People First Portal Upgrade
BENO Training

(February 2018)
Key Resources

• People First Portal Upgrade Release Website: www.dms.myflorida.com/PF then select the 2018 Portal Upgrade Helpful link on the right

• The following are some of the critical documents available on this site:
  – 01 – Summary People First Portal Upgrade
  – 02 – Agency-Required Technical Updates for March 2018 Portal Upgrade
  – 03 – Downtime to Implement the People First Portal Upgrade
  – Employee Training Materials – User Guides (Employee Self-Service and Benefits Enrollment Process), Video and FAQs (Employee Self-Service, Timesheet, Password and Leave Request)
  – Manager Training Materials – Video and FAQs (Manager Self-Service and PAR)
People First Downtime

- **Downtime Period** – People First will be brought offline at 5 p.m. on March 16, 2018, and will be brought back online at 8 a.m. March 26, 2018
- **Payrolls During Downtime** – Supplemental, monthly and biweekly payrolls that are scheduled to process during the downtime will be ran once the system comes offline on March 16; all agency changes must be made before this time
- **Files During Downtime** – BNI_001 files can continue as normal; BNO_002 will not be sent during downtime
- **People First Service Center During Downtime** – People First Service Center and IVR will be available during the downtime, but will be limited to answering downtime related questions and processing benefit reinstatements
- **Additional Details** – Refer to communication 03 – *Downtime to Implement the People First Portal Upgrade* for additional details
Browser Support

• **Supported Internet Browsers**
  – Google Chrome – Latest Version
  – Internet Explorer 11
  – Microsoft Edge – Latest Version
  – Firefox – Latest Version
  – Safari (Macintosh and Apple) – Latest Version
  – WebView (Android) – Latest Version

• **Additional Details** – Refer to communication 02 – *Agency-Required Technical Updates for March 2018 Portal Upgrade* for additional details
Password Changes

• All employee security questions are reset; questions are now used only for validation with the service center
• New password reset process requires use of employee email address (work or notification) or mobile phone that supports SMS text
• New password strength indicator provides a real-time indicator of how strong the employees’ passwords are as they are changing them
• Password masking allows employees to see their password as they type it (default is masked)
• New login ID recovery process allows employees to get their People First login ID instead of calling the service center
• Refer to Employee Self-Service User-Guide for additional details
Login Page

• Login page is simplified and focuses only on critical information (i.e., logging in to People First, accessing candidate site, resetting password, recovering login ID and navigating to contact information)

• Login page includes 12 different images of cities in Florida; images change daily

• Includes an updated People First logo
Login Page (Continued)
Landing Pages

• There are separate landing pages for employee self-service and manager self-service

• The Header, Footer, Inbox, Other Resources, and Announcements tiles are shared across both landing pages

• All other tiles are unique to the landing page. For example, the quick links displayed on the Manager landing page are not the same as those displayed on the Employee landing page
BENO HR Landing Page
BENO Employee Landing Page
Header

• Shared across both Employee and Manager landing pages (only one header)
• Left Side – Updated People First logo – if selected, the logo returns you to your landing page (either Employee or Manager, depending on security role code)
• Left Side – Manager and Employee landing page icons
• Center – Employee name, position title, and agency

JIMMY J COX
PEOPLE FIRST PROJECT ADMINISTRATOR - SES
Dept of Management Services
• Employee photo or silhouette
  – Employee photo can be updated only by HR professionals (A, H, X, U and Y security role codes)
  – Photos are shared across appointment IDs; if an employee is dually employed and one agency updates the photo it will copy across and show on the other appointment ID
Footer

• Shared across both Employee and Manager landing pages (only one footer)
• Contact – Includes the contact information for the People First Service Center and for the Chard Snyder Service Center
• Settings – Includes the following employee-specific options:
  – High Contrast – Allows employees to turn high contrast theming on and off; high contrast essentially converts background colors to black and text to white; the employee’s preference is saved for future log in, but can be changed
  – Keys On – By default, alpha descriptions are displayed and not the associated numeric code; however, employees who prefer to view both code and the description can turn their keys on; the employee’s preference is saved for future log in, but can be changed
• **Settings (continued)**
  
  – Animations – By default, there are very subtle animations built into People First when transitioning from screen to screen, when data is loading, and when the user is hovering over certain buttons and links; however, employees can turn it off if preferred; the employee’s preference is saved for future log in, but can be changed
  
  – Change Password – If employees want to change their current password, they can change it after they have logged in to People First; process requires entering the current password as well as entering and verifying the new password
• Settings (continued)
  – Security Questions
    • While security questions are no longer used as part of the online password reset process, security questions may be used for additional identification purposes when calling the People First Service Center
    • All security questions used prior to March 26, 2018, have been reset, allowing employees a fresh start upon initial login
    • Additional questions are available, providing employees a larger selection to choose from
    • Employees are able to maintain their security questions after initial creation
Inbox

• Shared across both Employee and Manager landing pages (only one Inbox)
• Replaces the My Tasks Due and Alerts tiles
• The following alerts will not be displayed:
  – OPS Alerts
• Includes a refresh button that updates the Inbox items and counts based on actions completed (you must either leave the landing page and navigate back or use the refresh button to update the items)
• Selecting either the Inbox item count or title navigates you to the applicable screen to complete the required action
• Inbox items are generated based on an action needing to be taken and are driven based on employees’ roles in the system
Inbox (Continued)

• A number is presented beside each Inbox item that shows the number of tasks pending for each item
  – Tasks that are due, but not overdue, will show with a blue circle, with the number of tasks due within it; if at least one task is overdue, the circle will be red, with the number of tasks due within it
  – For manager timesheet approvals, this number represents the number of employees who have a timesheet ready to approve, instead of the number of timesheets pending approval
• When all tasks are completed for the respective Inbox item, the Inbox item is removed until a future action requires the item to be generated again
Inbox (Continued)

– Personal
  • Verify Your Information – Presented August 1 of each year and for all new hires

– Insurance Benefits
  • Update Dependents SSN – Invalid or missing SSN for at least one of employee’s dependents
  • Choose Benefits Now – Employee has an active qualified status change event
  • Complete Open Enrollment Now – Presented during the state’s annual Open Enrollment period to benefits-eligible employees
Shared Tiles

• In addition to the Inbox tile, the following tiles are also shared across the Employee and Manager landing pages:
  – Other Resources – Includes the following single sign-on links (icons) for employees enrolled in one of the following plans (if employee is not enrolled in either plan, the tile is not presented):
    • Chard Snyder – Displays for employees enrolled in an FSA or HSA
    • Securian – Displays for employees enrolled in basic employee life, retiree life, or vested legislator life
Shared Tiles (Continued)

– Announcements tile
  • Displayed to all employees
  • Is not employee-specific or agency-specific
  • Used to communicate critical information to employees about ongoing or upcoming events (e.g., Open Enrollment)
Quick Links

• Quick links provide single-click navigation to access specific screens or processes
• Quick links are static and cannot be modified
• Quick links are always available within the self-service area (employee or manager) but can be hidden or shown by using the double left arrows (hide) or double right arrows (show)
• If the employee logged in does not have access to any of the quick links, the tile area will be blank
• Quick links are specific to either employee (ESS) or manager self-service (MSS), but are not shared across ESS and MSS areas
ESS Quick Links

• ESS quick links can include the following:
  – Open Enrollment – Presented only during the annual Open Enrollment period and only to those employees eligible to enroll for the next plan year
  – FSA/HSA – Presented only to employees enrolled in an FSA or HSA account
  – Contact Information – Presented to all employees
  – Employee Profile – Presented to all employees; provides a snapshot of the employee’s profile as of the moment selected
  – My Benefits – Presented only to insurance benefits-eligible employees
Employee Landing Page

• Employee landing page is presented to all employees
• Tiles are presented only if the employee has access to at least one screen within the functional area
• The following non-shared tiles can be presented:
  – Personal Info – Provides employees a menu of personal information screens where they can view (e.g., Personal Information) or update (e.g., phone number or email address in the Contact Information screen) their information
  – Work Info – Provides employees a menu of work-related screens where they can view (e.g., Action History) their information
Employee Landing Page (Continued)

– Insurance Benefits – Provides employees a menu of health and insurance-related screens where they can view (e.g., My Dependent Information) or update (e.g., Change My Benefits) their information

– Time and Attendance – Provides BENO Agency Administrator users access to the Alternate Time Entry screen to either enter additional OPS hours or correct OPS hours previously entered
Manager Landing Page

• BENO Agency Administrators will default to this page
• Manager landing page is the primary navigation starting point for reviewing information and updating your employees information
• Tiles are presented only if the employee has access to at least one screen within the functional area
Manager Landing Page (Continued)

• The following non-shared tiles can be presented:
  – My Team –
    • Replaces My Direct Reports Page
    • Navigates Agency Administrators to the My Team landing page where they can search for employees
  – Reports – Navigates you to the Reports landing page
Emails

• Additional emails are being implemented as part of the release and will be sent for items that require an action

• Emails will either be batch-generated daily (9 a.m.), or will be generated based on an action being performed

• Personal-related emails (e.g., insurance benefits, personal verification, retirement, leave without pay) will continue to be sent to the employee’s notification email address

• Security emails will be sent to the employees work email
Emails (Continued)

• New Insurance Benefits (notification email address) Emails
  – Underpayment (batch) – Sent when employee has an underpayment at the time the carrier file is created for the coverage month
  – Premium Increase (batch) – Sent when employee has a premium increase
  – Premium Decrease (batch) – Sent when employee has a premium decrease
  – QSC (real-time) – Sent when employee has an active qualified status change event
  – Evidence of Insurability (real-time) – Sent when employee enrolls in a life insurance plan that requires medical underwriting

• Current insurance benefits emails will also continue to be sent
Emails (Continued)

- Personnel Action Email
  - FMLA/FSWP (real-time, work email) – Sent to employee when PAR placing employee on FMLA or FSWP is completed
- Personal Emails (notification email)
  - Employee Verification (batch) – Sent August 1 each year
  - Retirement (batch) – Sent to new retirees who were enrolled in health or life insurance as an active employee
Emails (Continued)

• Security (work email address) Emails
  – Password Expiration (batch) – Sent 15 days before password expires and the day after the password expires
  – Password Updated (real-time) – Sent when employee’s password is changed (including when using password reset process)
  – Account Locked (real-time) – Sent when employee’s account is locked because of failed password attempts
  – Login ID – Sent when employee’s login ID was retrieved using the Forgot Login ID process
People First IDs

• Appointment ID – Employee (Emp) ID is shown as appointment ID in People First
  – Appointment ID is shown ONLY to managers and HR professionals
  – Employees do NOT see the appointment ID and do NOT need this ID
  – HR professionals must continue to use the appointment ID for human resource, payroll, etc., purposes
  – Appointment ID should not be provided to the employee

• Login ID – User ID is shown as login ID and is the ONLY ID that the employee sees in People First and is the ONLY ID employees need when using People First or when contacting the service center
System Navigation

• System navigation includes the following primary navigation means:
  – Tile navigation – Selecting tiles on the ESS or MSS landing pages provides a navigation menu that allows employees to select the screens they need to access.
System Navigation (Continued)

– Header navigation
  • Selecting the manager icon takes the employee to the Manager landing page
  • Selecting the employee icon takes the employee to the Employee landing page
  • Selecting the People First logo takes the employee to his or her default landing page (Employee or Manager)
System Navigation (Continued)

– Navigation path (breadcrumbs) – Once you navigate to a functional screen, your navigation path is presented in the top left corner between the Employee and Manager landing page icons and the screen name

– The navigation path is clickable, allowing you to return to a previous step
System Navigation (Continued)

– When the employee is navigating from a functional menu (tile on Employee or Manager landing page or menu on the My Team page), the navigation path also includes the menu for the functional area.
System Navigation (Continued)

- My Team page menu navigation – Once you select an employee in the My Team tile, a menu icon is presented on the right side of employee

- List View
System Navigation (Continued)

– Processes (insurance benefits enrollment, employee profile) include buttons to navigate through the process
  • Employee Profile
  • Enrollment Process
Reports Landing Page

- New Reports landing page includes one location (instead of two separate Reports Menu tiles) to access the human resource, payroll, time and attendance, insurance benefits, and data warehouse reports
  - When selecting data warehouse reports, the employee will be navigated to the data warehouse Reports landing page
  - No change to the source of the reports (i.e., data warehouse or SAP)
  - Phase II – All reports will be rolled into the Reports landing page and a new separate data warehouse Reports landing page will be deployed (date is TBD, but likely in Fall 2018)
My Team Page

• My Team Page

  – Includes the ability to search for active and terminated employees (based on employee’s security role code; access has not changed)

  – Includes the navigation menu to go to specific screens and actions for employees

  – Page is the primary navigation path to complete actions on behalf of employees
• Search parameters – In the search field, employees can search by employee name, login ID, appointment ID, SSN, position number, position title, organization code (24-digit org code), and organization title
  – Each value entered must be found for an employee or position to be returned in the search results; the order you enter your search parameters does not matter (e.g., first name does not have to be first)
  – Search parameters can be combined (with exception of SSN) to narrow the results; for example, if you were searching for Clark Archer, you could type C Archer, Clark A, or Clark Archer to limit the results
  – All searches must include at minimum three characters; the more you enter, the more your results will be narrowed down
  – If searching by SSN, the full 9-digit SSN must be entered and no other values should be entered; for example, do not enter part of the employee’s name and his or her SSN; enter only the SSN
My Team Page (Continued)

- **Search parameters (continued)**
  - Each space entered in the search field works as both a wildcard (*) for the previous search value and to include both the previous search value (if multiple previous, includes these as well) and the next search value. For example, if you enter C Archer 7200, the system will search the employee name fields, position title, and org title for anyone who includes C and Archer at the start of one of these fields (both values must be met), then will search those results to see if the position number or org number starts with 7200; only if all three criteria are met will the employee be returned.
  - Use quotation marks IF (and ONLY if) you are searching by position title (e.g., “Accountant Supervisor”), org title (e.g., “People First”) or an employee name that includes a space in the first, middle, or last name (e.g., employee’s first name is “Heath Roe”); quotations are needed only if you are entering one of these values.
My Team Page (Continued)

• Search parameters (continued)
  – Each search value entered is looking for a value in each of the fields being searched, but is looking for the field to have a record that starts with the value (e.g., if you entered Eaton, you would get back employees who have a last name of Eaton, but not employees that have a last name of Keaton); to find names that include the search criteria but that do not start with the search criteria, you must enter * at the beginning of the value (e.g., to find Keaton, you would have to either enter *eaton or Keaton)

• For Agency Administrators, use the Agency filter to narrow results

• Select the Inactive checkbox to search for a terminated employee
Filtering and Sorting Results

• Most places in the system where there is a list of results (e.g., searches, overview section in functional screens) provides the ability for the employee to sort and filter the list results by clicking on the column header.
Error and System Messages

• Success messages are presented as an overlay once the employee completes the save process when updating a record.

• Confirmation messages are presented when the employee attempts to abandon a process and navigate to a different screen.

• Error and warning message may also be presented as an overlay on some screens.

<table>
<thead>
<tr>
<th>Success</th>
<th>Confirmation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data saved successfully.</td>
<td>All unsaved data will be lost. Are you sure you want to close?</td>
</tr>
</tbody>
</table>
Error and System Messages (Continued)

• Informational, warning, and error messages specific to entries in the screen are presented at the bottom of the screen.

• Use the icons to expand, shrink, hide and show the messages.
Enrollment Process Flow

- Insurance benefits process includes a process flow that shows exactly where the employee is in the enrollment process.
- Steps that have not been completed are greyed out.
- The step the employee is completing is both shaded in blue and is underlined in blue.
- Once the employee completes a step, the step is shaded green and includes a checkmark indicating the step is complete.
- If employee is navigating to a previous step using the back button, steps that were already completed remain marked as completed; the blue underline is still presented to show the step in the process that is being completed.
Enrollment Process Navigation

• Buttons within the enrollment process are dynamic based on which step the employee is completing

• Buttons are the only way to navigate within the enrollment process (e.g., Back, Save, Cancel, Save and Continue, Complete Enrollment, Finished)
Enrollment Process Step 1

• Step 1 - Select the Event
  – Online life events are still limited to birth/adoption and marriage (available only if there is no active spouse); all other life events require the employee to work through the service center
  – Work events are still generated when PAR actions are completed
Enrollment Process Step 1 (Continued)

- To create a birth/adoption or marriage event, simply select the event; enter the date the event occurred; and select the Save and Continue button
  - Deadline to Choose Benefits is presented once the event date is entered
  - Future-dated events cannot be created
  - Events that occurred more than 60 days in the past cannot be created
Enrollment Process Step 1 (Continued)

- Once you create the event, the event is available to re-access and complete.
- Simply select Change My Benefits from the Insurance Benefits menu item; select the event; and select Save and Continue to move to the next step in the enrollment process.

<table>
<thead>
<tr>
<th>Event</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth or Adoption</td>
<td>01/01/2018</td>
<td>03/02/2018</td>
</tr>
<tr>
<td>Open Enrollment</td>
<td>01/16/2018</td>
<td>01/30/2018</td>
</tr>
</tbody>
</table>
Enrollment Process Step 2

• Step 2 – Dependent Verification
  – All active dependents are presented to the employee for verification
  – Simply select the checkbox beside each eligible dependent and select Save and Continue to move to step 3 in the enrollment process
  – If dependents who are no longer eligible are presented, select the delete icon (trash can) beside the dependent to remove
  – Deleted dependents are shown as struck through once removed; if the incorrect dependent is removed, the employee has an undo button presented beside the dependent
  – If the dependent’s SSN is incorrect or blank, select the update icon (pencil); once on the dependent details, enter the correct SSN and select Register Dependent (will be changed to Update Dependent in a future release)
  – Select the register a new dependent icon (plus) to add an eligible dependent who is not already registered
Enrollment Process Step 3

• Step 3 – Choose Plans
  – This step is very similar to the old plan summary step
  – Step defaults to the employee’s elections as of the event effective date and allows the employee to update his or her current enrollments
    • Update/cancel an enrollment by selecting the update icon (pencil)
    • Add an enrollment by select the add icon (plus)
    • Once either the update or add icon is selected, the employee is taken to the plan details page, where he or she can update the enrollment as needed
  – Once all election choices have been completed, select Save and Continue to move to step 4 in the enrollment process
Enrollment Process Step 3 (Continued)

- Step includes a new column that indicates how many dependents are covered under a plan; simply select the number to see who is covered
  - Once selected, all registered active dependents are presented; dependents being enrolled are shown with a checkmark; dependents who do not have a checkmark are not being enrolled

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Plan Name</th>
<th>Coverage</th>
<th>Monthly Cost</th>
<th>Dependents</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>State HDHP PPO Plan</td>
<td>Family</td>
<td>$30.00</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Basic Life</td>
<td>Basic Life Securian</td>
<td>$25,000</td>
<td>$0.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Optional Life</td>
<td>Optional Term Securian</td>
<td>3 times salary</td>
<td>$32.45</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spouse Life</td>
<td>Spouse Life</td>
<td>$20,000</td>
<td>$6.00</td>
<td>1</td>
<td></td>
</tr>
</tbody>
</table>
Enrollment Process Step 3 (Continued)

- Plan details tab includes current election and new election columns, presenting a side-by-side comparison
- Select Cancel to return to the Choose Plans screen without making changes and select Save to return to the Choose Plans page after making your changes
Enrollment Process Step 4

- **Step 4 – Dependent Summary**
  - This step shows the employee exactly what plans each dependent is enrolled in
  - Only plans the subscriber is enrolling in are presented (if not enrolling in the plan, the plan is not listed)
  - Once the dependent’s enrollments have been verified, select Save and Continue to move to step 5 in the enrollment process
Enrollment Process Step 4 (Continued)

– If the dependent is enrolled in the plan, a green checkmark is presented in the plan column for that dependent
– If the dependent is not enrolled in the plan, a red x is presented in the plan column for the dependent
– If the dependent is not eligible to be enrolled in the plan, a black x is presented in the plan column for the dependent
– If the enrollment is incorrect for a dependent, select the indicator for the plan to be updated for the dependent

<table>
<thead>
<tr>
<th>Dependent Name</th>
<th>Relationship</th>
<th>Health</th>
<th>Life</th>
<th>Dental</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAIME COX</td>
<td>Spouse</td>
<td>✔️</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>TIMOTHY COX</td>
<td>Child</td>
<td>✔️</td>
<td>✔️</td>
<td>✗</td>
</tr>
<tr>
<td>KELLER COX</td>
<td>Child</td>
<td>✔️</td>
<td>✔️</td>
<td>✗</td>
</tr>
</tbody>
</table>
Enrollment Process Step 5

• Step 5 – Plan Summary
  – This step lists out all plans the employee is enrolling in (if not enrolling in the plan, the plan is not listed)
  – Step includes a column that indicates how many dependents are covered under a plan; simply select the number to see who is covered
  – Once the enrollments have been verified, select Save and Continue to move to step 6 in the enrollment process

<table>
<thead>
<tr>
<th>Plan Type</th>
<th>Plan Name</th>
<th>Coverage</th>
<th>Monthly Cost</th>
<th>Dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health</td>
<td>State HDHP PPO Plan</td>
<td>Family</td>
<td>$30.00</td>
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<td>Optional Life</td>
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<td>Spouse Life</td>
<td>Spouse Life</td>
<td>$20,000</td>
<td>$6.00</td>
<td></td>
</tr>
</tbody>
</table>
Enrollment Process Step 6

- Step 6 - Complete Enrollment
  - Employee must enter his or her password and select Complete Enrollment to complete the enrollment changes
  - The Complete Enrollment button is not activated until the employee enters at least 8 digits in the Password field
Enrollment Process Step 7

• Step 7 - Confirmation Statement
  – Once enrollment is completed, the employee is taken to the Confirmation Statement to review changes and print or save a copy of the Confirmation Statement for future use
  – Select Finish to close the enrollment process

CONGRATULATIONS !!

You have just completed your enrollment. If you have any concerns or questions, please contact the People First Service Center at (866) 663-4735.
Dependent Audit

- Tracks which employees (and which dependents) have been audited; tracking includes whether the dependent passed the audit or was determined not eligible
  - Audit Status and Audit Date fields have been added to the dependent screen
- An edit will be implemented that prevents the employee from adding back a dependent who was determined ineligible (employee will have to appeal to add back a dependent determined ineligible, even if ineligibility was based on no response to the audit)
- Updates to modify the coverage level if dependents are removed and the current coverage level no longer matches the employee’s enrolled coverage level
Dependent Audit (Continued)

• New Dependent Audit Summary Report
  – Report will be available for HR professionals
  – Filters: Date, Agency, Sub-Agency (BENOs only), Appointment ID, and Audit Status (All, Pass, Fail, Not Audited)
  – Fields: Agency, Sub-Agency, Appointment ID, Name, Dependent Name, Dependent Audit Date, Dependent Audit Status (Pass, Fail, Not Audited)
• New Dependent Audit Details by Subscriber Report
  – Report will be available for HR professionals
  – Filters: Date, Agency, Sub-Agency (BENOs only), Appointment ID, and Audit Status (All, Pass, Fail, Not Audited)
  – Fields: Agency, Appointment ID, Name, Dependent Name, Dependent Audit Date, Dependent Status (Pass, Fail, Not Audited), Plan Fields (e.g., health, life, dental, etc.)
    • Plan fields show whether the subscriber and dependent are enrolled in the plan type
Correspondence History

• The following emails will be added in the correspondence history:
  – Employee Underpayment
  – Qualified Status Change
  – Optional/Spouse Life Requires Medical Underwriting
  – Premium Increase Notice
  – Premium Decrease Notice
  – Direct Deposit Rejection Notice
  – Tax Exemption is Expiring
  – Personal Verification Due
  – Congratulations on Your Retirement
  – Leave Without (LWOP) Pay Commencement
  – Return from LWOP
  – FMLA/FSWP PAR Processed
  – Return from Leave of Absence
Correspondence History (Continued)

• New Print History option
  – When selected, generates a PDF snapshot of the employee’s entire correspondence history
  – Print/Save capabilities vary based on the browser as this functionality uses the browser’s default print settings
Premium History

- Includes a separate row per coverage month (23 months back, current month, plus next coverage month) that includes the total over/under amount for the coverage month.

<table>
<thead>
<tr>
<th>Coverage Month</th>
<th>Plan Type</th>
<th>Net Employee Variance</th>
<th>Net Employer Variance</th>
<th>Does Variance Exist</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN-2018</td>
<td>(select to view)</td>
<td>-69.30</td>
<td>-1,533.18</td>
<td>Yes</td>
</tr>
<tr>
<td>DEC-2017</td>
<td>(select to view)</td>
<td>-0.23</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td>NOV-2017</td>
<td>(select to view)</td>
<td>0.01</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td>OCT-2017</td>
<td>(select to view)</td>
<td>0.01</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td>SEP-2017</td>
<td>(select to view)</td>
<td>0.01</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td>AUG-2017</td>
<td>(select to view)</td>
<td>0.01</td>
<td>0.00</td>
<td>No</td>
</tr>
</tbody>
</table>
Premium History (Continued)

- Coverage months are expandable (use the > and < arrows to expand and collapse a coverage month), presenting the plan-specific summary details (over/under) in separate rows.
Premium History (Continued)

- Details section includes all payments received, adjustments, refunds, etc., by plan type and coverage month. Simply select a plan to view the details.

<table>
<thead>
<tr>
<th>Coverage Month</th>
<th>Plan Type</th>
<th>Net Employee Variance</th>
<th>Net Employer Variance</th>
<th>Does Variance Exist</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN-2018</td>
<td>(select to view)</td>
<td>-69.30</td>
<td>-1,533.18</td>
<td>Yes</td>
</tr>
<tr>
<td>DEC-2017</td>
<td>(select to view)</td>
<td>-0.23</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Capital Health Plan HMO - 0400</td>
<td>0.00</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Basic Life Securian - 1001</td>
<td>0.00</td>
<td>0.00</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>Optional Term Securian - 1102</td>
<td>0.01</td>
<td>0.00</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>Spouse Life - 1500</td>
<td>-0.24</td>
<td>0.00</td>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Posting Date</th>
<th>Payment Source</th>
<th>Employee Due</th>
<th>Employee Paid</th>
<th>Variance</th>
<th>Employer Due</th>
<th>Employer Paid</th>
<th>Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/09/2017</td>
<td>Payroll Deduction</td>
<td>15.00</td>
<td></td>
<td></td>
<td>764.80</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/22/2017</td>
<td>Payroll Deduction</td>
<td>15.00</td>
<td></td>
<td></td>
<td>764.80</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL**

|            |               | 30.00        | 30.00        | 0.00     | 1529.60      | 1529.60       | 0.00    |
Premium History (Continued)

• Ability to access the Over/Under Payment Details Report for two years for the employee
  – Data is real-time as of the point of execution
  – Most employees will never have more than one or two months of underpayments because of the payroll retro posting process

• Ability to access a two-year Premium History Report for the employee
  – Data is real-time as of the point of execution
  – Includes the ability to run the report for all plans or a specific plan
Premium History (Continued)

• Ability to access the Retro Posting Report for the employee
  – Data is real-time as of the point of execution
  – Same report as the Payroll Deductions Retro Posting Report, including same filters, fields, etc.
  – Report is only visible to HR professionals (not visible to employee)
Payroll Deduction Process

• Universities – BNO_002 is being modified to send underpayments back to the University (does not apply for other BENOs) for payroll deduction

• BENOs should use the Premiums Due Report to identify underpayments that need to be payroll deducted (see next slide for more details on this new report)

• Goal is all underpayments are deducted through payroll to prevent employees benefits from being suspended; payroll deduction of underpayments is critical to ensure employees do not have an interruption in benefits
Payroll Deduction Process (Continued)

• New Premiums Due Report
  – Report will be available for HR professionals
  – Report will return only employees who have a retro amount due
  – For the employee with a retro amount due, the report will display both the current amount due (normal payroll deduction) and the retro amount due
  – Filters: Agency, Sub-Agency (BENOss only), and Plan Type
  – Fields: Login ID, Name, Plan Code and Description, Additional Amount Due (retro amount), and Standard Deduction
Underpayments Process Active Employees

• Employees are no longer underpaid until the end of the coverage month (approximately 3 business days prior to the end of the month); determination of underpayment is based on the carrier file.

• Employee underpayment email (first notice) is sent when the carrier file for the next coverage month runs (generally 2-3 business days prior to the end of the month) and when the employee is underpaid by at least $4 for one or more plans.
  – Notice advises employees they have an underpayment and that the underpayment will be deducted from the next payroll.

• Employee underpayment letter (second notice) is sent at the end of the coverage month that is underpaid and when the employee is underpaid by at least $4 for one or more plans.
Confirmation Statement Screen

• Shows all available statements in the Overview section rather than having to first select a plan year

<table>
<thead>
<tr>
<th>Confirmation Type</th>
<th>Date Election(s) Processed</th>
<th>Election(s) Processed by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open Enrollment Confirmation</td>
<td>01/11/2018</td>
<td>700361</td>
</tr>
<tr>
<td>Open Enrollment Confirmation</td>
<td>11/01/2016</td>
<td>700361</td>
</tr>
<tr>
<td>Open Enrollment Confirmation</td>
<td>10/19/2015</td>
<td>700361</td>
</tr>
</tbody>
</table>
Health Insurance Tax Forms

- Shows all available statements in the Overview section rather than having to first select a plan year

<table>
<thead>
<tr>
<th>Tax Year</th>
<th>Tax Form Type</th>
<th>Form Version</th>
<th>Date Created</th>
<th>Agency, University or BENO Entity Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>Tax Form 1095C</td>
<td>Original</td>
<td>01/24/2017</td>
<td>DMS - MANAGEMENT SVCS</td>
</tr>
</tbody>
</table>
My Benefits

- Defaults to enrolled plans as of system date instead of forcing entry of a date
- Allows running an enrollment history by plan type and for all plans (Benefits Details by Plan Type)
- Allows running an enrollment history as of a certain date (Benefits Details As of a Certain Date)
- Clicking on one of the records presents a PDF for that enrollment
- Separate PDF for all plans is not available
- Selecting the coverage link (when shown as a hyperlink) presents the enrolled dependents for that coverage

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Coverage Level</th>
<th>Coverage Level...</th>
<th>Medical Underwriting</th>
<th>Effective Date o...</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>State HDHP PPO Plan - 0105</td>
<td>Family</td>
<td>01/01/2018</td>
<td>N/A</td>
<td>01/01/2018</td>
<td>12/31/9999</td>
</tr>
<tr>
<td>Basic Life Securian - 1001</td>
<td>$25,000</td>
<td>01/01/2008</td>
<td>N/A</td>
<td>01/01/2008</td>
<td>12/31/9999</td>
</tr>
<tr>
<td>Optional Term Securian - 1102</td>
<td>3 times salary</td>
<td>01/01/2017</td>
<td>N/A</td>
<td>01/01/2017</td>
<td>12/31/9999</td>
</tr>
</tbody>
</table>
My Dependents Information

• Includes a health insurance and a dental insurance end date for each active dependent
• Includes audit status and audit date for each active dependent
• Additional fields for dependent address, Medicare, etc., have been added to the screen
  – Fields are not valid for most employees and will generally be blank
  – Medicare fields are only editable by the service center