Employee Self-Service: *Benefits*

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Introduction

You can view and update certain key pieces of benefit information. The Benefits icon contains your beneficiary, dependents, current benefits, benefits handbook, new hire enrollment and open enrollment.

As the employee, you are able to make edits to beneficiaries and dependents. Adding dependents under Benefits is <u>not</u> for newborns. To add a dependent under the Benefits icon, you must have all required information such as date of birth and social security number. If you need to add a newborn, you must do that under Life Events.

 If applicable, you will be able to enroll in benefits as well.

This guide will give you step by step instruction on how to update and view information for each link under Benefits.

Navigation

1. To access your benefit information, click the **Benefits** icon.

BENEFITS

2. A list of hyperlinks will display each section.

Annual Enrollment

1. Annual Enrollment is our annual open enrollment. This link will only be visible during the open enrollment timeframe.

2. Click the **Annual Enrollment** link to elect your coverage during the open enrollment timeframe.

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3. Once the message is displayed, click *Continue* to proceed with electing coverage.

4. Follow the wizard to elect your coverages.

5. Hit *Submit* to confirm your elections.

Beneficiary

1. To add and/or update your beneficiaries, click the **Beneficiary** link.

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2. All your applicable benefit plan types will be displayed along with beneficiaries assigned to those plans.

Beneficiaries

Current Beneficiaries

To add a beneficiary for a plan, click on the Add Individual or Add Trust button for the plan.

To change, delete or view additional detail for a current beneficiary, click on the beneficiary's name.

Plan Type	Employee Life
Plan Name	AD&D - Company Paid
Name	ERIN
Type	Primary
Amount	25.00%
Name	
Type	Primary
Amount	50.00%
Name	SHANNON
Type	Primary
Amount	25.00%

Add Individual   Add Trust

3. To add a beneficiary for a plan, click the **Add Individual** or **Add Trust.** A detail screen will be displayed to the right.

4. Enter all applicable information and required fields (these are notated with a red asterisk*). Click **Update** to save your changes.

Detail

*Required fields are indicated.

First Name*	John
Middle Initial	
Last Name*	Travolta
Last Name Suffix	▼
Distribution Type*	Percent ▼
Distribution Percent*	25
Beneficiary Type*	Contingent ▼
Relationship	▼
Social Number	
Employee Address	▼
or	
Address 1	
Address 2	
Address 3	
Address 4	
City or Address 5	
State or Province	▼
Postal Code	
Country	▼
Comments	

[Update] [Cancel]

5. To <u>change</u>, <u>delete</u> or <u>view details</u> a beneficiary for a plan, click the beneficiary's name which will be a link. A detail screen will be displayed to the right.

Beneficiaries

Current Beneficiaries

To add a beneficiary for a plan, click on the Add Individual or Add Trust button for the plan.

To change, delete or view additional detail for a current beneficiary, click on the beneficiary's name.

Plan Type   Employee Life
Plan Name   AD&D - Company Paid

Name   ERIN
Type   Primary
Amount   25.00%

Name
Type   Primary
Amount   50.00%

Name   SHANNON
Type   Primary
Amount   25.00%

[Add Individual] [Add Trust]

6. In the details area, you can update any applicable information such as distribution type, distribution amount, or address.

7. Once you've completed updating the information, click the *Update* button. If you need to delete the beneficiary, select the *Delete* button.

Benefit Plan Descriptions

1. To view the benefits handbook, click the **Benefit Plan Descriptions** link.

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2. The benefits handbook will open as a viewable PDF.

Dependents

1. Please note that adding dependents here is <u>not</u> for newborns. You must have all required information such as date of birth and social security number. If you need to add a newborn, you must do that under Life Events.

2. To add and/or update your dependents, click the **Dependents** link.

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3. To <u>update</u> or <u>view</u> details of a dependent, click on the dependent name.

Dependents

Current Dependents

To add a dependent, click on the Add button.

To change or view additional detail for the dependents listed here, click on a name.

Name	Social Number
ERIN SMITH	6921
Denzel Washington	2222

Add

4. The detail screen will open. There are two tabs: Main and Address.

5. The main tab contains the name, date of birth, social security number, relationship, gender & type of dependent.

6. The address tab is where you can add address details. This is not required.

7. Once you have updated or viewed the information, hit the **Update** or **Cancel** button.

Detail

Main | Address

*Required fields are indicated.

First Name*	Denzel
Middle Initial	
Last Name*	Washington
Name Suffix	▼
Birth Date*	06/11/2018 📅 MM/DD/YYYY
If Adopted, Date	📅 MM/DD/YYYY
If Adopted, Placement Date	06/11/2018 📅 MM/DD/YYYY
Social Number*	000112222
Type*	Dependent ▼
Status	Active ▼
Relationship*	Adopted Child ▼
Address*	Home ▼
Primary Care Physician	🔍
Gender*	Male ▼
Student	No ▼
Disabled	No ▼
Smoker	No ▼

Update | Cancel

8. To <u>add</u> a dependent, click on the **Add** button.

Dependents

Current Dependents

To add a dependent, click on the Add button.

To change or view additional detail for the dependents listed here, click on a name.

Name	Social Number
ERIN SMITH	6921
Denzel Washington	2222
	Add

9. Enter all applicable information and required fields (these are notated with a red asterisk*). Click **Update** to save your changes.

Detail

[Main] [Address]

*Required fields are indicated.

First Name*	
Middle Initial	
Last Name*	
Name Suffix	▼
Birth Date*	📅 *MM/DD/YYYY*
If Adopted, Date	📅 *MM/DD/YYYY*
If Adopted, Placement Date	📅 *MM/DD/YYYY*
Social Number*	
Type*	▼
Relationship*	▼
Address*	▼
Primary Care Physician	🔍
Gender*	▼
Student	No ▼
Disabled	No ▼
Smoker	No ▼

[Update] [Cancel]

New Hire Enrollment

1. This section is only for benefit eligible new hires that need to enroll in their benefits. New hires will click the **New Hire Enrollment** link.

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2. Once you click the link, the enrollment message will be displayed. Select *Continue* to launch the enrollment wizard.

New Hire Enrollment

Welcome to Saint Peter's New Hire Benefits Enrollment!

View Current Benefits

1. To view your current benefit elections, click the **View Current Benefits** link. This information is <u>view only</u>; you are not allowed to edit this data.
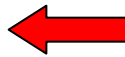
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2. Your current benefit elections will be displayed as of the current date.

Current Benefits

Benefit Plans and Coverage - 07/17/2018

Select an effective date. Costs are per Pay Period.

Effective Date*   07/17/2018 📅   Continue

MM/DD/YYYY

3. If you would like to view your coverage as of another date, enter that date in the Effective Date field and hit *Continue*.

Benefit Plans and Coverage - 05/08/2017

Select an effective date. Costs are per Pay Period.

Effective Date*   05/08/2017 📅   Continue

MM/DD/YYYY

Benefit Plans and Coverage - 07/19/2018

Select an effective date. Costs are per Pay Period.

Effective Date* [07/19/2018] 📅 [Continue]   [Print]

MM/DD/YYYY

Type of Plan	Plan	Start Date	Coverage	Pretax Cost	Aftertax Cost	Company Cost
Defined Contribution	TSA - Metropolitan Life	03/09/2008	7,800.00 per year	300.00		
Dental	Dental1	01/01/2018	Plan B - Family	28.64		
Disability	LTD - Managers - Co. Paid	01/01/2018				43.27
Employee Life	AD&D - Company Paid	01/01/2018				5.48
Employee Life	Life - Basic Company Paid	01/01/2018				27.38
Employee Life	Supp Life - Waive Plan	01/01/2017				
Health	United Medical PPO	01/01/2018	UPPO - Family	365.54		2,605.58
Health	VSP-Voluntary	01/01/2018	Vision - Family	8.88		
Spending Account	FSA Dependent Care Waive Plan	01/01/2017				
Spending Account	FSA Health Care Waive Plan	01/01/2017				