

Type: System Enhancements	ID Number: SE 100
Date: September 10, 2012	Subject: New Dependent Certification Process

Suggested Audience:

Human Resource Offices and Benefits Staff

Details:

Section I: General Information for Dependent Certification Process

On September 21, 2012, People First will implement major system enhancements that affect how employees manage their health and insurance choices in the People First system. As part of these enhancements, there will be a new **employee self-service** Dependent Certification process. While the process is intended to be an employee self-service process, if a human resource user attempts to complete an enrollment action for the employee, they will be forced to go through this process on behalf of the employee.

This process will be presented to all benefits eligible individuals (will not be shown to OPS employees or Contractors) during the annual Open Enrollment period. For the 2013 plan year Open Enrollment, this will be presented from October 8 through November 2. Additionally, this process will be presented for all Qualified Status Change (QSC) events. Once implemented (September 21), employees will not be able to make any enrollment changes without completing the Dependent Certification process. If an employee does not have any registered dependents, the Dependent Certification process will start with the Dependent Registration step.

During Open Enrollment, each time an employee logs into People First, they will be presented with the Dependent Certification process overlay screen until the process for Open Enrollment is completed for that employee. If an employee has a QSC during Open Enrollment, the employee will be required to complete this process for each event (Open Enrollment and/or QSC) in order to make changes through that event. The Dependent Certification process is required for each event.

If an employee has not completed the Address Verification process, the employee will be presented a combined process that starts with the Address Verification process and leads into the Dependent Certification process. The processes will be presented together in one flow. After completing the Address Verification process, the first screen in the Dependent Certification process will be presented.

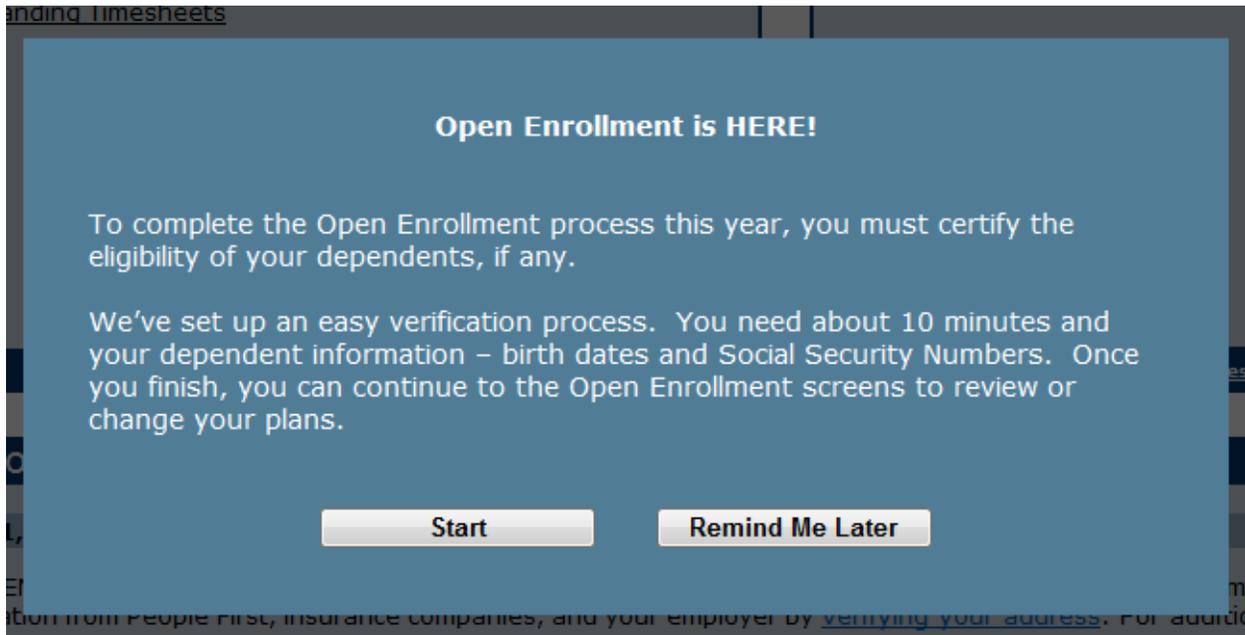
The Dependent Certification process consists of three sections: Dependent Verification, Dependent Registration and Dependent Certification. These sections are described in detail below.

Section II: Dependent Certification Process Details

Dependent Certification Process Overlay Screen

- For the Open Enrollment event, the employee will be presented with an overlay screen to start the certification process each time the employee logs into People First (Screenshot 1), until the Dependent Certification process is completed for the employee.
- The overlay screen is presented as a separate screen on top of the existing People First Home Page. The employee must select either the “Start” or “Remind Me Later” button to close the overlay screen.
 - If the employee selects “Start,” the employee will be taken to the first screen in the Dependent Certification process.
 - If the employee never completed the Address Verification process, they will be taken to the first step in the Address Verification process. Employees will be required to complete the Address Verification process prior to starting the Dependent Certification process. Additionally, employees will be required to complete both the Address Verification and Dependent Certification processes prior to making any benefit changes.
 - If the employee selects “Remind Me Later,” the employee will be taken to the Home Page.
 - During Open Enrollment the Dependent Certification process can be accessed by employees as follows:
 - Log into People First and select the “Start” button within the overlay screen.
 - Select “Open Enrollment” in the “My Tasks Due” section on the People First Home Page.
 - Select “Open Enrollment” in the “My Quick Links” section on the People First Home Page.
 - Select “Change My Benefits” from either the Health & Insurance drop down or on the Health & Insurance home page.
 - For QSC actions, employees will access this process by selecting “Change My Benefits” from either the Health & Insurance drop down or on the Health & Insurance home page and selecting the QSC event.
 - To access the process on behalf of another subscriber, select the “Change My Benefits” dropdown in the *Benefits* menu within the *My Direct Reports* page and select the event (Open Enrollment or the QSC).
 - If the employee does not complete the Dependent Certification process for Open Enrollment while logged in, the process overlay screen will be presented to that employee each time the employee logs into People First during Open Enrollment until the process is complete. The overlay screen will ONLY be presented during Open Enrollment.

Screenshot 1: Dependent Certification Overlay screen during Open Enrollment. *The language in the overlay is subject to change; this screenshot is only intended to show an example of what the screen will look like.*



Dependent Verification Section

- **Step 1:** Once the employee selects either the “Start” button within the overlay screen, “Open Enrollment” in the “My Tasks Due” or “My Quick Links” section or selects “Change My Benefits” from either the Health & Insurance drop down menu or on the Health & Insurance home page, the employee will be presented with the first dependent record for validation. The Dependent Verification section is ONLY presented to employees that have at least one active dependent registered in People First.
 - The Dependent Verification section within the process contains the following screens for each dependent.
 - The first screen (Screenshot 2) will include an overview section that contains the dependent’s name, dependent’s relationship (e.g., spouse, child, etc.), date of birth, gender and Social Security Number.
 - The details section of the screen will include a brief definition for that dependent’s relationship (e.g., for spouse it will state “Your spouse is defined as: a person of the opposite sex to whom you are legally married...”). The details section will also include a simple yes/no question asking whether this dependent is still an eligible dependent of the employee.
 - If the employee selects “Yes” and the Social Security Number for the employee does not pass current system edits, the employee will be presented an error message advising that the Social Security Number is invalid and will be prompted to correct it. The employee will be required to correct the Social Security Number for this dependent prior to proceeding. Once the Social Security

Number is corrected, the employee will be presented with the next dependent for verification.

- Employees with dependents on a Visa, who do not have a valid Social Security Number, will be required to contact the People First service center to complete the process.
- If the employee selects “Yes” and the Social Security Number passes system edits, the employee will be presented with an additional question asking if the dependent’s Social Security Number is correct (Screenshot 3).
 - If the employee selects “Yes” the next dependent record will be presented for verification.
 - If the employee selects “No” indicating the Social Security Number is not correct, they will be presented with a Social Security Number field to correct the number. Once the Social Security Number is corrected, the employee will be presented with the next dependent record for verification.
- If the employee selects “No” to the question whether this dependent is still an eligible dependent, the employee will be presented with a pop-up screen advising that they are about to end date that dependent’s record and the dependent will be removed from enrollment(s). Within the pop-up screen, the employee will be presented with both a “Back” and “OK” button. If the employee selects the “Back” button they will be taken back to the screen asking if the dependent is still their eligible dependent. If the employee selects “Ok” the dependent record will be end dated and removed from enrollment(s).
- This process will be presented for each registered dependent until the employee has either verified or end dated each registered dependent. Once this part of the process is completed, the employee will be taken to the Dependent Registration process.

Screenshot 2: Dependent Verification screen presenting the dependent’s information and a definition of the dependent’s relationship type.

My Dependents

Before completing your enrollment, you must certify your dependents. We will walk you through this process for each of your dependents.

We show your first dependent is:

Name	Relationship	Date of Birth	Gender	Social Security Number
Test Spouse	Spouse	02/07/1964	Female	123-45-6789

Your **spouse** is defined as: a person of the opposite sex to whom you are legally married. See Section 741.212(3), Florida Statutes. Based on this definition, is Grace D. your spouse?

Screenshot 3: Dependent Verification screen asking if the Social Security Number is correct.

My Dependents

Name	Relationship	Date of Birth	Gender	Social Security Number
Test Spouse	Spouse	02/07/1964	Female	123-45-6789

Verify your dependent information. If your dependent has not been issued a Social Security Number or any other information is incorrect, you must call the People First Service Center at 1-866-663-4735 before you can complete your enrollment. Service Center hours are Monday through Friday, 8 a.m. to 6 p.m. ET.

Is the Social Security Number correct?

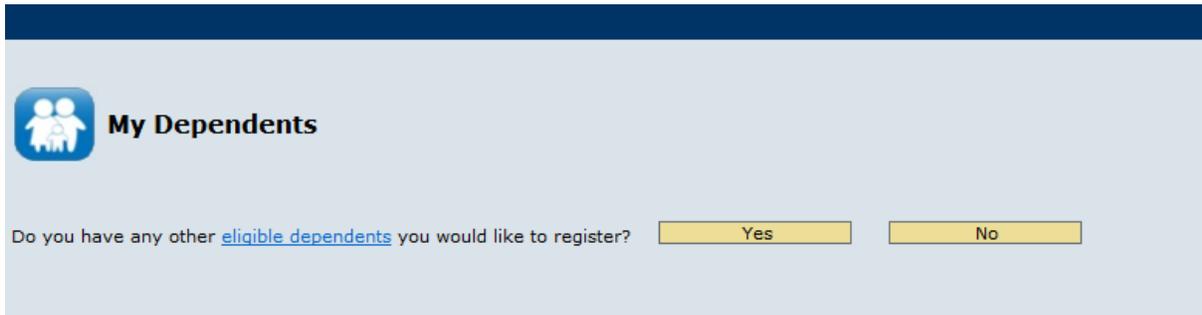
Dependent Registration Section

- **Step 2:** Once the employee has completed the verification step for all registered dependents, the employee will be presented with a screen asking “Do you have any other eligible dependents you would like to register?” (Screenshot 4). For an employee with no dependent registered in People First, the employee will start with this step.
- The employee will be presented with simple Yes/No buttons.
 - If the employee selects “Yes”, the employee will be taken to the Dependent Registration details page (Screenshot 5). On this page the employee will be presented with the key dependent fields to register the dependent. To register the dependent, the employee will be required to complete all fields (Relationship, First Name, Last Name, Date of Birth, Gender and Social Security Number). On this screen, the employee will be presented with a “Save” and “Back” button. If the employee selects the “Back” button they will be taken back to the screen

asking if they have any other eligible dependents to register. If the “Save” button is selected, the system will validate each field and return error messages if any field is left blank or invalid information is entered (e.g., a Social Security Number that starts with 9).

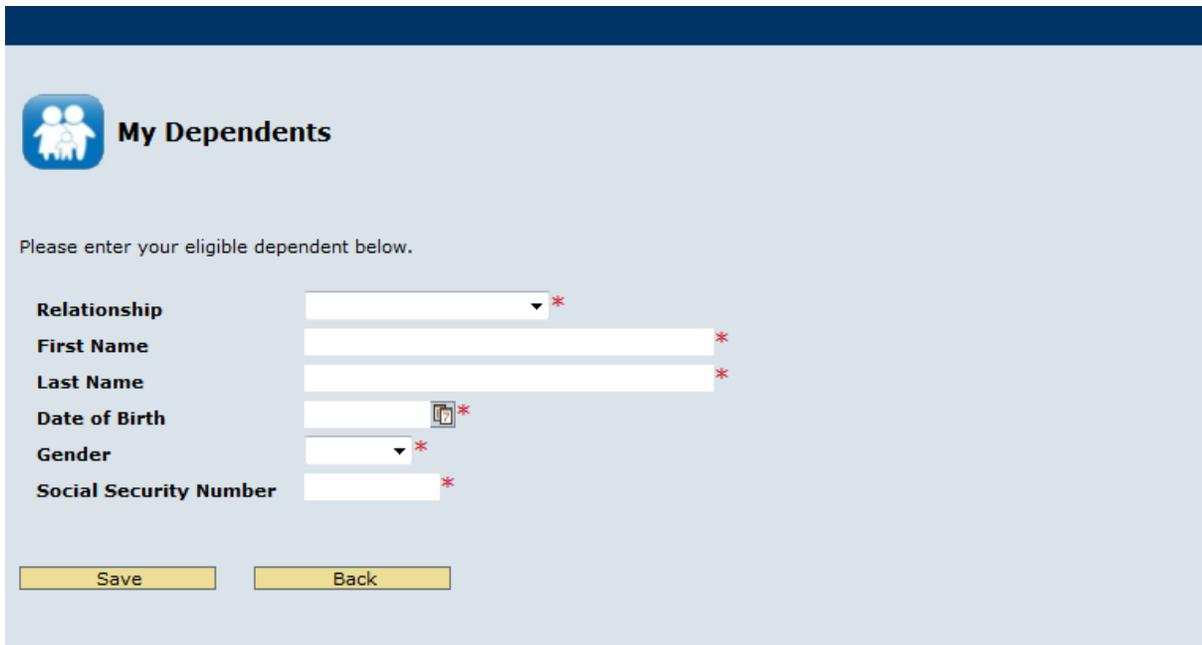
- Once the employee successfully saves the record, the employee will be presented with a pop-up screen advising them that the dependent has been registered but has NOT been added to any insurance coverage (screenshot 6).
- This process will be repeated until the employee registers all eligible dependents.
- If the employee selects “No”, the employee will be taken to the final step in the Dependent Certification process.

Screenshot 4: First screen in the Dependent Registration section asking the employee if they have any eligible dependents to register.



The screenshot shows a web interface titled "My Dependents" with a blue header bar. Below the title is a question: "Do you have any other [eligible dependents](#) you would like to register?". There are two yellow buttons: "Yes" and "No".

Screenshot 5: Dependent Registration details page.

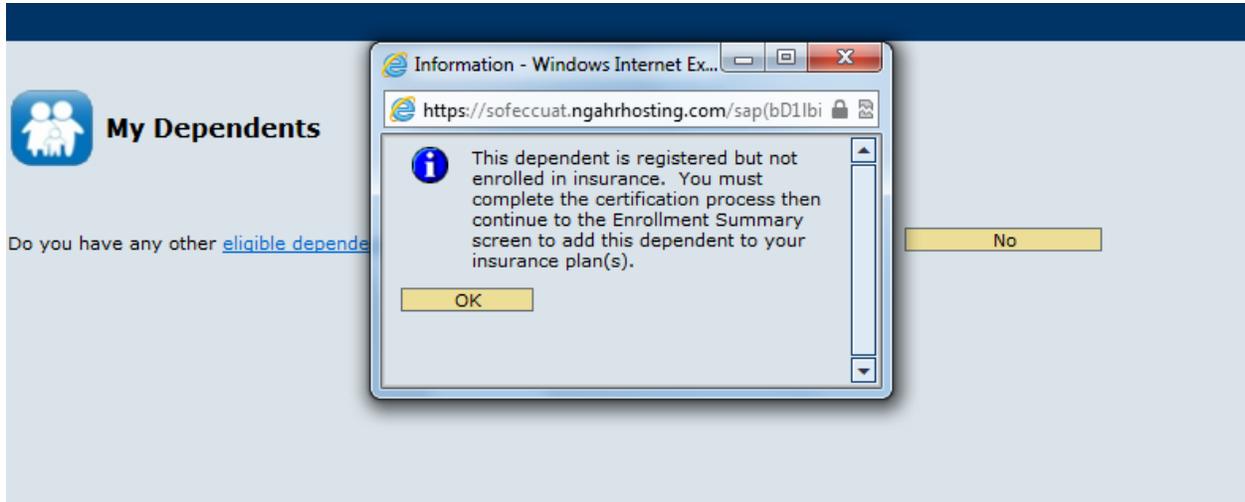


The screenshot shows a web interface titled "My Dependents" with a blue header bar. Below the title is the instruction: "Please enter your eligible dependent below." There are several input fields, each with a red asterisk indicating a required field:

- Relationship: dropdown menu
- First Name: text input
- Last Name: text input
- Date of Birth: text input with a calendar icon
- Gender: dropdown menu
- Social Security Number: text input

At the bottom, there are two yellow buttons: "Save" and "Back".

Screenshot 6: Dependent Registration process – reminder to add dependent to coverage.



Dependent Certification Section

- **Step 3:** Once the employee completes both the Dependent Verification and Dependent Registration sections, the employee will be taken to the Dependent Certification page.
 - On the Dependent Certification page (Screenshot 7), the employee will be presented with a summary of all registered dependents, a brief certification paragraph, a password field and a “Certify” and “Back” button. Dependents that are end dated through Open Enrollment will be shown with a Coverage End Date of 12/31/current year. For dependent records that are end dated during a QSC, the Coverage End Date will show the first day of the month that a payroll deduction has not been processed.
 - To complete the Dependent Certification section, the employee must enter his or her People First password and select the “Certify” button.
 - If the employee selects the “Back” button they will be taken back to the register dependent step in the process.
 - If the employee selects the “Certify” button without entering his or her People First password, the employee will receive an error message advising them that the password is required.
 - Once the employee successfully certifies their dependent(s), they will be taken to the Thank-You page to close out the process.

Screenshot 7: Dependent Certification page where the employee attests the dependents are eligible dependents.

My Dependents

Name	Relationship	Date of Birth	Gender	Social Security Number	Coverage End Date
Test Spouse	Spouse	01/01/1980	Male	850-85-0800	12/31/9999

I have read and understand the [definition\(s\) for the dependent\(s\)](#) listed above. I hereby affirm and attest that these dependent(s) meet the requirements of eligibility. If any dependent is determined to be ineligible or I fail to notify People First of a loss of eligibility or any supporting documentation is not provided upon request, I understand that I may be liable for any and all claims paid for any dependent deemed ineligible.

Password *

- Step 4 (final step):** Once the employee completes the Dependent Verification, Dependent Registration and Dependent Certification steps, the employee will be taken to a Thank-You page, which completes the Dependent Certification process (Screenshot 8). Once the employee reaches this page, the Dependent Certification is closed for that employee, for that enrollment event. Once the process is completed for Open Enrollment, the overlay screen will no longer be displayed upon logging into People First for that annual Open Enrollment period.
 - On this screen the employee can select either the “Enroll Now” or “Enroll Later” button to navigate out of the process.
 - If the employee selects “Enroll Now” they will be taken to the Enrollment Summary screen where they can view their current elections and select new elections.
 - If the employee selects “Enroll Later” they will be taken to the [People First Home Page](#).

Screenshot 8: Thank-You page. *The language on screenshot is subject to change; this screenshot is only intended to show an example of what the screen will look like.*

Thank you for completing this process.

What's Next?

- Watch this short [how-to video](#) or read the [enrollment user guide](#). The enrollment screens have changed and are easier than ever, so find out what's new.
- Choose your plans. Click "Enroll Now" to get started.