PeopleSoft HCM

Employee Benefits Enrollment Process - New Hire or Rehire

Employee Only Coverage

Prepared by: HR Operations
Created on 8/29/2018 4:31:00 PM
Table of Contents

Employee Benefits Enrollment Process - New Hire or Rehire................................. 1

Completing the Benefits Enrollment Process - Employee Only Coverage ..................... 3
  Step 1: Enter your Benefits Eligibility Date.................... Error! Bookmark not defined.
  Step 3: Enter Emergency Contact Information................. Error! Bookmark not defined.
  Step 4: Add/Review Dependent/Beneficiary .................... Error! Bookmark not defined.
  Step 5: Benefit Enrollment ...................................... Error! Bookmark not defined.
  Step 6: Benefits Election Review ............................... Error! Bookmark not defined.
  Step 7: Event Completion and Exit ............................. Error! Bookmark not defined.
  Step 8: Allocation of Beneficiary ............................... Error! Bookmark not defined.
Employee Benefits Enrollment Process - New Hire or Rehire Overview

This section will provide an understanding of Employee Self Service Benefits and the Employee Benefits Enrollment Process for New Hires and Rehires.

Objectives

Upon completion of this section, you will have a general understanding of:

- What are Employee Self Service Benefits
- How to Complete the Benefit Enrollment Process for Employee Only (Single) Coverage

Related Reference Material

Reference Materials may include Training Guides, Job Aids, Quick Reference Guides, and Additional Reference Materials.

Links to all PeopleSoft HCM materials are available at the end of each topic.

What are Employee Self Service Benefits?

**Employee Self Service** provides self-service capabilities to staff at the University of Alberta. As a staff member, you can access and manage your personal information and benefit enrollments.

The Benefits functionality is used to add dependents and beneficiary information upon hire, update marital status, modify existing beneficiary information, as well as add and remove dependents by processing a family status change.

The original signed Designation of Beneficiary form **must** be returned to Human Resources to validate the designation.
Completing the Benefits Enrollment Process - Employee Only Coverage

In this topic you will be introduced to the 8 steps of the Post Hire Benefits Enrollment process and learn how to review and submit your benefit enrollment selections for employee only (single) coverage.

Procedure

Follow these steps in the order listed to help you complete the Post Hire Benefit Enrollment Process with ease.

1. Confirm that your address and phone number is setup in PeopleSoft. *(Refer to the Personal Information section within the Faculty and Staff website. https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service/personal-information)*

2. Review the Enrolling in Benefits section for your specific employee type and upload/print the forms. *(https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service/enrolling-in-benefits)*

3. Watch/Read the Online Tutorial a ‘New Hire or Rehire’

4. Follow the instructions provided to complete your Online Post Hire Benefit Enrollment Process.
The first place to visit is the **Personal Information** webpage within the Faculty and Staff website.

This page provides information on how to view/update your personal information, including your Address Information and Phone Information.

Another important area on the Faculty and Staff website is the **Enrolling in Benefits** webpage. This is where you go to review and upload the applicable benefit related forms for your specific Employee Type.

* If you are unsure of what your employee type is, contact your Department HR Contact.

You will need to click on each link listed to upload/print the documents.

In this example, the list of links and forms are for Support Staff.
You will receive an e-mail from Human Resource Services with the Subject line: Important Time Sensitive Information Regarding Your Benefit Entitlements.

This e-mail indicates that you have been set up in the system and provides important Time Sensitive information.

**DO NOT** start your Online Benefit Enrollment until you have received this e-mail.

You have 90 days from your Start Date to ... 

- Apply for Optional Life, Optional Dependent Life, and Optional Critical Illness.
- Return your signed and fully completed original Application for Group Life Insurance Coverage Form to Human Resource Services.

Failure to meet these deadlines may result in additional forms being required or a delay in being eligible for the specific coverages mentioned above.
Navigating to the First Page of the Benefit Enrollment Process

1. After confirming that you have received your e-mail from Benefits Administration and you have signed in to Bear Tracks, Click the Employees link.

2. Click the Links to Employee Self Service link.

3. Click the Benefits Information link.

4. The Benefits Information link in Bear Tracks will open PeopleSoft HCM.

   **Note:** You may not see the same options on this page as is shown in the example. The applications you see are based on your security access.

5. In your Self-Service Center Navigation Collection, click the Life Events link.

Before beginning, it is important to note that **you can exit the process at any time**.

However, once you click the 'submit' button, you will not be able to go back and add to the original submission.

The steps to exit this process will follow shortly.
Important!
All pages within the enrollment process contain important information.

Please read each page carefully as you work through each step to ensure you understand what is required. Throughout the process, there will be times where you may need to consider the additional options available to you.

When you are hired or re-hired, you must complete the **Post Hire Benefits Enrollment** within **90 days** of your hire/start date.

6. Click the **Hire** option.

**WARNING!** You must **complete ALL 8 Steps** of this process. Failure to do so will result in an incomplete enrollment.

There are **8 Steps** in the **Post Hire Benefits Enrollment Process**.

- **Step 1.** Enter your Benefits Eligibility Date
  
  (If unsure of this date, contact your Department HR Contact)

- **Step 2.** Review Benefits Summary Report

- **Step 3.** Enter Emergency Contact Information

- **Step 4.** Add/Review Dependent/Beneficiary

- **Step 5.** Benefit Enrollment

- **Step 6.** Benefit Election Review

- **Step 7.** Completion and Exit

- **Step 8.** Allocation of Beneficiary

The type of employee that you are will determine the Benefit Programs you are eligible for. The system will initially default everything to single coverage.

**Remember!**
You can only complete the Post Hire Benefits Enrollment Process **ONCE**.

Otherwise, you need to submit a revision or change, and use dates later than the actual benefit eligibility date. This means that your changes or revisions would not take effect until **after** the original benefits eligibility date.
Step 1: Enter your Benefits Eligibility Date

1. This date is the date you become eligible for benefits and may vary depending on your contract/letter of appointment.

   If you are not sure of what date to enter, refer to your letter of appointment or contact your Department/Internal HR Contact.

   Use the calendar icon to select the date.

   Click the button to the right of the *Date Change Will take Effect field.

2. Select the Month, Year and Day of your benefit's eligibility date.

   In this example, Click June 1, 2016.
3. Click the OK button.

⚠️ Note: From this point forward, you can exit the process at any time UNTIL you click the 'Submit' button.

To continue the Post Hire Benefit Enrollment at a later time, click the Continue Later button in the top right corner of the page.

A "Message from web page' will appear. Click the OK button to continue at a later time.

4. The event you started will remain in the "event in progress" status until you return to complete the process.

Keep in mind that you will not be able to select any other event until the 'in progress' event has been completed.
5. Take note of the following key messages:

- **Ensure you access the Enrolling in Benefits webpage** within the Faculty and Staff website. Click on your appointment type for specific details and benefit forms (such as your enrollment guide and insurance applications).

- **Mandatory** - Application for Group Coverage must be submitted to Human Resource Services within **90 days of appointment** even if you choose NOT to take any optional coverage.

- **Optional** - Application for Voluntary Critical Illness for you and your spouse must be **mailed directly to Industrial Alliance**

- **Optional** - Application for Voluntary Accident Insurance can be made at any time

- **Mandatory for Pensionable Academic ONLY** - UAPP Designation of Beneficiary form must be completed and the original returned to Human Resource Services.

---

Always use the **Previous or Next buttons** located in the top right of the page to navigate to the next page.

**Do not** use the navigation list located on the far left of the page. This information is used to show what step you are at. It will automatically update as you complete each section.

6. Click the **Next** button.
Step 2: Review Benefits Summary Report

1. Review all information provided on the Benefits Summary page for accuracy.

   In the top right of the page, click the Next button.

Step 3: Enter Emergency Contact Information

1. Click the Add Emergency Contact button.

2. Enter your information into the fields provided by either selecting the drop-down options or entering into the free text fields.

   In this example, enter "New Contact Name" into the Contact Name field.
3. The Address of your emergency contact should be where your contact resides and does not have to be the same as your address.

![Emergency Contact Form](image)

4. Continue to enter information into all required fields identified by a "*". Ensure that all information entered is accurate.

   Click the **Save** button.

![Save Button](image)

5. If you have not confirmed or entered your personal information (address and phone number) before this step, an error will appear and you will not be able to proceed.

6. To fix this error you will need to:
   - Contact your Department HR Contact and ask them to clear the benefit information you entered.
   - Follow the instructions provided on the on Personal Information webpage. (Location provided earlier in this training)
   - Start the Benefit Enrollment Process from the beginning.
7. Click the **OK** button.

8. The contact information you entered is populated on this page.

   At this point, you may choose to delete and start over if needed.

   In the top right of the page, click the **Next** button.

**Step 4: Add/Review Dependent/Beneficiary**

1. If you are a **New Hire**, this page will have nothing listed under the Dependent Information section.

   If you are a **Rehire**, review each dependent/beneficiary listed to ensure they still meet the eligibility criteria for dependent coverage and that the information provided is accurate.
2. If the Dependent/Beneficiary Information shown is correct, you can click the **Next** button and skip over the next few pages until you get to **Step 5: Benefit Enrollment**.

3. **Adding a Dependent/Beneficiary**

   This section will demonstrate how to **ADD** a beneficiary and/or dependent (if needed).

   Revising or changing an existing beneficiary/dependent is covered later in this topic.

   **Important!**
   When Adding a beneficiary or dependent, **NEVER** over write the existing information.

   Always add a new row.
4. To **Add** a dependent/beneficiary, Click the **Add a dependent or beneficiary** button.

5. All fields within the **Dependent/Beneficiary Personal Information** page must be filled out.

   Enter your dependent's/beneficiary's name into the **First Name** field.

   In this example, enter "**New**".

6. Continue to enter the appropriate information into the remaining fields.

   **Note:** In the Address and Telephone section, the ‘Same Address as Employee’ box **MUST** be checked regardless of whether it actually is the same or not.

   *If you did not confirm/setup your address and phone number in your Personal Information, you will receive an error message when you try to submit your benefit selections. You will need to contact your Department HR Contact to clear the benefit information you entered and you will have to start at the beginning of the Benefit Enrollment Process, after entering your Personal Information.*
7. If you are entering a beneficiary, keep in mind that there is further setup required which is covered under Step 8.

8. Click the **Save** button.

9. If you see a **Warning Message**, click the OK button and then make the corrections as indicated in the message.
10. If no warning message appears, you are returned to the *Add/Review Dependent/Beneficiary* page.

Notice that the added dependent appears in the detail listing.

11. If you do not need to Revise or Change the existing Dependent/Beneficiary information, you can click the **Next** button and skip over the next few pages until you get to **Step 5**: Benefit Enrollment.

12. **Revising Dependent/Beneficiary Information**

To revise information for an existing dependent, Click the **Name of the Dependent** link.
13. At the bottom of the page, Click the **Edit** button.
Important!
Although all fields can be changed, it is important to NEVER delete or change the First and Last Name fields to a different person. The information in these fields are used for audit and reporting purposes.

Instead of over writing the name fields you would add a new Beneficiary/Dependent and withdraw (uncheck) the incorrect person. (Instructions on how to withdraw a dependent/beneficiary is covered later within this topic.)

If a name has changed but the person is the same (such as a last name change) refer to the topic ‘Changing the Name of a Beneficiary/Dependent’ for further instructions.

14. In this example, the Marital Status field is changed from Unknown to Married.

15. Once all revisions have been made to this person, Click the Save button.
16. Continue to make changes as required.

When all additions and revisions have been made to your dependent/beneficiary information, click the Next button located in the top right of the page.
Step 5: Benefit Enrollment

1. In this step, you will be deciding on the type of Benefit Coverage you want (Employee Only).

   Click the **Start My Enrollment** button.

   ![Start My Enrollment Button]

   **Important!**
   All employees are automatically set up with 'Employee Only' benefit coverage when hired or rehired. It is up to you to change this, if needed.

2. Within the **Benefits Enrollment** page, is the Open Benefit Events area.

   Within this grid, you will see an **information icon**, which provides additional information about your enrollment when you click on it.
3. The **Event Date** field is automatically populated with the date your benefits start (Benefits Eligibility Date).

4. When the **Event Status** field is marked as **Open**, it indicates that your benefits enrollment is open and ready to be completed.

**Important!**

Once you have initially selected the type of benefits you want, you cannot make changes unless a life event occurs, such as marriage or divorce.

However, changes to designation of beneficiary and application for optional coverage may be made at any time.

5. To continue the benefit enrollment process, Click the **Select** button.

6. Within the **Post Hire Enrollment** page, the Enrollment Summary section displays the type of Benefit Coverage you are enrolled in.

   In this example, the employee has been enrolled in the Staff Support Plan with Employee Only Benefit Coverage.
7. To keep your benefit coverage as Employee Only and continue to the next step in the process, click the I Have No Changes button at the bottom of the page.

If you Do Not need to change your Benefit Coverage to 'Family', Click 'I Have No Changes'
Important!
When you get to the Submit Benefit Choices page, this is the Point of No Return for your health benefit selection! Once you click the Submit button, you will not be able to make changes to your benefit information until a life event occurs.

8. You now have two choices, Cancel or Submit.

If you are not ready to submit your choices to Human Resource Services and want to return to the Enrollment Summary, click the Cancel button.

To submit your final choices to Human Resource Services, click the Submit button.

In this example, Click the Submit button.
9. In the **Submit Confirmation** page, click the **OK** button.

10. You will be returned to the **Benefits Enrollment** page. The Event Status has changed to **Submitted**.

11. In the top right of the page, click the **Next** button.

**Step 6: Benefits Election Review**

1. The **Benefit Election Review** page outlines your updated benefit choices.

   Review your changes to ensure accuracy. You may need to scroll down to view ALL the information provided.

   In the top right of the page, click the **Next** button.
Step 7: Event Completion and Exit

1. The following **MUST** be manually submitted to Human Resource Services:
   - Application for Group Coverage Detail Form (Optional Life Insurance)
   - UAPP Designation of Beneficiary

Click the **Complete** button.

Complete
You are almost done. One more STEP TO GO!

You will need to open a Different Page to complete the last step.

**Step 8: Allocation of Beneficiary**

1. Although you have already identified your beneficiaries in Step 4, Step 8 provides you the opportunity to allocate your insurance amongst your beneficiaries.

   Navigation Path: Main Menu > Self Service > Benefits > Insurance Summary

2. The date will automatically default to the current date. However, you do have the ability to change this date to view your benefits summary as of a different date.

   **WARNING!** If you are making any changes, this date **MUST** be the current date.
3. To change how your benefits are distributed amongst your beneficiaries you will need to click on each individual type of benefit listed in your Benefit Summary grid.

In this example, changes will be made to the 'Life' Benefit Plan.

Click the **Life** link.

4. In this example, no Beneficiaries have been added or defined.

Click the **Edit** button.
5. The Allocation Type section defaults to Percent.

Leave this as the default setting. **Do Not Change.**

6. The **Allocation Details** grid provides a list of the dependents/beneficiaries you had setup in step 4 of this process.

7. The **New Primary Allocation** column is used to define which of the people listed is your first choice(s) as beneficiary and the portion they are entitled to.

The total amount of the column MUST equal 100.
8. The **New Secondary Allocation** column is used to define which of the people listed will be your alternate (contingent) beneficiary and the portion they are entitled to, should anything happen to your Primary Beneficiary.

The total amount of the column MUST equal 100.

9. **Note:** You do not need a Secondary (contingent) Beneficiary.

9. In this example, the employee's spouse is to be the primary beneficiary for their Life Benefits and the employee's Parents and Child are to be the Secondary (contingent).
10. First, you need to specify the percentage your Primary Beneficiary is entitled to. Enter a valid value e.g. "100" into the New Primary Allocation field of the Spouse.

11. Next, enter the allocation for the Secondary (contingent) Beneficiaries.
12. In this example, the Parents and Child are to be designated as Secondary Beneficiaries. (25% for each of the Parents and 50% to the child)

Enter the percentage into the **New Secondary Allocation** field.

In this example, enter "25" in the first parent's **New Secondary Allocation** field.

13. Enter the percentage into another **New Secondary Allocation** field as required.

In this example, enter "25" in the second parent's **New Secondary Allocation** field.

14. Continue entering the percentage into the **New Secondary Allocation** field for all applicable people.

For this example, enter "50" in the child's **New Secondary Allocation** field.

15. Once all allocations are entered, click the **Update Totals** button.

16. The column totals must ALWAYS be 100.

17. Click the **Save** button.
18. Click the OK button.

19. Review the information for accuracy.

If all information is correct, click the Return to Life Insurance Main link.

20. You are returned to the Insurance Summary page.

You may continue to change beneficiary allocations for any other Benefits by selecting the appropriate Type of Benefit and following the same steps as outlined earlier.

Note: Human Resource Services updates your Optional Life Insurance when they receive the completed Application for Group Coverage.
21. When you are finished defining your primary and secondary benefit allocations, you have completed all the steps required in the Post Hire Enrollment Process and can sign out of PeopleSoft HCM.

22. Now that your Benefit Selections have been submitted to Human Resource Services you will be able to view your Benefit Summary information on the next working day.

The system requires overnight processing to upload your information over night.

**REMEMBER** to submit your completed Form!

23. Congratulations! You have completed the training on how to complete the Benefits Enrollment Process for Employee Only coverage.

For reference materials and more tutorials please see the links provided below.

**End of Procedure.**
For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service).


Refer to the Online Learning web page (https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning) within the Human Resource Services website for all Online Tutorials and videos.