount**

Validated ☒

6055 Reporting ☐

Track Primary Doctor ☐

Track Secondary Doctor ☐

Track Identification Number ☐

Allow Employer Contribution Percent ☐

Minimum Employer Contribution

Comments

Save **Save/New** **Reset**

Once you have entered the necessary information, click **Save**.

Once the plan has been saved, click on the **Options** tab at the top to tell the system which benefit groups are eligible for this plan.

Benefit Administration Cost - Select Rule Set and Benefit Group

Rule Set **ALL**

Available Benefit Groups

- Elected - Elected Officials
- Exception - Exception
- Fire A Shift - A Shift Fire Officers
- Fire B Shift - B Shift Fire Officers
- Fire C Shift - C Shift Fire Officers
- MR - Mary's BG
- No OT No Accrual - No OT No Accrual
- P/T 20 hr - Part Time 20 Hour Week
- P/T 25 hr - Part Time 25 Hour Week
- P/T 30 hr - Part Time 30 Hour Week
- P/T 35 hr - Part Time 35 Hour Week
- P/T No Accruals - Part Time - No Accruals
- RayBG - Ray's Benefit Group
- RayBG - Ray's Benefit Group

Selected Benefit Groups

Ok **Cancel**

Click **OK** for the Cost Entry screen to pop up. The columns show each benefit option. The top rows are for employer contribution costs and the bottom rows are for employee contribution costs. Click **Save**.

Cost Entry							
	EE Hired After Sept. 1, 2008	Employee + Child(ren)	Employee + Family	Employee + One	Employee + Spouse	Employee Only	Employee
Applies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Monthly Plan Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Annual Plan Cost	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employer Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employer Percent	100.0000%	100.0000%	100.0000%	100.0000%	100.0000%	100.0000%	100.0000%
Employer Benefit Code							
Max Percent of Annual Pay	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Employee Amount	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Employee Percent	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%	0.0000%
Employee Deduction Code							

Save Reset Close

Applies Determines whether this coverage option--Employee, Employee + 1, etc.--applies to the selected plan. If it applies, check the box.

Monthly/Annual Plan Cost Total dollar amounts required per month and year to pay for the coverage option selected.

Employer Amount Employer's share of the cost, expressed as a fixed dollar amount.

For cafeteria benefit plan options, the employer share of the cost will be set automatically to 100%; consequently, this field will be hidden.

Employer Percent Employer's share of the cost, expressed as a percentage of the total cost. The acceptable range of entry is from 0.01 to 100.00 percent.

Typing a percentage disables the Employer Amount field, and its value and the value of the Employee Share are calculated automatically. Values are recalculated based on the Employee Percent.

Typing an amount disables the Employer Percent field, and its value and the value of the employee share are calculated.

For cafeteria benefit plan options, the employer share of the cost will be set automatically to 100%; consequently, the Employer Amount field will be hidden.

Employer Benefit Code Benefit code used to calculate the employer's share of the cost, required when the benefit plan option contains an employer-paid amount greater than 0%.

This code is assigned to an employee upon enrollment in this benefit plan option.

A benefit code is available on the dropdown if it is marked in Maintenance as Active, if the Include in Benefit Plan box is checked and if the Vendor is the same as the Provider selected on the General tab of the Benefits Administration Plan Entry page. The Employer Benefit Code cannot be in use by another active benefit plan.

This field is disabled if the employee share is \$0.00 or 0%.

Click the field prompt to select from an alphabetized list of valid codes, or begin to type the code, and select it when it appears in a list of codes that match what you are typing.

Max Percent of Annual Pay Maximum amount, expressed as a percentage of annual pay, an employee may contribute in one year.

Employee Amount Employee's share of the cost, expressed as a fixed dollar amount, paid through deductions.

Typing an amount in this cell automatically calculates and populates the Employee Percent.

Employee Percent Employee's share of the cost, expressed as a percentage of the total cost.

Employee Deduction Code Deduction code used to calculate the employee's share of the cost, required when the benefit plan option contains an employee-paid amount greater than 0%.

This code is assigned to an employee upon enrollment in this benefit plan option.

A deduction code is available on the dropdown if it is marked in Maintenance as Active, if the Include in Benefit Plan box is checked and if the Vendor is the same as the Provider selected on the General tab of the Benefits Administration Plan Entry page. The Employee Deduction Code cannot be in use by another active benefit plan.

This field is disabled if the employee share is \$0.00 or 0%.

Click the field prompt to select from an alphabetized list of valid codes, or begin to type the code, and select it when it appears in a list of codes that match what you are typing.

Next, click the **Payment Frequency** tab to enter in how benefit plans run in payroll.

Benefits Administration Categories > Benefits Administration Category

Benefits Administration Plan Entry

General Options **Payment Frequency** Replaced Plans

Pay Group	Frequency	Number of Payments
Bi-Weekly	24 Times Per Year	26

Save Refresh Export Options

LIFE EVENTS SETUP

This new feature lets employees who experience qualifying life events submit requests to make changes to their existing benefit plans outside the yearly open enrollment period. You must be licensed to eBenefit.

SET UP PERMISSIONS

1. Navigate to Maintenance > new world ERP Suite > Security > Users. The User List page will open.
2. Select a user.
3. Click **Permissions**. The Permissions page for the selected user will open, showing a grid of application security components.
4. In the **Filter** panel, type **life events** in the *Security Components* field (the entry is not case sensitive). The grid will refresh to show only the Life Events components. There are four: *Life Events Document*, *Life Events Post*, *Life Events Settings* and *Life Events Workflow Page*.
5. Select the appropriate permissions for each component. For *Life Events Post*, selecting **Full** or **Change** gives the user permission to validate and post life events. For *Life Events Settings*, selecting **Full** or **View** adds that option to the Benefits Administration Maintenance menu. The *Life Events Workflow Page* permission selections determine whether the Life Events option is visible on the Human Resources main menu and the extent to which the user is able to process life events.
6. Click **Save**.
7. For the permissions to take effect, the user will need to log off and log back on.

SET UP ROLES

1. Navigate to Maintenance > new world ERP Suite > Security > Roles.
2. Click **New**. The Role page will open.
3. In the *Role* field, type the name of the role.
4. Type the *Description* of the role. (This entry may or may not be the same as the *Name*.)
5. Below the *Role* and *Description* is a list of users. Select the check boxes next to the users you want to assign to the role. Assign at least one user.
6. Click **Save**.
7. To associate the role and selected user(s) with one or more departments, click the **Departments** icon located below the list of users. The Associate Departments dialog will open.
8. Select the *User*.
9. To associate the user with departments, select the corresponding department check boxes.
10. Click **Save**.

The user will have access to employees who work for the departments selected in step 9.

SET UP APPROVAL PROCESS

1. Navigate to Maintenance > new world ERP Suite > Approval Manager.
2. Click **New**. The Create New Process dialog will open.
3. Select the *Effective Date* of the approval process.
4. Type the *Name* of the approval process.
5. In the *Type* field, select *Life Events*.
6. If you want to set up a sequential approval process, select *Sequential Approval*.
7. Select the check boxes next to the departments that will use the approval process.
8. Click **Save**. The Edit Process dialog will open, containing a list of the department(s) you just added.
9. Click the **Departments** icon if you need to add departments to this process.

Next, you will add approval levels to a department.

10. (If you added and saved departments in step 9, click the **Back** button.)
11. Select/Highlight a department that will use this approval process.
12. Click **Approval Levels**.
13. The Manage Approval Levels dialog will open.
14. Click **Add**. The Edit Approval Level dialog will open.
15. Type the *Name* of the approval level.
16. In the *Required Approvers (#)* field, type the number of approvers required at this level.
17. Click **Save**. The Manage Approval Levels dialog will reopen, containing a row for the level you just created.

To add another approval level, repeat steps 13-16.

When you are finished, the Manage Approval Levels dialog should contain rows for each approval level.

Next, you will add users to the approval level(s).

18. Click the **Back** button. The Edit Process dialog will open.
19. Click the name of a department in the grid. The Manage Approval Levels dialog will open.
20. Click an approval level. The Edit Approval Level dialog will open, with a list of users displayed below the *Name* and *Required Approvers (#)* fields.
21. Select the check box next to each user who will approve at this level.
22. Click **Save**.

23. Repeat steps 20-22 for the next approval level and add users as necessary. You may reorder approval levels by dragging them to the appropriate places.
24. Click **Back** to return to the Approval Manager grid.

SET UP LIFE EVENTS

1. Navigate to Maintenance > Human Resources > Benefits Administration > Life Events Settings.
2. On the **General** tab, select the Life Events *Approval Process*. The *Approval Process* drop-down contains an alphabetical list of the approval processes that have been assigned a Life Events process type in Approval Manager.
3. The *Hire/Rehire Date* is enabled and required when the *Hire/Rehire* life event is selected. Select one of the benefit eligibility date types: **Accrual Date**, **Benefit Date**, **Hire Date**, **Seniority** or any user-defined date type from the **Employment** tab of Workforce Administration.
4. In the Life Event grid, select the life events that will be available for processing for the selected approval process and roles.
5. On the **Categories** tab, select the benefit categories that will be available for life events processing.
6. On the **Roles** tab, assign roles to the Life Events approval process by moving them from the *Available* list box to the *Selected* list box. The *Available* list box contains all roles that have been created at Maintenance > new world ERP Suite > Security > Roles. (For more on roles, see Create roles for users and associate departments with roles above.)
7. Click **Save**.

SET UP EMAIL NOTIFICATIONS

1. To create the link for email notifications that are sent when life events are submitted from eBenefit Enrollment, navigate to **Maintenance > new world ERP Suite > System > Company Suite Settings**.
2. Click the **eSuite** tab.
3. Type the eSuite site URL for the eHRAccess setting.
4. Click **Save**.

SET UP LIFE EVENTS IN ESUITE

1. From the new world Administration page, navigate to eAdministration > eHR > eEmployee > Employee Account Maintenance.
2. Select an *Employee*. The Manage Employee Account section will appear.
3. In the **Access Roles** section, select the *eBenefitsLifeEventEmployee* check box.

Selecting this box adds a Life Events option to the selected employee's Benefit Enrollment tab on the HR Portal, where the employee may create and submit life events.

4. Click **Save**.

Add custom content to the top of the Life Events pages:

1. From the new world Administration page, navigate to eAdministration > eHR > eEmployee > Content Configuration.
2. In the *Select a Module* drop-down, select *eLifeEvents*.
3. In the *Select a Content Region* drop-down, select the Life Events page or message for which you want to add custom content. You may add custom content for the following:
 - Decline message
 - Dental message
 - Dependent coverage
 - Dependent entry message
 - Document message
 - Life event header
 - Live event submit message
 - Life event welcome message
 - Medical message
 - Payroll authorization message
 - Plan documents message
 - Printer friendly message
 - Setup incomplete message
 - Summary message
 - Vision message
4. Type your content in the space at the bottom of the page.
5. Click **Save**.

Add plan documentation and links for employees:

1. To provide plan documentation and links for employees on the Life Events page, navigate to eAdministration > eHR > eBenefits > Manage Life Event Documentation. The Life Event Document Management page will open.
2. To add a document, click the **Add a Document** button. The Plan Document (Add/Edit) page will open.
3. In the *Title* field, type the title of the document as you will want it to appear in the enrollment and documents navigation panel on the Life Event page (see next section, Submitting a life event from eSuite).

4. To upload a document, select the *Upload a Document* radio button and browse for the file. To link to a document, select the *Link to an Existing Document* radio button and fill in the URL.
5. Click **Save**. The document title will be added to the Life Event Document Management page, with the options to edit and delete to the right of the title. The title also will appear on the enrollment and documents navigation panel as a link for employees.

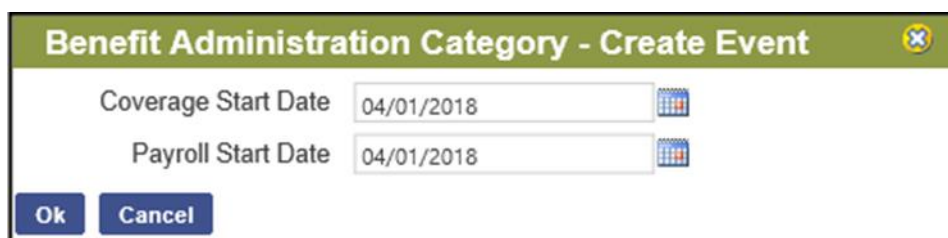
END USER'S GUIDE

Now that your benefit plans are built, you can start the open enrollment process.

UPDATING BENEFIT CATEGORIES

When it is time to update Benefit Categories for the year, Navigate to Maintenance > Human Resources > Benefits Administration > Benefit Plan Maintenance.

Click **Create Event** at the bottom of a selected benefit category. The dates for the next year will automatically populate. Click **OK**.



The screenshot shows a dialog box titled "Benefit Administration Category - Create Event". It contains two date selection fields. The first field is labeled "Coverage Start Date" and has the value "04/01/2018". The second field is labeled "Payroll Start Date" and also has the value "04/01/2018". Both fields have a small calendar icon to their right. At the bottom of the dialog box, there are two buttons: "Ok" and "Cancel".

Make any necessary updates to the plan and click **Save**.

PROCESSING OPEN ENROLLMENT

1. Navigate to HR > Benefits Administration > Open Enrollment.
2. Click **New** at the bottom of the screen to display the Open Enrollment Batch Entry screen.
3. Enter in *Effective Date*. The Benefit Categories section populates based on what Effective Date you enter based on the plan's coverage start dates.
4. Description is what will display on the Benefit Open Enrollment page.
5. No Enrollment Prior Year:
 - a. No Selection will require the user to select a coverage option for those who have not previously made a selection.
 - b. Declined will default employees to the plan within this category and edits can be made.
6. Select the category you want in the plan. Coverage start dates and payroll dates can be adjusted in the grid.
7. Move over the applicable benefit groups and click **Create Batch**.

Open Enrollment Batch List
Open Enrollment Batch Entry

Open Enrollment Batch

Batch Information

Effective Date

Description

No Enrollment Prior Year

Declined

Benefit Categories

	Category	Coverage Start Date	Coverage End Date	Payroll Start Date	Payroll End Date
<input type="checkbox"/>					

Benefit Groups

AJ-Benefit Code - AJ-Benefit Description - Soldi
ATP - Ashley Test Plan
DaveTest - DaveTest
Elected - Elected Officials
Exception - Exception
Fire A Shift - A Shift Fire Officers
Fire B Shift - B Shift Fire Officers
Fire C Shift - C Shift Fire Officers
MR - Mary's BG
No OT No Accrual - No OT No Accrual
P/T 20 hr - Part Time 20 Hour Week
P/T 25 hr - Part Time 25 Hour Week
P/T 30 hr - Part Time 30 Hour Week

Available: 25

Selected: 0

Create Batch

Cancel

Back on the Open Enrollment Batch List, click on the batch you just created to open the Open Enrollment Batch Employee List page that shows all the employees in the batch.

Open Enrollment Batch List			
List			
Validated	Description	Effective Date	Number of Employees
	Health 2	06/01/2017	368
New Refresh Delete Options			

Open Enrollment Batch Employee List

<input type="checkbox"/>	Employee Name	Employee Number	No Selection	Benefit Group	Department
<input type="checkbox"/>	Abaja, Morgan R	3049	0	Regular Full Time Non-Exempt	Fire - Suppression
<input type="checkbox"/>	Abdullah, Kayla J II	3066	0	Sworn Police	Police - Patrol Operations
<input type="checkbox"/>	Adamowski, Phoebe B	1873	0	Sworn Police	Police - Patrol Operations
<input type="checkbox"/>	Admire, Patricia L	914	0	Regular Full Time Non-Exempt	Police
<input type="checkbox"/>	Agnelli, Tania S	1048	0	Regular Full Time Exempt	Fire - Administration
<input type="checkbox"/>	Aguller, Lilian L III	1920	0	Regular Full Time Exempt	Finance
<input type="checkbox"/>	Aikman, Antony A	3192	0	Sworn Police	Police - Patrol Operations
<input type="checkbox"/>	Akamiro, Margaret M	3322	0	Sworn Police	Police - Patrol Operations
<input type="checkbox"/>	Appleyard, Landon J	3643	0	Sworn Police	Police - Patrol Operations
<input type="checkbox"/>	Auck, Braiden R	3646	0	Sworn Police	Police - Patrol Operations
<input type="checkbox"/>	Ax, Quinten	2288	0	Regular Full Time Non-Exempt	Finance
<input type="checkbox"/>	Ax, Quinten D	2757	0	Sworn Police	Police - Criminal Investigations
<input type="checkbox"/>	Ballen, Karen W	1723	0	Regular Full Time Non-Exempt	Finance
<input type="checkbox"/>	Barnes, Jasper A	599	0	Regular Full Time Exempt	Police - Administration
<input type="checkbox"/>	Barnes, Jasper S	739	0	Regular Full Time Non-Exempt	Fire - Administration
<input type="checkbox"/>	Barnes, Jasper S	3000	0	Sworn Police	Police - Patrol Operations

New

Delete

Options

368 Rows Prev Page 4 of 4 Next

On the Employee List, click on an employee to make any necessary edits if they are changing their enrollment. Click the edit icon in the pop up for the Benefit Plan Detail pop up to display.

Click **New** at the bottom if you need to enter in an employee into the batch.

Benefit Plans									
	Category - Plan	Option	Coverage Dates	Payroll Dates	Deduction Amount	Declined	Overridden	Comments	Required
	Health 2		06/01/2017 - Open	06/01/2017 - Open	N/A	<input checked="" type="checkbox"/>			

Save
 Save/New
 Cancel

Benefit Plan Detail

Coverage Start Date: 06/01/2017

Coverage End Date:

 Category: Health 2

Plan:

 Option:
 Enrollment Date:

Payroll Start Date: 06/01/2017

Payroll End Date:

 Frequency:
 Decline / Reason: ☒
 Comments:

Close

Make any necessary changes and click **Save**. Breadcrumb back to the Open Enrollment Batch List.

1. Click the **Validation** tab.
2. Select the Description and click **Submit**.

Open Enrollment Batch Validation

Validation

Description	Effective Date	Number of Employees
<input checked="" type="checkbox"/> Health 2	06/01/2017	368

Submit Refresh Options

A validation report will be created in myReports. Open this report and review any errors.

3. Click the **Print Edit & Error Listing** tab.
4. Click the Description and click **Submit**.

Open Enrollment Batch Print Edit & Error Listing

Print Edit & Error Listing

Description	Effective Date	Number of Employees
<input checked="" type="checkbox"/> Health 2	06/01/2017	368

Submit Refresh Options

5. Go to myReports to review the created reports.
6. Click the **Post** tab.
7. Select the Description and click **Submit**. This will update the employees with new enrollment for the coverage dates and categories that were entered during enrollment. An edit report will also be sent to myReports.

Open Enrollment Batch Post		
Post		
Description	Effective Date	Number of Employees
Health 2	06/01/2017	368
<input type="button" value="Submit"/> <input type="button" value="Refresh"/> <input type="button" value="Options"/>		

SUBMITTING A LIFE EVENT IN ESUITE

The following example uses a birth/adoption life event:

1. From the HR portal, navigate to **BENEFIT ENROLLMENT > Life Events**.
2. The Life page will load, containing a grid of any life events completed in the past and a **NEW LIFE EVENT** button. Click the **NEW LIFE EVENT** button. The Life Events start page will load, containing an enrollment and documents navigation panel, a *Life Event Type* field, an *Event Date* field and a grid of current dependents. This page is the launching point for adding a life event and enrolling in benefits.
3. Select a *Life Event Type*. Selections currently available are ***Birth/Adoption, Divorce, Marriage*** and ***Hire/Rehire***.
4. Select an *Event Date*.
5. Click **SAVE AND CONTINUE**. The Dependent Entry page will load, containing fields for the entry of your dependent's information.
6. Fill in your dependent's information. Required entries are *First Name, Last Name, Birth Date, Gender* and *Relationship*. If *Comments* exceed the display length, hover functionality will show the complete text. (If you try to exit the page before saving entries, you will receive a message saying you have unsaved entries and asking you to confirm you want to exit.)
7. When you have made your entries, click **ADD**. A New Dependents grid will appear at the bottom of the page, populated with your dependent's information.
8. If you need to remove a dependent from the grid, click the red **X** in the *Delete* column of the appropriate row. A pop-up will ask you to confirm the delete. If you need to edit a dependent's information, click the pencil icon in the *Edit* column. Entries from the **New Dependents** grid will re-populate the dependent entry fields, and the **ADD** button will be replaced by an **UPDATE** button.

9. When you are satisfied with your entries, click **SAVE AND CONTINUE**. The Upload Documentation page will open, containing an area for uploading supporting documentation, such as a birth certificate, and a grid containing the added dependent's information.

10. Browse for and select the document file.

11. Click **UPLOAD THE DOCUMENT**. The document will be added to a Documents grid directly above the **Added Dependents** grid and will be associated exclusively with the life event. (If the document could not be uploaded, an error message will explain why.)

In Workforce Administration, if new world ERP is integrated with Tyler Content Manager (TCM), document counts will appear next to the document icon, telling you at a glance whether the records you are viewing have documents attached and, if so, how many.

12. When you have finished uploading documents, click **SAVE AND CONTINUE**. The page for the first benefit category in the **Enrollment** section of the navigation panel will open, showing your current plan election and pay period deduction at the top, with plan options and employer and employee costs per pay period below. The eligible plans and plan costs displayed are as of the date of the life event.

All defined enrollment categories will display individually as links in the navigation panel, allowing you to enroll in one plan per category. Each category will have its own enrollment page. Eligibility for a category is determined by the benefit groups assigned to the rule set in Benefits Administration maintenance in new world ERP. You will see only the categories for which you are eligible and your cost per pay period for each category as of the date of the life event. If you have not enrolled or have declined coverage in a category, your cost will show as \$0.00. As you complete categories, you will be able to use the navigation links to toggle back and forth and make changes, if necessary.

The Plan Documents section contains links to documents related to life events and the enrollment process.

13. If necessary, change the plan election to accommodate the life event.

14. Click **CONTINUE** to save the plan election. If the category is flagged in new world ERP Benefits Administration maintenance to track covered dependents, the Select Covered Individual(s) page will open, containing a grid of your active dependents, including the dependent just added through the Life Events process, and their relationships to you.

If you added custom content for **Dependent Coverage** in Content Configuration, it will display at the top of the page.

15. Select the individuals to be covered by the plan. The *Self* check box, referring to you, is selected by default and disabled. The number of covered individuals must coincide with the coverage option selected on the **Category** tab of the Benefits Administration Category page in new world ERP Benefits Administration maintenance. (If you select incorrectly, an error message will explain why.)

16. If you need to change your plan selection, click **BACK TO PLAN SELECTION**; otherwise, once you have made your selections, click **SAVE AND CONTINUE**. The page of the next benefit category in the **Enrollment** section of the navigation panel will open.

17. Continue through the benefit enrollment process, making changes where necessary. To go back to a benefit category, click the corresponding link in the navigation panel. As you enroll in categories, the links will turn gray, and check marks will appear next to the category names. If you log out before completing the entire process, you will have the option to resume or cancel the life event the next time you log in and select the Life Events option from the BENEFIT ENROLLMENT menu.

When you complete the final benefit category, a Confirm & Submit page will open, showing a summary of your elections.

If you added custom content for **Summary Message** in Content Configuration, it will display at the top of the page.

18. If you are satisfied with your elections, click **SUBMIT**.
19. A confirmation pop-up will open, giving you the option to click **OK** to submit or **Cancel** to go back and make changes.

As soon as you submit the life event, you will receive a Confirmation Statement summarizing your elections and giving you the option to print the statement.

Also, email notifications will be sent to the primary email address you have selected in Workforce Administration and to the email address(es) of the approvers.

The life event will appear with a link in the myTasks section of the approver's home page and on the Life Events page in new world ERP, where it will go through the approval and post processes.

20. When you close the Confirmation Statement, the Confirm & Submit page will provide a **VIEW YOUR LIFE EVENTS** button to let you view a grid containing the life event, life event number, life event date, status and submitted date of the life event. Clicking the life event number will take you back to the Confirmation Statement.
21. To view or print your Confirmation Statement at a later time, from the HR Portal, navigate to BENEFIT ENROLLMENT > Life Events. The Life Event history page will open.
22. Click the hyperlinked *Life Event Number*.

MANAGING LIFE EVENTS IN NEW WORLD ERP

Navigate to **Human Resources > Life Events**. The Life Events page will open.

Employee Number	Employee Name	Request Number	Life Event Type	Effective Date	Status	Department	Benefit Group
1630	Abbington, Jacqueline L	2017-0000000016		01/09/2017	0 of 1 at 1	4100 - Parks	P/T No Accruals - ...
3713	Abbe, Frederick T	2017-0000000098		01/25/2017	0 of 1 at 1	4222 - Parks - Aquati...	P/T No Accruals - ...
1873	Adamowski, Phoebe B	2017-0000000027		01/10/2017	0 of 1 at 1	2136 - Police - Patrol...	Sworn Officers - S...
914	Admire, Patricia L	2017-0000000087	Birth/Adoption	02/01/2017	0 of 1 at 1	2100 - Police	Reg F/T NE - Regul...
1048	Agneli, Tania S	2017-0000000015		01/01/2017	Not Submitted	2211 - Fire - Adminis...	Reg F/T E - Regul...
2471	Agullon, Douglas A	2017-0000000160	Hire/Rehire	02/01/2017	Not Submitted	2221 - Fire - Suppres...	Fire A Shift - A Shif...
3322	Akamiro, Margaret M	2017-0000000053		01/12/2017	0 of 1 at 1	2136 - Police - Patrol...	Sworn Officers - S...
1046	Albritton, Eden	2017-0000000117		02/02/2017	0 of 1 at 2	2221 - Fire - Suppres...	Fire C Shift - C Shif...
3812	Amauty, Eric P	2016-0000000055	Divorce	02/17/2017	Not Submitted	4222 - Parks - Aquati...	P/T No Accruals - ...
3524	Anderson, Isabelle	2017-0000000007		01/01/2017	0 of 1 at 1	2134 - Police - Specia...	P/T 20 hr - Part Ti...
2476	Appleyard, Landon E	2017-0000000176	Birth/Adoption	02/21/2017	Approved	2221 - Fire - Suppres...	Fire A Shift - A Shif...
2648	Arters, Frank S	2016-0000000093		12/23/2016	Not Submitted	2221 - Fire - Suppres...	Fire B Shift - B Shift...
3646	Auck, Braiden R	2016-0000000095		12/15/2016	Not Submitted	2136 - Police - Patrol...	Sworn Officers - S...
2288	Ax, Quinten	2017-0000000243	Birth/Adoption	03/21/2017	0 of 1 at 1	1400 - Finance	Reg F/T NE - Regul...
1040	Bertella, Juan D	2017-0000000004		01/01/2017	0 of 1 at 1	2134 - Police - Specia...	Sworn Officers - S...
796	Besso, Meredith E	2017-0000000091		01/24/2017	0 of 1 at 1	1200 - Administration	Reg F/T E - Regul...

Employee life event submissions from the HR Portal appear on this page in a grid, with each row corresponding to a life event. You may sort or filter the grid by any column. To sort, click in the column header; to filter, type in the *Contains* field directly below the column header.

Use the *Views* field in the top-right corner of the Life Events page to reload the grid with life event submissions in each status.

Use the **Show View Preferences** button to set a default view for the list of life event submissions; for example, to set the default to all submissions that need approval, click **Show View Preferences**, and select **To Approve** in the *Select Default View* field. After that, each time you open the Life Events page, only the submissions that need approval will display.

If a life event has a validation warning or error, a red **X** will display in the *Status* column. Click the **X** to open a Life Event Error Listing that contains a description of each warning or error.

Request numbers in the grid link to the Contacts/Dependents and Benefit Plans sections of Workforce, where the life event entries submitted from the HR Portal will appear on a **Life Event** tab. According to your security permissions, you may view or edit the entries in these sections and add contacts, dependents and benefit plans.

The bottom of this page and the Life Events page contain a series of icons that will change depending on your security setup and the status of a life event or the view selected.

APPROVE

If you have received a life event approval task in the myTasks panel of your home page, you may click the *Transaction ID*, and it will take you directly to the Life Event approval page (step 3 below).

1. In lieu of that, navigate to **Human Resources > Life Events**.
2. In the *Views* field in the top-right corner, select the To Approve view. The Life Events grid will reload to show only the events that are awaiting approval.

- The bottom of the page contains a series of icons, including **Approve**, **Reject**, **Return** and **Cancel**. If the life event is at your level of approval, the icons will be active. You may select the event and click the **Approve** icon. You also may click the employee's *Request Number*. The Life Event approval page will open, containing the same series of icons at the bottom.

Life Events
2017-0000000016 - Abbington, Jacqueline L (1630)

Common Links
Documents

Life Event

New

Contact Name	Primary Phone	Primary Contact	Emergency Contact	Beneficiary	Dependent	Comments
Abbington, Mary					✓	

Benefit Plans

Category - Plan	Option	Coverage Dates	Payroll Dates	Deduction Amount	Declined	Overridden	Comments	Required
Health - Health	Employee + Child(ren)	01/09/2017 - Open	01/09/2017 - Open	\$215.38				
Rx - Rx	Employee + Child(ren)	01/09/2017 - Open	01/09/2017 - Open	\$21.54				
Medical Date Test - Medical test	Employee + Family	01/09/2017 - Open	01/09/2017 - Open	\$19.23				

Approve Reject Return Cancel Compare

- Click the **Approve** icon to approve the event. The Approve dialog will open. If you are not the last or only approver, the next approval level will be the default selection in the *Send To* field. If you want to send an approval request to a particular approver at the next level, you may select the name from the drop-down.
- If necessary, add a *Comment*.
- Click **Submit**. The Approve Results pop-up will open, and an approval request will be sent to the next approver's email address and **myTasks** panel.
- Using the appropriate icon along the way, an approver with permission set up in Approval Manager may reject the request, return the request to the previous level or cancel the request.
- The results of these actions will show in the approval display summary. Click the Compare icon in the bottom-right corner of the Life Event approval page to view the approval display summary and, below that in red, the new information related to the life event.
- To view a diagram showing the status of the approval process, including the dates and times of each action taken, click any one of the approval step icons in the approval display summary.

VALIDATE AND POST

Once the approval process for a life event has completed, the **Validate** icon will be enabled on the To Validate view of the general Life Events page and on the employee's Life Event page.

Life Events
2017-0000000016 - Abbington, Jacqueline L (1630)

Common Links
Documents

Life Event

New

Contacts/Dependents							
Contact Name	Primary Phone	Primary Contact	Emergency Contact	Beneficiary	Dependent	Comments	
Abbington, Mary					✓		

New

Benefit Plans								
Category - Plan	Option	Coverage Dates	Payroll Dates	Deduction Amount	Declined	Overridden	Comments	Required
Health - Health	Employee + Child(ren)	01/09/2017 - Open	01/09/2017 - Open	\$215.38				
Rx - Rx	Employee + Child(ren)	01/09/2017 - Open	01/09/2017 - Open	\$21.54				
Medical Date Test - Medical test	Employee + Family	01/09/2017 - Open	01/09/2017 - Open	\$19.23				

Submit Approve Reject Return Validate Post Cancel

Compare

1. To validate a selected life event submission, click the **Validate** icon. A Validation Results pop-up will display to let you know whether the validation was successful.

If one or more warnings are generated, the validation will be successful, but the pop-up will display a warning(s)/error(s) message in red. You may click the message to view a listing of the warning(s). If one or more errors are generated, the validation will be unsuccessful, but the listing will explain the errors so they may be corrected, if possible.

2. Click **Close** to close the Validation Results pop-up. If the validation was successful, the **Post** icon will be enabled on the To Post view of the general Life Events page and on the employee's Life Event page.
3. To post a selected life event submission, click the **Post** icon. A dialog will display, asking you to confirm whether you want to post.
4. Click **OK** to post. The life event will be added to the Posted view on the Life Events page, the employee who submitted the life event will be notified by email of the event's approval, and the changes will add to the appropriate sections on the employee's Workforce Administration page.