

# Welcome to Benefits Manager

Instruction Guide for

**Online Enrollment Management** 

Contents | Next >

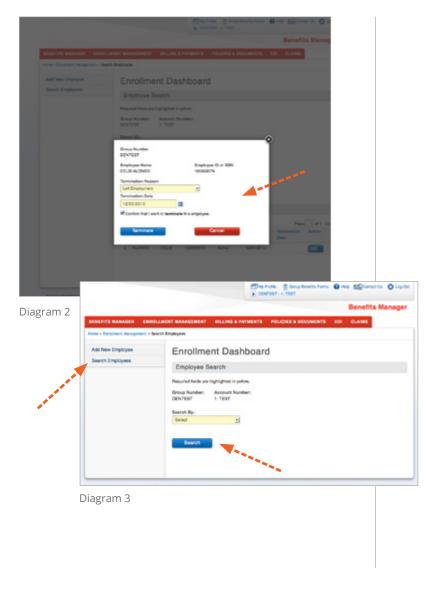
This instruction guide demonstrates how to navigate through Enrollment Management. Please make sure you are successfully logged into Benefits Manager before beginning this guide (Diagram 1).

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Diagram 1

#### **Contents:**

Section 1: Enrollment Management Overview
Section 2: Search
Section 3: Change
Section 4: Add Employee



## Section 1: Enrollment Management Overview

If you have access to multiple groups and/or accounts, you will be prompted to make your group and account selection upon first entering Enrollment Management. Information will automatically populate if you have access to one group and one account (Diagram 2). From the Enrollment Management page (Diagram 3) you may access the following transactions:

#### 1. Add Employee

Click "Add Employee" to add an employee.

**Tip:** Add Employee also covers adding Late Entrants and new employees during Annual Enrollment.

#### 2. Change

Add New Employee or Search an existing employee to view or change their record (Diagram 3).

#### 3. Search

View your Group's active and terminated insured lists and individual employee information.

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## Section 2:

## Search

The Insured List and Recent Additions Search (Diagram 4) allows you to search by Name, Employee ID or SSN and Status.

The Status options are as follows:

- **Save** a saved incomplete record
- Submitted submission has not yet been processed by our system
  - **Rejected** the system could not successfully process the record; call Customer Service for resolution
- **Completed** successfully processed
  - Active employee with active benefits

**Terminated** – employee with terminated benefits

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The Search results appear on the bottom of the same page.

To view the employees current benefits information, click on the "+" sign at the left of the employee name and then the Group and Account number link (Diagram 5).

**Tip:** To update an employee's information click on the "Edit" button to the right.

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Diagram 6 Salary Update	
Termination of E	ployee
Re-Order Dental	ards
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## 3:

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ving changes and requests can be submitted g on the group's products (Diagram 6):

- Products Change
- COBRA for Dependents
- Demographic Update •
- Salary Update •
- Termination of Employee

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Add Now Engloyee Search Employees Enrollment Ma O Search Employee Products Change Employer Information	exist for this employee. Click have to discard this application and view the mattern Required flatds are highlighted in yellow. Account Number 17157 Wire Date 1205/2011	Step 1: Continue >	<ul> <li>changes to an existing employee's coverage, including:</li> <li>Product additions / terminations</li> <li>Dependent additions / terminations</li> <li>Class changes and coverage option changes.</li> <li>Once you have completed your modification clic Continue.</li> </ul>

Group Number ABC GROUP		
Employee Name JOHN SMITH	Employee ID or SSI 1234567890	N
Salary	Salary Period	
45000	Annually	-
Effective Date		
12/25/2013		
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Submit	Cancel	
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gram 8 Group Number ABC GROUP Employee Name	Employee ID or SSI 1234567890	N
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#### 2. Salary Updates

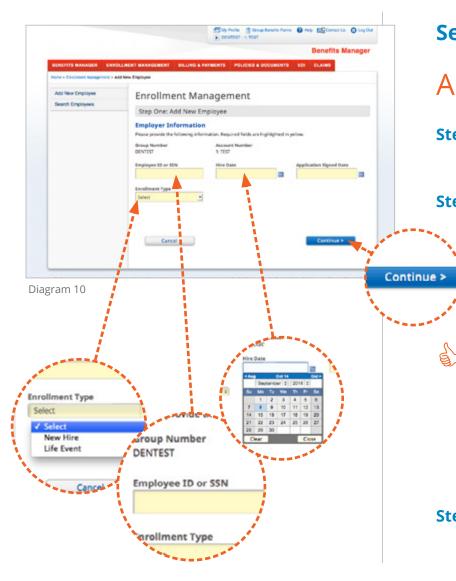
**Step 1:** Make the desired edits to the Salary Update (Diagram 8).

Please note: Salary, Salary Period, and Effective Date are required.

**Step 2:** When edits are complete, click submit.

#### 3. Terminations

- **Step 1:** Make the edits to the Termination of Employee (Diagram 9).
- **Tip:** For Termination of Employees we simply require the reason and termination date.
- **Step 2:** When edits are complete, click submit.



### Section 4:

## Add Employee

- **Step 1:** Enter your Employee's ID or SSN, Date of Hire and Application Signed Date.
- **Step 2:** The Class field will then populate with the appropriate selections based on the dates entered.

**Please note:** you MUST enter the Employee ID or SSN, Hire Date, and Application Signed Date in order for Class to populate.

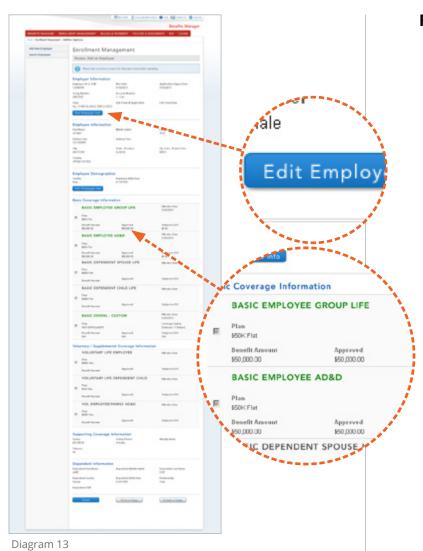
## **Tip:** Only choose a "Life Event" if that is the main reason for the addition.

If the Enrollment is taking place during the group's anniversary period, Anniversary will display as an option in Enrollment Type.

**Step 3:** Click Continue (Diagram 10).

		DENTER TERT		4: Enter the employee's name, address and
		Benefits	Manager	demographics. These are all required fields
Hone - Dycliment Nanagement -	OLLMENT MANAGEMENT DILLING & PRY	INENTS POLICIES & DOCUMENTS EDI CLAINS		(Diagram 11).
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	Employer Information		Step	<b>5:</b> Enter the appropriate coverage information. Bas
	Employee 32 or 35N 123w557990	Group Number Account Number DEVT057 1: 7857		on the previous information entered, the fields
	Employee Information			default to the benefits available for that employ
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	Address One	Address Two		
				only be required if salary based or tobacco rated
	Oty	State / Province Bip Code / Postal Code		plans are elected.
		Select •		plans alle elected.
	Ceurory UNITED STATES			
				<b>Tip:</b> If you choose to "Save for Later" you wil
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	Gender	Employee Birth Date		be able to access the record in Search b
	-	-		
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	Erestore Online 1	S) Tip:	You can continue to "Add More Dependents" as needed.
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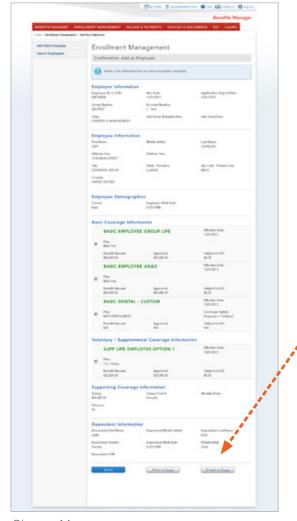


#### **Review: Add an Employee**

Upon review, Edit and Save for Later options will be available (Diagram 13).

**Tip:** Selected products will appear in Green.

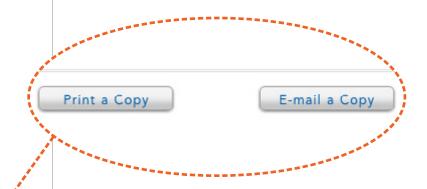
The system will indicate if the requested amount requires an EOI application.





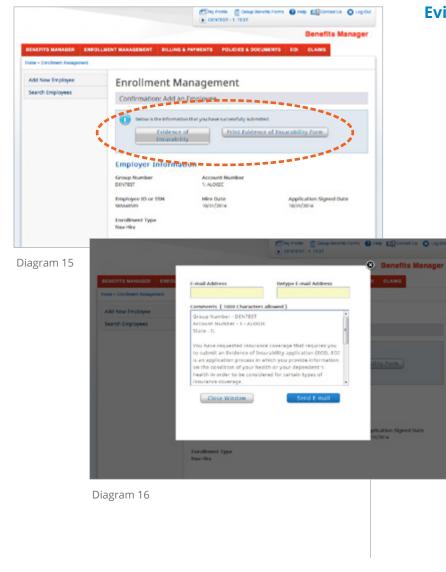
#### Confirmation: Add an Employee

Here you can Print or email a copy of the confirmation to an employee or yourself (Diagram 14).



#### **Evidence of Insurability (EOI)**

If Evidence of Insurability (EOI) is required, the Confirmation page will present two options for notifying the employee to complete the necessary form.



#### Evidence of Insurability (EOI) (continued)

Clicking on "Print Evidence of Insurability Form" will print a paper copy of the EOI form (Diagram 15). Clicking on "Evidence of Insurability" will launch a window in which you may enter and confirm the employee's email address (Diagram 16). This will send an email to the employee containing a link to the online EOI form, as well as instructions for completing the application.

#### This concludes the Enrollment Management Guide.

Thank you for using Benefits Manager.