# PeopleSoft 8.00.01 eBenefits PeopleBook

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**SKU MABCr8SP1B 1200**

**PeopleBooks Contributors:** Teams from PeopleSoft Product Documentation and Development.



Printed in the United States of America.

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# About This PeopleBook

This book provides you with the information you will need for implementing and using PeopleSoft eBenefits. You can order the online version by requesting SKU HRB8SP1R0, or the hardcopy version by requesting SKU MABCr8SP1B 1200.

This section describes information you should know before you begin working with PeopleSoft applications and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft HRMS application line, how to order additional copies of our documentation, and so on.

## Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating around the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

## PeopleSoft Application Fundamentals

The *PeopleSoft* eBenefits *PeopleBook* provides you with implementation and processing information for your PeopleSoft eBenefits system. However, there is additional, essential information describing the set up and design of your system that is contained in a companion volume of documentation called *PeopleSoft Application Fundamentals.*

*PeopleSoft Application Fundamentals* consists of important topics that apply to many or all PeopleSoft applications across the HRMS application line. Whether you are implementing only PeopleSoft eBenefits, some combination of applications within the application line (for example, PeopleSoft Benefits Administration, Stock Administration, Time & Labor, and Pension Administration), or the entire PeopleSoft HRMS system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals such as setting up control tables and administering security.

In the *PeopleSoft Applications Fundamentals* PeopleBook, we've included common information pertinent to all applications in the HRMS application line, such as defining general options. If you're upgrading from a previous PeopleSoft release, you may notice that we've removed some topics or topic headings from the individual application PeopleBooks

and consolidated them in this single reference book. You'll now find only application-specific information in your individual application PeopleBooks. This makes the documentation as a whole less redundant. Throughout each PeopleBook, we provide cross-references to *PeopleSoft Application Fundamentals* and other PeopleBooks.

Below you'll find a list of those *PeopleSoft Application Fundamentals* sections that apply specifically to PeopleSoft eBenefits.

**Introduction to PeopleSoft HRMS** introduces you to the basic concepts of PeopleSoft Human Resources and reviews the various activities involved in using the system, including setting up system-wide and HR information, performing daily processes, working with PeopleSoft Human Resources menus, and generating reports.

**Regulating HRMS System Data** reviews the Business Unit/SetID feature which enables you to organize your businesses by dividing them into logical units other than Companies and Departments, and also enables you to control how your organizational data is shared among those organizational units.

**Processing Transactions Using Regulatory Regions** discusses the Regulatory Region concept, how Regulatory Regions are set up in your PeopleSoft HRMS, and how to set up additional Regulatory Regions, if necessary.

**Working With Currencies** explains how to track personnel salaries and reimbursement amounts in multiple currencies, or in multiple currency rate types, yet keep an eye on the bottom line by using one currency as a point of reference to track your expenses and costs worldwide.

**Working With Languages** discusses PeopleSoft's language support features.

**Setting Up Control Tables** discusses the different ways you can run PeopleSoft Human Resources and helps you decide which way it should be used. Setting Up Controls Tables also instructs how to set up data that serves as the foundation of your organization's human resource system. These tables are the basis not only for Human Resources, but all your PeopleSoft HRMS applications.

**E&G Setting Up Service Parameters** is a section for Education and Government users that discusses how you set up methods to handle time duration for measuring accrued service for employees in public sector organizations.

**USF Setting Up Your Work-In-Progress Management System** is a section for U.S. Federal Government users that explains how to set up the system to automatically route a wide variety of requests directly to reviewing officials, and on to human resources, in the specific path that your organization chooses.

**Administering Security** reviews how to set up and maintain security for employee data by using a security tree. This enables you to view and update the reporting relationships among units and use this information to grant and deny user access to employee data. You can also choose to set up employee data security in other ways, if that is what you need.

**Using Mass Change** describes how you can select a particular set of employee records from the database, define the alteration you would like to perform on those records, and make those changes in the background, using scheduled processing.

**Using Workflow** discusses, at a high level, how workflow is used in HRMS and shows you how to set up approvals workflow for self-service transactions in collaborative applications such as PeopleSoft eRecruit and PeopleSoft eDevelopment. We also include detail information on some of the workflow processes delivered in Release 8.

**Working With Multiple Components of Pay** discusses how you use the system to tailor unique compensation packages for each of your employees or create default pay component packages that are consistent for jobs and salary steps throughout your organization.

**Working With Multiple Jobs** explains how several PeopleSoft HRMS applications enable you to process information for employees who hold multiple, concurrent jobs within an organization.

**Working With Groups** shows you how to use the Group Build functionality in HRMS, which gives you a standardized way to create groups of employees and non-employees. Once you've created a group using this feature, you can use it across several HRMS applications for a wide variety of purposes.

## Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection www.peoplesoft.com. We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

**Important!** Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

### Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

### Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *PeopleSoft 8.00.01 HRMS* and *PeopleTools 8.12 PeopleBooks,* SKU CD-HRB8SP1R0.

Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

The CD includes the following PeopleBooks (presented in HTML format) that you can print in whole or in part:

- PeopleSoft *8.00.01* Application Fundamentals for PeopleSoft HRMS
- PeopleSoft *8.00.01* Base Benefits
- PeopleSoft *8.00.01* Benefits Administration
- PeopleSoft *8.00.01* eBenefits
- PeopleSoft *8.00.01* eCompensation
- PeopleSoft *8.00.01* eDevelopment
- PeopleSoft *8.00.01* eEquity
- PeopleSoft *8.00.01* ePay
- PeopleSoft *8.00.01* eProfile
- PeopleSoft *8.00.01* eRecruit
- PeopleSoft *8.00.01* eTime
- PeopleSoft *8.00.01* FSA Administration
- PeopleSoft *8.00.01* Global Payroll
- PeopleSoft *8.00.01* Human Resources
- PeopleSoft *8.00.01* Payroll for North America
- PeopleSoft *8.00.01* Payroll Interface
- PeopleSoft *8.00.01* Pension Administration
- PeopleSoft *8.00.01* Stock Administration

## Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

| | |
|---|---|
| **Internet** | From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.<br><br>PeopleSoft Internet site: http://www.peoplesoft.com/. |
| **Telephone** | Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.** |
| **Email** | Email CPI at callcenter@conpub.com. |

## PeopleBooks Standard Page Element Definitions

Throughout our application documentation, you will encounter fields that are used on many application pages. This section lists the most common fields and provides standard definitions.

| ***Field*** | ***Definition*** |
|---|---|
| **Address 1, Address 2, Address 3** | Freeflow text entry fields that enable you to describe street, street number, apartment number, and other address information. |
| **As of Date** | The last date for which a report or process includes data. |
| **Block (Bloque)** | In Spanish addresses, a building or buildings that are close together may be called a Block (Bloque). Include the Block name in the address, if necessary. |
| **Business Unit** | An identification code that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization. |
| **City** | Name of city for address. |
| **Country** | Country for address. Other address fields will be adjusted to reflect Country choice. |
| **County** (also **Prefecture** and **Parish**) | Name of county (prefecture/parish) for address, if applicable. |
| **Description** | Freeflow text up to 36 characters that describes what you are defining. |
| **Door (Puerta)** | In Spanish addresses, identifies the door name or number. |

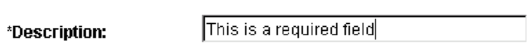
| | |
|---|---|
| **Effective Date** | Date on which a table row becomes effective; the date that an action begins. For example, if you want to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages and batch processes that use the information use the current row.<br><br>For more information about effective dates, see Using PeopleSoft Applications, "Working With Browser-Based Applications" . |
| **Email** | The email address for a person or organization. |
| **EmplID** (employee ID) | Unique identification code for an individual associated with your organization. |
| **Fax** (also **Fax Number**) | The fax number for a person or organization. |
| **Floor (Piso)** | In Spanish addresses, identifies the floor name or number. |
| **House** | Identifies the type of house. |
| **Initials** | Initials of individual. |
| **Language** | Language spoken by employee/applicant/non-employee. |
| **Language** or **Language Code** | The language in which you want the field labels and report headings of your reports to print. The field values appear as you enter them.<br><br>Language also refers to the language spoken by an employee, applicant, or non-employee. |
| **Last Run On** | The date that a report or process was last run. |
| **Name** | Name of individual. |
| **National ID** | Identification code used by countries to track information on their residents for payroll, identification, benefits, and other purposes. For example, for US residents this would be their Social Security Number; for German residents it would be their Social Insurance Number, and for UK residents it would be their National Insurance Code. |
| **Number** | The number related to a street, avenue, or other address field in Spanish addresses. When an address has no number, enter s/n (sin numero) to indicate that there is no number. |

| | |
|---|---|
| **Phone Extension** | The phone extension number for a person or organization. |
| **Phone Type** | Identifies the type of phone number entered in the Telephone field. Valid values are ***Business, Campus, Cellular, Dormitory, FAX, Home, Other, Pager 1, Pager 2,*** or ***Telex.*** |
| **Post Code (also Postal)** | Postal code for address. |
| **Prefix** | Prefix for individual (such as Mr., Ms., Mrs., Dr., and so on) |
| **Process Frequency** group box | Designates the appropriate frequency in the **Process Frequency** group box:<br>**Once** executes the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to **Don't Run**.<br>**Always** executes the request every time the batch process runs.<br>**Don't Run** ignores the request when the batch process runs. |
| **Process Monitor** | This button takes you to the Process List page, where you can view the status of submitted process requests. |
| **Report ID** | Identifies a report. |
| **Report Manager** | This button takes you to the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list). |
| **Request ID** | A request identification that represents a set of selection criteria for a report or process. |
| **Run** | This button takes you to the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.<br>For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics. |
| **Run Control ID** | Identifies specific run control settings for a page. |
| **Run Date** | The date that a process was run or a report was generated. |
| **Run Time** | The time that a process was run or a report was generated. |

| | |
|---|---|
| **SetID** | An identification code that represents a set of control table information. SetIds enable the sharing of a set of control table information across two or more Business Units. |
| **Short Description** | Freeflow text up to 15 characters. |
| **Stair (Escalera)** | In Spanish addresses, identifies the stair name or number. |
| **State** (also **Province**) | State (Province) for address. |
| **Street Type** | Identifies whether an address is a place, street, avenue, road, or so on. Spanish law requires addresses in official documents to include the Street Type. |
| **Telephone (Phone)** | The telephone number for a person or organization. |
| **User ID** | The system identifier for the individual who generates a transaction. |
| **User ID** | Identifies the individual that generated the transaction. |

## Required Fields on Pages

When you see a field on a page with an asterisk ( * ) preceding the field name, it means the field is required. You can not save a page without entering data into all of the required fields on a page.



Example of a required field label

In some unique instances a field may be required even though there is no asterisk preceding the field name. In such cases, you will be prompted to enter data in these fields before saving the page.

## Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

| | |
|---|---|
| `monospace font` | Indicates PeopleCode. |

| | |
|---|---|
| **Bold** | Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).<br><br>We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**). |
| *Italics* | Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.***<br><br>We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter O. |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W. |
| Jump links | Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section. |
| Cross-references | The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:<br><br>For more information**,** see Documentation on CD-ROM in *About These PeopleBooks:* Additional Resources. |
| • Topic list | Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents menu. |
| Name of Page | Opens a pop-up menu that contains the named page. Click the button to display the page. Some screen shots may also appear inline (directly in the text). |

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration.  Pay very close attention to these warning messages.

## Page Introductory Table

In the documentation, each page description in the application will include an introductory table with pertinent information about the page. Not all of the information will be available for all pages.

| | |
|---|---|
| Usage | Describes how you would use the page or process. |
| Object Name | GIVES THE SYSTEM NAME OF THE PAGE OR PROCESS AS SPECIFIED IN THE PEOPLETOOLS APPLICATION DESIGNER. FOR EXAMPLE, THE OBJECT NAME OF THE DETAIL CALENDAR PAGE IS DETAIL_CALENDAR1. |
| Navigation | Provides the path for accessing the page or process. |
| Prerequisites | Specifies which objects must have been defined before you use the page or process. |
| Access Requirements | Specifies the keys and other information necessary to access the page. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page. |

## USF U.S. Federal Government Functionality

Any functionality that is specific to the U.S. Federal Government sector will be designated by a USF marker.  Most often this will appear at the beginning of a section heading (such as with this section), but the USF designation might also appear in a Note or within text, if appropriate.

## E&G Education and Government Functionality

Any functionality that is specific to the Education and Government sector will be designated by a E&G marker.  Most often this will appear at the beginning of a section heading (such as with this section), but the E&G designation might also appear in a Note or within text, if appropriate.

## Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft HRMS Application Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of the PeopleSoft documentation at:

mailto:DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our application communications for you.

CHAPTER 1

# eBenefits Overview

## Overview of eBenefits

PeopleSoft eBenefits collaborative applications consist of PeopleSoft transactions that provide your employees convenient access to information using a browser. Access to information by all of your employees is flexible, convenient, and easy. For many people, these transactions provide an improved alternative to automated telephone prompting systems, and they can help ease the workload for internal support staff and customer service representatives.

In eBenefits, we produce several Web pages as templates. You can use the PeopleTools Application Designer to modify and configure the Internet pages just as you would any application page.

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For more information, see Application Designer.

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## Components of eBenefits

PeopleSoft eBenefits is comprised of 8 self-service Web applications that that are designed to interface with the Human Resources system. These applications will enable employees to review, add, update, and delete (where appropriate) their benefits information.

- **eBenefits Home** page is the starting place for employees to access their benefit programs in order to review benefit choices or make allowable changes. The page displays the benefits summary for an employee, as well as available enrollment events.
- **eBenefits Enrollment** pages enable employees to communicate their benefit choices to the organization
- **eBenefits Health** pages are presented in a manner that enables users to navigate from summary level pages to more detailed information by clicking on the appropriate plan links. They may view information about their benefit selections, and then make any changes allowed by an organization's program rules.
- **eBenefits Savings** pages are presented in a manner that enables users to navigate from summary level savings plan pages to more detailed information by clicking on the appropriate plan links. They may view information about their benefit selections, and then make any changes allowed by an organization's program rules.
- **eBenefits Insurances** pages are presented in a manner that enables users to navigate from

summary level pages to more detailed information by clicking on the appropriate plan links. They may view information about their benefit selections, and then make any changes allowed by an organization's program rules.

- **eBenefits Dependents/Beneficiaries** pages are presented in a manner that enables users to navigate from summary level pages to more detailed information by clicking on the appropriate plan links. They may view information about their benefit selections, and then make any changes allowed by an organization's program rules.
- **eBenefits Flexible Spending Accounts** pages are presented in a manner that enables users to navigate from summary level pages to more detailed information by clicking on the appropriate plan links. They may view information about their benefit selections, and then make any changes allowed by an organization's program rules.
- **eBenefits Life Event pages** are designed for employees to use when marriage or birth/adoption occur. Because many employees may not be familiar with these transactions, the pages have been designed to be as intuitive as possible

## Understanding Roles

PeopleSoft eBenefits currently provides self-service web pages for the role of Employee and Manager. We deliver definitions for these roles and define a menu for these roles.

## Understanding Security

The user profile that you create for each individual who will access your self-service web application determines the web pages the user will have access to by default. You create user profiles in Maintain Security in the User Profile component. You assign a role to each user profile, which is linked to access control lists. Each access control list identifies pages that individuals can access. To modify the access for specific web pages for each role, you modify the access control list for the user's role.

You also define which data the user has access to in the user profile.

For more information about user profiles, roles, and access control lists; see Security.

CHAPTER 2

# Setting Up eBenefits

## Overview

With the exception of text tables used by Benefits enrollment, all controls for how and what the eBenefits pages display have been added to existing pages in the PeopleSoft Base Benefits application.

This document will describe the different setup fields and what they control. The setup fields are placed in existing core setup tables.

## Before You Begin

As stated above, all functions of the eBenefits pages are determined on the base benefits core setup pages. It is therefore necessary to define the organization's benefit programs, plans, and plan types in PeopleSoft Base Benefits before implementing online functionality.

For more information about defining benefit programs, see Building Benefit Programs.

## Display Control Fields

These fields control the display and processing of benefits transaction pages. The first two fields apply to all transactions. The remaining fields apply only to the enrollment form.

### Collect Dependent/Beneficiaries Field

This is a one-character Yes/No field, and may be set to Yes by selecting the associated check box. It tells the system whether to collect dependents/beneficiaries. On the enrollment form, this field works in concert with the event rules' Ignore Dep/Ben Edits field. If Collect Dependent/Beneficiaries is set to Yes, the Ignore Dep/Ben Edits flag should be set to No.

This field will exist in two places. It will be on the Event Rules table, next to the Collect Fund Allocations check box, where it will control the enrollment form. It will also be on the Benefit Program table at the plan type level. From this location it will control the rest of the self-service transactions.

For more information about the event rules component, see Creating Event Rules.

For more information about the benefit program definition component, see Setting Up Benefit Plans.

When the check box is selected, the system displays dependent/beneficiary grids and collects dependent/beneficiary elections. For 1x plans on the enrollment form, the system collects elections at the plan level when the check box is selected. The employee selects which dependents should be covered under the plan by selecting a check box next to each individual's name. The system derives the coverage code based on the dependents that are selected.

When the check box is clear, the system hides the dependent or beneficiary sections and does not collect dependent or beneficiary elections. For 1x plans on the enrollment form, the system collects elections at the coverage code level when the check box is clear.

## Collect Funds Field

This is a one-character Yes/No field, and may be set to Yes by selecting the associated check box. It tells the system whether to collect fund allocations. On the enrollment form, this field works in concert with the event rules' Ignore Investment Edits flag. If Collect Funds is set to Yes, then the Ignore Investment Edits flag should be set to No.

This field will exist in two places. It will be on the Event Rules table, next to the Ignore Investment Edits check box, where it will control the enrollment form. It will also be on the Benefit Program table at the plan type level. From this location it will control the rest of the self-service transactions.

For more information about the event rules component, see Creating Event Rules.

For more information about the benefit program definition component, see Setting Up Benefit Plans.

The system displays funds and collects fund allocations when the check box is selected. The system hides the fund sections when the check box is clear.

## Domestic Coverage  Link Field

This is a two-character field containing a plan type. It links plan types when there is a qualified to non-qualified relationship in the cross plan edits. For example, plan type 15 Domestic Partner Medical is linked to plan type 10 Medical.

This field is on the Benefit Program table at the plan type level, and is visible for 1x plan-types but is unavailable for all other plan types.

For more information about the benefit program definition component, see Setting Up Benefit Plans.

The plan type that has this field filled is considered the subordinate plan type. The plan type value in the field identifies the plan type that controls the cross-plan dependency. For example, to set up domestic partner medical plans, the Domestic Coverage field is set to 10 in the Self Service configuration options for plan type 15. The field is blank for plan type 10. On the enrollment form, the system combines the two plan types on one page.

## Show if No Choice on Default Field

This is a one-character Yes/No field, and may be set to Yes by selecting the associated check box. If the check box is selected, the system displays the plan type, even if the employee has no choice. For example, this might occur with a leave plan type with only one option, no waive, where the employee always receives that option.

This field is on the Benefit Program table at the plan type level.

For more information about the benefit program definition component, see Setting Up Benefit Plans.

When the check box is selected, the system shows the plan type in the summary. It will not display the Edit button. The system will not display the plan type when the field is left blank.

## Plan Descriptions Field

This is a long field. It holds text describing a benefit plan. The 1x, 3x, 5x, and 7x plan types display these descriptions on the enrollment pages.

This field is on the Benefit Program table at the plan type level.

For more information about the benefit plan type definition component, see Identifying Benefit Plans.

## Cost Freq on Enrollment Form Field

This is a one-character field. It tells the system whether to display the Annual costs (Annual) or the Per Period costs (Deduction). It controls the display of costs on all pages in the enrollment process.

This flag is on the Benefit Program table at the program level.

For more information about the benefit program definition component, see Building Base Benefit Programs.

### Show Credits on Enrollment Form Field

This is a one-character Yes/No field. It tells the system whether to display total cost and credits on the pages. This field can be set to "N" if credits are not used by the organization.

This flag is on the Benefit Program table at the program level.

For more information about the benefit program definition component, see Building Base Benefit Programs.

## URLs

Uniform Resource Locators (URLs) become links on the enrollment pages and other benefit transactions to employee handbooks, provider pages, and service provider documents.

The specific URL address, description, and identifier are entered on the URL table.

For more information about the URL table, see Managing URLs in the PeopleSoft PeopleTools book.

Once the address, description, and identifier are entered in the URL table, then only the identifier is entered in the Benefit Program table, Vendor table, and Benefit Plan table.

The SPD URL ID on the Benefit Plan table has priority over the General Policy URL ID on the Vendor table when displaying one or the other next to plan provider.

The rules that determine which URL will appear next to plan name on benefit plan review pages are as follows:

- If a URL identifier is connected to the SPD URL ID on the Benefit Plan table, this is the link that appears on the benefit plan review page.
- If a URL identifier is connected to General Policy URL ID on the Vendor Policy table and no SPD URL ID is defined, this is the link that appears on the benefit plan review page.
- If Authoria PS is installed, there is no link to the SPD or General Policy URL IDs.
- If GeoAcess is installed, the Find a Health Care Provider link will go to the GeoAccess Provider Finder search and the Authorized Providers URL ID will not be enabled.

The Authorized Providers URL ID on the Vendor Policy table is independent of the links listed above. If an URL identifier is connected to the Authorized Providers URL ID, then that is the link that appears on the Review page next to Find a Health Care Provider under the

Additional Information section. This link is for 1x plan types only. No link will appear for the other plan types.

A group number is required in order for the General Policy URL ID and Authorized Providers URL ID links to work because group number is a key field.

It is recommended that you use a prefix naming convention, such as the one shown below:

- Use "SPD" as a prefix when defining Summary Plan Description URL IDs (SMRYPLNDOC_URL_ID): SPD_AETNAPPO.
- Use "GEN" as a prefix when defining the General Policy URL ID (POLICY_URL_ID): GEN_AETNA.
- Use "PRV" as a prefix when defining the Authorized Providers URL ID (VENDOR_URL_ID): PRV_AETNA.

## Handbook Links

These URLs provide links to the enrollment handbook. There can be a link to the entire handbook and a link to each of the plan-type sections.

Because the handbooks may vary by benefit program, the keys are benefit program and plan type. The URL Identifiers are on the benefit program definition at both the program and plan-type levels.

For more information about the benefits program definition component, see Building Base Benefit Programs.

For more information about the benefit plan-type component, see Benefit Program Table - Plan Type and Option Page page.

There can be one URL for the entire handbook or separate URLs for each plan type.

## General Policy Links

These URL Identifiers provide links to the provider home pages or to a company intranet site. The fields are defined on the Vendor Policy table.

For more information about the Vendor Policy table, see Provider/Vendor Table - Policy Information Page.

### Authorized Provider Links

These URL identifiers provide links to the provider's PCP finder, and are only applicable for 1x plan types. The fields are defined on the Vendor table.

For more information about the Vendor Policy table, see Provider/Vendor Table - Policy Information Page.

### SPD (Summary Plan Description) Links

These URL identifiers provide links to the plan SPDs. The fields are defined on the Benefit Plan table.

For more information about the benefit plan definition, see Defining Benefit Plans.

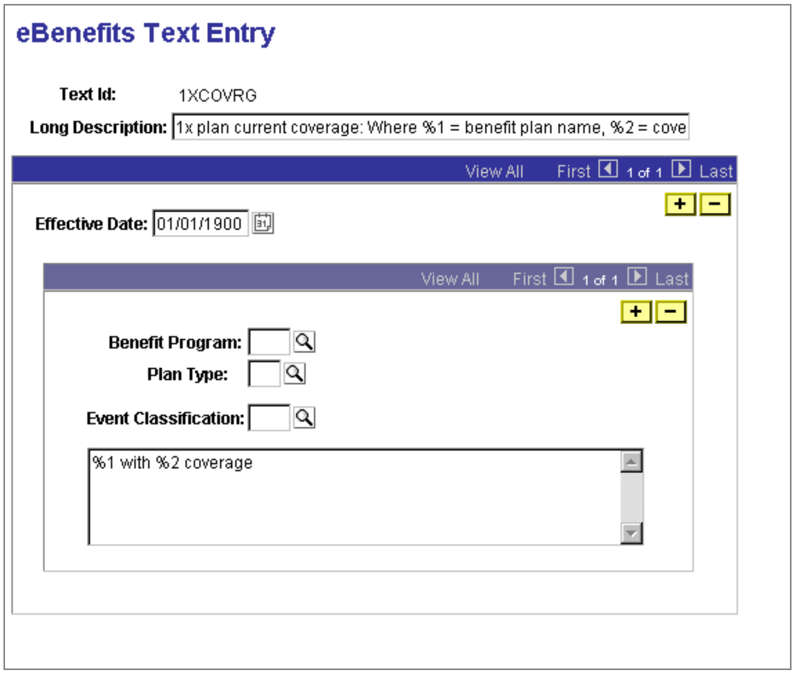
## Text Blocks

The text blocks are a collection of paragraphs, sentences, phrases, and words that are used when displaying the enrollment pages. All wording on the pages will come from this collection, with the exception of error and warning messages, which use Message Catalog 4001.

Text tables are found in the Define Business Rules, Define Automated Benefits, Setup, Self Service Text Entry menu.

### eBenefits Text Entry Page

| | |
|---|---|
| Usage | Used to enter text and associate the text with benefit programs, plan-types, and event classes on eBenefits enrollment pages |
| Object Name | W3EB_TEXT |
| Navigation | **Define Business Rules, Define Automated Benefits, Setup, Self-Service Text Entry** |




eBenefits Text Entry page

The eBenefits Text Entry page is used to enter phases, sentences, or paragraphs that are displayed as text blocks on the eBenefits enrollment pages.

**Text ID** This is a character field that uniquely identifies the text block.

**Long Description** This is the long description of the character field.

**Effective Date** The effective date of the information displayed.

**Benefit Program** This is the benefit program that uses this text. If Benefit Program is left blank, the text will apply to all benefit programs.

**Plan Type** This is the plan type that uses this text. If Plan Type is left blank, the text will apply to all plan types within the benefit program selected

**Event Classification** This is the event classification that uses this text. If Event Classification is left blank, the text will apply to all event classifications within the benefit program and plan type selected.

When the key fields have been entered, the text block at the bottom of the page is used to enter the text that will appear on the eBenefits enrollment pages.

## Flexible Keys

Some page text is the same for all situations. Some of the text varies from benefit program to benefit program. Other text varies from plan type to plan type. Text can vary by plan type within benefit program and can vary by the type of event. To accommodate this, the system keys the text pieces by benefit program, plan type, and event class.

The system will use the following rules when matching text to a text block:

- The system will look for a match on benefit program. It uses only those rows that match the benefit program, or, lacking any rows that match the benefit program, uses the rows that have a blank benefit program.
- Within this set of rows, the system looks for a match on plan type. It uses only those rows that match the plan type, or, lacking any rows that match the plan type, uses the rows that have a blank plan type.
- Within this set of rows, the system looks for a match on event class. It uses only the row that matches the event class, or, lacking a match on event class, uses the row that has a blank event class.

## Field List

This is a list of the fields on the following tables: W3EB_TEXT, W3EB_TEXT_EFFDT, and W3EB_TEXT_MSGID

- Text ID – A character field that uniquely identifies the text block.
- Language Code – The language for this text block.
- Description – A description of this text block.
- Effective Date – The date this text block takes effect.
- Benefit Program – A distinct benefit program or blank.
- Plan Type – A distinct plan type or blank.
- Event Class – An event class or blank.
- Text – A long field containing the text block itself. The text may include up to five substitution variables.

## Update and Display

The system provides a page for updating the text tables. The system also provides display-only pages. showing the contents of a selected text table. On this page the user can plug in a text ID, a program, plan type and event class, and any substitutable values. The system will show the user what it intends to display based on the input.

## Delivered Text and Effective Dating

The text is effective dated, which allows it to be changed from one plan year to the next. The delivered text has an effective date of 1/1/1900 and is defined as system data in Peoplesoft

HRMS database. It is important to use a later effective date when you add new text entries Any customized text should use a later date.

### Enrollment Form Technical Information

Inside the enrollment form, the system uses a common function to access the text blocks. The format of this function is:

```
GetText(&TextID, &PlanType, &TextArea, &Sub1, &Sub2, &Sub3, &Sub4, &Sub5)
```

The parameters are as follows:

`&TextID` – A character string that uniquely identifies the text string.

`&PlanType` – The plan type. 01 is used for the event picker, summary, and other non-plan type pages.

`&TextArea` – Where the function returns the text.

`&Sub1,2,3,4,5` – Up to 5 character fields that hold substitution variables. The function updates the text with the substitution values.

The calling function fills in the `&TextID`, `&PlanType`, and `&Sub` parameters.

On return, the calling function takes the text returned in `&TextArea` and puts it into HTML areas on the page.

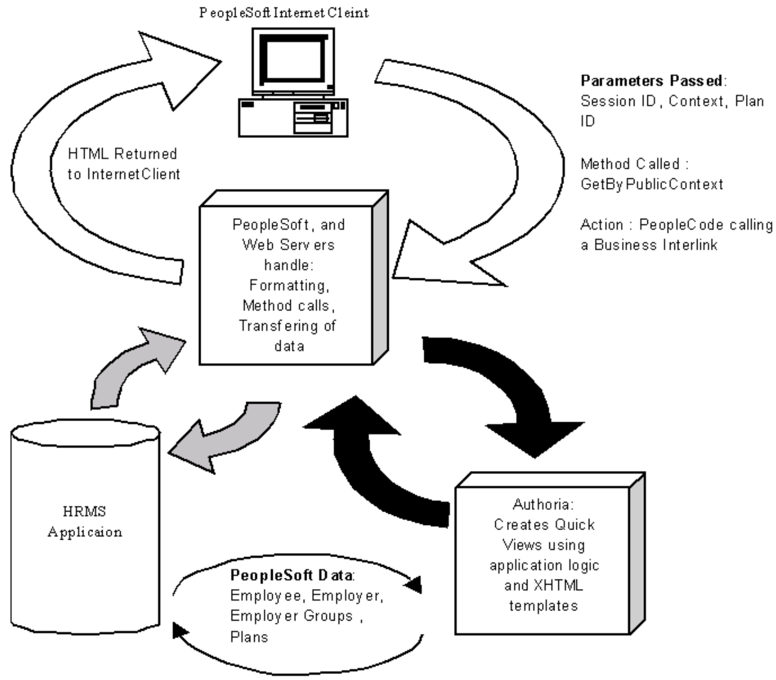
The function does not have to supply the Benefit Program or Event Class because these values can be derived from the event itself and do not change.

## Merchant Integration

Authoria PS and GeoAccess are currently supported by eBenefits. This section discusses the installation and setup of these two suppliers.

### Authoria PS

Authoria PS is a knowledge base application provider for benefits-related information. Authoria's application, named QuickViews, is a knowledge base that dynamically displays personalized answers to employees' queries. QuickViews enables decision-making within PeopleSoft eBenefits. PeopleSoft unifies employee-centric information and transactions within the context of a given business activity, and Authoria's QuickViews knowledge base exemplifies the level of self-sufficiency that PeopleSoft delivers to users.




PeopleSoft/Authoria PS Data Transfer

To Install Authoria PS:

**1.** Install Authoria PS.

Install Authoria PS in accordance with the instructions included with the software. Your Authoria PS representative can assist you with populating the knowledge base.

**2.** Verify BFXSERV.INI file.

Open the file named "BFXSERV.INI", found in C:\WINNT\BFXSERV.INI, and in the section named "BRIDGE" ensure the following:

**a.** That on the "DSN=" line, a valid HR database with ODBC connection is defined on the same machine where Authoria PS is installed.

**b.** That the "uid=" line contains a valid database password.

**c.** That the "pwd=" line contains a valid database user ID.

**d.** That "Eligibility Rule = Client Based".

**3.** Register Authoria PS.

Register Authoria PS by going to Start, Run, regsvr32 "C:\Program Files\Authoria HR\AuthoriaPSBNProxy.dll

**4.** Activate Authoria

e. Click Go, Compensate Employees, Administer Merchants, Authoria, Activate Authoria.

f. Check the Merchant Enabled checkbox, and click **Save**.

5. Assign Keywords to Benefit Plans and Plan-Types

g. Open the PeopleSoft Application Engine program and click **Go, Compensate Employees, Administer Merchants, Authoria, Maintain Plan Type Keywords**. You have 2 methods by which you can enter Plan Type Keywords.

h. You can either insert each Benefit Plan and Plan Type row individually, or Load all of your Benefit Plans and Plan Types in bulk by clicking a button, then deleting the Benefit Plans and Plan Types for content not supported by Authoria.

6. To insert each Benefit Plan and Plan Type individually

i. When the Keyword page appears, prompt for benefit plan, plan-type and the appropriate Authoria keyword for each benefit plan and plan-type offered by the organization. The Authoria keyword you will assign to each benefit plan will be from the following list:401K

ADD

BIRTH

CHILDDEATH

CHILDOVERAGE

DENTAL

DEPCAREFSA

DEPLIFE

DIVORCE

EEDEATH

EETERM

ESOP

ESPPFIXED

ESPPOPEN

FLEXBEN

GUL

HLTHCAREFSA

LEGAL

LIFE

LTC

LTD

MARRIAGE

MEDICAL

PENSION

PROFSHARING

SPOUSEDEATH

SPOUSEHEALTH

SPOUSENEWJOB

SPOUSETERM

STD

TRAVELBUSINESS

VACATIONBUY

VACATIONSELL

VISION

**7.** To insert all of the Benefit Plans and plan-types in bulk:

If you have not previously loaded the Benefit Plan or Plan Type Keyword table, you will see a "Load BENEF_PLN_TBL" button the page. Click this button to populate the keyword table with every combination of Benefit Plans and Plan Types in the BENEF_PLN_TBL. You should assign an Authoria Keyword to each of the Benefit Plans and Plan type combinations. Rows where you leave the Keyword field blank will automatically be deleted for you.

**8.** Assign keywords for benefit programs.

**j.** Open the PeopleSoft Application Engine program and click Go, Compensate Employees, Administer Merchants, Authoria, Maintain Ben Prog Keywords.

**k.** **FL** will automatically be entered In the Plan Type field**.**

**l.** In the Benefit Program field, prompt for one of the benefit programs set up in BEN_DEFN_PGM.

**m.** **FLEXBEN** will automatically be entered In the Authoria Keyword field**.**

**n.** **Benefit Program** will automatically be entered In the Authoria Keyword Type field**.**

**9.** Assign keywords for Marriage Life Event.

**o.** Open the PeopleSoft Application Engine program and click Go, Compensate Employees, Administer Merchants, Authoria, Maintain Marriage Keywords.

p. **MA** will automatically be entered In the Plan-Type field**.**

q. In the Benefit Program field, prompt for one of the benefit programs set up in BEN_DEFN_PGM.

r. **MARRIAGE** will automatically be entered In the Authoria Keyword field**.**

s. **Marriage Life Event** will automatically be entered In the Authoria Keyword Type field**.**

**10.** Assign keywords for Birth Life Event.

t. Open the PeopleSoft Application Engine program and click Go, Compensate Employees, Administer Merchants, Authoria, Maintain Birth Keywords.

u. **BI** will automatically be entered In the Plan-Type field**.**

v. In the Benefit Program field, prompt for one of the benefit programs set up in BEN_DEFN_PGM.

w. **BIRTH** will automatically be entered In the Authoria Keyword field**.**

x. **Birth Life Event** will automatically be entered In the Authoria Keyword Type field**.**

**11.** Assign keywords for Waived Benefits.

y. Open the PeopleSoft Application Engine program and click Go, Compensate Employees, Administer Merchants, Authoria, Maintain Waive Keywords.

z. **BI** will automatically be entered In the Plan-Type field**.**

aa. In the Benefit Program field, prompt for one of the benefit programs set up in BEN_DEFN_PGM.

bb. **BIRTH** will automatically be entered In the Authoria Keyword field**.**

cc. **Birth Life Event** will automatically be entered In the Authoria Keyword Type field**.**

**12.** (Alternatively) To Insert all of the keywords for Waived Benefits in bulk:

If you have not previously loaded the Waived Benefit Keyword table, you will see a "Load BENEF_PLN_TBL" button the page. Click this button to populate the keyword table with every unique instance of Plan Types in the BENEF_PLN_TBL. If you choose the bulk method, the Authoria Keyword will automatically be assigned for you, based on the Keyword you assigned to the Plan Type in Step 5.

**13.** Assign keywords for non-tracked benefits, such as Group Legal.

dd. Open the PeopleSoft Application Engine program and click Go, Compensate Employees, Administer Merchants, Authoria, Maintain Plan Type Keywords.

ee. In the Plan-Type field, enter **NT,**

ff. In the Benefit Plan field, enter the external name as found in the Authoria Data Manager,

gg. In the Keyword field, enter a keyword from the preceding list.

**14.** Populate Bridge Tables

**hh.** Open the PeopleSoft Application Engine program and click Go, Compensate Employees, Administer Merchants, Authoria, Populate Authoria Bridge.

**ii.** When the Run Control panel appears, enter an organization ID, for example PSFT, and click **Save**.

**jj.** Click the **Run** icon, and the following Bridge Tables will be populated:

BFX_EMPLOYEE

BFX_EMPGROUP

BFX_EMPLOYER

BFX__ENROLL_BEN

---

The preceding tables are not prefaced with the usual "PS_" prefix.

---

## GeoAccess

GeoAccess ProviderSearch enables a provider searching capability within the PeopleSoft eBenefits application. Users can search for health care providers based on information such as specialty, location and health plan affiliation. The integration allows for pre-population of search fields, such as the user's address information. The provider database includes physicians and other health care facilities in the employer's contracted health plan's networks, and is updated continuously. The integration also allows for pre-population of the provider's ID into the PeopleSoft eBenefits online enrollment form with a single click of a button.

The provider search page can be accessed from the Health Care transaction pages, the enrollment election form.

### GeoAccess Contact Information

GeoAccess, Inc.

6320 Lamar Ave., Suite. 230

Overland Park, KS 66202

Phone: 800.436.6584

Fax: 913.722.1413

Corporate web site: www.geoaccess.com

Email: psinfo@geoaccess.com

To Set Up GeoAccess:

**1.** Enable GeoAccess.

**kk.** From the Home menu, select Compensate Employees, Administer Merchants, GeoAccess, and click **Step 1**.

**ll.** When the page appears, select the Merchant Enabled check box and enter a Customer ID in the space provided.

**mm.** Click the **Save** button.

**2.** Load GeoAccess codes.

The GeoAccess codes are based on your Customer ID number, and will be populated in the drop-down code lists on the advanced search pages, and include such codes as hospital codes, application codes and language codes.

**nn.** From the Home menu, select Compensate Employees, Administer Merchants, GeoAccess, and click **Step 2**.

**oo.** Click Load GeoAccess Codes, and when the GeoAccess Code Load page appears, enter the Run Control ID in the space provided.

**pp.** Click the **Add** button.

**qq.** When the Process Scheduler Request page appears, click the **OK** button.

**rr.** Click the **Process Monitor** button and ensure that the request status indicates successful completion.

**3.** Map plans.

Plan mapping is the association of PeopleSoft plan-types with GeoAccess product codes. You may need assistance from GeoAccess for the mapping process.

**ss.** From the Home menu, select Compensate Employees, Administer Merchants, GeoAccess.

**tt.** Click **Step 3**, and the GeoAccess Plan Mapping page appears.

**uu.** On the GeoAccess Plan Mapping page, click the PeopleSoft Plan-Type look-up button and select a plan-type from the list for each plan-type offered by the organization.

**vv.** On the GeoAccess Plan Mapping page, click the PeopleSoft Benefit Plan look-up button and select a benefit plan-ID from the list for each benefit plan offered by the organization.

**ww.** On the GeoAccess Plan Mapping page, click the Effective Date look-up button and select an effective date by clicking the appropriate date on the pop-up calendar.

**xx.** On the GeoAccess Plan Mapping page, click the GeoAccess Product Code look-up button and select a benefit plan-ID from the Product Code list or Product Name list (recommended) for each benefit plan offered by the organization.

**yy.** On the GeoAccess Plan Mapping page, click the **Save** button.

# CHAPTER 3

# eBenefits Home

## Overview

eBenefits home is the starting place for employees to access their benefit programs in order to review benefit choices or make allowable changes. The pages display the benefits summary for an employee, as well as available enrollment events.

The pages provide links for the employee to review such benefit plans as health plans, insurance plans, savings plans, as well as manage dependent and beneficiary information.

## Benefits Summary Page

| | |
|---|---|
| Usage | Used to review benefit elections and link to benefit plans. |
| Object Name | W3EB_GRID |
| Navigation | **Self Service, eBenefits, Home, Benefits Summary** |


**Benefits Summary**

Stephen Ackland

To view your benefits as of another date, enter the date and click Go:

08/01/2000 Go

| Type of Benefit | Job Description | Plan Description | Coverage or Participation |
|---|---|---|---|
| Medical | Eben Manager | Blue Cross Indemnity | Family |
| Dental | Eben Manager | Cornerstone Managed Dental | Family |
| Vision | Eben Clerk | Standard Vision Service Plan | Family |
| Life | Eben Manager | Prudential Life 1x Salary | 1 X Salary |
| Supplemental Life | Eben Manager | New York Life Supplemental 50K | $50,000 |
| AD/D | Eben Manager | Prudential AD & D Insurance | $ |
| Dependent Life | Eben Manager | New York Life Dependent Life | See Dependent Covrgs |
| Short-Term Disability | Eben Manager | Blue Cross Short-Term Disablty | 40% of Salary |
| Long-Term Disability | Eben Manager | | Waived |
| 401(k) | Eben Manager | Fidelity 401(k) | 9% Before Tax |
| Employee Stock Purchase | Eben Manager | ZEB Company ESPP Program | 7% Before Tax |
| Sick | Eben Manager | EBenefits Sick Plan | - - - - - |
| Vacation | Eben Manager | EBenefits Vactn Plan | - - - - - |

Benefits Program Overview

Other Benefits

Search Authoria

Benefits Summary page

Listed first on this page is the name of the employee, followed by a line of text informing the user to enter a new date in order to review information in effect as of that date.

Appearing next on the page is a summary of the employee's benefits arranged as follows:

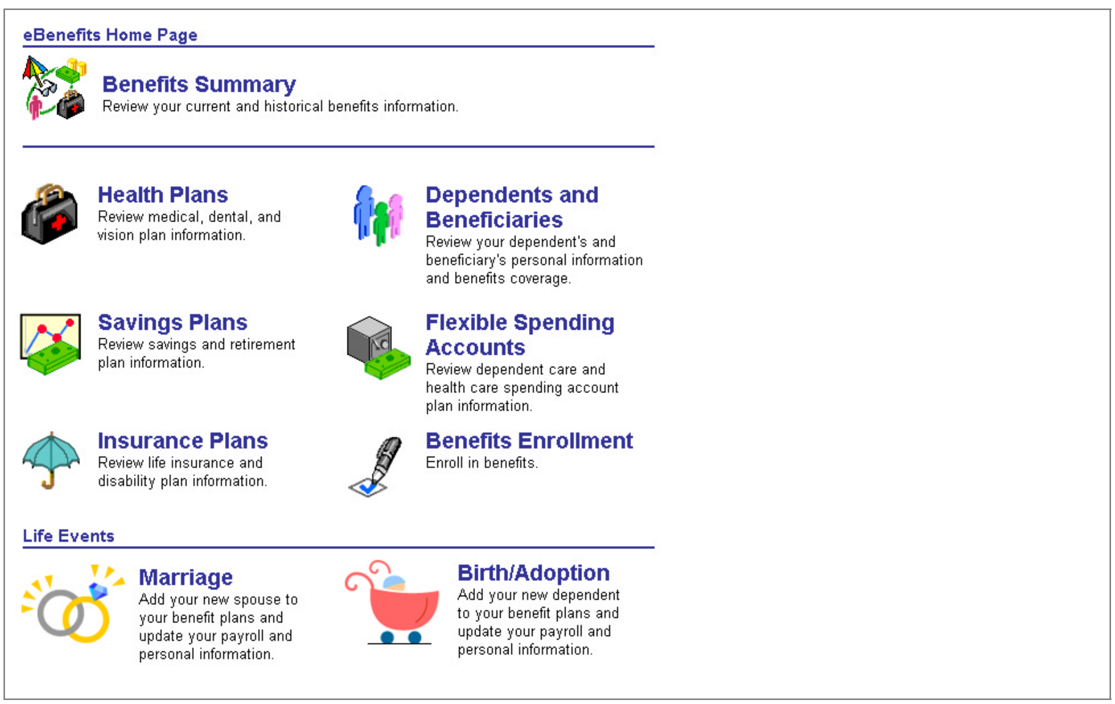
| | |
|---|---|
| **Type of Benefit** | The benefit plan type, such as medical, dental, vision, and so on. Clicking on any benefit plan takes the employee to a page displaying plan details. |
| **Job Description** | This is an employee's job description for each listed benefit enrollment, if the employee has multiple jobs. |
| **Plan Description** | The name of the benefit plan as defined on the Benefit Plan table. |
| **Coverage or Participation** | The level or value of coverage. Level of coverage applies to medical plans when the coverage code describes the number of covered family members. |

A benefit plan type listed in the table may also be a link to the provider's pages, or, if Authoria PS is installed, to the Authoria PS pages.

If Authoria PS is installed, links to a benefits program overview, other benefits, and to an Authoria PS search page will appear.

## Benefits Home Page

| | |
|---|---|
| Usage | Used to link you to pages enabling you to review current, future and historical information for all of your enrolled plans. |
| Object Name | W3EB_INTRO |
| Navigation | **Self Service, eBenefits, Home, Benefits Home** |




eBenefits Home Page

The eBenefits Home Page provides users with icons and descriptions of key eBenefits pages. Each icon is a link to the entry-level page for that benefit.

CHAPTER 4

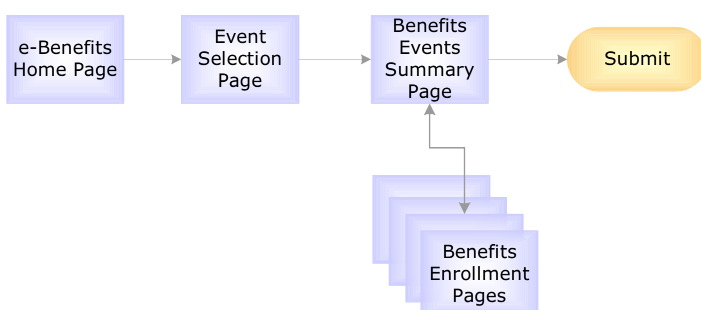
# Enrolling in Benefits

## Overview of Enrollment Pages

eBenefits enrollment pages are a two-way communication between an organization and its employees. The organization presents information about benefits and how they work as well as any rules and regulations regarding the employee's benefit choices. Employees use the benefits enrollment pages to communicate their benefit choices to the organization.

The enrollment process is initiated when the system creates an enrollment event. Once employees are notified of an event, they can link to the Open Benefit Events page from the eBenefits home page. From the Open Benefit Events page, they are taken to the Benefits Summary page, where they can review benefit elections for all plans in their benefit program, as well as link to all plan-type pages where elections can be made.

After any plan-type election has been made, the employee is returned to the Benefits Summary page to continue the selection process, and the process is repeated for each available benefit. After completing all elections, employees submit their choices to the system.




Enrollment process

## Setting Up Benefits Enrollment

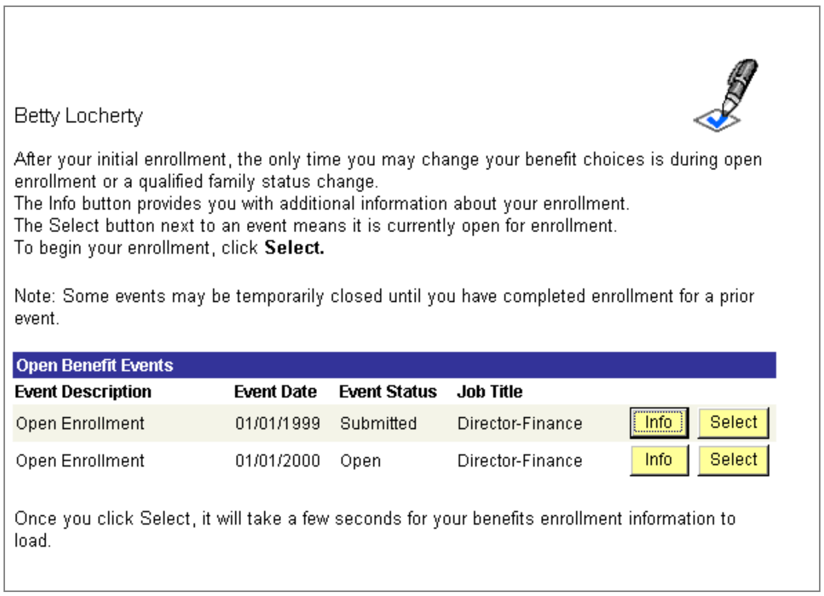
### Setup Table

All eBenefits functionality is controlled by fields on pages within the core benefits application. It is necessary to configure these fields before Benefits Enrollment pages are activated.

For more information about configuring eBenefits pages, see Setting Up eBenefits .

## Open Benefit Events Page

| | |
|---|---|
| Usage | Use the Open Benefit Events page to display information about an enrollment event. The enrollment process is initiated when eligibility and event rules have been processed to produce a list of valid benefit choices. |
| Object Name | W3EB_ENR_SELECTW3 |
| Navigation | **Self Service, eBenefits, Enrollment, Benefits Enrollment** |




Open Benefit Events page

Listed after the title of the page is the name of the person enrolling for benefits. Immediately following is a text block that provides information relevant to the enrollment process. The paragraph of instructional text is stored in a setup table and can be modified as necessary. This informational text is the same across all programs and events.

### Open Benefit Events

**Event Description** Type of enrollment event (open enrollment, life event, and so on).

**Event Date** The date that the system assigns to an enrollment event.

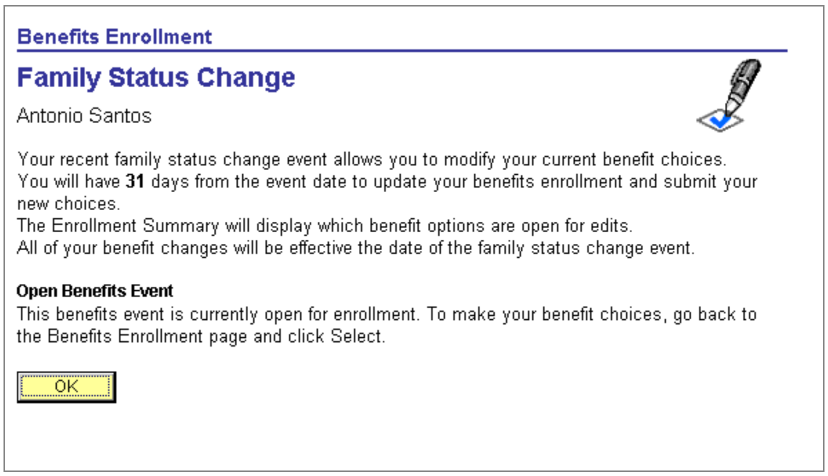
**Event Status** The event status can be one of three values: ***Open, Closed,*** or ***Submitted.***

**Job Title** The employee's job title is derived from the primary Job record on which the event is based.

| | |
|---|---|
| **Info** | Click **Info** to display an informational page describing the event. |
| **Select** | Click **Select** to move to the Benefits Summary page. |

## Event Information Page

| | |
|---|---|
| Usage | This page provides enrollment information to the employee. |
| Object Name | W3EB_ENR_INFO |
| Navigation | Click **Info** on the Event Selection page. |

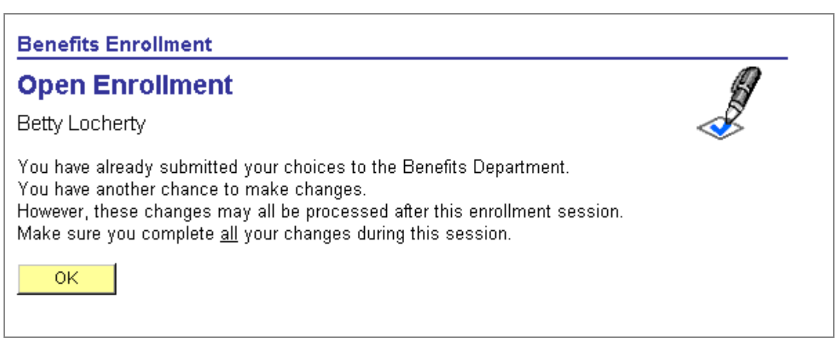


Event Information page

This page presents enrollment information to employees, and instructs them to click **OK** to return to the Open Benefits Event page in order to continue the enrollment process.

## Submitted Event Working Page

| | |
|---|---|
| Usage | This page provides enrollment information to the employee. |
| Object Name | W3EB_ENR_SELECTWRN |
| Navigation | Click **Select** on the Event Selection page. |



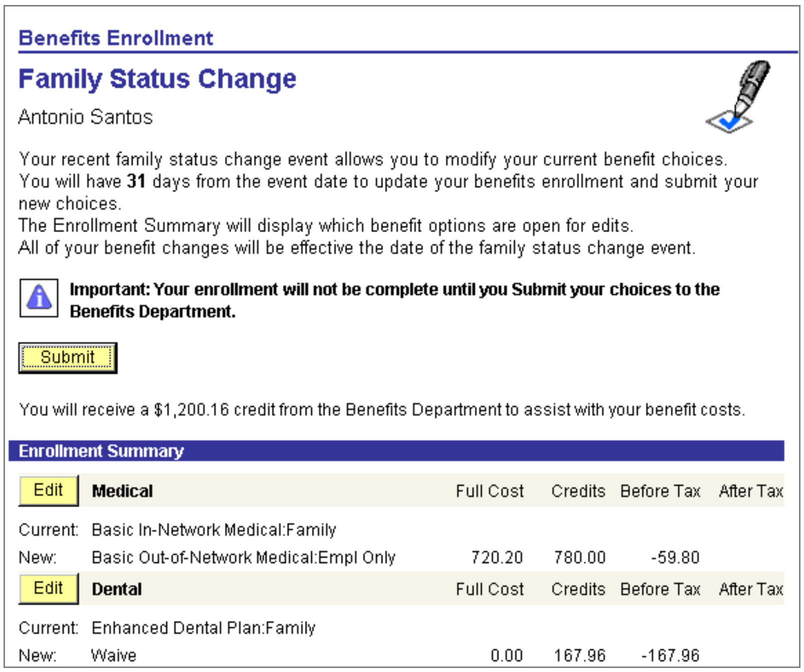
Submitted Event Working page

This page will be displayed when the event is submitted.

When users have read the information, they should click the **OK** button to continue the enrollment process.

## Benefits Event Summary Page

| | |
|---|---|
| Usage | Use the Benefits Event Summary page to review benefit plan elections. |
| Object Name | W3EB_ENR_SUMMARY |
| Navigation | Click **Select** on the Event Selection page. |



Benefits Event Summary page (1 of 6)

| | | | | | |
|---|---|---|---|---|---|
| Edit | **Vision** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Standard Vision Plan:Family | | | | |
| New: | Standard Vision Plan:Family | 208.00 | 0.00 | 208.00 | |
| | **Domestic Partner Medical - linked benefit, enroll through Medical.** | | | | |
| Current: | No Coverage | | | | |
| New: | Waive | 0.00 | 0.00 | | 0.00 |
| | **Domestic Partner Dental - linked benefit, enroll through Dental.** | | | | |
| Current: | No Coverage | | | | |
| New: | Waive | 0.00 | 0.00 | | 0.00 |
| | **Domestic Partner Vision - linked benefit, enroll through Vision.** | | | | |
| Current: | No Coverage | | | | |
| New: | No Coverage | | | | |
| Edit | **Life** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Basic Life Plan: $50,000 | | | | |
| New: | Basic Life Plan: $50,000 | 0.00 | 0.00 | 0.00 | |
| Edit | **Supplemental Life** | Full Cost | Credits | Before Tax | After Tax |
| Current: | 2x Salary: 2 * Salary | | | | |
| New: | 2x Salary: 2 * Salary: $37,000 | 13.52 | 0.00 | | 13.52 |
| Edit | **AD/D** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Flat 25K AD&D: $25,000 | | | | |
| New: | Flat 25K AD&D: $25,000 | 0.00 | 0.00 | | 0.00 |

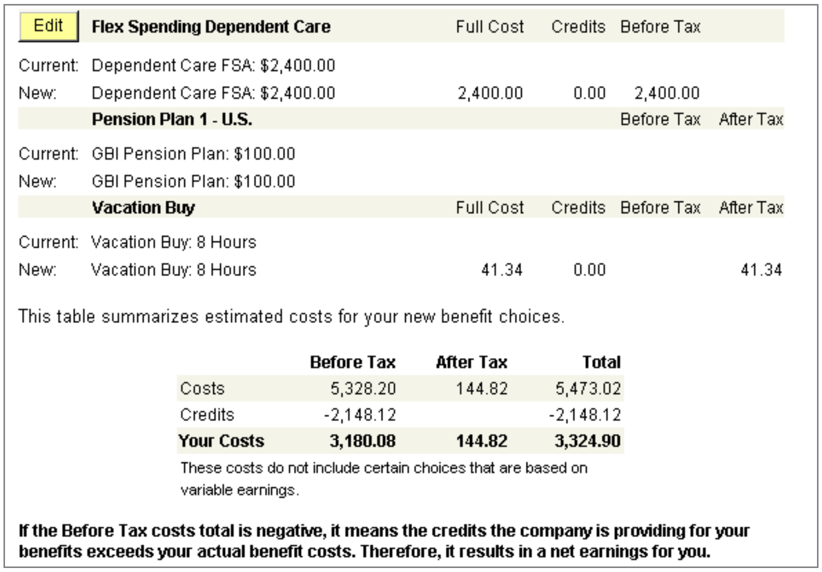
Benefits Event Summary page (2 of 6)

| | | | | | |
|---|---|---|---|---|---|
| Edit | **Dependent AD/D** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Dependent Accidental Death: $5,000 | | | | |
| New: | Dependent Accidental Death: $10,000 | 4.68 | 0.00 | | 4.68 |
| Edit | **Dependent Life** | Full Cost | Credits | Before Tax | After Tax |
| Current: | DepLife EE: 1*Salary | | | | |
| New: | DepLife EE: 1*Salary | 0.00 | 0.00 | | 0.00 |

Benefits Event Summary page (3 of 6)

| | | | | | |
|---|---|---|---|---|---|
| Edit | **Supplemental AD/D** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Supplemental AD/D - $500K: $500,000 | | | | |
| New: | Supplemental AD/D - $500K: $500,000 | 1.04 | 0.00 | | 1.04 |
| | **Short-Term Disability** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Short Term Disability - 50%: 50% of Salary | | | | |
| New: | Short Term Disability - 50%: 50% of Salary | 10.40 | 0.00 | | 10.40 |
| | **Long-Term Disability** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Standard Long-term Disability: 50% of Salary | | | | |
| New: | Standard Long-term Disability: 50% of Salary | 73.84 | 0.00 | | 73.84 |
| | **401(k)** | | | Before Tax | After Tax |
| Current: | 401(k) Employer Pct Match | | | 3.00% | $200.00 |
| New: | 401(k) Employer Pct Match | | | 3.00% | $200.00 |
| | **Profit Sharing** | | | Before Tax | After Tax |
| Current: | Profit Sharing Plan | | | | |
| New: | Profit Sharing Plan | | | | |
| | **Employee Stock Purchase** | | | Before Tax | After Tax |
| Current: | GBI Company ESPP Program | | | | 1.00% |
| New: | GBI Company ESPP Program | | | | 1.00% |
| Edit | **Flex Spending Health - U.S.** | Full Cost | Credits | Before Tax | |
| Current: | Healthcare FSA: $2,000.00 | | | | |
| New: | Healthcare FSA: $2,000.00 | 2,000.00 | 0.00 | 2,000.00 | |

Benefits Event Summary page (4 of 6)



| Edit | Flex Spending Dependent Care | Full Cost | Credits | Before Tax | |
|---|---|---|---|---|---|
| Current: | Dependent Care FSA: $2,400.00 | | | | |
| New: | Dependent Care FSA: $2,400.00 | 2,400.00 | 0.00 | 2,400.00 | |
| | **Pension Plan 1 - U.S.** | | | Before Tax | After Tax |
| Current: | GBI Pension Plan: $100.00 | | | | |
| New: | GBI Pension Plan: $100.00 | | | | |
| | **Vacation Buy** | Full Cost | Credits | Before Tax | After Tax |
| Current: | Vacation Buy: 8 Hours | | | | |
| New: | Vacation Buy: 8 Hours | 41.34 | 0.00 | | 41.34 |

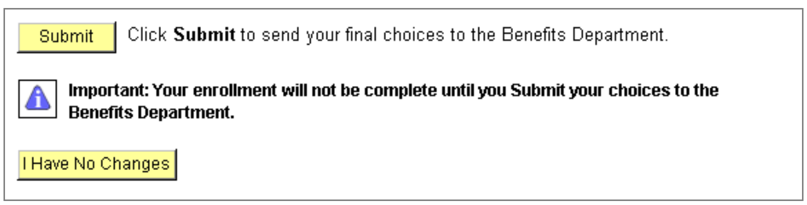
This table summarizes estimated costs for your new benefit choices.

| | Before Tax | After Tax | Total |
|---|---|---|---|
| Costs | 5,328.20 | 144.82 | 5,473.02 |
| Credits | -2,148.12 | | -2,148.12 |
| **Your Costs** | **3,180.08** | **144.82** | **3,324.90** |

These costs do not include certain choices that are based on variable earnings.

**If the Before Tax costs total is negative, it means the credits the company is providing for your benefits exceeds your actual benefit costs. Therefore, it results in a net earnings for you.**

Benefits Event Summary page (5 of 6)



Submit Click **Submit** to send your final choices to the Benefits Department.

**Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.**

I Have No Changes

Benefits Event Summary page (6 of 6)

### Open Enrollment

Listed first on this page is the type of enrollment event, followed by the name of the person enrolling for benefits. Immediately following is a text block providing enrollment information. The first set of text is an explanation of the event and comes from an effective-dated setup table that can be modified. The setup table is keyed by benefit program and event, enabling the inclusion of different descriptions for each event and permitting different descriptions of the same event for various employee groups.

Click the **Submit** button to initiate the Enrollment Submission process. If employees are satisfied with their current elections, they should click the **I Have No Changes** button located at the bottom of the page.

The Coverage and Election Summary section displays the different benefits available to the employee, the current enrollment in those benefits, and what the employee will get at the end of the event. The Current and New coverages are a combination of the benefit plan names and the plan-type specific coverage details.

Click the **Edit** button to link to the page displaying benefits for plan-types. Edit buttons are visible only if the employee can make changes to that type of benefit. The system will also suppress the Edit button if the plan-type is in a non-qualified relationship with another plan-type. In that case, the system will instead display text referencing the other plan-type.

The following fields are consistent regardless of the plans displayed:

| | |
|---|---|
| **Full Cost** | Cost of benefit. The cost amounts will be either the annual costs or the per-period costs, and display preferences can be defined on the setup tables. The system will use the same rate period for all pages and all employees in the benefit program. Full Cost and Credits columns can be suppressed in the setup tables. |
| **Credits** | Value of offsetting credits contributed by the employer. The Credits column displays the total of all credits for the plan-type, including both the plan specific credits and the general credits at the plan-type level. |
| **Before Tax** | The employee's cost if the deduction is taken on a pre-tax basis. |
| **After Tax** | The employee's cost if the deduction is taken on a post-tax basis. |

### Cost Summary

At the bottom of this page is a cost summary table. This table displays all the available costs and the total credit amount, and can be modified to include additional instructions.

Click the Submit button to initiate the Enrollment Submission process, which has three parts: validating the election, collecting rollover choice, and confirming that the employee is finished.

The system does a final validation of the employee's elections, and, if errors are found, it displays an error message, and returns to the summary page.

The credit rollover portion collects the employee's choice regarding what to do with excess credits. The setup tables can be modified to collect this information. The text on this section comes from the setup tables and can also be customized.

## Technical Information About the Benefits Event Summary Page

Information about an individual's current coverage comes from the base benefit tables. The system will not use the event date when pulling current coverage. It will instead use the deduction begin date on the BAS_PARTIC_PLAN rows. This date has been adjusted for grace and waiting periods. Using this date gives a more accurate current election and more closely matches what the batch process will consider current.

Information about new coverage comes from the employee's election or the default coverage. If the BAS_PARTIC_PLAN row has an election, either entered by the employee or pre-entered by the system, then the system will use that entry as the basis for formatting the new coverage. If there is no entry, then the system will go to the BAS_PARTIC_OPTN rows to find the default value. If there is no election and no default, then the system will display the phrase "*No Coverage*".

The plan-types (medical, vision, savings, FSA, and so on) display in the top row of the Coverage and Election Summary section. There is one multi-line entry for every plan-type in the event. The plan-types will list in order based on the display plan sequence value in the benefit program definition. The name of the plan-type comes from the long name in the Translate table.

For all plan-types, the system always shows the rows if there are multiple plans available, or if there is the option of waiving coverage. The setup tables can be modified so that the system suppresses the plan-types if the employees have no choice.

# Benefits Enrollment Pages

Clicking any **Edit** button on the Enrollment Summary page takes the user to an enrollment page for that benefit.

The following table lists code ranges for benefit plan types:

| ***Plan-type*** | ***Code Ranges*** |
|---|---|
| Health Plans | 10–19, 1A–1Z |
| Life and AD/D Plans | 20–29 , 2A–2Z |
| Disability Plans | 30–39, 3A–3Z |
| Savings Plans | 40–49, 4A–4Z |
| Leave Plans | 50–59, 5A–5Z |
| Flexible Benefit Plans | 60–69, 6A–6Z |
| United States Retirement Plans | 70–79, 7A–7Z |
| Canadian Pension Plans | 80–89, 8A–8Z |
| Vacation Buy/Sell Plans | 90–99, 9A–9Z |

## Health Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use this page to review or elect health plan-type benefits. |
| Object Name | W3EB_ENR_1X_ELECT |
| Navigation | Click the **Edit** button on any Health line of the Enrollment Summary page. |
| Prerequisites | The system must create an enrollment event. |

**Benefits Enrollment**

## Medical

Antonio Santos

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured.

**Important! Your current coverage is: Basic In-Network Medical with Family coverage. This coverage is no longer available. If you do not make a choice, your coverage will be: Basic Out-of-Network Medical with Employee Only coverage**

Enrollment in this benefit may require proof of coverage.

Your enrollment on this page may affect your choices for the following type(s) of coverage:
Dental

Complete your enrollment on this page before enrolling in the benefit plans listed above.

Besides any credits listed below, you will receive an additional $120.12 credit to help with the cost of this benefit. You will only receive this credit if you select one of the following choices.

Health Plan Enrollment Page (1 of

**Select an Option**

Here Are Your Available Options With Your annual Costs:
(Your cost = Full benefit cost - Credits)

Overview of all Plans

Select one of the following plans:

If you choose to Waive coverage in this plan, you will receive a $192 credit.

(•) Basic Out-of-Network Medical — Search for providers in this plan

This plan is offered in areas where Aetna networks are unavailable. You may choose any doctor or hospital. This plan has a deductible of $200 per person and $600 per family. Once the deductible is met, the plan pays 80% of customary charges.

| Coverage Level | Costs | Credits | Your Costs | Tax Class |
|---|---|---|---|---|
| Employee Only | $720.20 | $659.88 | $60.32 | Before-Tax |
| Employee + Spouse | $900.12 | $659.88 | $240.24 | Before-Tax |
| Employee + Dependents | $1,200.16 | $659.88 | $540.28 | Before-Tax |
| Family | $1,439.88 | $659.88 | $780.00 | Before-Tax |

Health Plan Enrollment Page (2 of 6)

( ) Enhanced Medical Plan

The enhanced plan allows you to use both in-network and out-of-network providers. We suggest that you use in-network providers whenver possible to minimize your out-of-pocket costs. This plan has a deductible of $300 per person and $900 per family.

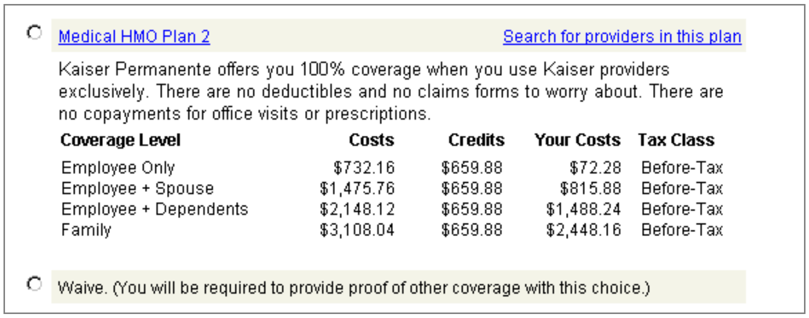
| Coverage Level | Costs | Credits | Your Costs | Tax Class |
|---|---|---|---|---|
| Employee Only | $888.16 | $659.88 | $228.28 | Before-Tax |
| Employee + Spouse | $1,763.84 | $659.88 | $1,103.96 | Before-Tax |
| Employee + Dependents | $2,580.24 | $659.88 | $1,920.36 | Before-Tax |
| Family | $3,708.12 | $659.88 | $3,048.24 | Before-Tax |

( ) Medical HMO Plan 1 — Search for providers in this plan

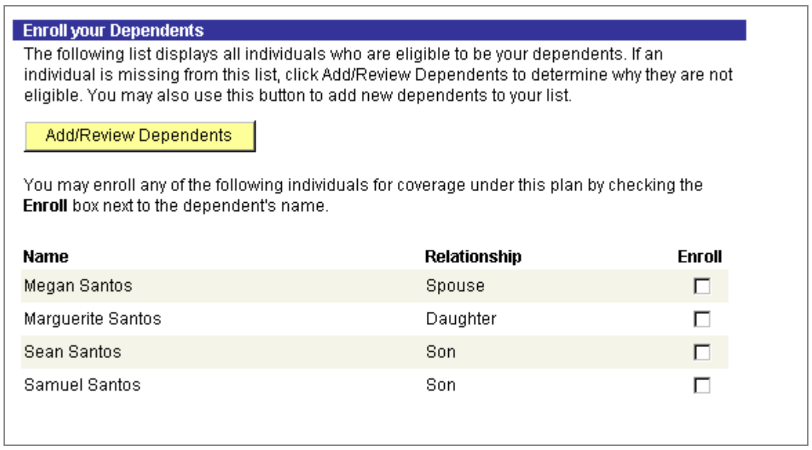
Kaiser Permanente offers you 100% coverage when you use Kaiser providers exclusively. There are no deductibles and no claims forms to worry about. With this option, you have a $10.00 copayment for office visits and prescriptions.

| Coverage Level | Costs | Credits | Your Costs | Tax Class |
|---|---|---|---|---|
| Employee Only | $732.16 | $659.88 | $72.28 | Before-Tax |
| Employee + Spouse | $1,475.76 | $659.88 | $815.88 | Before-Tax |
| Employee + Dependents | $2,148.12 | $659.88 | $1,488.24 | Before-Tax |
| Family | $3,108.04 | $659.88 | $2,448.16 | Before-Tax |

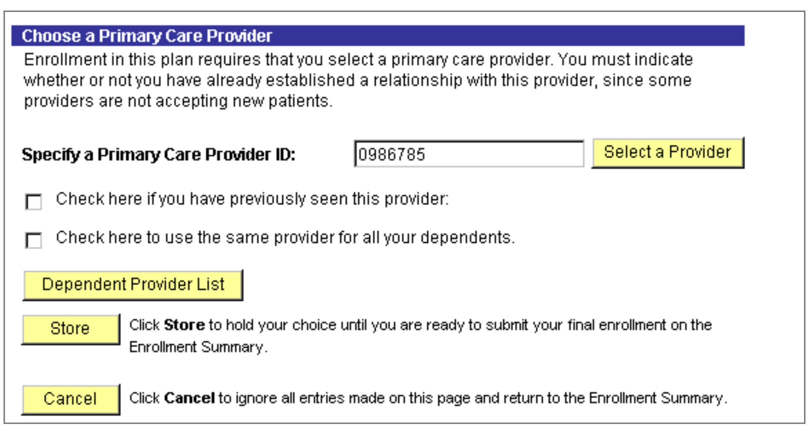
Health Plan Enrollment Page (3 of 6)




Health Plan Enrollment Page (4 of 6)




Health Plan Enrollment Page (5 of 6)




Health Plan Enrollment Page (6 of 6)

The example shown is for medical benefits, but all health plan pages are similar in organization and design.

Listed first on this page is the plan type description, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information that is relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Listed next is a text block about current and default coverage.

The system starts by checking for existing coverage. It uses the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The system searches the plan options looking for the one marked as the default. The default will be one of the following:

- ***The current coverage,*** in which the system displays the text "You will remain in this coverage if you do not choose something different."
- ***A different plan,*** in which the system displays a message informing the employee that their coverage will change if they do not make an alternative election. The system will format the plan description using the same rules defined above for the current coverage.
- ***Waive,*** in which the system displays the text "You will lose your coverage if you do not make an election."
- ***No default,*** in which the system displays the text "You will lose your coverage if you do not make an election."

The text block continues with information regarding plan-type restrictions. The system will list any restrictions, limits, or requirements immediately below the Default Coverage area. Some restrictions apply to all plan-types, such as cross-plan restrictions and proof required. Some restrictions are specific to the type of benefit. The cross-plan logic is derived from multiple sources.

The user can click Condensed Summary Page and be taken to a page where all the plans, coverage levels, and costs are condensed into a single grid.

### Select One of the Following Plans

The focus of Health Plan Enrollment pages is the list of options. This list is organized differently from the way that the benefit program is built and from the way that the data is stored in the database.

The order of the plans will be based on the Option Sequence field in the benefit program definition. The order of the coverage levels under each plan will also be based on the Option Sequence field, but within the benefit plan.

The employees make their choice at the plan level, not the coverage level. The system will determine the level of coverage based on which dependents the employee chooses to cover. It will select the cheapest coverage that will allow all the dependents chosen.

The plan name provides a link to additional information. The rules are as follows:

- If Authoria PS is installed and there is content for this plan, the name will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the name will link to the provider's page. The installation process provides this address in the provider definition. This is an external link and may show as a new browser window. The system will let the user know if it transfers to a new window.

- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the plan name shows as plain text.
- If GeoAccess is installed a link will appear that takes the user to a GeoAccess provider search page.

The description of the plan comes from the benefit plan definition. It is keyed by plan-type and plan, so the description will be the same across all benefit programs and all events.

The coverage level grid entries consist of a description of the coverage code, full disclosure of costs, and the Before/After tax status of the deduction. The cost disclosure consists of the total cost, the total of any credits at the plan level and the employee's cost, which is the difference between the two. The cost disclosure does not include credits at the plan-type level, so the amount in the "Your Cost" column may be reduced even further.

Cross-plan dependencies will show differently depending on whether the dependency is a non-qualified coverage relationship.

In a non-qualified relationship, the system will combine the two plan-types into one display and process them together.

If there is not a non-qualified relationship, the system will display any cross-plan dependencies below the option description.

The coverage level dependency will be handled automatically by the system. The system will change the dependent enrollments to match the enrollments in the dependent plan.

| | |
|---|---|
| **Coverage Level** | Employee only, employee + spouse, employee + dependents, family. |
| **Cost** | Cost of benefit. |
| **Credits** | Value of offsetting credits contributed by the employer. |
| **Your Cost** | Cost to employee after credits are applied. |
| **Tax Class** | ***Before-Tax*** or ***After-Tax.*** |

### Enroll Your Dependents

The explanatory text and the instruction text come from the setup tables and can be modified. Both are keyed by benefit program, event type, and plan-type. If employees need to review dependent information, they should click the **Add/Review Dependents** button and they will be taken to the Dependent/Beneficiary Coverage Summary Page.

This dependents section exists even if the employee has no dependents. There is an option in the installation process to suppress this section in the setup tables.

The initial setting of the check boxes in this section comes from the event tables, not the current coverage. So unless the Pre-Enter option is selected on the Event Rules page, these check boxes are initially clear.

In the case of a cross-plan dependency at the dependent level, the system sets the check boxes based on the enrollment in the other plan-type. The system will leave all check boxes clear if there is no election yet in the other plan-type.

The system won't perform any edits if the "Ignore Dep/Ben edits" flag is ***On*** in the event rules.

The system determines the level of coverage based on which dependents are chosen to be covered. It selects the cheapest coverage for all selected dependents.

The system displays any court order messages attached to the dependents. It will not allow the employee to stop coverage for a dependent if there is a court order for the dependent, and the dependent is currently covered.

| | |
|---|---|
| **Add/Review Dependents** | Click this button to launch a new window and be taken to the Dependent/Beneficiary Summary page. |
| **Name** | Name of dependent |
| **Relationship** | Relationship of dependent |
| **Enroll** | Users may enroll dependents in the chosen medical plan by selecting the check box(es). |

### Choose a Primary Care Provider

The primary care provider section displays only if the plan selected requires a primary care provider. The text at the beginning is stored in the setup tables and can be modified. The text is keyed by benefit program, event, and plan-type.

Clicking the **Select a Provider** button, if present, takes the user to a page displaying the vendor's list of all participating primary care providers.

Below the **Select a Provider** button, if present, are check boxes for selecting whether the primary care physician (PCP) has been previously seen, and whether to use the same PCP for dependents.

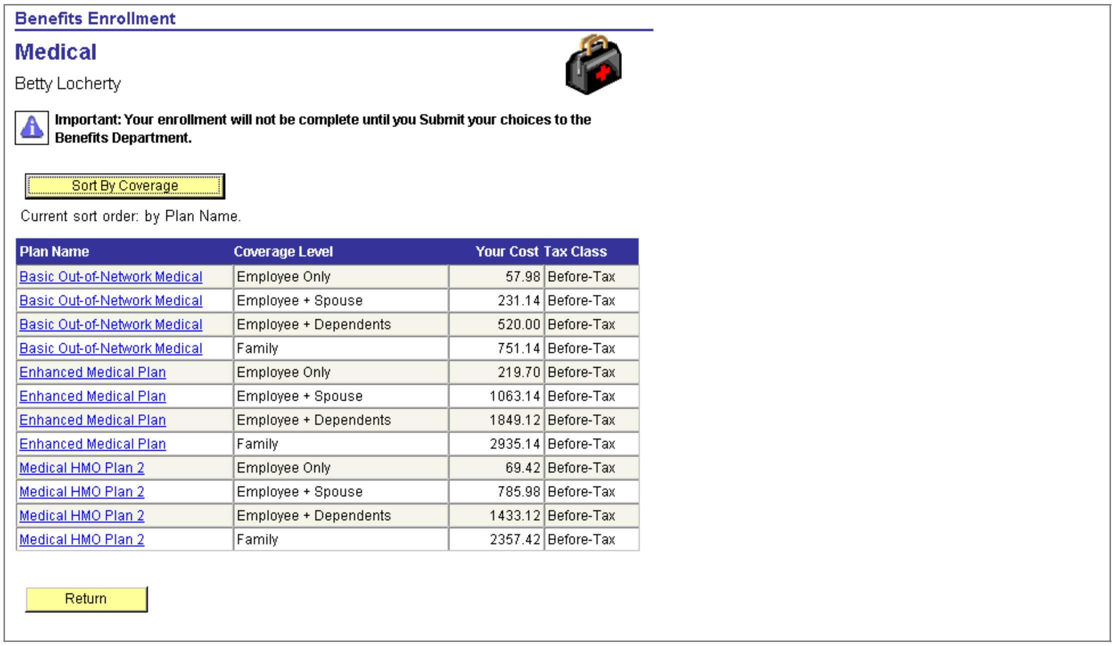
The table for entering dependent primary care providers, if present, will appear as a separate page if the user clears the **Check here to use the same provider for all your dependents** check box.

### Closing

| | |
|---|---|
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

### Condensed Summary Page

| | |
|---|---|
| Usage | Use the condensed Summary page to view all plans, coverage levels, and costs condensed into a single grid. |
| Object Name | W3EB_ENR_1X_SMRY |
| Navigation | Click **Overview of All Plans** on the Health Plan enrollment page |
| Prerequisites | The system must create an enrollment event. |


Benefits Enrollment

Medical

Betty Locherty

Important: Your enrollment will not be complete until you Submit your choices to the Benefits Department.

Sort By Coverage

Current sort order: by Plan Name.

| Plan Name | Coverage Level | Your Cost | Tax Class |
|---|---|---|---|
| Basic Out-of-Network Medical | Employee Only | 57.98 | Before-Tax |
| Basic Out-of-Network Medical | Employee + Spouse | 231.14 | Before-Tax |
| Basic Out-of-Network Medical | Employee + Dependents | 520.00 | Before-Tax |
| Basic Out-of-Network Medical | Family | 751.14 | Before-Tax |
| Enhanced Medical Plan | Employee Only | 219.70 | Before-Tax |
| Enhanced Medical Plan | Employee + Spouse | 1063.14 | Before-Tax |
| Enhanced Medical Plan | Employee + Dependents | 1849.12 | Before-Tax |
| Enhanced Medical Plan | Family | 2935.14 | Before-Tax |
| Medical HMO Plan 2 | Employee Only | 69.42 | Before-Tax |
| Medical HMO Plan 2 | Employee + Spouse | 785.98 | Before-Tax |
| Medical HMO Plan 2 | Employee + Dependents | 1433.12 | Before-Tax |
| Medical HMO Plan 2 | Family | 2357.42 | Before-Tax |

Return

Condensed Summary page

| | |
|---|---|
| **Description of Benefit** | Name of plan-type |
| **Coverage Level** | Employee and any dependents or family enrollments. |
| **Your Cost** | Cost of benefit |
| **Tax Class** | Either ***Before-Tax*** or ***After-Tax*** classification. |

The grid can be sorted by provider or by coverage level. This display makes it easier to compare costs across all plans by condensing them into a space that can fit completely within the browser window. Elections may not be made from this display.

Employees return to the previous page by clicking the **Return** button.

## Insurance Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use the Life Insurance Enrollment page to enroll in life insurance benefits. |
| Object Name | W3EB_ENR_2X_ELECT |
| Navigation | Click the **Edit** button on any insurance line of the Enrollment Summary page. |

**Benefits Enrollment**

**Life**

Antonio Santos

Life insurance plays an important role in ensuring that your family is financially secure if you were to pass away.

**Important! Your current coverage is: Basic Life Plan: $50,000. You will continue with this coverage if you do not make a choice.**

**Here Are Your Available Options With Your Annual Costs:**

(•) Basic Life Plan ( $50,000)
You are automatically enrolled in the Basic Life Plan ( $50,000) plan.

**Notes**

This coverage is provided at no cost to you.
Coverage in this plan is automatic. However you will need to designate your beneficiaries.

Life Insurance Plan Enrollment page (1 of 3)

**Designate Your Beneficiaries**

The following list displays all individuals who are eligible to be your beneficiaries. If an individual is missing from this list, click Add/Review Beneficiaries to determine why they are not eligible. You may also use this button to add new beneficiaries to your list.

Add/Review Beneficiaries

You may designate the following individuals as Primary or Secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all Primary beneficiaries are deceased.

If you select flat dollar amounts, then one beneficiary must be designated to receive any left over money from the policy.

If you select percents, all percents for Primary beneficiaries must total 100. All percents for Secondary beneficiaries (if any) must also total 100.

*Enter Primary Allocations as: Percent

***Enter Secondary Allocations as:** Percent

Life Insurance Plan Enrollment page (2 of 3)

| Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation |
|---|---|---|---|---|---|
| Megan Santos | Spouse | 25 | | 25 | |
| Marguerite Santos | Daughter | 25 | | 25 | |
| Sean Santos | Son | 25 | | 25 | |
| Carissa Santos | Mother | 25 | | 25 | |
| Samuel Santos | Son | | | | |
| | | | **Total:** | 100 | 0 |

Store — Click **Store** to hold your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Cancel — Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Life Insurance Plan Enrollment page (3 of 3)

### Life

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next is a text block relating to current and default coverage The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage. It uses the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The system searches the plan options looking for the one marked as the default. The default will be one of the following:

- ***The current coverage,*** in which the system displays the text informing employees that their coverage will change if they do not make an alternative election.
- ***A different plan,*** in which the system displays a message informing the employee that their coverage will change if they do not make an alternative election. The system will format the plan description using the same rules defined above for the current coverage.
- ***Waive,*** in which the system displays the text "You will lose your coverage if you do not make an election."

There may not be a default - the system displays the text "You will lose your coverage if you do not make an election."

### Select an Option

This text block displays a message appropriate for the employee's available plans.

### Designate Your Beneficiaries

This section begins with a text block providing information about the beneficiaries listed in the subsequent beneficiary allocation tables, and tells the user to click the **Add/Review Beneficiaries** button to make any necessary changes to the list.

The text block also provides instructions for making primary and secondary beneficiary allocations, including information regarding dollar amounts as well as percentages. Select **Percent** from the available options to allocate a percentage. Select **Amount** from the available options to allocate a specific dollar amount.

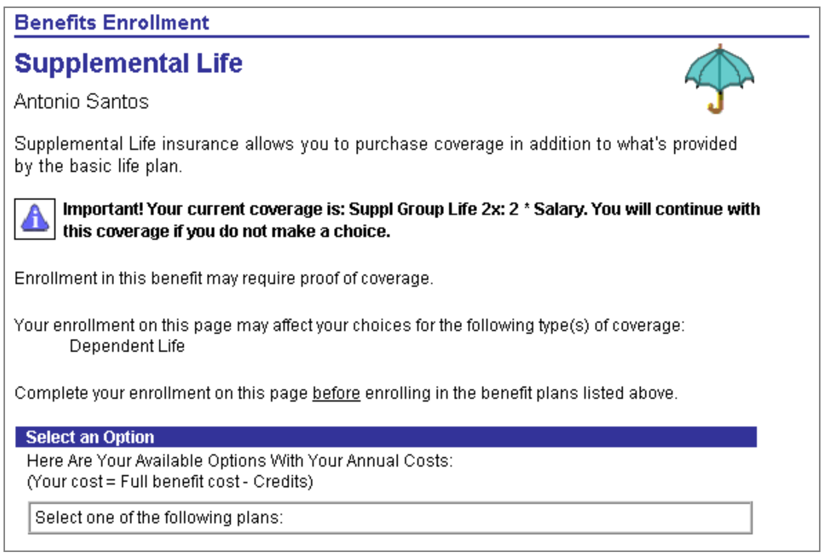
| | |
|---|---|
| **Name** | Name of beneficiary |
| **Relationship** | Relationship of beneficiary to employee. |
| **Current Primary Allocation** | Flat amount or percentage value of allocation. |
| **Current Secondary Allocation** | Flat amount or percentage value of allocation. |
| **New Primary Allocation** | Flat amount or percentage of new allocation. |
| **New Secondary Allocation** | Flat amount or percentage of new allocation. |

**Store** Click this button to hold elections for submission.

**Cancel** Click this button to cancel all entries and return to the enrollment form.

## Supplemental Life Insurance Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use the Supplemental Life Insurance Plan Enrollment page to enroll in supplemental life insurance benefits. |
| Object Name | W3EB_ENR_2X_ELECT |
| Navigation | Click the **Edit** button on the Supplemental Life line of the Enrollment Summary page. |
| Prerequisites | The system must create an enrollment event. |




Supplemental Life Insurance Plan Enrollment page (1 of 4)

| | Coverage Level | Full Cost | Credits | Your Cost | Tax Class |
|---|---|---|---|---|---|
| ○ | Waive | | | | |
| ○ | Suppl Group Life 1x ( $19,000) | 6.76 | | 6.76 | After-Tax |
| ◉ | Suppl Group Life 2x ( $37,000) | 13.52 | | 13.52 | After-Tax |
| ○ | * Suppl Group Life 3x ( $56,000) | 20.28 | | 20.28 | After-Tax |
| ○ | * Suppl Group Life 4x ( $74,000) | 26.52 | | 26.52 | After-Tax |
| ○ | * Suppl Group Life 5x ( $93,000) | 33.28 | | 33.28 | After-Tax |
| ○ | Suppl Group Life 100K ( $100,000) | 35.88 | | 35.88 | After-Tax |
| ○ | New York Life Supplementl Life | 0.36 | | 0.36 ^ | After-Tax |

**Notes**

* If you select this choice, you will be required to provide Evidence of Insurability before coverage takes effect.
^ The cost displayed for this plan is per $1,000 of coverage.

Supplemental Life Insurance Plan Enrollment page (2 of 4)

**Designate Your Beneficiaries**

The following list displays all individuals who are eligible to be your beneficiaries. If an individual is missing from this list, click Add/Review Beneficiaries to determine why they are not eligible. You may also use this button to add new beneficiaries to your list.

Add/Review Beneficiaries

You may designate the following individuals as Primary or Secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all Primary beneficiaries are deceased.

If you select flat dollar amounts, then one beneficiary must be designated to receive any left over money from the policy.

If you select percents, all percents for Primary beneficiaries must total 100. All percents for Secondary beneficiaries (if any) must also total 100.

***Enter Primary Allocations as:** Percent

***Enter Secondary Allocations as:** Percent

Supplemental Life Insurance Plan Enrollment page (3 of 4)

| Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation |
|---|---|---|---|---|---|
| Megan Santos | Spouse | 25 | | 25 | |
| Marguerite Santos | Daughter | 25 | | 25 | |
| Sean Santos | Son | 25 | | 25 | |
| Carissa Santos | Mother | 25 | | 25 | |
| Samuel Santos | Son | | | | |
| | | | **Total:** | 100 | 0 |

Store — Click **Store** to hold your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Cancel — Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Supplemental Life Insurance Plan Enrollment page (4 of 4)

The Supplemental Life page is similar to the Life Insurance page in organization and design.

### Supplemental Life

Supplementary Insurance Plan pages have the most variability in how system information is displayed, calculated and limited. There are different ways of collecting beneficiary information, which affect decisions on whether the system collects beneficiaries or dependents.

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. Some of this information is common to all plan types, and some is plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage, using the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

#### Select an Option

**Coverage Level**

Coverage amounts. The coverage level provides a link to additional information. All levels will link to the same place having the following system rules:

- If Authoria PS is installed and there is content for this plan, the coverage level will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the coverage level will link to the provider’s page. The installation process provides this address in the provider definition. This is an external link and may appear as a new browser window.
- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the coverage level appears as plain text.

**Full Cost**

Cost of coverage

**Credits**

Value of offsetting credits contributed by the employer.

**Your Cost**

Cost of benefit to employee.

**Tax Class**

***Before-Tax*** or ***After-Tax.***

### Designate Your Beneficiaries

Immediately below the options section on the page is a place for collecting beneficiary information. This section does not appear for plans where the method of calculation is "Sum of Dependent Coverage." The installation process has the option of designating whether to collect beneficiaries at the plan-type level.

This section begins with a text block providing information about the beneficiaries listed in the subsequent beneficiary allocation tables, and tells the user to click the **Add/Review Beneficiaries** button to make any changes to the list.

---

For more information about Add/Review Beneficiaries, see Dependent/Beneficiary Management.

---

The text block also provides instructions for making primary and secondary beneficiary allocations, including information regarding dollar amounts as well as percentages.

For all supplemental insurance plan-types, the system displays beneficiaries. The system will not show deceased dependents or beneficiaries unless they have a current allocation.

The system will display any court order messages attached to the beneficiaries. It will force the coverage to stay the same as the current coverage. For example, if a beneficiary has a court order and is currently getting 50% as a beneficiary in the base benefit tables, the system will put 50% in the percentage field and gray it out so that it cannot be changed.

Next on the page is an area for employees to enter their choice for primary and secondary allocations as either percentages or amounts.

| | |
|---|---|
| **Percent, Amount** | Select one of these values to allocate either a percentage or a flat amount. |
| **Name** | Name of beneficiary |
| **Relationship** | Relationship of beneficiary to employee. |
| **Current Primary Allocation** | Flat amount or percentage value of allocation. |
| **Current Secondary Allocation** | Flat amount or percentage value of allocation. |
| **New Primary Allocation** | Flat amount or percentage of new allocation. |
| **New Secondary Allocation** | Flat amount or percentage of new allocation. |

| | |
|---|---|
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

### Limits

The system modifies the display based on any limits that apply. There are three limits involved: coverage group limits, level limits, and cross plan limits. The latter two have to be considered together, as either one could set the lower end for the amount of coverage.

#### Level Limits

These are limits in the event rules that control movement from one plan to the next. There are two types of controls: how many levels can be changed overall and how many levels can be changed with proof.

By definition, level limits only apply when there are multiple plans in the plan-type; therefore, they exist only with the simple grid showing multiple plans.

The system shows only those plans that can be chosen. It does not show plans that are outside the maximum limit. Of the plans displayed, the system marks the plans that require proof and displays text explaining the proof limit.

When there are multiple options in a grid, the system adds an extra column and adds an asterisk if proof is required for the option. The system displays the following message under the grid: “If you select this choice, you will be required to submit evidence of insurability before coverage takes effect.”

#### Coverage Group Limits

Coverage Group Limits are the way that organizations control the amount of coverage for multiple plan-types. For example, the organization may want a total limit on life insurance of $200,000, but life insurance is contained in two plan-types, Life and Supplemental Life. A coverage group limit lets the organization set this limit.

The system will check for a coverage group limit on the current plan-type. It will check other insurance plan-types to see if they also participate in the group limit. If they do, the system will check for enrollments in these plan-types and calculate the coverage elected.

Having found the limit, and the amount currently elected, the system will display the limit, and display a warning if the limit is exceeded. The system will not restrict elections due to a coverage group limit, however it will inform the user that the payroll system will adjust coverage when it calculates checks.

#### Cross Plan Limits

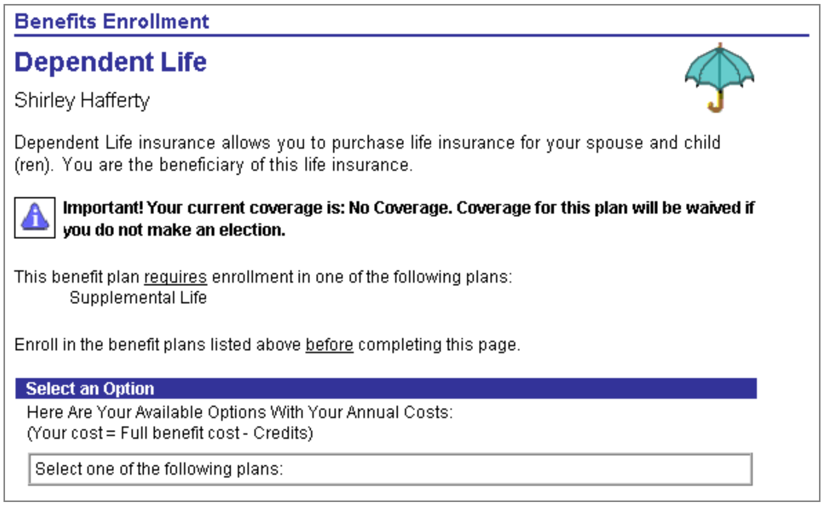
A cross plan limit exists when the coverage elected in the current plan-type can only be a certain percentage of the coverage in another plan-type.

The system will check the other plan-type to see if elections have been made, and, if they have, then the system can get the amount of coverage and calculate the cross plan maximum.

Having calculated the limit, the system can set restrictions in the current plan-type, such as displaying text listing what the limit is. In the case of factor and/or fixed amount coverage, where the amount of coverage is known and unchangeable, the system will make the options unavailable by hiding the option button. In this case, the system will suppress the limit text, if none of the options has exceeded the limit.

## Dependent Life Enrollment Page

| | |
|---|---|
| Usage | This page is used to enroll dependents in life insurance plans. |
| Object Name | W3EB_ENR_2X_ELECT |
| Navigation | Click **Edit** on the Dependent Life line of the Enrollment Summary page. |


Benefits Enrollment

Dependent Life

Shirley Hafferty

Dependent Life insurance allows you to purchase life insurance for your spouse and child (ren). You are the beneficiary of this life insurance.

**Important! Your current coverage is: No Coverage. Coverage for this plan will be waived if you do not make an election.**

This benefit plan requires enrollment in one of the following plans:
Supplemental Life

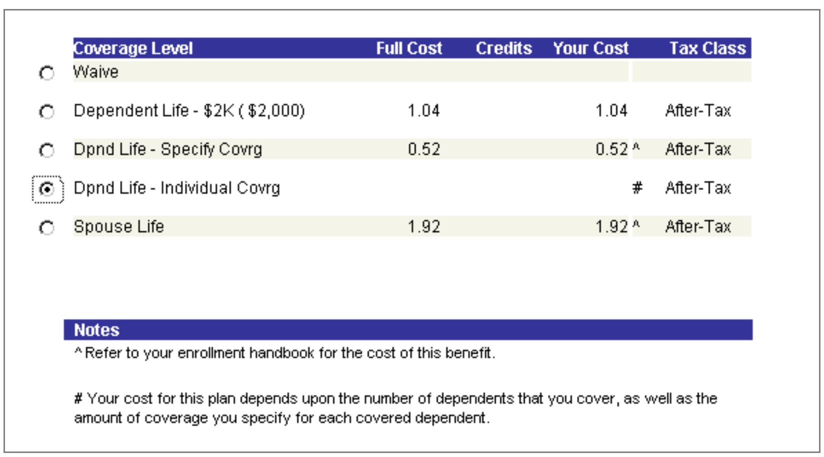
Enroll in the benefit plans listed above before completing this page.

Select an Option

Here Are Your Available Options With Your Annual Costs:
(Your cost = Full benefit cost - Credits)

Select one of the following plans:

Dependent Life Enrollment page (1 of 3)

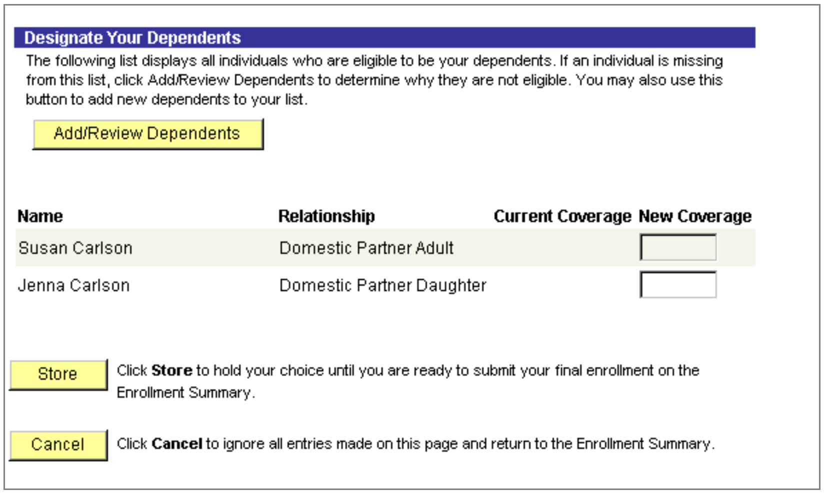

| Coverage Level | Full Cost | Credits | Your Cost | Tax Class |
|---|---|---|---|---|
| Waive | | | | |
| Dependent Life - $2K ( $2,000) | 1.04 | | 1.04 | After-Tax |
| Dpnd Life - Specify Covrg | 0.52 | | 0.52 ^ | After-Tax |
| Dpnd Life - Individual Covrg | | | # | After-Tax |
| Spouse Life | 1.92 | | 1.92 ^ | After-Tax |

Notes

^ Refer to your enrollment handbook for the cost of this benefit.

# Your cost for this plan depends upon the number of dependents that you cover, as well as the amount of coverage you specify for each covered dependent.

Dependent Life Enrollment page (2 of 3)




Dependent Life Enrollment page (3 of 3)

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This page is similar in design and organization to all insurance enrollment pages, except for the section on display options for “Sum of Dependent Coverage” calculations in the Designate Your Dependents section, which is explained below.

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### Display Options for “Sum of Dependent Coverage” Calculations

For “Sum of Dependent Coverage” calculations, the system displays a grid listing the dependents in the Designate Your Dependents section of the page.. The grid shows the user’s dependents and collects the amount of coverage. Each line shows the dependent’s name, the relationship, the currently elected coverage from the base benefits tables, and a space for entering the new amount.

There is an alternative form of this display when the amount of coverage is a fixed amount. In this case, the system displays the dependents as above, but replaces the coverage fields with check boxes.

In all cases, the system will access the calculation rules to get the coverage and premium “as of” rules. It will display text when the coverage is calculated. If the “as of” method is “Current/Pay End Date”, the system will also display text stating that the amount of coverage and the premium will change over time if salary changes.

The system will also get the rounding rules from the Calc Rule table and display those.

### Enter a Coverage Amount

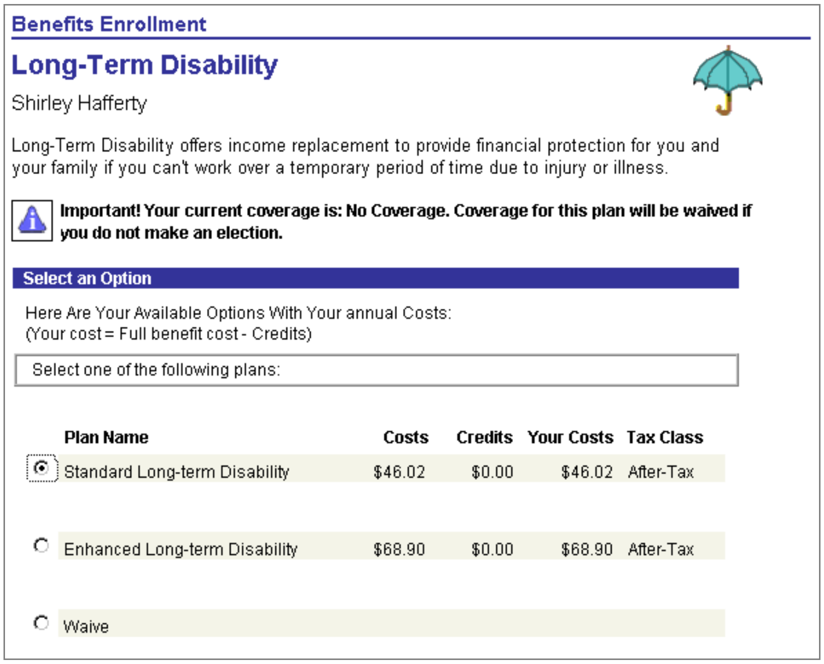
This section is used to enter a coverage amount in the space provided. The coverage amount has an upper and lower value limit.

### Notes

This section provides text informing the employee of plan enrollment requirements.

## Disability Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use the Long Term Disability Plan Enrollment page to enroll in disability benefits. |
| Object Name | W3EB_ENR_357X_ELCT |
| Navigation | Click the **Edit** button on the Disability line of the Enrollment Summary page. |




Long-Term Disability Enrollment page

The example shown is for long-term disability insurance, but all disability plan pages are similar in organization and design.

### Long Term Disability

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information that is relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. Some of this information is common to all plan types, and some is plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage, using the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The distinguishing characteristics of disability plan pages are replacement levels and coverage limits.

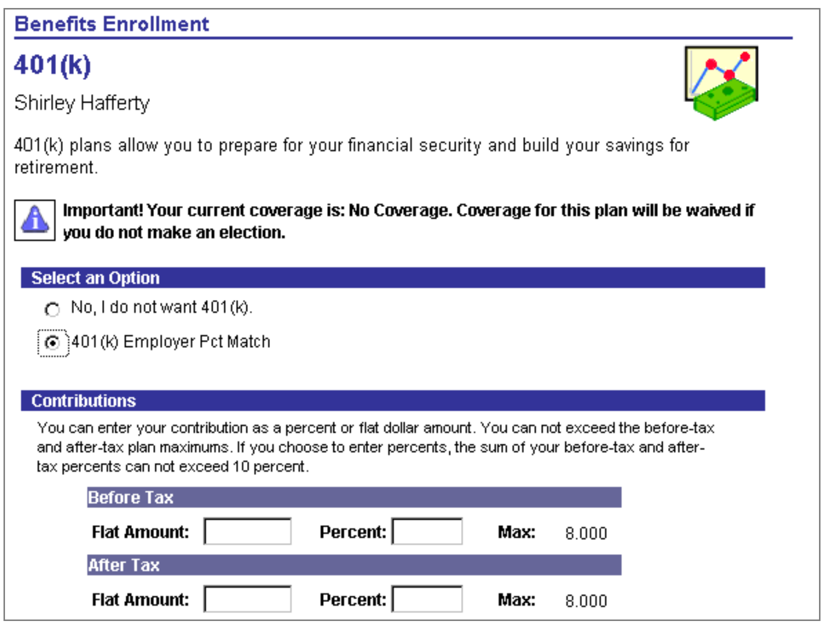
### Select an Option

| | |
|---|---|
| **Plan Name** | Names of long-term disability plans. |
| **Cost** | Cost of coverage |
| **Credits** | Value of offsetting credits contributed by the employer. |
| **Your Cost** | Cost of benefit to employee. |
| **Tax Class** | ***Before-Tax*** or ***After-Tax.*** |

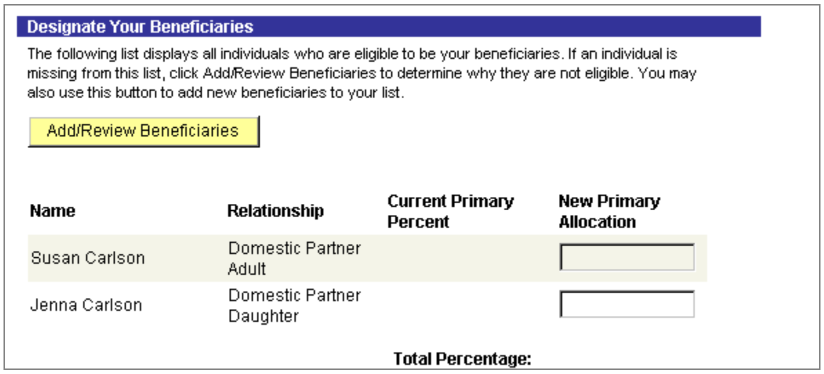
| | |
|---|---|
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

## Savings Plans Enrollment Pages

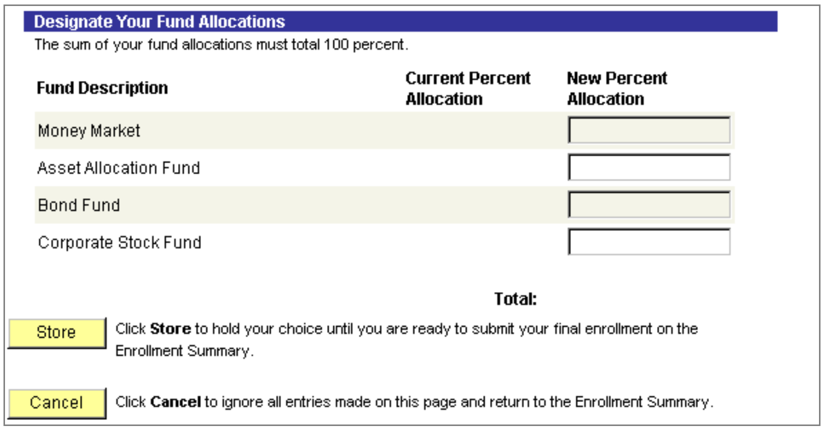
| | |
|---|---|
| Usage | Employees use the Savings Plan Enrollment page to enroll in savings plan benefits. |
| Object Name | W3EB_ENR_4X |
| Navigation | Click the **Edit** button on the 401(k) line of the Enrollment Summary page. |




401(k) Savings Plan Enrollment page (1 of 3)




401(k) Savings Plan Enrollment page (2 of 3)




401(k) Savings Plan Enrollment page (3 of 3)

The example shown is for the 401(k) plan, but all savings plan pages are similar in organization and design.

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. The information here is part common, part plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage, using the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The distinguishing characteristics of savings plans pages are the before and after tax elections, beneficiaries, and investment options. As in the Insurance Plans pages, the system applies a number of edits (generally limit checks) which are specified in the plan definition.

### Select an Option

Employees can select **No, I do not want 401(k),** or they can select one of the listed options. If there are multiple plans, the system uses a simple grid listing the available plans. Unlike the grid for insurance plans, this grid will list only the plan names with no prices or other information.

The plan names provide a link to additional information. The rules are as follows:

- If Authoria PS is installed and there is content for this plan, the name will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the name will link to the provider's page. The installation process provides this address in the provider definition. This is an external link and may show as a new browser window.
- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the plan name shows as plain text.

### Contributions

The system will suppress the After Tax line if the plan does not allow After Tax elections. Users cannot elect both an amount and percentage in the same tax class. If a percentage is elected, then the amount has to be less than the limits specified in the plan definition. The combined total cannot exceed the combined limit specified in the plan definition. The system will also apply any other edits that are applied in the core application.

| | |
|---|---|
| **Before Tax** | Enter the amount or percentage. |
| **After Tax** | Enter the amount or percentage. |

### Designate Your Beneficiaries

This section begins with a text block providing information about the beneficiaries listed in the subsequent beneficiary allocation table, and instructs users to click the **Add/Review Beneficiaries** button to make any changes to the list. The text is stored on the setup tables and can be modified. The text is keyed by benefit program and plan type.

The system will validate entries if the "Ignore Dep/Ben Edits" flag on the event rules is off. All edits in the system apply.

The system will display any court order messages attached to the beneficiaries. It will force the coverage to stay the same as the current coverage. For example, if a beneficiary has a court order and is currently getting 50% as a beneficiary in the base benefit tables, the system will put 50% (50 percent) in the percentage field and make it unavailable for entry.

| | |
|---|---|
| **Name** | Name of beneficiary |
| **Relationship** | Relationship of beneficiary to employee |
| **Current Primary Allocation** | Allocation currently assigned to beneficiary |
| **New Primary Allocation** | Allocation to be assigned to beneficiary |

### Designate Your Fund Allocations

This section appears only if the system has been configured to collect investment selections. The system can also be configured to collect investments at the plan-type level.

**Fund Description** The type of investment (fund, bond, money market, and so forth).

**Current Percent Allocation** The percent of allocation towards the fund.

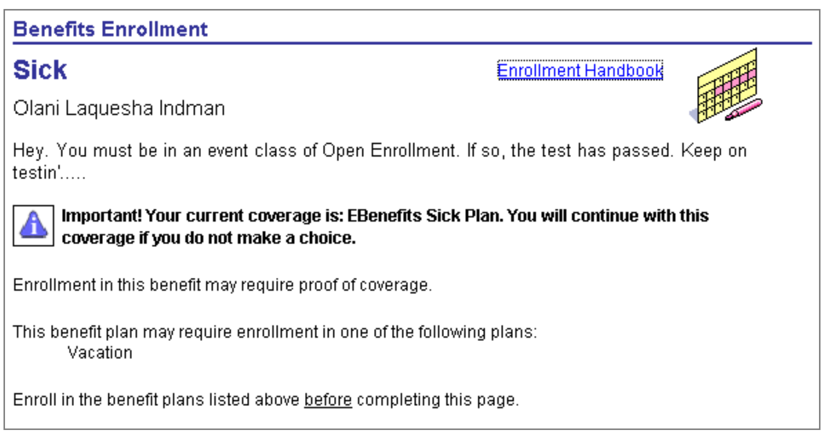
**New Percent Allocation** Enter the new percentage allocation value.

**Store** Click this button to hold elections for submission.

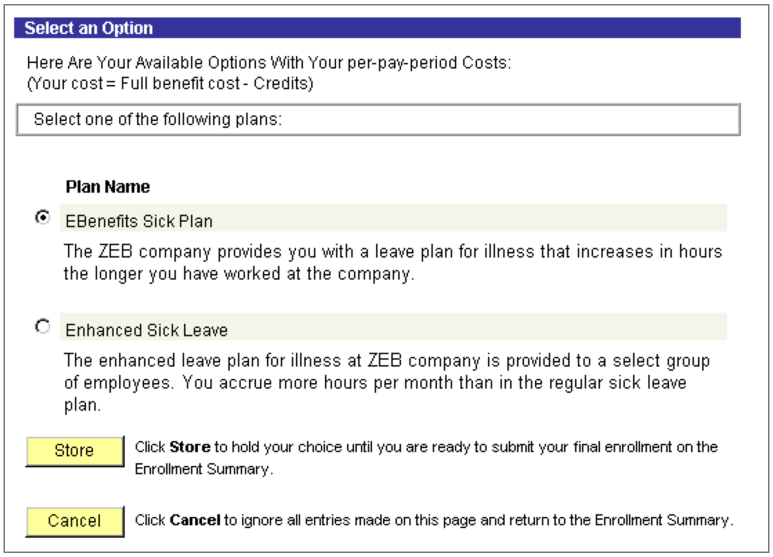
**Cancel** Click this button to cancel all entries and return to the enrollment form.

## Leave Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use the Leave Plan Enrollment page to enroll in leave plan benefits. |
| Object Name | W3 EB_ENR_357X ELECT |
| Navigation | Click the **Edit** button on the Sick line of the Enrollment Summary page. |




Sick Plan Enrollment page (1 of 2)




Sick Plan Enrollment page (2 of 2)

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The example shown is for Sick Leave, but all Leave Plan pages are similar in organization and design.

---

### Sick

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. The information here is part common, part plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage. It uses the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The distinguishing feature about leave plans is that there are no plan-specific fields or costs.

### Select an Option

The system will not display leave plan-types unless the user has some type of choice, such as the choice to elect or waive plans. In such cases, this feature can be configured during the installation process.

**Plan Name** Description of plan. The plan names provide a link to additional information. The rules are as follows:

- If Authoria PS is installed and there is content for this plan, the name will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the name will link to the provider's page. The installation process provides this address in the provider definition. This is an external link and may show as a new browser window.
- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the plan name shows as plain text.

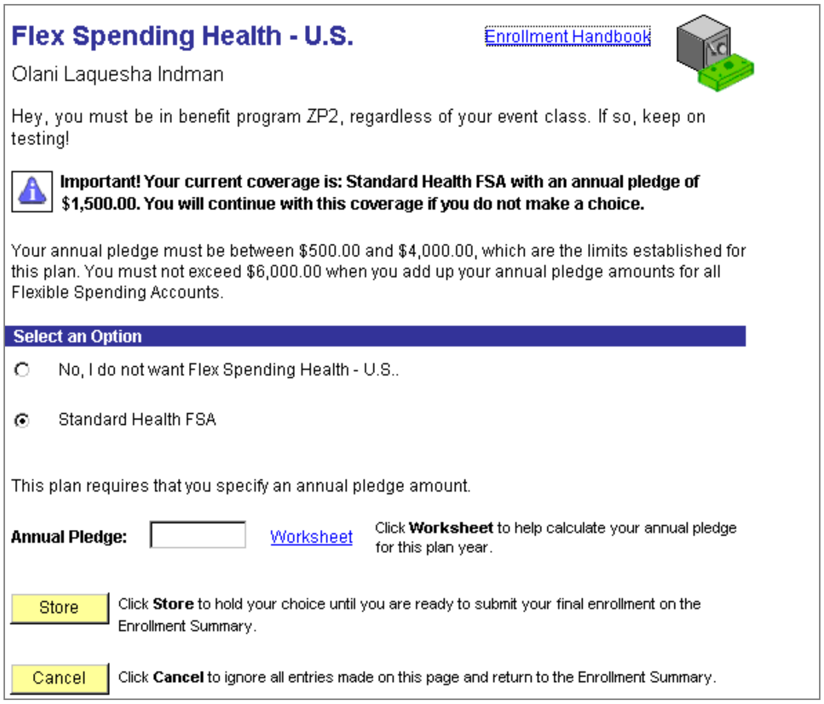
### Closing

**Store** Click this button to hold elections for submission.

**Cancel** Click this button to cancel all entries and return to the enrollment form.

## FSA Enrollment Pages

| | |
|---|---|
| Usage | Employees use the FSA Enrollment page to enroll in FSA plan benefits. |
| Object Name | W3EB_ENR_6X_ELECT |
| Navigation | Click the **Edit** button on any FSA line of the Enrollment Summary page. |



FSA Health Care - U.S. Enrollment page

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The example shown is for FSA Health Care - U.S., but all FSA pages are similar in organization and design.

---

### FSA Health Care - U.S.

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. The information here is part common, part plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage. It uses the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The distinguishing characteristics of FSA plan pages are the annual pledge and the per-period contribution.

### Select an Option

Users may select whether to enroll in an FSA plan. If there are multiple plans, the system uses a simple grid listing the available plans. Like the grid for savings plans, this grid will list the plan names with no prices or other information.

If users are eligible for only one plan with an option to waive coverage, the system will display a “No/Yes” format.

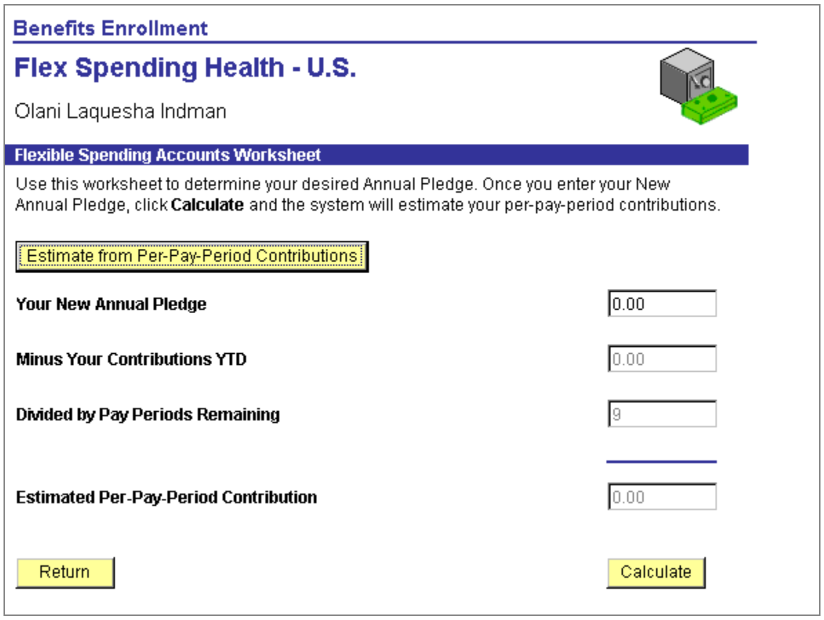
The plan names provide a link to additional information. The rules are as follows:

- If Authoria PS is installed and there is content for this plan, the name will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the name will link to the provider's page. The installation process provides this address in the provider definition. This is an external link and may show as a new browser window.
- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the plan name shows as plain text.

| | |
|---|---|
| **Annual Pledge** | Enter the amount of the pledge. |
| **Worksheet** | Click **Worksheet** to help determine what your annual pledge should be for this plan year. |
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

### Flex Spending Health – U.S. Worksheet Page

| | |
|---|---|
| Usage | Employees use the Worksheet page to enter their desired annual pledge. Once they have entered the new annual pledge, they click the **Calculate** button and the system will estimate per-pay-period contributions. |
| Object Name | W3EB_ENR_6X_WKSHT |
| Navigation | Click the **Worksheet** link on the FSA Health Care - U.S. page. |




Flex Spending Health - U.S. Worksheet page

Listed first on this page is the type of enrollment event, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the use of the page.

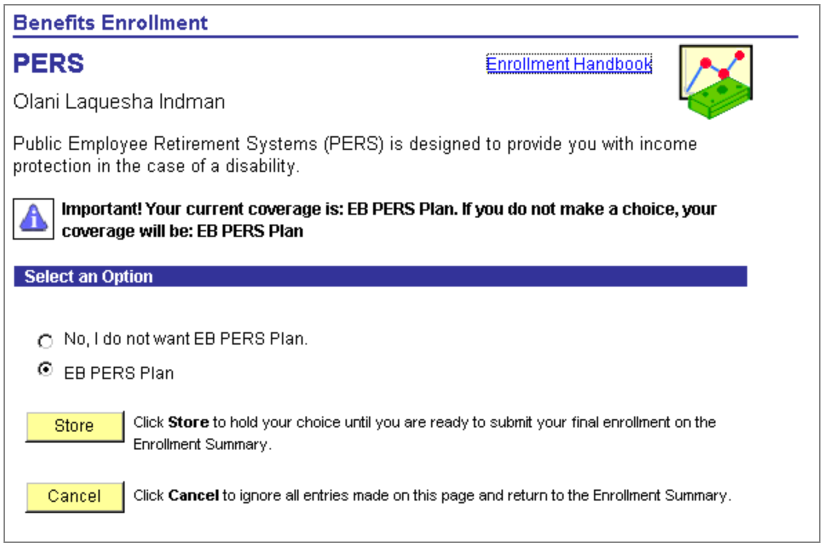
Clicking the **Estimate from Per-Pay-Period Contributions** button brings up a similar worksheet page enabling users to calculate their annual pledge.

| | |
|---|---|
| **Your New Annual Pledge** | Enter the amount of the pledge. |
| **Minus Your Contributions YTD** (minus your contributions year-to-date) | Enter any year-to-date contributions. |
| **Divided by Pay Periods Remaining** | Enter the remaining pay periods. |
| **Estimated Per-Pay-Period Contribution** | When the **Calculate** button is clicked, the system computes and enters the employee's estimated pay period contribution. |
| **Return** | Clicking the **Return** button returns the employee to the FSA Enrollment page. |
| **Calculate** | When the **Calculate** button is clicked, the system computes and enters the employee's estimated pay period contribution. |

## Retirement Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use the Retirement Plan Enrollment page to enroll in |

| | |
|---|---|
| | retirement plan benefits. |
| Object Name | W3EB_ENR_357X_ELCT |
| Navigation | Click the **Edit** button on any retirement line of the Enrollment Summary page |




Retirement Plan page

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

### Select an Option

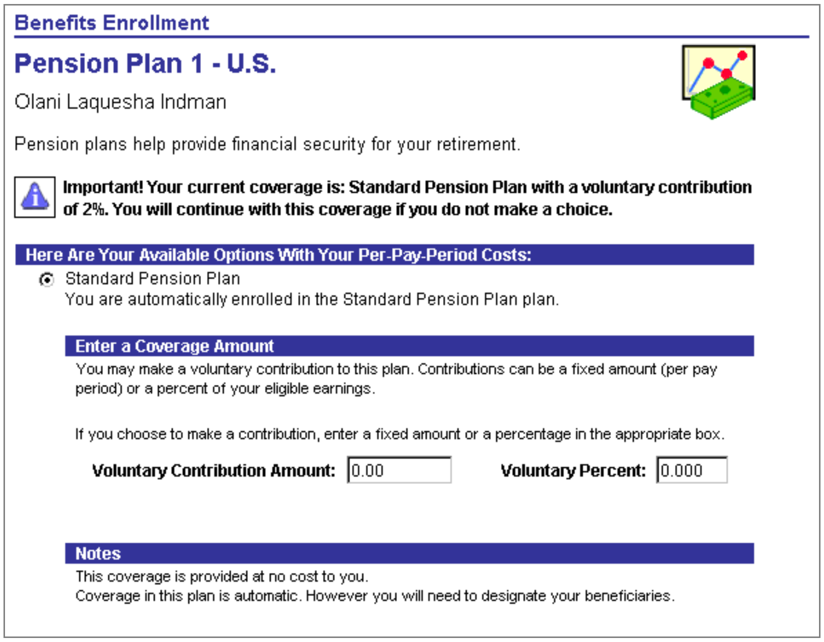
This section displays the choices for employees to either enroll or waive retirement plan benefits.

As with leave plans, the distinguishing characteristic of retirement plan pages is that there is nothing but the plan description.

| | |
|---|---|
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

## Pension Plan Enrollment Pages

| | |
|---|---|
| Usage | Employees use the Pension Plan Enrollment page to enroll in pension plan benefits. |
| Object Name | W3EB_ENR_8X_ELECT |
| Navigation | Click the **Edit** button on any Pension line of the Enrollment Summary page |



Benefits Enrollment

Pension Plan 1 - U.S.

Olani Laquesha Indman

Pension plans help provide financial security for your retirement.

**Important! Your current coverage is: Standard Pension Plan with a voluntary contribution of 2%. You will continue with this coverage if you do not make a choice.**

**Here Are Your Available Options With Your Per-Pay-Period Costs:**

Standard Pension Plan
You are automatically enrolled in the Standard Pension Plan plan.

**Enter a Coverage Amount**

You may make a voluntary contribution to this plan. Contributions can be a fixed amount (per pay period) or a percent of your eligible earnings.

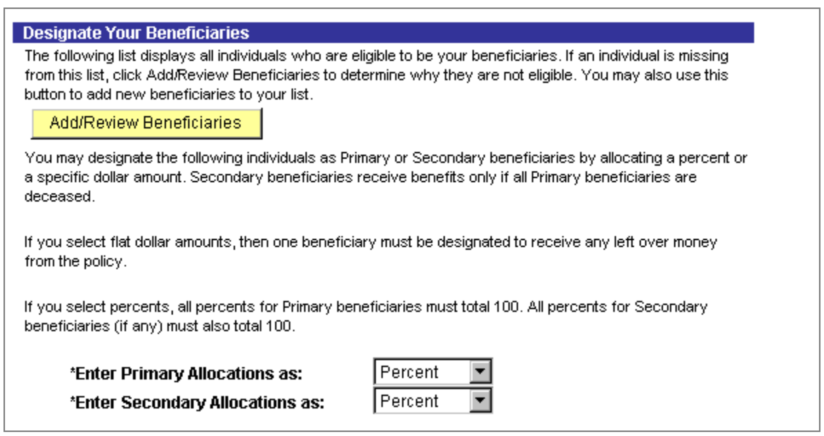
If you choose to make a contribution, enter a fixed amount or a percentage in the appropriate box.

**Voluntary Contribution Amount:** 0.00 **Voluntary Percent:** 0.000

**Notes**

This coverage is provided at no cost to you.
Coverage in this plan is automatic. However you will need to designate your beneficiaries.

Standard Pension Enrollment page (1 of 3)



**Designate Your Beneficiaries**

The following list displays all individuals who are eligible to be your beneficiaries. If an individual is missing from this list, click Add/Review Beneficiaries to determine why they are not eligible. You may also use this button to add new beneficiaries to your list.

Add/Review Beneficiaries

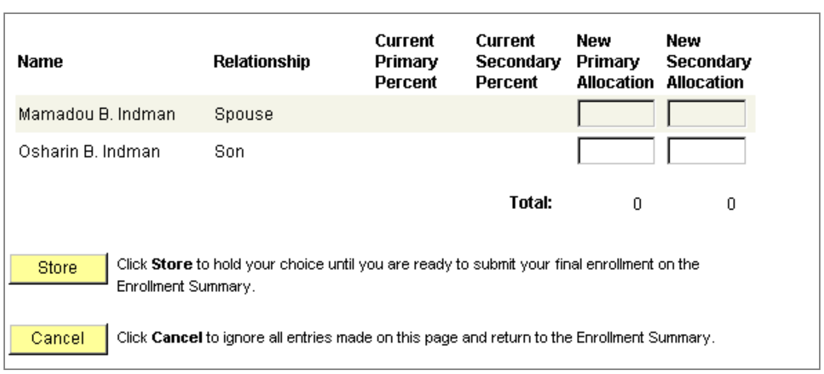
You may designate the following individuals as Primary or Secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all Primary beneficiaries are deceased.

If you select flat dollar amounts, then one beneficiary must be designated to receive any left over money from the policy.

If you select percents, all percents for Primary beneficiaries must total 100. All percents for Secondary beneficiaries (if any) must also total 100.

***Enter Primary Allocations as:** Percent
***Enter Secondary Allocations as:** Percent

Standard Pension Enrollment page (2 of 3)



| Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation |
|---|---|---|---|---|---|
| Mamadou B. Indman | Spouse | | | | |
| Osharin B. Indman | Son | | | | |
| | | | **Total:** | 0 | 0 |

Store — Click **Store** to hold your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Cancel — Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Standard Pension Enrollment page (3 of 3)

The example shown is for the Standard Pension plan, but all pension plan pages are similar in organization and design.

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. The information here is part common, part plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage. It uses the deduction begin date from the BAS_PARTIC_PLAN row as the effective date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The distinguishing characteristics of pension plan pages are voluntary contributions and beneficiaries.

### Select an Option

This section of the page supports all the pension plan rules. The system is able to distinguish between U.S. and Canadian plans, and to accommodate the appropriate rules.

Users may select whether to enroll in a pension plan. If there are multiple plans, the system uses a simple grid listing the available plans. As in the savings plan grids, this grid will list only the plan names with no prices or other information.

If an employee is eligible for only one plan with an option to waive coverage, then the system will display a “No/Yes” format.

The plan names provide a link to additional information. The rules are as follows:

- If Authoria PS is installed and there is content for this plan, the name will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the name will link to the provider’s page. The installation process provides this address in the provider definition. This is an external link and may show as a new browser window.
- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the plan name shows as plain text.
- If employees are only eligible for one plan, and waive is not an option, then the system will display text informing them of their automatic enrollment, and go directly to the Plan Specific Values. The text will include the plan name and a link to additional information.

Enter the contribution value, as either a flat amount or a percent of salary.

### Designate Your Beneficiaries

Immediately below the options section on the page is a place for collecting beneficiary information. This section does not appear for plans where the method of calculation is “Sum of Dependent Coverage." The installation process has the option of designating whether to collect beneficiaries at the plan-type level.

This section begins with a text block providing information about the beneficiaries listed in the subsequent beneficiary allocation tables, and tells users to click the **Add/Review Beneficiaries** button to make any necessary changes to the list.

The text block also provides instructions and for making primary and secondary beneficiary allocations, including information regarding dollar amounts as well as percentages.

The system will display any court order messages attached to the beneficiaries. It will force the coverage to stay the same as the current coverage. For example, if a beneficiary has a court order and is currently getting 50% as a beneficiary in the base benefit tables, the system will put ***50%*** in the percent box and make the field unavailable for entry.

### Primary Allocations

| | |
|---|---|
| **Percent, Amount** | Text block enabling users to select flat amount or percentages for primary beneficiary allocations. |
| **Beneficiary** | Name of beneficiary |
| **Relationship** | Relationship of beneficiary to employee |
| **Current Primary Allocation** | Flat amount or percentage value of allocation |
| **New Primary Allocation** | Flat amount or percentage of new allocation |
| **Excess** | Check box for selection of beneficiary to receive excess |

### Secondary Allocations

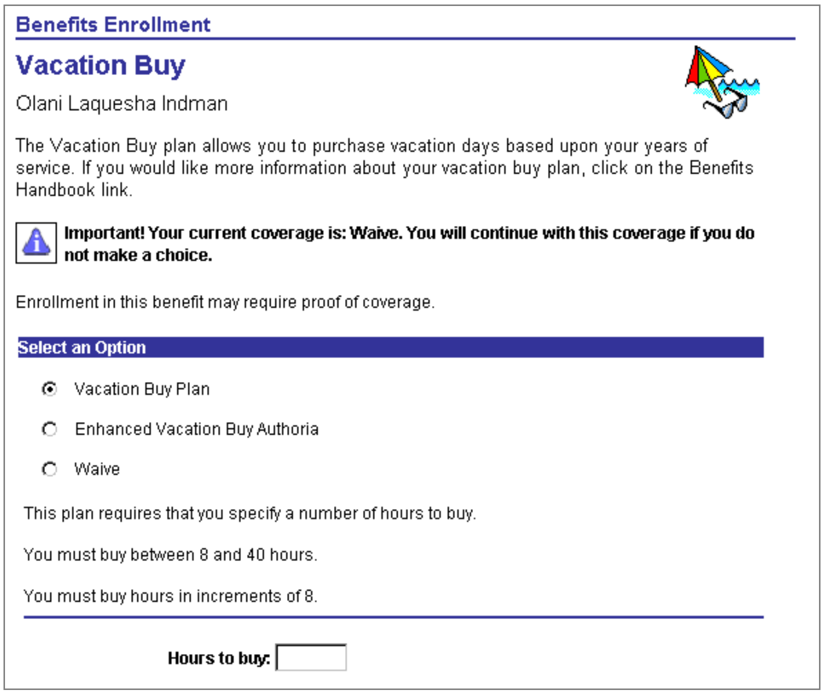
| | |
|---|---|
| **Percent, Amount** | Text block enabling users to select flat amount or percentages for secondary beneficiary allocations. |
| **Beneficiary** | Name of beneficiary |
| **Relationship** | Relationship of beneficiary to employee |
| **Current Secondary Allocation** | Flat amount or percentage value of allocation |
| **New Secondary Allocation** | Flat amount or percentage of new allocation |
| **Excess** | Check box for selection of beneficiary to receive excess |

### Closing

| | |
|---|---|
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

## Vacation Enrollment Pages

| | |
|---|---|
| Usage | Employees use Vacation Enrollment pages to enroll in vacation plan benefits. |
| Object Name | W3EB_ENR_9X_ELECT |
| Navigation | Click the **Edit** button on any Vacation line of the Enrollment Summary page |



Vacation Buy Enrollment page

The example shown is for a Vacation Buy plan, but all vacation plan pages are similar in organization and design.

Listed first on this page is the plan type, followed by the name of the person enrolling for benefits. Immediately following is a text block providing information relevant to the enrollment process. The text describing the plan-type comes from a setup table and can be modified. It is indexed by benefit program, event, and plan-type.

Next on the page is a text block relating to current and default coverage. The information here is part common, part plan-type specific. The high-order logic controlling what displays is common to all plan-types. The logic for formatting the current coverage varies from one type of benefit to the next. The system starts by checking for existing coverage. It uses the deduction begin date from the BAS_PARTIC_PLAN row as the effective-date search. This date has been adjusted for grace and waiting periods and more accurately matches the date on which coverage would really take effect.

The distinguishing characteristics of vacation plans are the hours to be bought or sold.

### Select an Option

Users may select whether to enroll in a Vacation Buy plan. If there are multiple plans, the system uses a grid listing the available plans, including plan names.

The plan names provide a link to additional information. The rules are as follows:

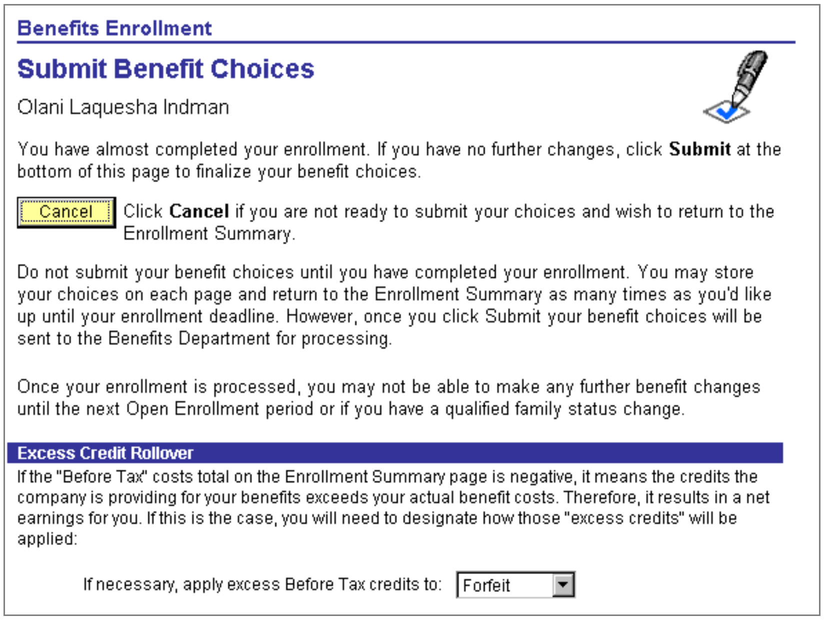
- If Authoria PS is installed and there is content for this plan, the name will link to the Authoria PS information page.
- If there is no Authoria PS content, or Authoria PS is not installed, the name will link to the provider's page. The installation process provides this address in the provider definition. This is an external link and may show as a new browser window.
- If there is no Authoria PS content and the installation process does not provide an address, there is no link and the plan name shows as plain text.
- If users are eligible for only one plan, and waive is not an option, then the system will display text informing them of their automatic enrollment and go directly to the Plan Specific Values. The text will include the plan name and a link to additional information.

Users enter the number of hours that they want to buy.

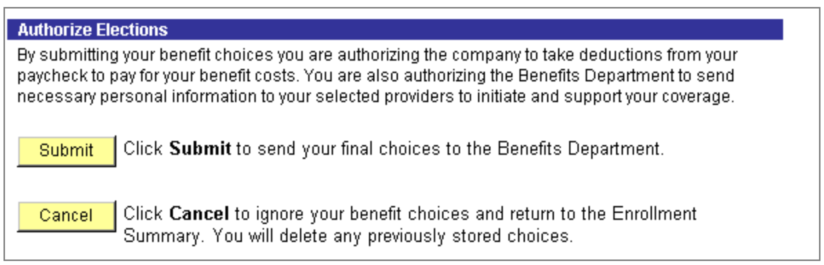
| | |
|---|---|
| **Store** | Click this button to hold elections for submission. |
| **Cancel** | Click this button to cancel all entries and return to the enrollment form. |

## Submit Benefit Choices Page

| | |
|---|---|
| Usage | Employees use the Submit Benefit Choices page to submit their benefit choices to the system. |
| Object Name | W3EB_ENR_SUBMIT |
| Navigation | Click the **Submit** button on Enrollment Summary page |




Submit Benefit Choices page (1 of 2)




Submit Benefit Choices page (2 of 2)

Appearing after the title of the page and the name of the employee is a text block instructing the employee to click the submit button at the bottom of the page to finalize their benefit choices, or to click the cancel button to return to the Benefit Summary page.

### Excess Credit Rollover

This section presents information to the employee about applying any excess credits, if any, to their earnings. There is a list of available credit application options from which the employee can choose.

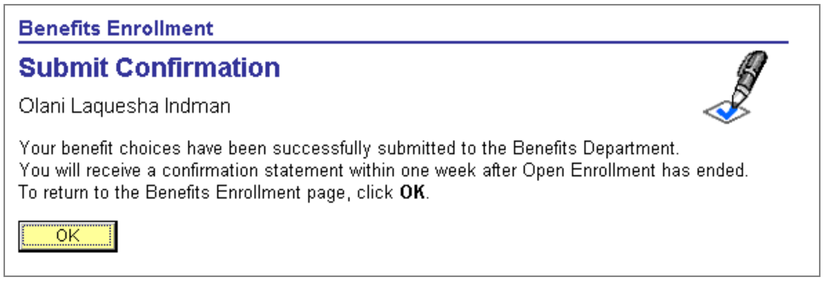
### Authorize Elections

This section contains enrollment information and **Submit** and **Cancel** buttons.

## Submit Confirmation Page

| | |
|---|---|
| Usage | Employees use the Submit Confirmation page to confirm that their benefit choices have been submitted to the system. |
| Object Name | W3EB_ENR_CONFIRM |

| | |
|---|---|
| Navigation | Click the **Submit** button on Submit Benefit Choices page |




Submit Confirmation page

This page provides confirmation to the employee that their benefit choices have been successfully submitted to the Benefits Department.

To return to the Benefits Enrollment page, the employee clicks the **OK** button.

CHAPTER 5

# Managing Health Plans

The Health Plan pages present employee health plan information in a manner that enables the user to move from summary level pages to more detailed information by clicking on appropriate links.

## Overview of Health Plan Pages

Employees enter the health plan pages from the Benefits Summary page by clicking on any health plan link that they are interested in reviewing, such as medical, dental, vision, and so on. Each of these pages displays more detailed information about the specific plan-type, and includes links to provider pages, employee handbooks, and dependent information pages.

This chapter assumes that the employee has completed the enrollment process, and is accessing the Health Plan pages in order to review health plan information.

For more information about health plan enrollments, see Enrolling in Benefits.

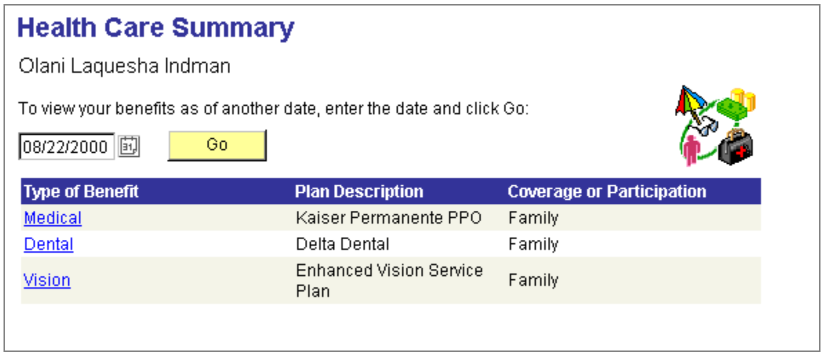
The pages shown in this chapter are representative in design and organization of pages that the user will encounter, but the information displayed will depend on each employee's benefit elections.

## Using Health Plan Pages

The following sections describe the pages that users will typically encounter when viewing their health plan benefits.

### Health Care Summary Page

| | |
|---|---|
| Usage | Use the Health Care Summary page to review health plan coverage. |
| Object Name | W3EB_GRID |
| Navigation | • Self Service, eBenefits, Health, Health Care Summary |




Health Care Summary page

Listed immediately after the page title is the name of the employee, followed by a line of text informing the user that, to review other benefits information, they should enter the date in the provided space and click the **Go** button.

**Type of Benefit** The type of heath plan, such as medical, dental, or vision.

**Job Description** The employee's job title. This column will only appear if multiple jobs is turned on.

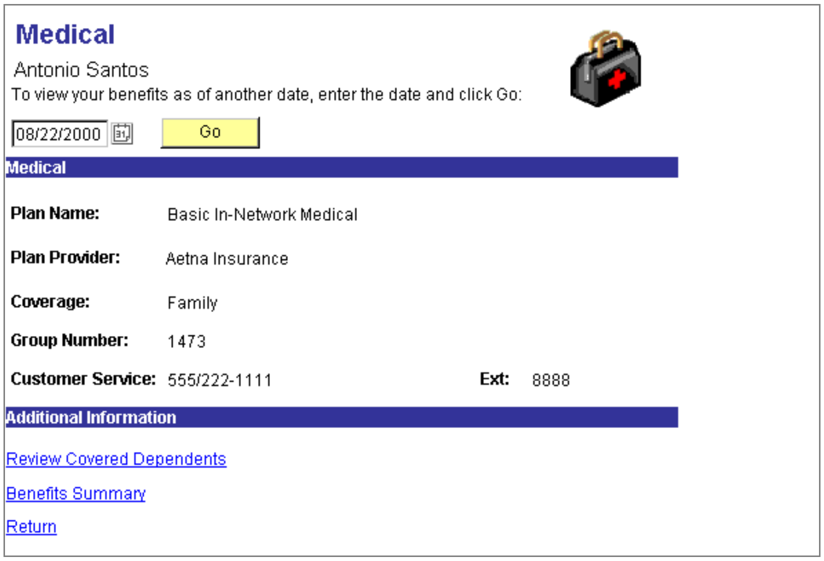
**Plan Description** A brief description of the plan.

**Coverage or Participation** This indicates who is covered or is participating in the plan.

At the bottom of the page is a link that, when clicked, takes the user to a page displaying open benefits enrollment records.  This link will only appear if the employee has an open benefit enrollment event.

## Medical Plan Summary Page

| | |
|---|---|
| Usage | Use the Medical page to review medical plan coverage. |
| Object Name | W3EB_HEALTH_PLANS |
| Navigation | Select **Medical** from the Benefits Enrollment Summary page. |




Medical page

Listed first on this page is the plan name and the employee's name. Immediately following is a text block informing users that, to view benefits as of another date, they should enter the new date and click the **Go** button.

## Medical

**Plan Name** Name of the medical plan. This is the description from the Benefit Plan table.

**Plan Provider** Name of medical plan provider. This is the description of the Vendor ID from the Benefit Plan table.

**Coverage** Employee and any dependents covered under the plan. This is the description of the coverage code associated with the employee's enrollment.

**Group Number** The group number of the medical plan. This is the group number from the Benefit Plan table.

**Customer Service** Contact information for the medical plan health provider This is the vendor contact information in the Vendor table. The main phone number for the customer service contact type is displayed in this area.

## Additional Information

**Review Covered Dependents** Links to a page displaying a list of dependents covered under the plan, including links to review and edit dependent personal information.

For more information about medical plan dependents coverage, see Managing Dependent Information.

**Find a Health Care Provider** — This link will appear if an URL identifier is connected to the Authorized Providers URL ID on the Vendor Policy table. Or it will link to a search page for provider information, if GeoAccess is installed.

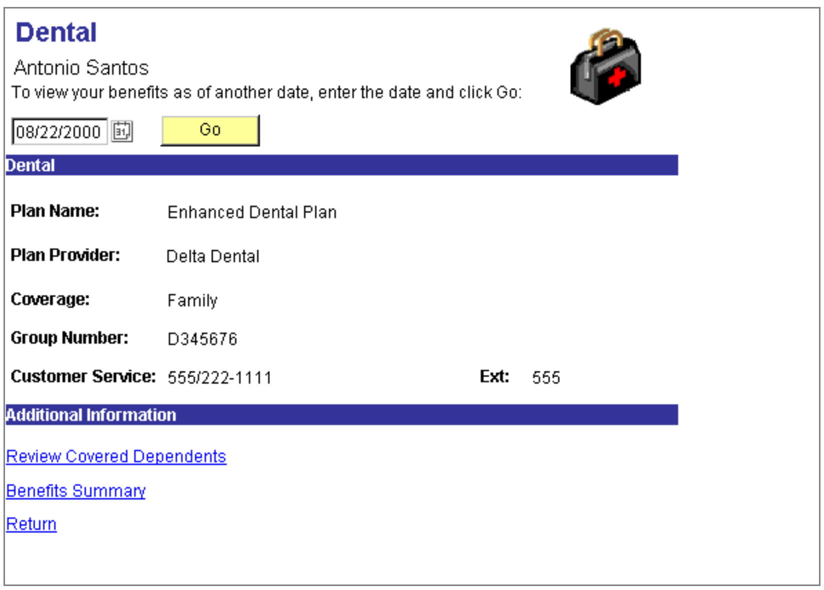
**Benefits Summary** — Takes the user to the Benefits Summary Page page.

**Return** — This link will take the user back to the Health Care Summary page. This link will only appear if the user navigated from that page.

At the bottom of the page is a link taking users back to the Benefits Community home page.

## Dental Plan Summary Page

| | |
|---|---|
| Usage | Used to review dental plan coverage. |
| Object Name | W3EB_HEALTH_PLANS |
| Navigation | Select **Dental** from the Benefits Enrollment Summary page. |




Dental page

Listed first on this page is the plan name and the employee's name. Immediately following is a text block informing users wanting to view their benefits as of another date to enter the new date and click the **Go** button.

### Dental

**Plan Name** — Name of the dental plan

**Plan Provider** — Name of the dental plan provider

**Coverage** — Employee and any dependents covered under the plan

**Group Number** The group number of the dental plan.

**Customer Service** Contact information for customer service.

### Additional Information

**Review Covered Dependents** Links to a page displaying a list of dependents covered under the plan, including links to review and edit dependent personal information.

For more information about dental plan dependents coverage, see Managing Dependent Information.

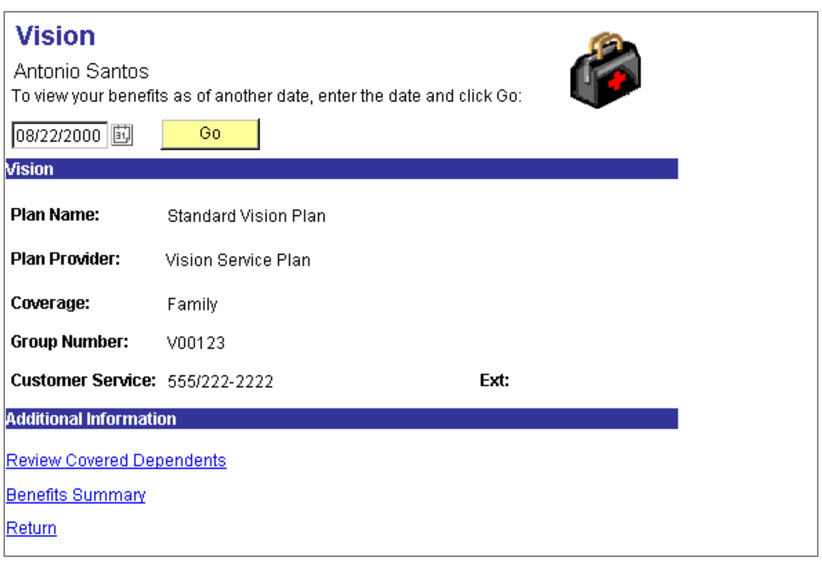
**Find a Health Care Provider** This link will appear if an URL identifier is connected to the Authorized Providers URL ID on the Vendor Policy table. Or it will link to a search page for provider information, if GeoAccess is installed.

**Benefits Summary** Takes the user to the Benefits Summary Page.

**Return** This link will take the user back to the Health Care Summary page. This link will only appear if the user navigated from that page.

## Vision Plan Summary Page

| | |
|---|---|
| Usage | Used to review vision plan coverage. |
| Object Name | W3EB_HEALTH_PLANS |
| Navigation | Select **Vision** from the Benefits Enrollment Summary page. |




Vision page

Listed first on this page are the plan name and the employee's name. Immediately following is a text block informing users wanting to view their benefits as of another date, to enter the new date and click the **Go** button.

### Vision

| | |
|---|---|
| **Plan Name** | Name of the vision plan |
| **Plan Provider** | Name of the vision plan provider, which may also be a link to the provider's home page. |
| **Coverage** | Employee and any dependents covered under the plan |
| **Group Number** | The group number of the vision plan. |
| **Customer Service** | Contact information for customer service. |

### Additional Information

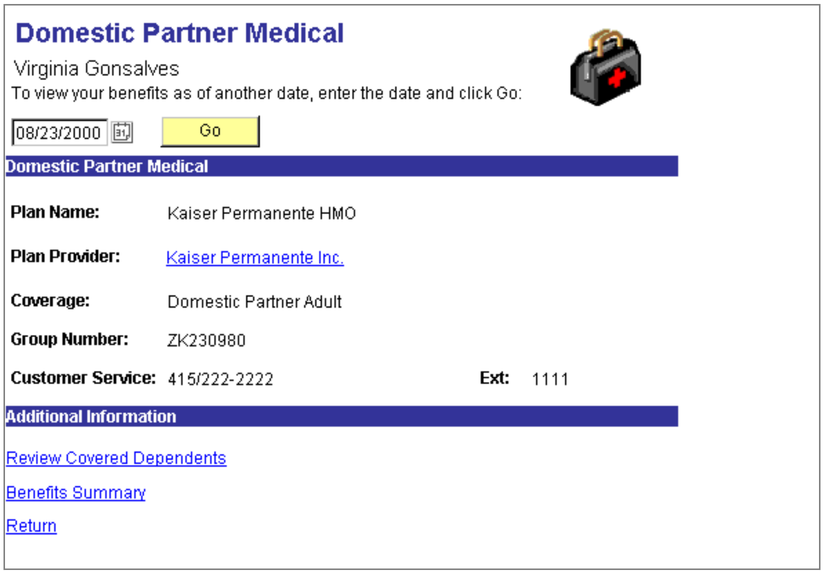
| | |
|---|---|
| **Review Covered Dependents** | Links to a page displaying a list of dependents covered under the plan, including links to review and edit dependent personal information. |

For more information about vision plan dependents coverage, see Managing Dependent Information.

| | |
|---|---|
| **Find a Health Care Provider** | This link will appear if an URL identifier is connected to the Authorized Providers URL ID on the Vendor Policy table. Or it will link to a search page for provider information, if GeoAccess is installed. |
| **Benefits Summary** | Takes the user to the Benefits Summary Page. |
| **Return** | This link will take the user back to the Health Care Summary page. This link will only appear if the user navigated from that page. |

## Domestic Partner Medical Plan Summary Page

| | |
|---|---|
| Usage | Used to review domestic partner medical plan coverage. |
| Object Name | W3EB_HEALTH_PLANS |
| Navigation | Select **Domestic Partner Medical** from the Health Plan Summary page. |




Domestic Partner Medical Plan summary page

Listed first on this page is the plan name and the employee's name. Immediately following is a text block informing users wanting to view their benefits as of another date, to enter the new date and click the **Go** button.

### Domestic Partner Medical Plan

| | |
|---|---|
| **Plan Name** | Name of the medical plan |
| **Plan Provider** | Name of the medical plan provider |
| **Coverage** | Employee and any dependents covered under the plan |
| **Group Number** | The group number of the medical plan. |
| **Customer Service** | Contact information for customer service. |

### Additional Information

| | |
|---|---|
| **Review Covered Dependents** | Links to a page displaying a list of dependents covered under the plan, including links to review and edit dependent personal information. |

For more information about medical plan dependents coverage, see Managing Dependent Information.

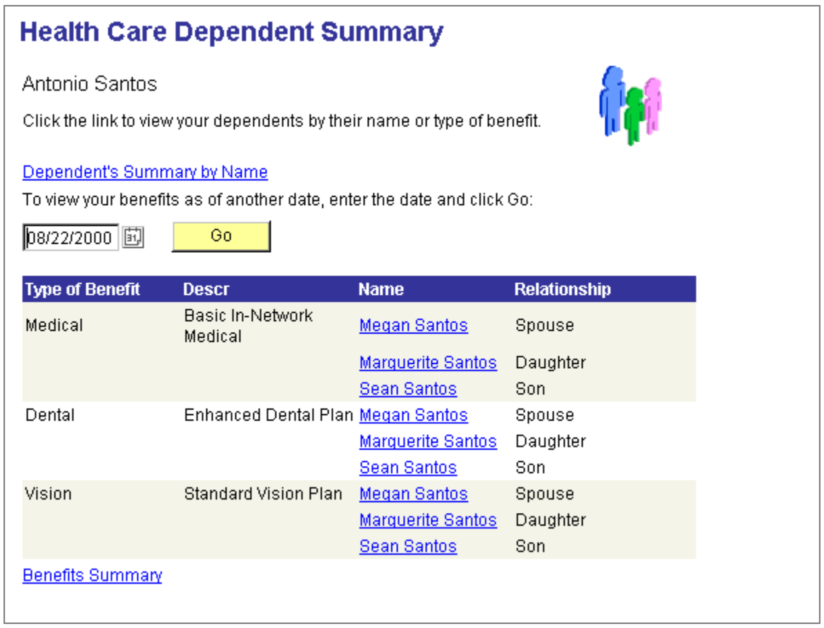
| | |
|---|---|
| **Benefits Summary** | Takes the user to the Benefits Summary Page. |
| **Return** | This link will take the user back to the Health Care Summary page. This link will only appear if the user navigated from that page. |

# Managing Dependent Information

This section describes dependent management for benefit processes that are specific to health care functions. For dependent/beneficiary management information common to all benefit processes, see Dependent/Beneficiary Management.

## Health Care Dependent Summary Page

| | |
|---|---|
| Usage | Used to review dependents covered under health plans. |
| Object Name | W3EB_DEPSMRYBYNM |
| Navigation | **Self Service, eBenefits, Health, Health Care Dependent Summary** |



Health Care Dependent Summary page

Listed first on this page is the page name and the employee's name. Immediately following is a text block informing users wanting to view their dependent's information by name or type of benefit, to click the link appearing below, and that to view benefits as of another date, to enter the new date and click the **Go** button.

**Type of Benefit** This is the benefit type in which the dependent is currently enrolled.

**Descr** This is the description of the benefit plan.

**Name** This is the name of the dependent. Each name is a link to a page displaying personal information about the dependent.

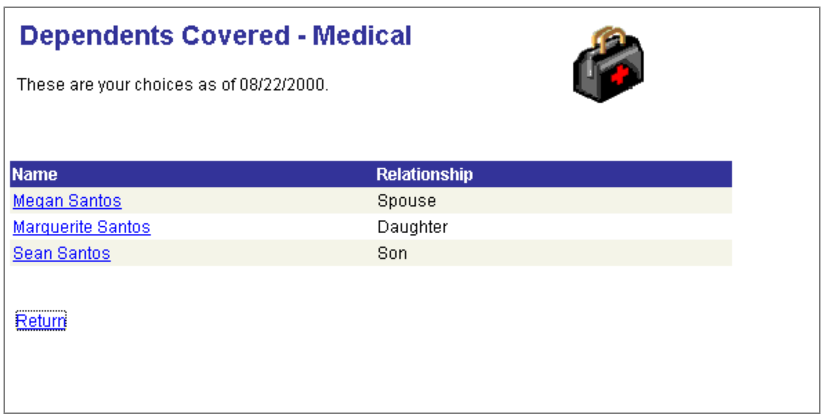
For more information about dependent/beneficiary management, see Managing Dependent Information.

**Relationship** Relationship of dependent to employee

Appearing at the bottom of the page is a link returning the user to the Benefits Summary Page.

## Health Plan Dependents Coverage Pages

| | |
|---|---|
| Usage | Used to review dependents covered under health plans. |
| Object Name | W3EB_DEPENDENTS |
| Navigation | Clicking **Review Covered Dependents** on the following pages takes users to the Dependents Summary pages:<br>• Medical Plan summary page<br>• Dental Plan summary page<br>• Vision Plan summary page<br>• Domestic Partner Medical Plan summary page |




Dependents Covered - Medical page

The example shown is for Medical Benefits, but all Health Plan Dependents summary pages are similar in organization and design.

Listed first on this page is a line of text explaining that this is a page displaying dependents covered under the associated health plan, and that the page is displaying information as of the date shown.

**Name** Name of dependent. The name is also a link taking users to the Dependent/Beneficiary Personal Information page for that dependent.

For more information about dependent/beneficiary management, see Managing Dependent Information.

| | |
|---|---|
| **Relationship** | Relationship of dependent to employee |

At the bottom of the page is a Return link taking users back to their medical plan page.

CHAPTER 6

# Insurance Plans

## Overview of Insurance Plan Pages

This chapter assumes that the employee has completed the enrollment process, and is accessing insurance plan pages in order to review insurance plan information or to modify their beneficiary allocations.

Pages displaying employee insurance plans are presented in a manner that enables the user to navigate from summary level pages to more detailed information by clicking on the appropriate insurance plan links.

For more information about insurance plan enrollments, see Enrolling in Benefits.

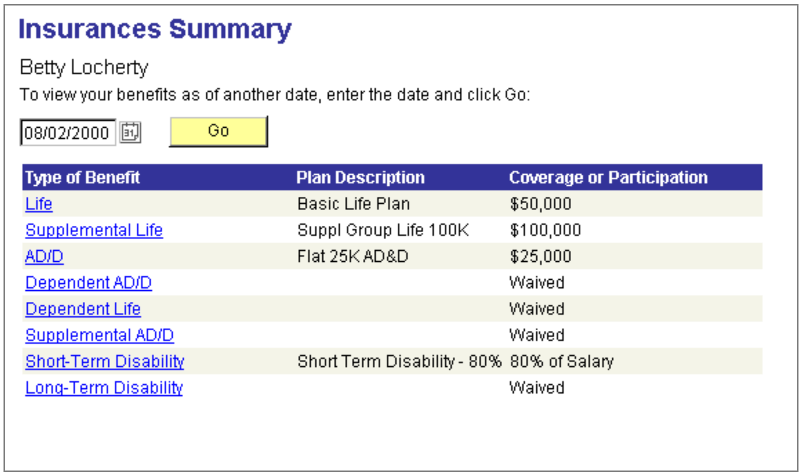
## Using Insurance Plan Pages

The following sections describe the pages that the employee will typically encounter when viewing or modifying insurance plan elections.

When navigating to a given page, the current effective-dated row(s) are displayed. To change the coverage date shown, enter the desired coverage date and click the Go button. The page will refresh and return the coverage information for that date.

### Insurances Summary Page

| | |
|---|---|
| Usage | Used to display summary information about all insurance plan types for which you are enrolled. Includes links to plan-type detail pages, and a link to the enrollment page. |
| Object Name | W3EB_GRID |
| Navigation | **Self Service, eBenefits, Insurances, Insurances Summary** |


Insurances Summary

Betty Locherty

To view your benefits as of another date, enter the date and click Go:

08/02/2000 Go

| Type of Benefit | Plan Description | Coverage or Participation |
|---|---|---|
| Life | Basic Life Plan | $50,000 |
| Supplemental Life | Suppl Group Life 100K | $100,000 |
| AD/D | Flat 25K AD&D | $25,000 |
| Dependent AD/D | | Waived |
| Dependent Life | | Waived |
| Supplemental AD/D | | Waived |
| Short-Term Disability | Short Term Disability - 80% | 80% of Salary |
| Long-Term Disability | | Waived |

Insurances Summary page

Listed first on this page is the name of the person who is enrolled for benefits. Immediately following is a line of text informing users wanting to review previous benefits information to enter the date and click the **Go** button. The page will then refresh and return coverage information for the entered date.

**Type of Benefit** The plan type of the insurance plan.

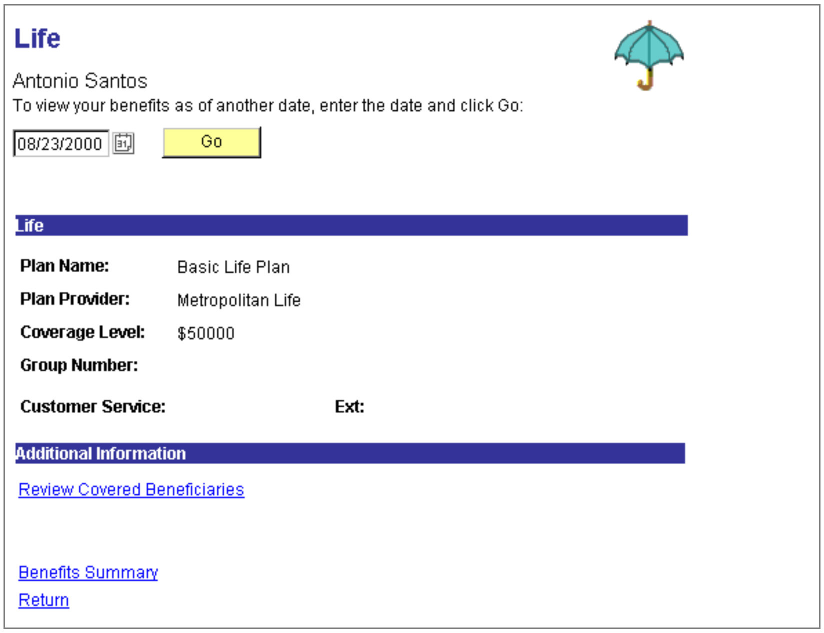
**Plan Description** The name of your life insurance plan. This is the description from the Benefit Plan table.

**Coverage or Participation** The level of coverage you have elected. This is the description of the coverage plus the factor or amount from the Life and AD/D Plan table. If the plan is defined as a flat amount, this is the flat amount from the Life and AD/D Plan table. If the plan is Specified in Employee Record, it will be the flat amount from the employee's enrollment record.

Appearing at the bottom of the page is a link taking the user to the Benefits Enrollment pages. This link will appear if the user has an open benefits event.

## Insurance Page

| | |
|---|---|
| Usage | Used to display information about your life insurance plan, and a link to associated plan beneficiaries. |
| Object Name | W3EB_LIFEADD_MAIN |
| Navigation | Click **Life** on the Insurances Summary page. |




Insurance Plan page

The example shown is for a life insurance page, but all insurance plan pages are similar in design and organization.

Listed first on this page is the name of the person who is enrolled for benefits. Immediately following is a line of text informing users wanting to review previous benefits information to enter the date and click the **Go** button. The page will then refresh and return coverage information for the entered date.

### Life

| | |
|---|---|
| **Plan Name** | The name of your life insurance plan. This is the description from the Benefit Plan table. |
| **Plan Provider** | The name of your life insurance plan provider. This is the description of the Vendor ID from the Benefit Plan table. |
| **Coverage Level** | The level of coverage that you have elected. This is the description of the coverage plus the factor or amount from the Life and AD/D Plan Table. If the plan is defined as a flat amount, this is the flat amount from the Life and AD/D Plan table. If the plan is Specified in Employee Record, it will be the flat amount from the employee's enrollment record. |
| **Group Number** | The group number of your insurance plan. This is the group number from the Benefit Plan table. |
| **Customer Service** | The phone number for customer service. This is the vendor contact phone number in the Vendor table. We display the main phone number for the customer service phone type in this area. |

### Additional Information

This section may contain links to pages enabling users to review and update their beneficiaries information, to go to the benefits enrollment pages, and to return to the Insurances Summary page.

For more information about beneficiary coverage, see Dependent Life Insurance Page.

## Dependent Life Insurance Page

| | |
|---|---|
| Usage | Used to review dependent life insurance information. |
| Object Name | W3EB_LIFEADD_MAIN |
| Navigation | Click **Dependent Life** on the Insurances Summary page. |


Dependent Life Insurance page

Listed first on this page is the name of the person who is enrolled for benefits. Immediately following is a line of text informing users wanting to review previous benefits information to enter the date and click the **Go** button.

### Dependent Life

| | |
|---|---|
| **Plan Name** | The name of your dependent life insurance plan. This is the description from the Benefit Plan table. |
| **Plan Provider** | The name of your dependent life insurance plan provider. This is the description of the Vendor ID from the Benefit Plan table. |

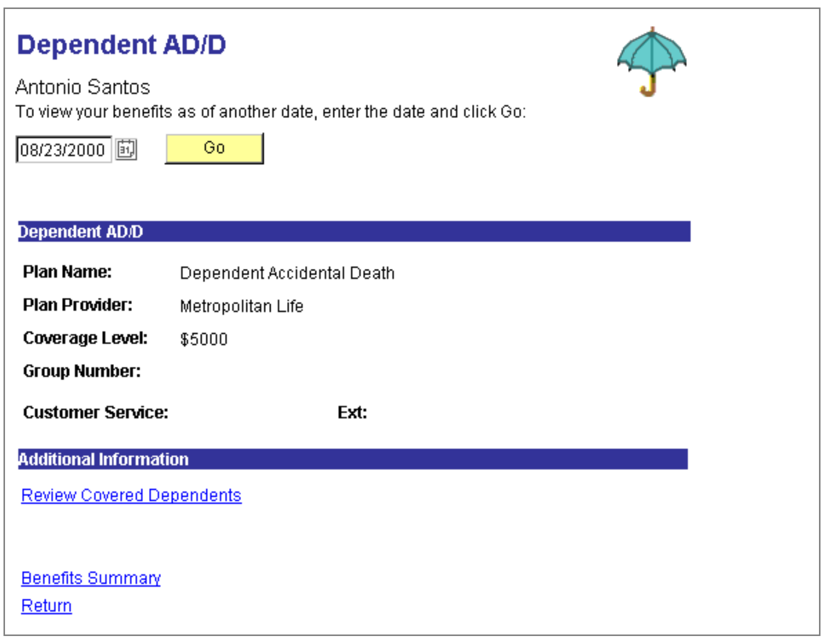
| | |
|---|---|
| **Coverage Level** | The level of coverage that you have elected for your dependent. |
| **Group Number** | The group number of your dependent's insurance plan. This is the group number from the Benefit Plan table. |
| **Customer Service** | The phone number for customer service. This is the vendor contact phone number in the Vendor table. We display the main phone number for the customer service phone type in this area. |

### Additional Information

This section contains links to the Review Covered Dependents page, the Benefits Summary page, and to return the employee to the previous page.

## Dependent AD/D Insurance Page

| | |
|---|---|
| Usage | Used to review dependent AD/D insurance information. |
| Object Name | W3EB_LIFEADD_MAIN |
| Navigation | Click **Dependent AD/D** on the Insurances Summary page. |



Dependent AD/D page

Listed first on this page is the name of the person who is enrolled for benefits. Immediately following is a line of text informing users wanting to review previous benefits information to enter the date and click the **Go** button.

### Dependent Life

**Plan Name** The name of your dependent AD/D insurance plan. This is the description from the Benefit Plan table.

**Plan Provider** The name of your dependent AD/D insurance plan provider. This is the description of the Vendor ID from the Benefit Plan table.

**Coverage Level** The level of coverage that you have elected for your dependent.

**Group Number** The group number of your dependent's insurance plan. This is the group number from the Benefit Plan table.

**Customer Service** The phone number for customer service. This is the vendor contact phone number in the Vendor table. We display the main phone number for the customer service phone type in this area.

### Additional Information

This section contains links to the Review Covered Dependents page, the Benefits Summary page, and to return the employee to the previous page.

## Managing Beneficiary Information

For more information about beneficiaries, see Dependent/Beneficiary Management.

### Insurances Beneficiary Summary Page

| | |
|---|---|
| Usage | Used to review beneficiary insurance information. |
| Object Name | W3EB_LIFINSALLBYNM |
| Navigation | **Self Service, eBenefits, Insurances, Insurances Beneficiary Summary** |


Insurances Beneficiary Summary page (1 of 2)

| Type of Benefit | Name | Relationship | Allocation |
|---|---|---|---|
| Life | Megan Santos | Spouse | 25% |
| | Marguerite Santos | Daughter | 25% |
| | Sean Santos | Son | 25% |
| | Carissa Santos | Mother | 25% |
| Supp Life | Megan Santos | Spouse | 25% |
| | Marguerite Santos | Daughter | 25% |
| | Sean Santos | Son | 25% |
| | Carissa Santos | Mother | 25% |
| AD/D | Megan Santos | Spouse | 70% |
| | Marguerite Santos | Daughter | 10% |
| | Sean Santos | Son | 10% |
| | Carissa Santos | Mother | 10% |
| Supp AD/D | Megan Santos | Spouse | 70% |
| | Marguerite Santos | Daughter | 10% |
| | Sean Santos | Son | 10% |
| | Carissa Santos | Mother | 10% |

Benefits Summary

Insurances Summary

Insurances Beneficiary Summary page (2 of 2)

Listed after the title of the page is the name of the employee. Immediately following is a line of text informing users wanting to review previous benefits information to enter the date and click the **Go** button.

**Type of Benefit** The plan type of the insurance plan.

**Name** The name of your beneficiary. Each name is a link to the beneficiary's Personal Information page.

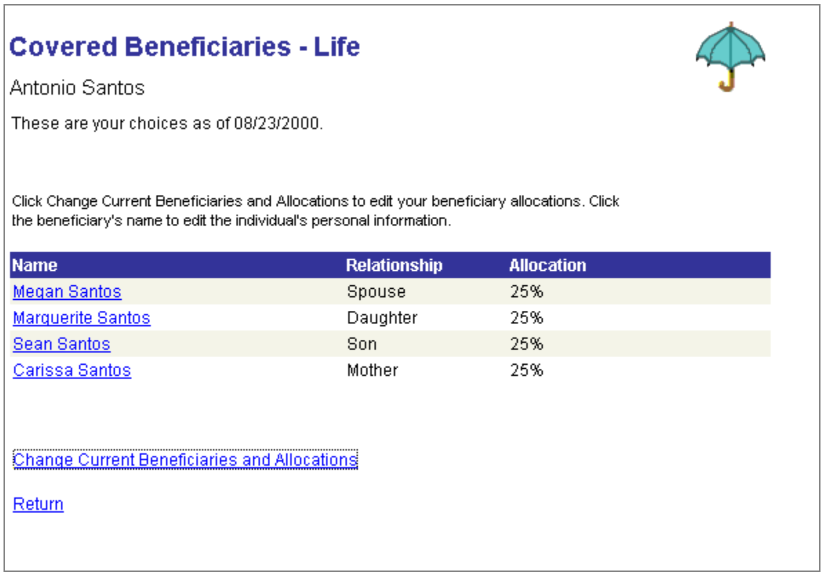
**Relationship** This is the relationship of the beneficiary to the employee.

**Allocation** This is the percent of allocation of the benefit plan type for the beneficiary

At the bottom of the page are links taking the user to the Benefits Summary page and the Insurances Summary page.

## Insurance Review Covered Beneficiaries Page

| | |
|---|---|
| Usage | Used to review beneficiary allocations. |
| Object Name | W3EB_PRIM_SEC_BEN |
| Navigation | Click **Review Covered Beneficiaries** on the Insurance page. |




Insurance Review Covered Beneficiaries page

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The example shown is for life insurance beneficiaries, but all insurance plan beneficiary pages are similar in design and organization.

---

Listed first on this page is the name of the person who is enrolled for benefits. Immediately following is a line of text informing users that these are the elections as of the date shown.

**Name** The name of your beneficiary. Each name is a link to a page enabling you to change the beneficiary's personal information.

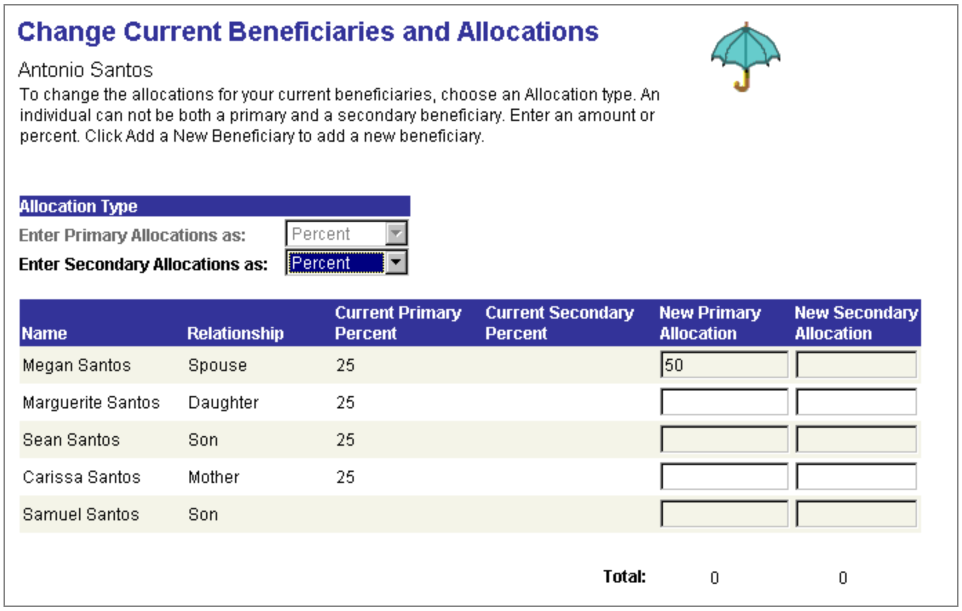
**Relationship** Relationship of beneficiary to employee.

**Allocation** Current allocation of benefits to primary beneficiary.

At the end of the page are links enabling users to go to a beneficiary allocations change page, or to return to the Life Insurance page.

### Change Current Beneficiaries and Allocations Page

| | |
|---|---|
| Usage | Used to change beneficiary allocations. |
| Object Name | W3EB_LFE_CHG_ALLOC |
| Navigation | Click **Change Current Beneficiaries and Allocations** on the Insurance Review Covered Beneficiaries page. |



Change Current Beneficiaries and Allocations

Antonio Santos

To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter an amount or percent. Click Add a New Beneficiary to add a new beneficiary.

Allocation Type

Enter Primary Allocations as: Percent

Enter Secondary Allocations as: Percent

| Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation |
|---|---|---|---|---|---|
| Megan Santos | Spouse | 25 | | 50 | |
| Marguerite Santos | Daughter | 25 | | | |
| Sean Santos | Son | 25 | | | |
| Carissa Santos | Mother | 25 | | | |
| Samuel Santos | Son | | | | |
| | | | Total: | 0 | 0 |

Change Current Beneficiaries and Allocations page

Listed first on this page is the name of the person enrolled in benefits.

### Allocation Type

Select primary and secondary allocations from the available options, as either flat amounts or percentages. Employees are able to use flat amounts for primary beneficiaries, and percentages for secondary beneficiaries (and vice versa) for life insurance plans.

**Name** Name of beneficiary.

**Relationship** Relationship of beneficiary to employee.

**Current Primary Percent** Current percent allocated to the designated primary beneficiary.

**Current Secondary Percent** Current percent allocated to the designated secondary beneficiary.

**New Primary Allocation** New percent allocated to the designated primary beneficiary.

**New Secondary Allocation** New percent allocated to the designated secondary beneficiary.

**Total** Totals of new primary and secondary allocations.

**Who should receive any left over money?** This section will appear below the beneficiary's names if Flat Amounts is chosen for Primary or Secondary allocations.

Near the bottom of the page is a link taking users to the edit mode of the Dependent/Beneficiary Personal Information page, enabling beneficiaries to be added.

Click the **Save** button when you are satisfied with your selections.

CHAPTER 7

# Managing Savings Plans

This chapter assumes that the employee has completed the enrollment process, and is accessing savings plan pages in order to review plan information or modify their beneficiary and/or fund allocations.

Pages displaying employee savings plans are presented in a manner that enables the user to navigate from summary level pages to more detailed information by clicking on the appropriate plan links.

For more information about creating Savings Plans Detail, see Building Base Benefit Programs.

## Overview of Savings Plans Pages

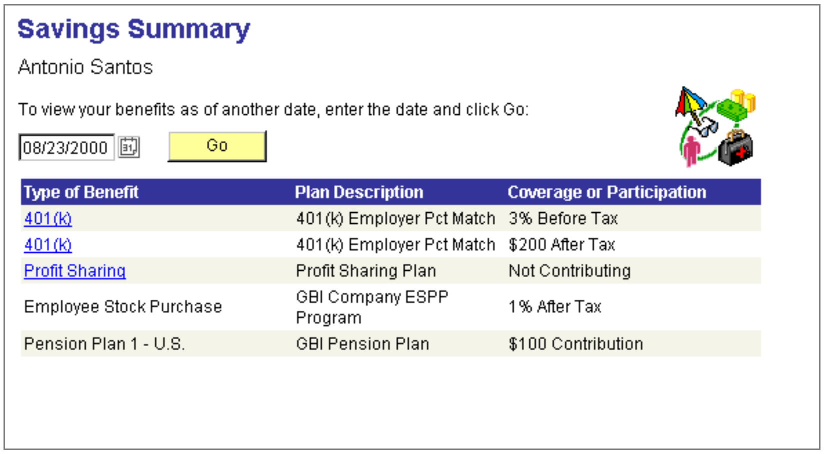
Savings plan pages enable employees to access information about their savings plans from any workstation connected to the Internet, whether at work, at home, or on the road.  They may view information about their benefit selections, and then make any changes enabled by an organization's program rules.

## Managing Savings Plan Information

The following sections describe the pages that users will typically encounter when viewing or modifying their Savings Plans elections.

### Savings Summary Page

| | |
|---|---|
| Usage | Use the Savings Summary page to review summary information about savings plans. |
| Object Name | W3EB_GRID |
| Navigation | **Self Service, eBenefits, Savings, Savings Summary.** |



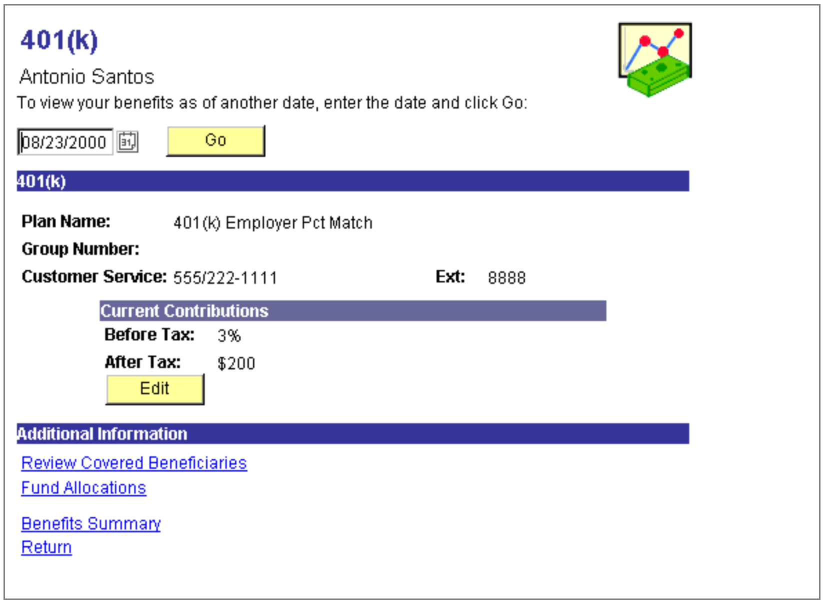

Savings Summary page

Listed first on this page is the title of the page followed by the name of the person enrolled in the savings plan.  Immediately following is a line of text enabling employees to view savings plan information for a previous date by typing in the desired date and clicking the **Go** button.

| | |
|---|---|
| **Type of Benefit** | Displays the type of savings plan in which the employee is currently enrolled.  Each Type of Benefit entry can be a link to a page displaying information about that savings plan. |
| **Plan Description** | The name of your savings plan. This is the Description from the Benefit Plan Table. |
| **Coverage or Participation** | The level of coverage or participation in which the employee is currently enrolled. |

## Savings Plan Page

| | |
|---|---|
| Usage | Use the Savings Plan page to review information about your savings plan, review covered beneficiaries, and change fund allocations.. |
| Object Name | W3EB_VIEWSAVINGS |
| Navigation | On the Savings Summary page, click a **Type of Benefit** savings plan link**.** |



Savings Plan page

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The example shown is for a 401(k) page, but all savings plan pages are similar in design and organization.

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Listed first on this page is the name of the person enrolled in the savings plan. Immediately following is a line of text enabling employees to view savings plan information for a previous date by typing in the desired date and clicking the **Go** button.

### 401(k)

| | |
|---|---|
| **Plan Name** | The name of your savings plan. This is the Description from the Benefit Plan Table. The plan name can be a link to the Authoria PS page (if Authoria PS is installed), or to a provider home page (if entered in the URL table). |
| **Group Number** | The group number of your savings plan. This is the Group Number from the Benefit Plan Table. |
| **Customer Service** | The phone number for customer service. This is the Vendor Contact phone number in the Vendor Table. We display the Main phone number for the Customer Service phone type in this area. |

### Current Contributions

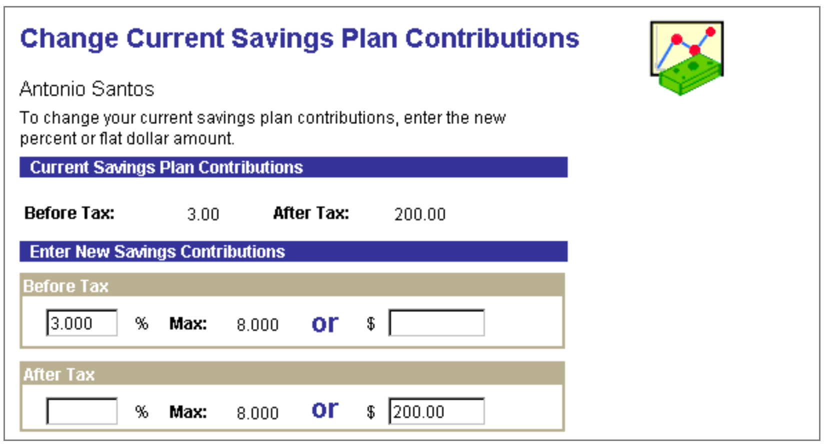
| | |
|---|---|
| **Before Tax** | The amount of pre-tax contributions to the savings plan. |
| **After Tax** | The amount of after-tax contributions to the savings plan. |

### Additional Information

| | |
|---|---|
| **Review Covered Beneficiaries** | This is a link to the View Beneficiary Allocations page. |
| **Fund Allocations** | This is a link to the Fund Allocations Page. |

### Change Current Savings Plan Contributions Page

| | |
|---|---|
| Usage | Use this page to change current and savings plans contributions. |
| Object Name | W3EB_SAVPLAN1 |
| Navigation | Click the **Edit** button in the Current Contributions section of the Savings Plan page. |




Change Current Savings Plan Contributions page

### Current Savings Plan Contributions

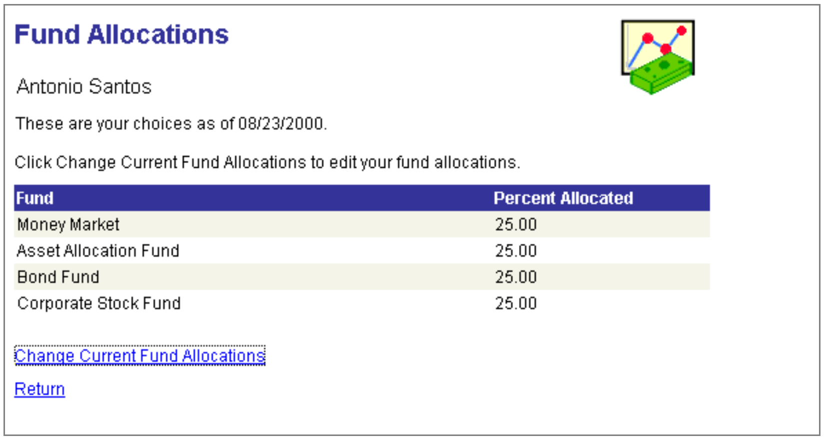
This section displays the current before tax and after tax savings plan contributions.

### Current Savings Plan Contributions

This section enables the employee to enter new savings plan before tax and after tax contributions, either as a percentage or as a flat amount.

### Fund Allocations Page

| | |
|---|---|
| Usage | Use this page to review savings plans fund allocations, and to link to pages enabling changes to fund allocations. |
| Object Name | W3EB_SAVEVWFUND |
| Navigation | Click **Fund Allocations** on the Savings Plan page. |




Fund Allocations page

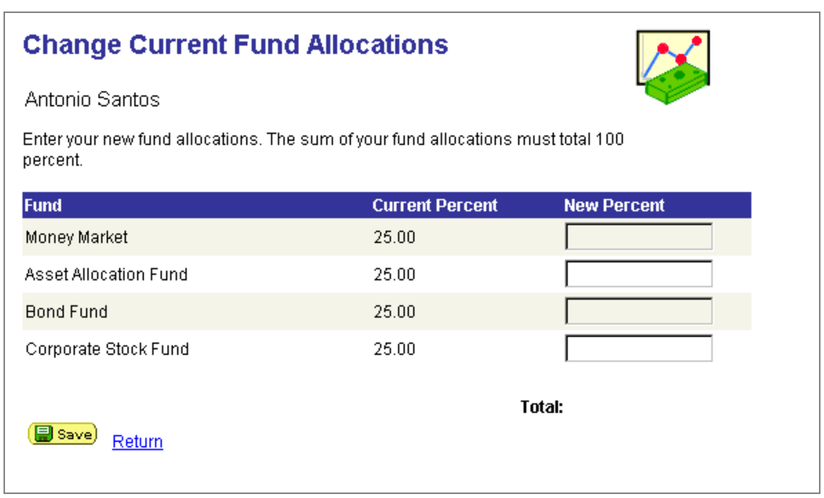
Listed after the page title is the name of the person enrolled for savings plan benefits. Immediately following, is a line of text informing users that these are the elections as of the date shown, and to change the allocations, click the Change Current Fund Allocations link.

| | |
|---|---|
| **Fund** | The type of fund to which you are currently contributing. |
| **Percent Allocated** | The percent of total contributions you are making into this fund. |

At the bottom of the page are links taking employees to the Change Current Fund Allocations Page, and to return to the previous page.

### Change Current Fund Allocations Page

| | |
|---|---|
| Usage | Use this page to change fund allocations. |
| Object Name | W3EB_SAVPLAN3_WRK |
| Navigation | Click the **Change Current Fund Allocations** link on the Fund Allocations page. |




Change Current Fund Allocations page

Listed first on this page is the name of the person enrolled in the savings plan, followed by a line of text informing the user how to change allocations.

**Fund** The type of fund to which you are currently contributing.

**Current Percent** This is the current percent of allocation.

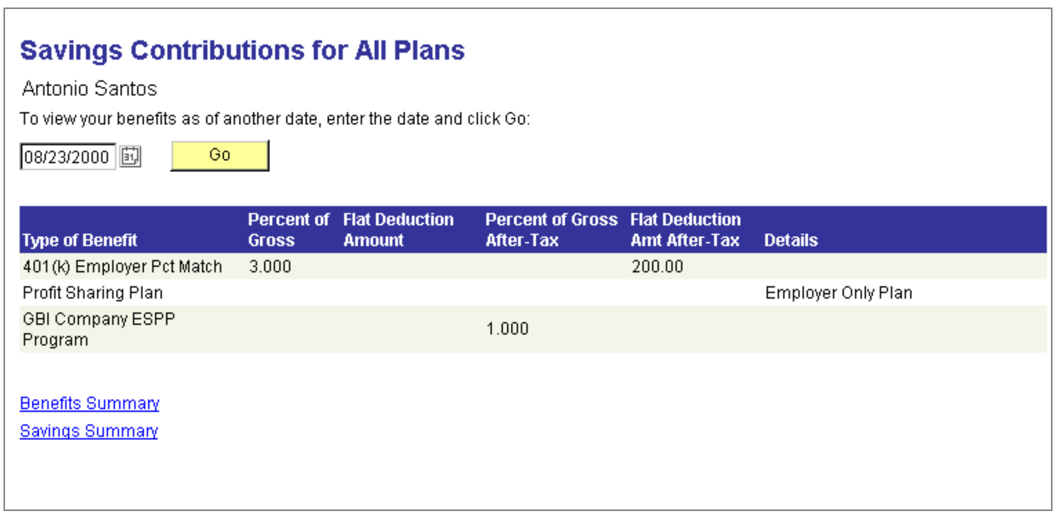
**New Percent** Enter the new fund allocation in this space. The total of allocations must equal 100%.

When satisfied with any changes made to contribution allocations, click the **Save** button.

If the user clicks the **Return** button, their changes will not be saved and they will return to the previous page.

## Savings Contribution Summary Page

| | |
|---|---|
| Usage | Use this page to view savings contributions for all plans. |
| Object Name | W3EB_VWALLSAVCONTR |
| Navigation | **Self Service, eBenefits, Savings, Savings Contribution Summary** |



Savings Contributions for All Plans

Antonio Santos

To view your benefits as of another date, enter the date and click Go:

08/23/2000 Go

| Type of Benefit | Percent of Gross | Flat Deduction Amount | Percent of Gross After-Tax | Flat Deduction Amt After-Tax | Details |
|---|---|---|---|---|---|
| 401(k) Employer Pct Match | 3.000 | | | 200.00 | |
| Profit Sharing Plan | | | | | Employer Only Plan |
| GBI Company ESPP Program | | | 1.000 | | |

Benefits Summary

Savings Summary

Savings Contributions Summary page

Listed first on this page is the name of the person enrolled in the savings plan. Immediately following is a line of text enabling employees to view savings plan information for a previous date by typing in the desired date and clicking the **Go** button.

**Type of Benefit** This is the type of savings plan enrolled in.

**Percent of Gross** This is the before tax percentage deducted per pay period.

**Flat Deduction Amount** This is the before tax flat amount deducted per-pay-period.

**Percent of Gross Amt After-Tax** This is the after tax percentage deducted per-pay-period.

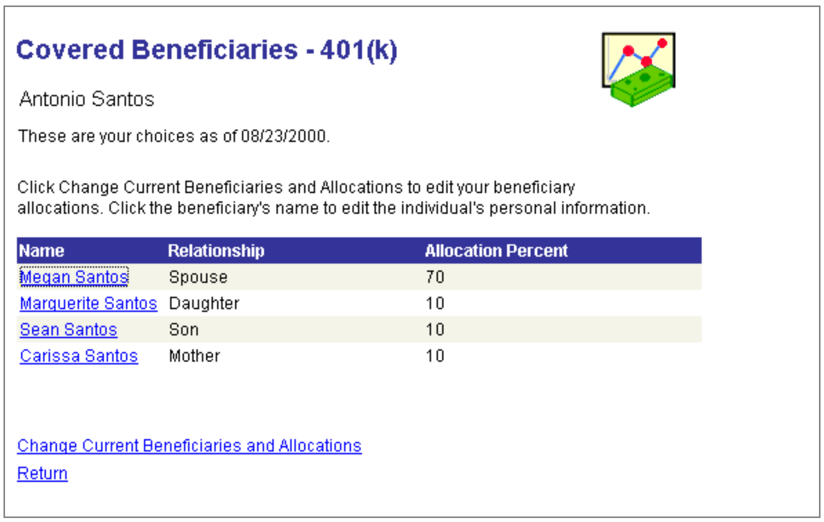
**Flat Amt After-Tax** This is the after tax flat amount deducted per-pay-period.

**Details** This is additional savings plan information.

At the bottom of the page are links taking the employee to the Benefits Summary page and the Savings Summary page.

### View Beneficiary Allocations page

| | |
|---|---|
| Usage | Use this page to view savings plan beneficiary allocations. |
| Object Name | W3EB_SAVEVWBENEF |
| Navigation | Click the **Review Covered Beneficiaries** link on the Savings Plan page. |



View Beneficiary Allocations page

For more information about beneficiary allocations, see Dependent/Beneficiary Management.

For more information about PeopleSoft HRMS Beneficiary Allocations, see Savings Plans - Beneficiaries.

The Beneficiary Allocations Summary page lists all of the employee's beneficiaries by name, relationship, and percentage of allocation.

Listed first on this page is the name of the person enrolled in savings plans. Immediately following is a line of text informing employees that the allocations displayed are for the date entered on the Savings Plan Summary page.

**Name** This is the name of the beneficiary. Clicking on the name takes the user to the Dependent/Beneficiary Coverage Summary Page.

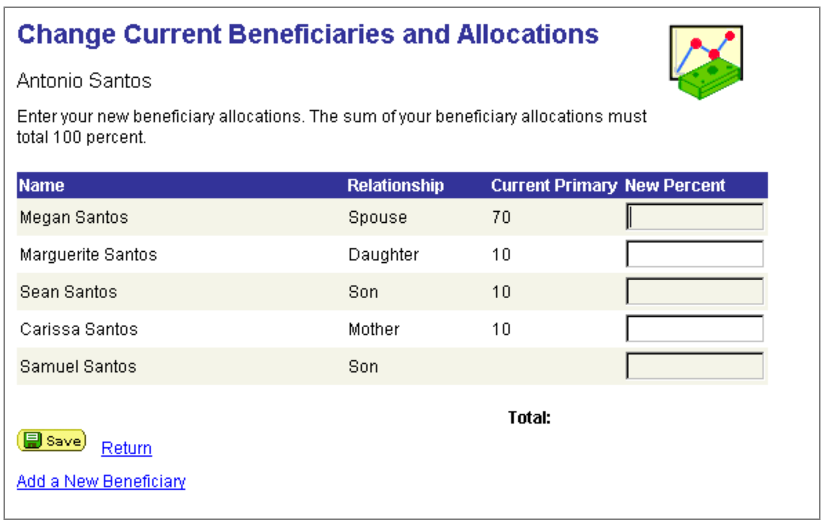
**Relationship** The relationship of the beneficiary to the employee

**Allocation Percent** The percent of allocation to that beneficiary

Clicking on Change Current Beneficiary Allocations or Add Beneficiary takes employees to the Change Beneficiary Allocations page.

### Change Current Beneficiary Allocations Page

| | |
|---|---|
| Usage | Use this page to change savings plan beneficiary allocations. |
| Object Name | W3EB_SAVPLAN4_WRK |
| Navigation | Click **Change Current Beneficiaries and Allocations** on the View Beneficiary Allocations page. |



Change Current Beneficiary Allocations page

**Name** The name of the beneficiary

**Relationship** The relationship of the beneficiary to the employee

**Current** The current allocation to the beneficiary.

**New Percent** Enter the new allocation percent to the beneficiary

The Change Beneficiary Allocations page displays a list of the employee's beneficiaries, their relationship to the employee, and their allocation percentage.

When satisfied with any changes made, click the **Save** button.

Appearing at the bottom of the page are links to return the user to the previous page, or to add a new beneficiary.

For more information about adding beneficiaries and beneficiary allocations, see Dependent/Beneficiary Management . For more information about PeopleSoft HRMS Beneficiary Allocations, see Deleting a Savings Plan Beneficiary Assignment.

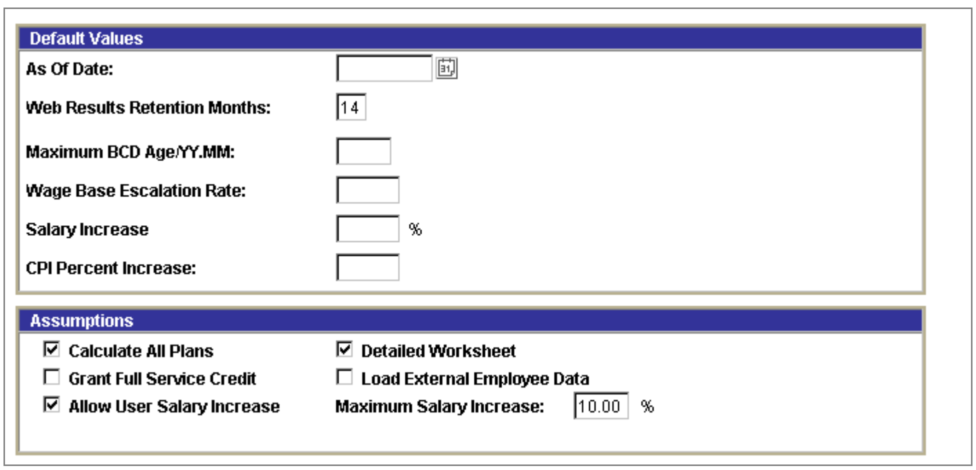
## Calculating Pension Estimates

Employees use the Estimate Pensions self-service transaction to calculate and view their Pension Benefit estimates. Separate estimates may be created to illustrate how different retirement dates could affect the pension benefit amount.

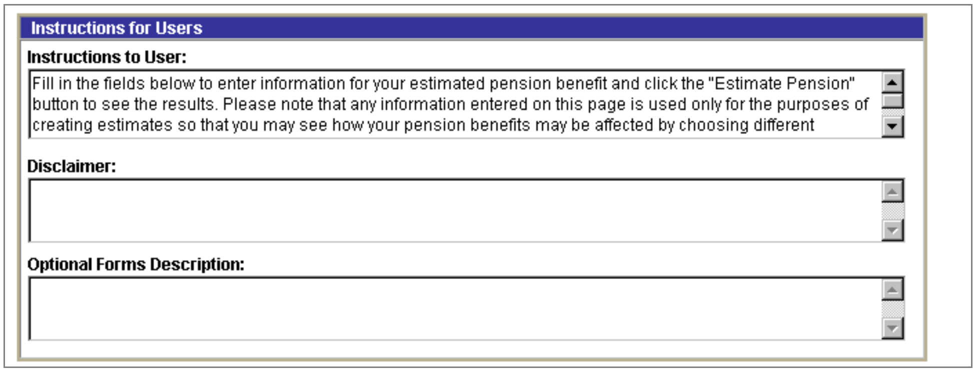
Only customers who have licensed PeopleSoft Pension Administration will have access to the transactions described in this section.

### Setting Up the Estimate Pensions Self-Service Transaction

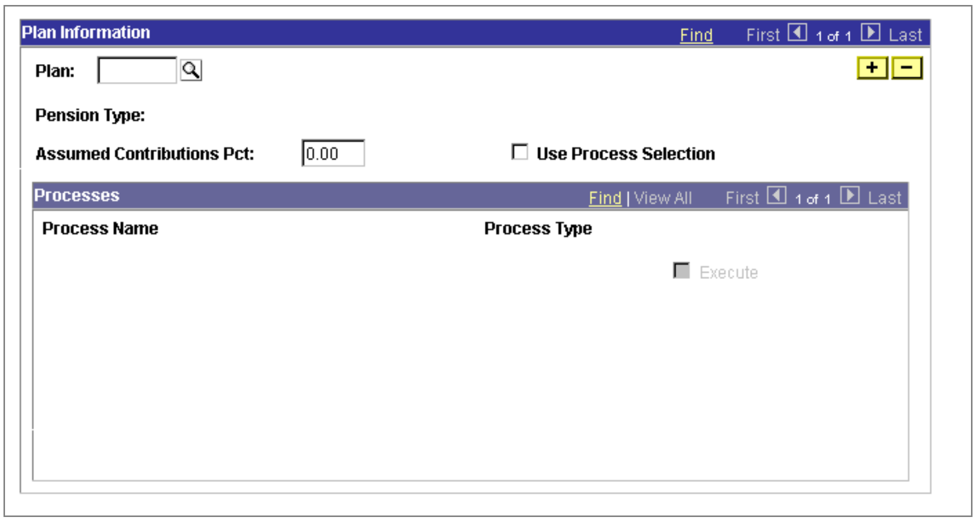
| | |
|---|---|
| Usage | Use the Self-Service Calculation Defaults page to define parameters for the Estimate Pension self-service transaction. |
| Object Name | PA_SSV_DEFAULTS2 |
| Navigation | **Home, Define Business Rules, Maintain Pension Parameters, Rules, Self Serv Calc Defaults** |




Self-Serv Calculation Default page 1 of 3




Self-Serv Calculation Default page 2 of 3




Self-Serv Calculation Default page 3 of 3

## Default Values

**As Of Date**

Because your plan rules are effective-dated, you need to enter and **As Of Date** for the rules. If you are reproducing a past estimate, this date ensures that you use only the data that was available at the time.

**Web Results Retention Months**

Enter the number of months that you want the database to retain the user's calculation results. Every time the user runs this Estimate Pensions calculation it will replace the previous calculation results.

**Maximum BCD Age/YY.MM** (maximum benefit commencement date age)

Enter the **Maximum BCD Age** in YY.MM format.

**Wage Base Escalation Rate** Enter the **Wage Base Escalation Rate.** The wage base escalation rate is the assumed rate of increase in the Taxable Wage Base. This is used for Social Security calculations and it can also affect other calculation components, depending on the plan rules.

**Salary Increase** Enter the **Salary Increase** percentage. The salary increase percentage is the assumed rate of increase in periodic earnings.

**CPI Percent Increase** (consumer price index percent increase) Enter the **CPI Percent Increase.** The CPI percent increase is the assumed rate of increase in the CPI-W table. This is used for Social Security benefit increases.

### Assumptions

**Calculate All Plans** If you select the **Calculate All Plans** check box the system will use all Pension plans that have been defined in your Pensions Administration system.

**Detailed Worksheet** Select the **Detailed Worksheet** check box to preserve these intermediate results for reporting purposes.

**Grant Full Service Credit** If you select the **Grant Full Service Credit** check box, the calculation will give the employee full credit for all the service that was forfeited because of a withdrawal of contributions.

**Load External Employee Data** If you select the **Load External Employee Data** check box the system will run your own process to bring relevant employee data into the calculation linkage where it will then be available to all the pension functions.

**Allow User Salary Increase** Select this check box to enable the user to choose their own projected salary increase for use in the Estimate Pension calculation.

**Maximum Salary Increase** If you have selected the **Allow User Salary Increase** check box, enter a **Maximum Salary Increase** limit.

### Instructions for Users

**Instructions to User** Use the **Instructions to User** text box to enter any instructions that you would like the user to read. These instructions will appear at the top of the Estimate Pension page.

**Disclaimer** Use the **Disclaimer** text box to enter information that will appear to the user at the top of the Disclaimer page.

**Optional Forms Description** Use the **Optional Forms Description** text box to enter payment descriptions that users will access by clicking on the Descriptions of Options for Forms of Payment button on the Pension Plan Estimate – Eligible Plans page.

### Plan Information

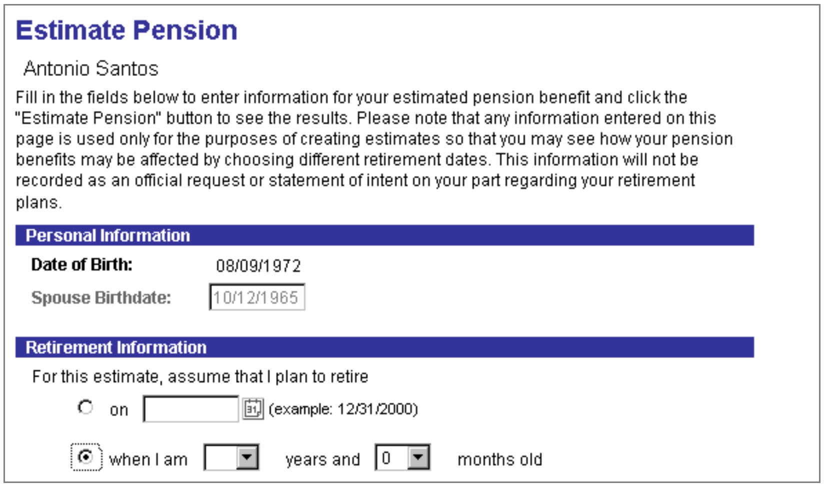
| | |
|---|---|
| **Plan** | Enter the Pension plans that your organization wants to make available to the users of the Estimate Pensions calculation. Only eligible plans will be displayed to the user. |
| **Pension Type** | System displays the **Pension Type.** |
| **Assumed Contributions Pct** (assumed contributions percentage) | Enter the **Assumed Contributions Pct.** When the calculation projects contributions, the system applies this percentage to projected earnings to arrive at future contribution amounts. |
| **Use Process Selection** | Select the **Use Process Selection** check box to single out specific processes to run. Scroll to the desired plan and select the **Use Process Selection** check box. Then select the **Execute** box for each process you want to execute. If you select a process that depends on values obtained from previous processes, be sure you execute those previous processes as well. |

### Plan Information – Processes

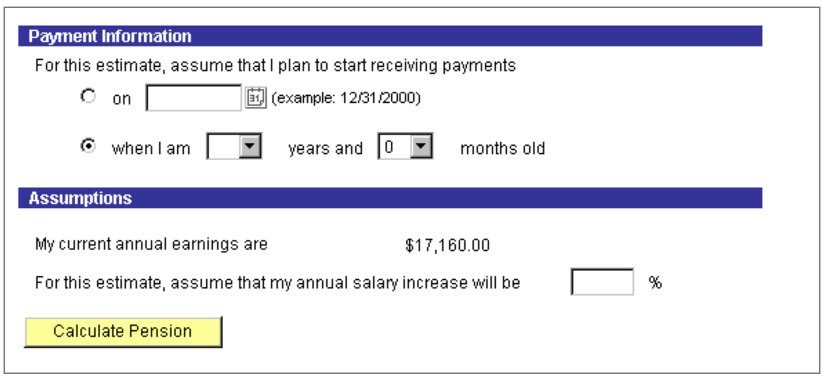
| | |
|---|---|
| **Process Name** | The **Process Name** is the name your organization has assigned to the specific process; the description follows. |
| **Process Type** | The **Process Type** tells you how your organization defined the processing rules; you can disregard this field. |
| **Execute** | Select the **Execute** check box for every process you want to execute. |

### Estimate Pension Page

| | |
|---|---|
| Usage | Use the Estimate Pension page to enter information necessary to run the Estimate Pension calculation. |
| Object Name | PA_I_ESTIMATE |
| Navigation | **Self Service, eBenefits, Savings, Pension Estimates** |
| Access Requirements | User must have an Employee ID. System opens up information specific to user. |




Estimate Pension page (1 of 2)




Estimate Pension page (2 of 2)

### Personal Information

| | |
|---|---|
| **Date of Birth** | System displays the employee's **Date of Birth.** |
| **Spouse Birthdate** | Enter the Spouse's birthdate. |

### Retirement Information

| | |
|---|---|
| **On** | Enter date the employee plans to retire in the **on** field or the age the employee plans to retire in the **when I am** field. |
| **when I am** | Enter the age the employee plans to retire in the **when I am** field or the date the employee plans to retire in the **on** field. |

### Payment Information

| | |
|---|---|
| **On** | Enter date the employee plans to begin receiving payments in the **on** field or the age the employee plans to begin receiving payments in the **when I am** field. |

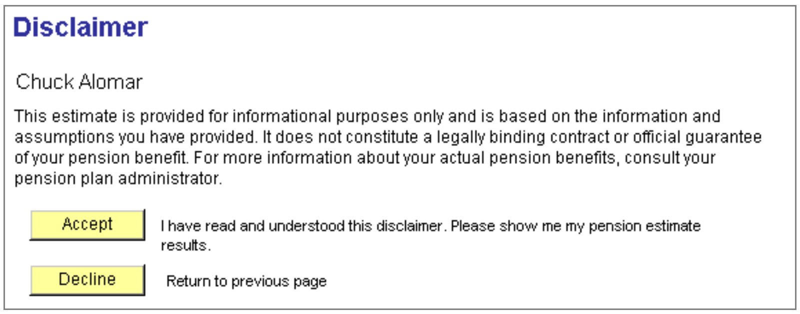
**when I am** Enter age the employee plans to begin receiving payments in the **when I am** field or the date the employee plans to begin receiving payments in the **on** field.

### Assumptions

**%** Enter the assumed salary increase.

**Calculate Pension** Click the **Calculate Pension** button to see the results. The user will first be presented with a Disclaimer page.

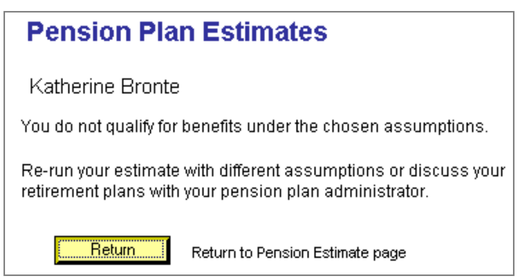
### Disclaimer Page




Disclaimer page

To view the Estimated Pension calculation, the user must accept the conditions of the disclaimer.

### Pension Plan Estimates – No Benefits Page



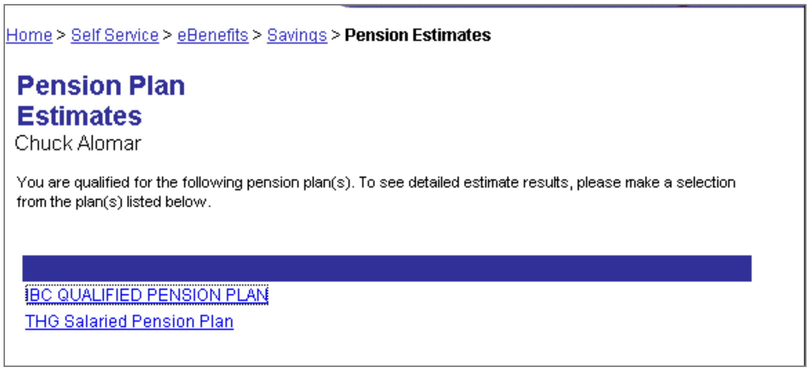

Pension Plan Estimates – No Benefits page

If the employee does not qualify for any Pension benefits the Pension Plan Estimates – No Benefits page will display.

### Pension Plan Estimates – Payment Options Summary Page

| | |
|---|---|
| Usage | The Pension Plan Estimates – Eligible Plans page displays a summary of the plans for which the user qualifies. This page is only displayed if the user is eligible for more than one plan. |

| | |
|---|---|
| Object Name | PA_I_RESULTS |
| Navigation | To access the Pension Plan Estimates – Payment Options Summary page the user must click **Accept** on the Disclaimer page. |
| Prerequisites | User must have previously filled out the Estimate Pension page. |

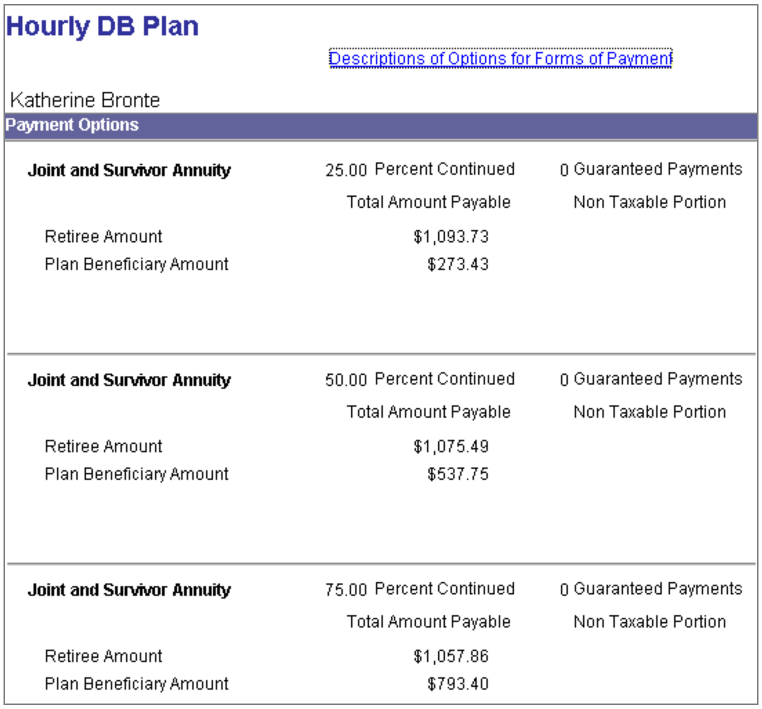



Pension Plan Estimates – Payment Options Summary page

The user may click any of the plan hyperlinks to see the detailed payment options for that plan.

### Pension Plan Estimates – Payment Options Details Page

| | |
|---|---|
| Usage | The Pension Plan Estimates – Payment Options Details page displays a list of all the estimated benefit payment options for a specified plan. If the user is only eligible for one plan, the system will bypass the Pension Plan Estimates – Payment Options Summary page and direct the user to the Pension Plan Estimates – Payment Options Details page. |
| Object Name | PA_I_RESULTS_PLAN |
| Navigation | To access the Pension Plan Estimates – Payment Options Details page the user must select a hyperlink from the Payment Options Summary page. |
| Prerequisites | User must have previously filled out the Estimate Pensions page and accepted the conditions of the Disclaimer page. |



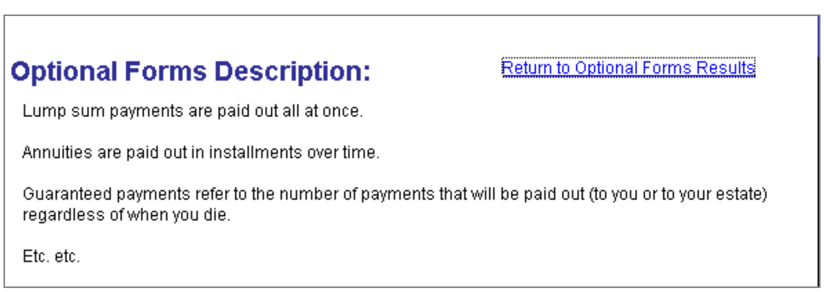

Pension Plan Estimates – Payment Options Details page

System displays all payment options for a particular plan that are available to the user.

| | |
|---|---|
| **Descriptions of Options for Forms of Payment** | Click the **Description of Options for Forms of Payments** button to display a description of the payment options the company has defined for the available Pension plans. |

### *Optional Forms Description page*

| | |
|---|---|
| Usage | The Optional Forms Descriptions page displays a description of the payment options the company has defined for the available Pension plans. |
| Object Name | PA_I_OPFORM_DISP |
| Navigation | To access the Optional Forms Description page click the **Descriptions of Options for Forms of Payment** link on the Pension Plan Estimates – Payment Options Details page. |




Optional Forms Description Page

The Optional Forms Descriptions page displays a description of the payment options that the organization has defined for its available pension plans.

---

The page shown is a representation of information that could be displayed.  Information on actual pages will depend on the organization's pension plans.

---

CHAPTER 8

# Flexible Spending Accounts (FSA)

## Overview

This chapter assumes that the employee has completed the enrollment process, and is accessing FSA plan pages in order to review plan information.

Pages displaying employee FSA plans are presented in a manner that enables the user to navigate from summary level pages to more detailed information by clicking on the appropriate plan links.

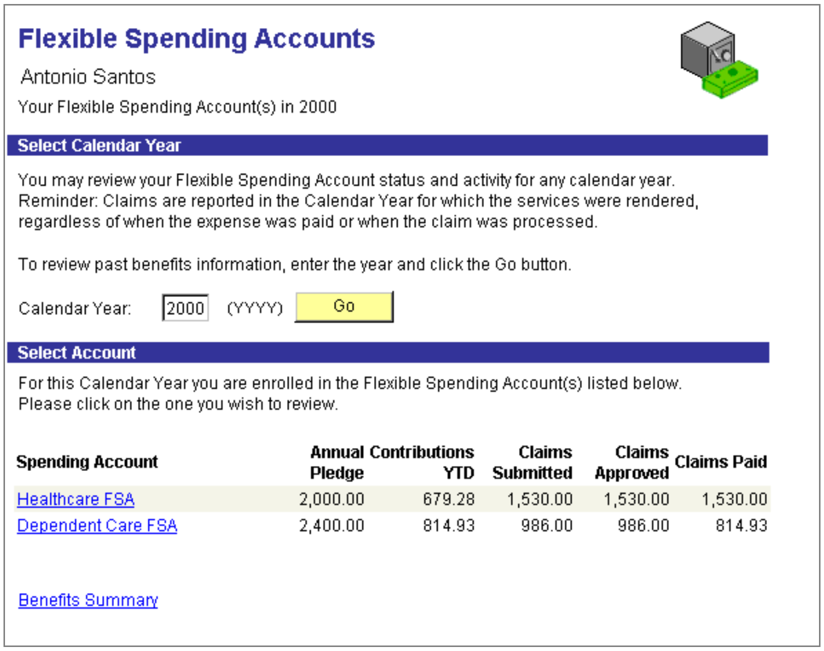
Flexible Spending Accounts (FSA) are plans that enable employees to save money on out-of-pocket health or dependent care expenses by enabling them to pay with pre-tax dollars. There are two types of accounts:

- *Health Care Spending Account* (HCSA). Employees can elect to contribute money on a pre-tax basis to this type of account and later reimburse themselves for certain qualifying medical expenses.
- *Dependent Care Spending Account* (DCSA). Employees contribute pre-tax dollars into this account and use it to reimburse themselves for day care expenses.

The following pages are used to display information about flexible spending accounts.

## Flexible Spending Accounts Page

| | |
|---|---|
| Usage | Use the Flexible Spending Accounts page to review your flexible spending accounts activity. |
| Object Name | W3EB_FSA_ACCT_LIST |
| Navigation | **Self Service, eBenefits, Flex Spend, Flexible Spending Accounts** |



Flexible Spending Account page

This page is used to review FSA account activity.

Listed first on this page is the title of the page followed by the name of the person accessing the FSA pages and the effective date of the information displayed.

Appearing next on the page is a section enabling the user to review past or future benefits information by entering the desired year and clicking the **Go** button.

### Select Account

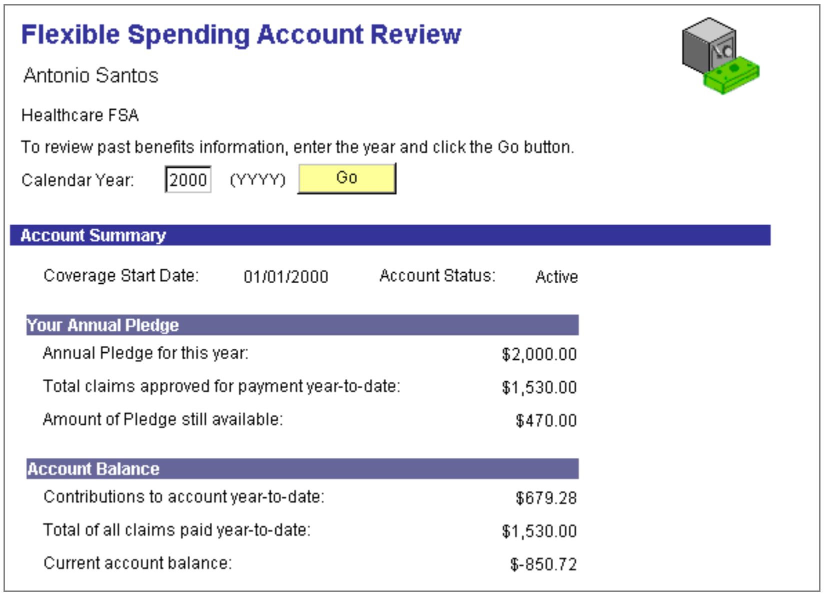
This section presents information about the employee’s spending accounts and enables users to click a spending account link to review details about that account.

| | |
|---|---|
| **Spending Account** | This is the type of spending account. Each account type is a link to the Flexible Spending Account Review Page displaying details about that account. |
| **Annual Contributions (Pledge)** | This is the value of the annual contribution pledge. |
| **Annual Contributions (YTD)** | This is the amount paid towards the pledge this year. |
| **Claims Submitted** | This is the value of claims submitted. |
| **Claims Approved** | This is the value of claims approved. |
| **Claims Paid** | This is the value of claims paid. |

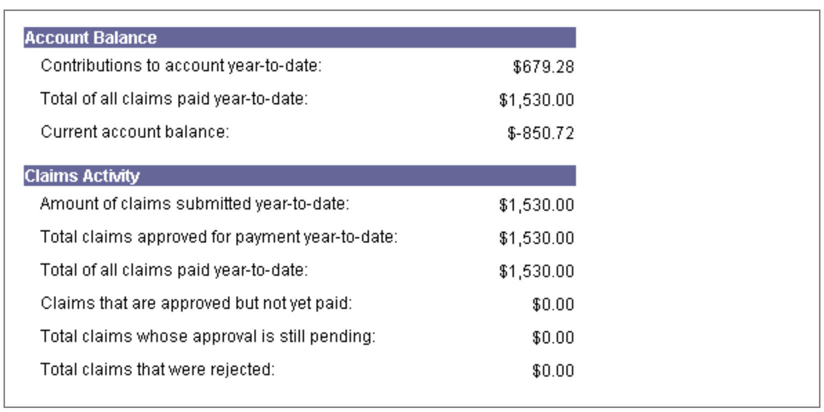
Appearing at the bottom of the page is a link taking users to the Benefits Summary Page.

### Flexible Spending Account Review Page

| | |
|---|---|
| Usage | Used to review details of flexible spending account. |
| Object Name | W3EB_FSA_ACCT_DTLS |
| Navigation | Click any **Spending Account** link on the Flexible Spending Accounts page. |




Flexible Spending Account Review page (1 of 4)




Flexible Spending Account Review page (2 of 4)

**Claim History**

Your claims are shown below in descending date order (service start date).
Click on the date to see the details for each claim.

| Service Start Date | Claim ID | Type of Service | Claim Amount |
|---|---|---|---|
| 04/18/2000 | 00010031 | Dental | $150.00 |
| 04/05/2000 | 00010030 | Medical | $180.00 |
| 03/18/2000 | 00010023 | Dental | $10.00 |
| 03/05/2000 | 00010022 | Medical | $340.00 |
| 02/18/2000 | 00010014 | Dental | $50.00 |
| 02/02/2000 | 00010013 | Medical | $300.00 |
| 01/18/2000 | 00010002 | Dental | $150.00 |
| 01/05/2000 | 00010001 | Medical | $350.00 |

Flexible Spending Account Review page (3 of 4)

**Payment History**

The checks issued to pay your claims are shown below in descending check date order.
Click on the date to see the details for each payment.

| Check Date | Check # | Check Status | Check Amount |
|---|---|---|---|
| 04/30/2000 | 1020 | Paid | $330.00 |
| 03/31/2000 | 1015 | Paid | $350.00 |
| 02/28/2000 | 1008 | Paid | $350.00 |
| 02/01/2000 | 1001 | Paid | $500.00 |

Benefits Summary
Return

Flexible Spending Account Review page (4 of 4)

Appearing after the page title and employee's name is the plan name. Below the plan name is a block of text informing the user that to review information as of another date, to enter the date and click the **Go** button.

Next on the page is a section displaying the following account information:

### Account Summary

This read-only section presents information about the account start date and account status, as well as details about the following:

- Your annual pledge
- Account balance
- Claims activity

### Claim History

| | |
|---|---|
| **Service Start Date** | This is the start date of the benefit service. Each date is a link taking the user to a page displaying details about that claim. |
| **Claim ID** | This is the ID number of the claim. |

| | |
|---|---|
| **Type of Service** | This is the type of benefit service, such as medical, dental, and so on. |
| **Claim Amount** | This is the amount of the claim. |

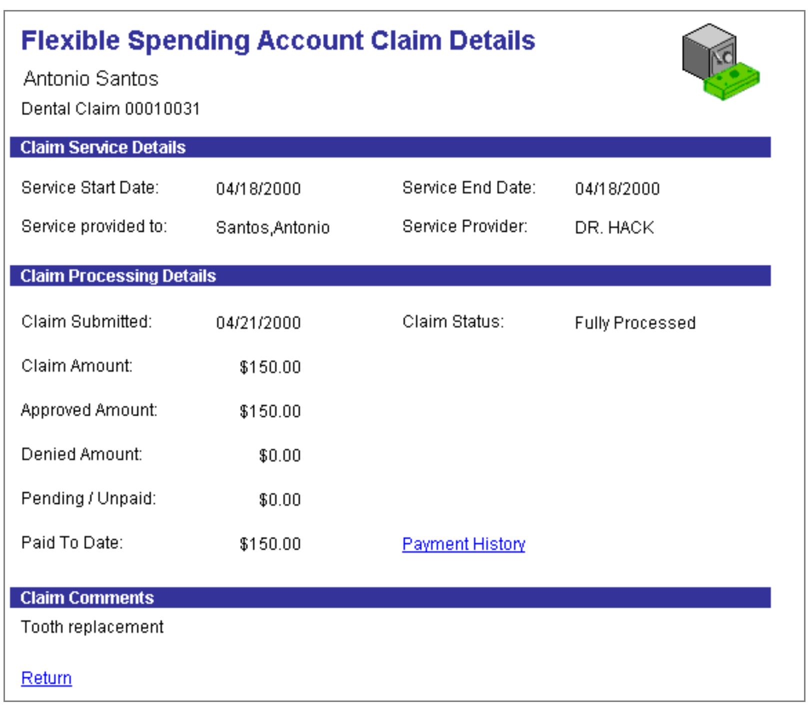
### Payment History

| | |
|---|---|
| **Check Date** | This is the date of check issuance. |
| **Check Number** | This is the check number of the issued check. |
| **Check Status** | This is the status of the check. |
| **Check Amount** | This is the amount of the check. |

Appearing at the bottom of the page are links taking users to the Benefits Summary Page, and returning users to the previous page.

## Flexible Spending Account Claim Details Page

| | |
|---|---|
| Usage | Used to review details of flexible spending account. |
| Object Name | W3EB_FSA_CLAIM_DTL |
| Navigation | Select any **Service Start Date** link under Claim History on the Flexible Spending Account Review page. |



Flexible Spending Account Claim Details page

### Claim Service Details

| | |
|---|---|
| **Service Start Date** | This is the date the claim service started. |
| **Service End Date** | This is the date the claim service ended. |
| **Service provided to** | This is the name of the recipient of service. |
| **Service Provider** | This is the name of the service provider. |

### Claim Processing Details

| | |
|---|---|
| **Claim Submitted** | This is the date claim was submitted. |
| **Claim Status** | This is the status of the submitted claim. |
| **Claim Amount** | This is the amount of the claim submitted. |
| **Approved Amount** | This is the amount of the submitted claim that has been approved for payment. |
| **Denied Amount** | This is the amount of submitted claim that has been denied for payment. |
| **Pending/Unpaid** | This is the amount of any claim(s) pending approval or unpaid. |
| **Paid To Date** | This is the amount of any claims paid to date. |
| **Payment History** | This is a link to the Flexible Spending Account Payment Details page. |

At the end of the page is a link returning users to the Flexible Spending Account Review page.

### Flexible Spending Account Payment Details Page

| | |
|---|---|
| Usage | Used to review details about FSA claim payments. |
| Object Name | W3EB_FSA_CLAIMPYMT |
| Navigation | Click the **Payment History** link on the Flexible Spending Account Claim Details page. |

Flexible Spending Account Claim Payments page

Appearing after the page title and employee's name is the claim description and claim number.

### Claim Payment History

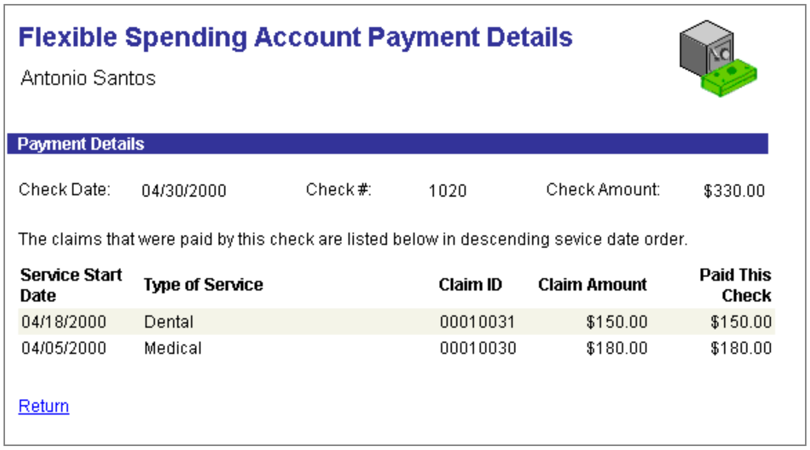
This section presents information about the payment history of the claim, including the claim-submitted date, and the claim amount.

| | |
|---|---|
| **Check Date** | This is the date of check issuance. |
| **Check Number** | This is the check number of the issued check. |
| **Check Status** | This is the status of the check. |
| **Check Amount** | This is the amount of the check. |
| **Claim Amount Paid** | This is the amount of the claim paid by this check. |

At the bottom of the page is a link returning the user to the previous page.

## Flexible Spending Account Payment Details Page

| | |
|---|---|
| Usage | Used to review details about FSA payments |
| Object Name | W3EB_FSA_PYMTCLAIM |
| Navigation | Select any **Check Date** link under Payment History on the Flexible Spending Account Review page. |



**Flexible Spending Account Payment Details**

Antonio Santos

**Payment Details**

Check Date: 04/30/2000 Check #: 1020 Check Amount: $330.00

The claims that were paid by this check are listed below in descending sevice date order.

| Service Start Date | Type of Service | Claim ID | Claim Amount | Paid This Check |
|---|---|---|---|---|
| 04/18/2000 | Dental | 00010031 | $150.00 | $150.00 |
| 04/05/2000 | Medical | 00010030 | $180.00 | $180.00 |

Return

Flexible Spending Account Payment Details page

## Payment Details

The Payment Details section begins with the date of any checks, their check number, and the amount of the checks. Following check information is a grid showing the claims that paid by these checks.

| | |
|---|---|
| **Service Start Date** | This is the date the service started. |
| **Type of Service** | This describes what kind of service was rendered (medical, dental, and so on). |
| **Claim ID** | This is the identification number of claim. |
| **Claim Amount** | This is the total amount of the claim. |
| **Paid This Check** | This is the amount of claim paid for by this check. |

At the bottom of this page is a link returning users to the previous page.

# CHAPTER 9

# Dependent/Beneficiary Management

## Overview

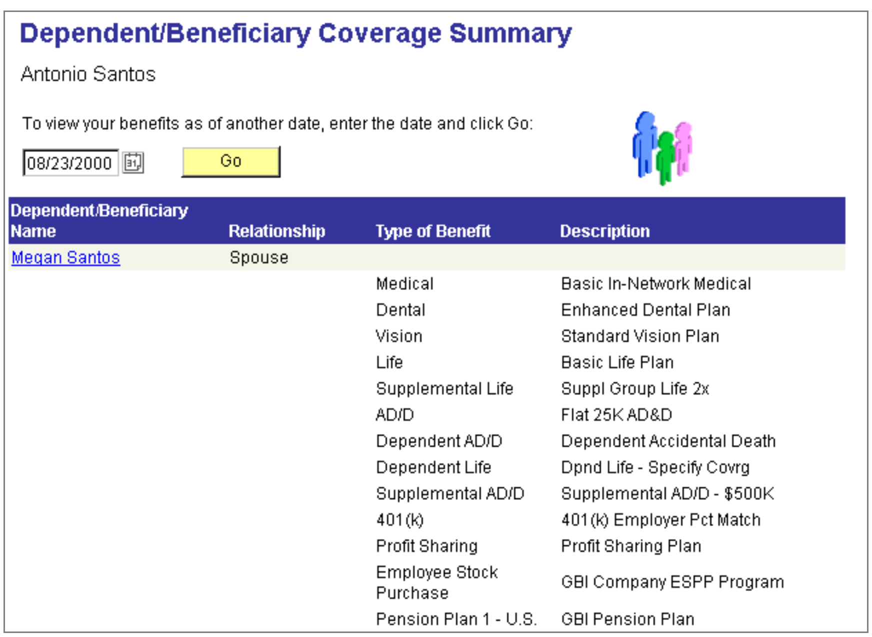
This chapter discusses dependent/beneficiary pages that are common to all applicable benefit plan types. Dependent/beneficiary pages that are specific to a given plan type are discussed in their respective chapters.

## Dependent/ Beneficiary Pages

Employees use the Dependent/Beneficiary Management page to view and edit information about their dependents and beneficiaries.

### Dependent/Beneficiary Coverage Summary Page

| | |
|---|---|
| Usage | Used to display summary dependent/beneficiary benefit information |
| Object Name | W3EB_DEPBEN_SUM |
| Navigation | **Self Service, eBenefits, Dependents, Dependent/Beneficiary Coverage** |



Dependent/Beneficiary Coverage Summary

Antonio Santos

To view your benefits as of another date, enter the date and click Go:

08/23/2000 Go

| Dependent/Beneficiary Name | Relationship | Type of Benefit | Description |
|---|---|---|---|
| Megan Santos | Spouse | | |
| | | Medical | Basic In-Network Medical |
| | | Dental | Enhanced Dental Plan |
| | | Vision | Standard Vision Plan |
| | | Life | Basic Life Plan |
| | | Supplemental Life | Suppl Group Life 2x |
| | | AD/D | Flat 25K AD&D |
| | | Dependent AD/D | Dependent Accidental Death |
| | | Dependent Life | Dpnd Life - Specify Covrg |
| | | Supplemental AD/D | Supplemental AD/D - $500K |
| | | 401(k) | 401(k) Employer Pct Match |
| | | Profit Sharing | Profit Sharing Plan |
| | | Employee Stock Purchase | GBI Company ESPP Program |
| | | Pension Plan 1 - U.S. | GBI Pension Plan |

Dependent/Beneficiary Coverage Summary page (1 of 3)

| | | | |
|---|---|---|---|
| Marguerite Santos | Daughter | | |
| | | Medical | Basic In-Network Medical |
| | | Dental | Enhanced Dental Plan |
| | | Vision | Standard Vision Plan |
| | | Life | Basic Life Plan |
| | | Supplemental Life | Suppl Group Life 2x |
| | | AD/D | Flat 25K AD&D |
| | | Dependent AD/D | Dependent Accidental Death |
| | | Dependent Life | Dpnd Life - Specify Covrg |
| | | Supplemental AD/D | Supplemental AD/D - $500K |
| | | 401(k) | 401(k) Employer Pct Match |
| | | Profit Sharing | Profit Sharing Plan |
| | | Employee Stock Purchase | GBI Company ESPP Program |
| | | Pension Plan 1 - U.S. | GBI Pension Plan |

Dependent/Beneficiary Coverage Summary page (2 of 3)

| | | | |
|---|---|---|---|
| Carissa Santos | Mother | | |
| | | Life | Basic Life Plan |
| | | Supplemental Life | Suppl Group Life 2x |
| | | AD/D | Flat 25K AD&D |
| | | Supplemental AD/D | Supplemental AD/D - $500K |
| | | 401(k) | 401(k) Employer Pct Match |
| | | Profit Sharing | Profit Sharing Plan |
| | | Employee Stock Purchase | GBI Company ESPP Program |
| | | Pension Plan 1 - U.S. | GBI Pension Plan |
| Samuel Santos | Son | | |

Benefits Summary

Dependent/Beneficiary Coverage Summary page (3 of 3)

Listed immediately after the title of the page is the name of the employee, followed by a text block informing users that in order to display information for a different date, they should enter a new date in the box and click the **Go** button.

**Dependent/Beneficiary Name** This is the name of the dependent or beneficiary. The name is also a link to a personal information page for the person.

**Relationship** This is the relationship of dependent/beneficiary to employee

**Type of Benefit** This is the benefit plan type in which the dependent/beneficiary is enrolled

**Description** This is the description of benefit plan type for the dependent/beneficiary

The Dependent Beneficiary Coverage Summary page is a compilation of an employee's dependents and beneficiaries for all applicable plan types for which they are enrolled.

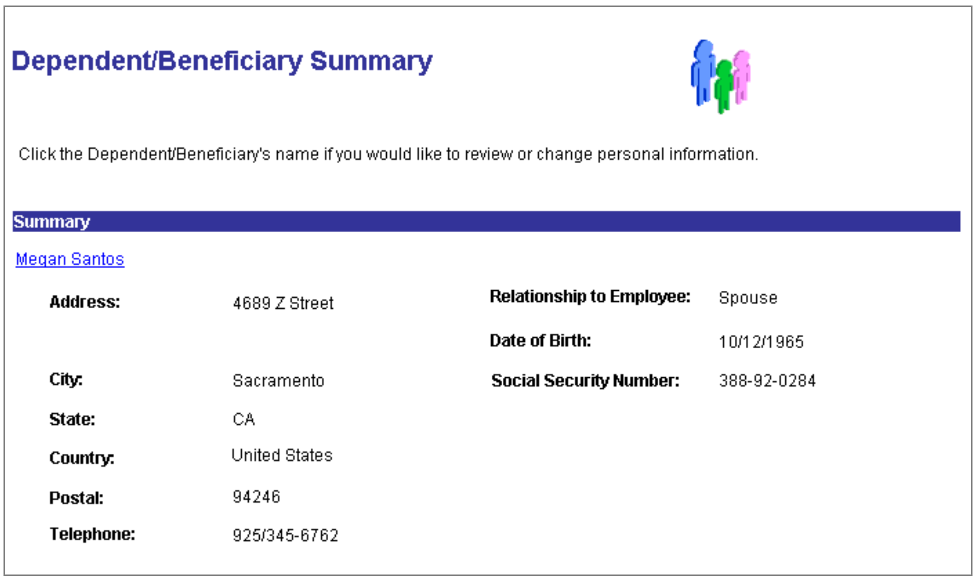
Deceased dependents and beneficiaries will be filtered out from display unless they have a current beneficiary allocation or enrollment record.

The summary displays all dependents and beneficiaries, regardless of whether the dependent or beneficiary is actually enrolled in a plan. A text message will appear underneath individuals that have no enrollments.

Clicking on any name in the **Name** column takes the user to the Dependent/Beneficiary Summary Page.

## Dependent/Beneficiary Summary Page

| | |
|---|---|
| Usage | Used to display a summary of dependent/beneficiary personal information |
| Object Name | W3EB_PERS_DTA_SMRY |
| Navigation | **Self Service, eBenefits, Dependents, Dependent/Beneficiary Summary** |


Dependent/Beneficiary Summary

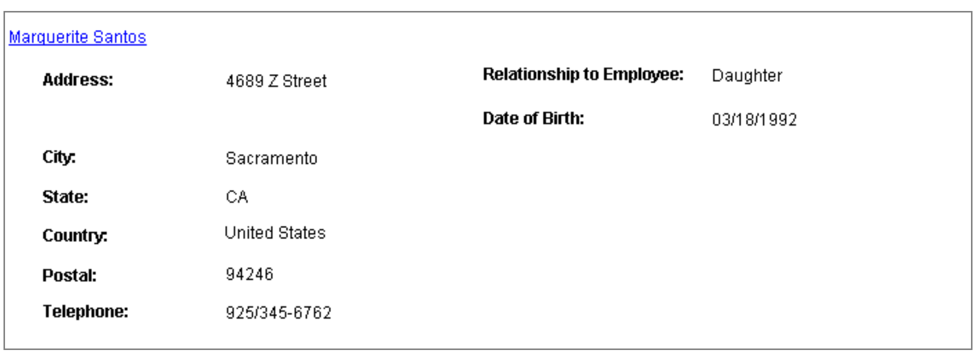
Click the Dependent/Beneficiary's name if you would like to review or change personal information.

Summary

Megan Santos

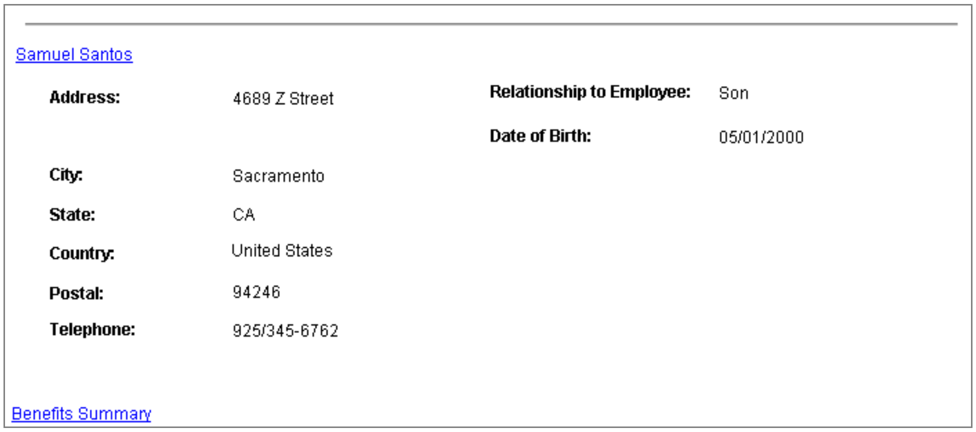
| | | | |
|---|---|---|---|
| **Address:** | 4689 Z Street | **Relationship to Employee:** | Spouse |
| | | **Date of Birth:** | 10/12/1965 |
| **City:** | Sacramento | **Social Security Number:** | 388-92-0284 |
| **State:** | CA | | |
| **Country:** | United States | | |
| **Postal:** | 94246 | | |
| **Telephone:** | 925/345-6762 | | |

Dependent/Beneficiary Summary page (1 of 3)


Marquerite Santos

| | | | |
|---|---|---|---|
| **Address:** | 4689 Z Street | **Relationship to Employee:** | Daughter |
| | | **Date of Birth:** | 03/18/1992 |
| **City:** | Sacramento | | |
| **State:** | CA | | |
| **Country:** | United States | | |
| **Postal:** | 94246 | | |
| **Telephone:** | 925/345-6762 | | |

Dependent/Beneficiary Summary page (2 of 3)



Samuel Santos

| | | | |
|---|---|---|---|
| **Address:** | 4689 Z Street | **Relationship to Employee:** | Son |
| | | **Date of Birth:** | 05/01/2000 |
| **City:** | Sacramento | | |
| **State:** | CA | | |
| **Country:** | United States | | |
| **Postal:** | 94246 | | |
| **Telephone:** | 925/345-6762 | | |

Benefits Summary

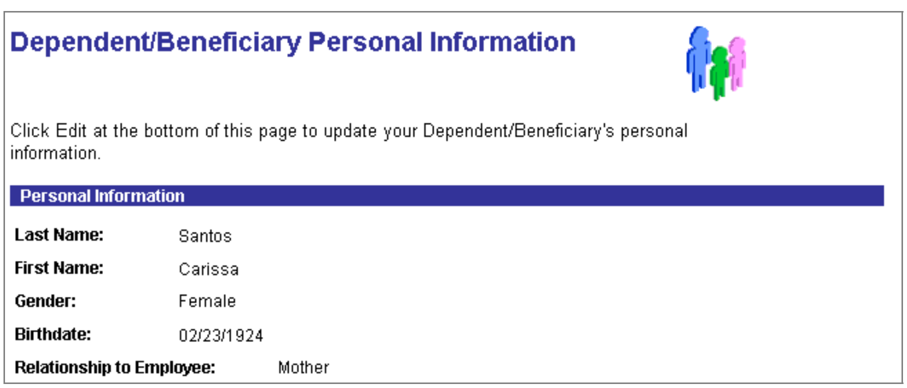
Dependent/Beneficiary Summary page (3 of 3)

Listed after the title of the page is a text block informing users that in order to review additional personal information about an individual, they should click the person's name, and they will be taken to the Dependent/Beneficiary Personal Information Page displaying detailed personal information for that dependent/beneficiary.

Appearing next on the page are information sections for each dependent/beneficiary that display summary personal data such as name, address, phone number, relationship, date of birth, and so on.  All summary information displayed on this page is view-only and cannot be modified.

### Dependent/Beneficiary Personal Information Page

| | |
|---|---|
| Usage | Used to review and update detailed dependent/beneficiary personal information |
| Object Name | W3EB_DEPBEN_DETAIL |
| Navigation | Click any name in the information section of the of the Dependent/Beneficiary Summary page**.** |



**Dependent/Beneficiary Personal Information**

Click Edit at the bottom of this page to update your Dependent/Beneficiary's personal information.

**Personal Information**

| | |
|---|---|
| **Last Name:** | Santos |
| **First Name:** | Carissa |
| **Gender:** | Female |
| **Birthdate:** | 02/23/1924 |
| **Relationship to Employee:** | Mother |

Dependent/Beneficiary Personal Information page (1 of 2)

Dependent/Beneficiary Personal Information page (2 of 2)

This page is used to review personal information about a dependent/beneficiary. If employees need to modify the displayed information, they should click the **Edit** button located at the bottom of the page, and the page will reappear in edit mode.

### Personal Information

| | |
|---|---|
| **Last Name** | This is the last name of the dependent/beneficiary |
| **First Name** | This is the first name of the dependent/beneficiary |
| **Gender** | This is the gender of the dependent/beneficiary |
| **Birthdate** | This is the birthdate of the dependent/beneficiary |
| **Relationship to Employee** | This is the relationship of the dependent/beneficiary to employee |

### Status Information

| | |
|---|---|
| **Marital Status** | This is the marital status of the dependent/beneficiary. |
| **Student** | This field indicates whether the dependent/beneficiary is a student. |
| **Disabled** | This field indicates whether the dependent/beneficiary is disabled. |
| **Smoker** | This field indicates whether the dependent/beneficiary is a smoker. |

### Address and Telephone

| | |
|---|---|
| **Address 1** | This is the primary street address of dependent/beneficiary |
| **City** | This is the city of dependent/beneficiary |
| **County** | This is the county of dependent/beneficiary |

| | |
|---|---|
| **State** | This is the state of dependent/beneficiary |
| **Country** | This is the country of dependent/beneficiary |
| **Postal Code** | This is the postal code of dependent/beneficiary |
| **Phone** | This is the phone number of dependent/beneficiary |

Appearing at the end of the page is an **Edit** button that, when clicked, displays the page again in edit mode, and enables the employee to make changes to dependent/beneficiary personal information. When satisfied with any changes made, the employee clicks the **Save** button to enter the new information.

At the bottom of the page are links taking the user to the previous page or to the Benefits Summary Page.

CHAPTER 10

# Life Events

## Overview of Life Events Pages

Life events pages are designed for employees to use when a marriage or birth/adoption occur. Because many employees may not be familiar with these transactions, the pages have been designed to be as intuitive as possible.

When employees first enter a life events page, they are presented with a brief description of the event. In the center of the page will be an outline of the steps related to the event with brief descriptions.

### Activity Guide

The Activity Guide appears at the top of each life events page, and displays the employee's progress through the event process. Each life event has steps that need to be completed in order to properly notify all interested parties/systems of the event, and all steps are represented by a page. For example, in a marriage event the following steps may need to be completed:

- Name change: Update personal profile in human resources (HR).
- Benefits: Add spouse to insurance policies, update beneficiaries.
- Payroll: Change W4 information

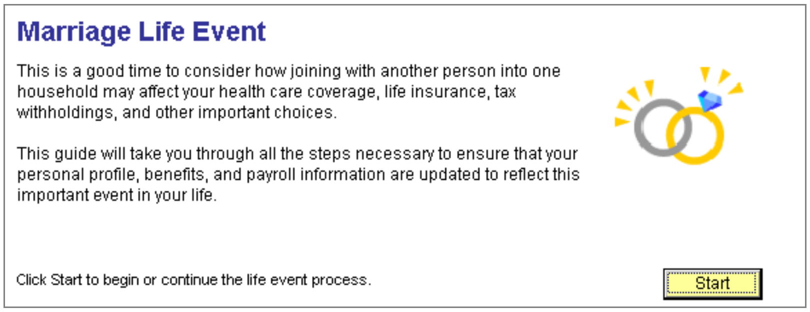
For more information about the Event Guide process, see Designing Activity Guides.

## Marriage Life Event Pages

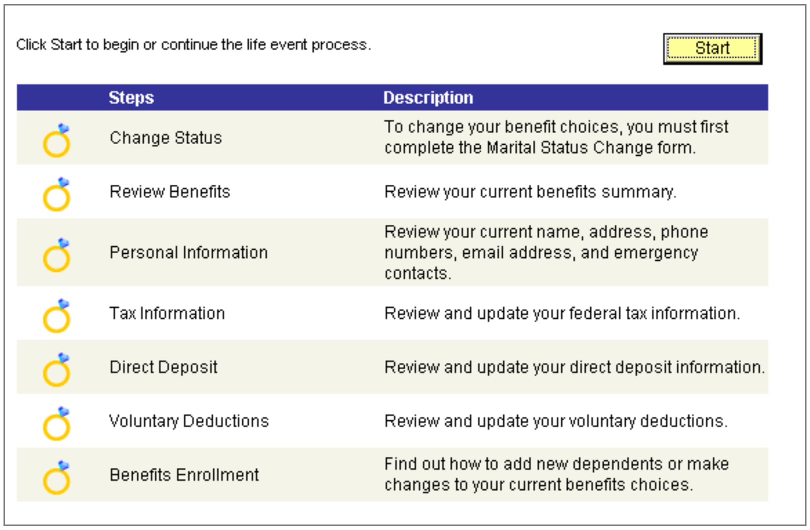
There are several steps an employee will need to consider when getting married. Each step is represented with a separate page, and the employee is guided through the process as follows.

### Marriage Life Event Page

| | |
|---|---|
| Usage | Used to begin the marriage life events process |
| Object Name | Page:W3EB_MARR_START |
| Navigation | **Self Service, eBenefits, Life Event, Marriage** |




Marriage Life Event page (1 of 2)




Marriage Life Event page (2 of 2)

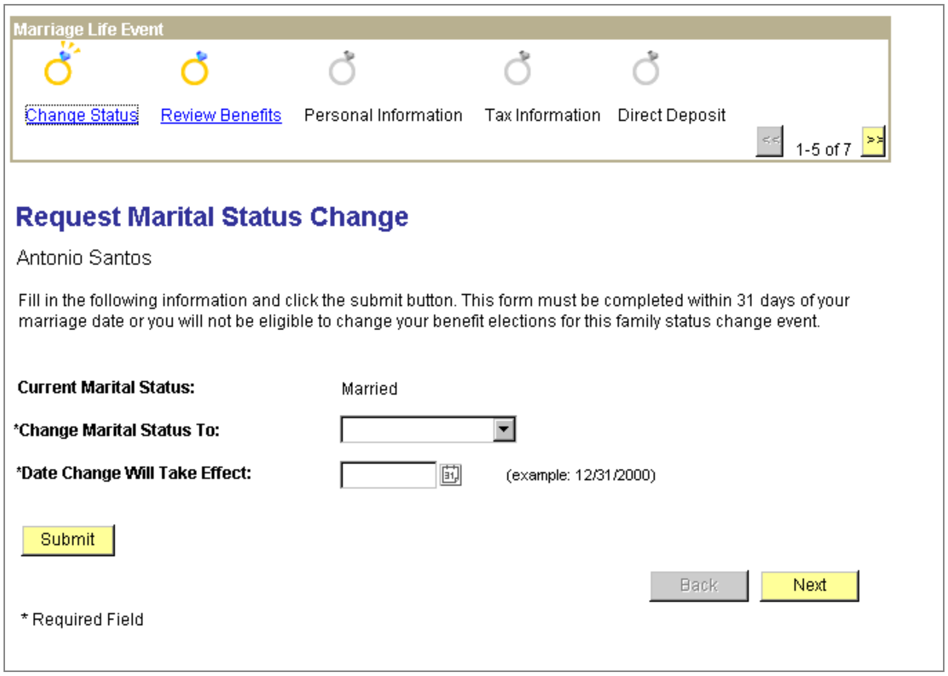
Listed first on the page is a text area describing the process, and instructing the employee to click the **Start** button in order to begin the process. The button name will change to **Continue** if the employee previously began the process and has returned at a later time. This text area is stored in the message catalog (3001, 278).

Immediately below the **Start** button a list of steps appear, and their associated descriptions, that an employee needs to complete when moving through the marriage life events process. The text for each step and description is defined during the Activity Guide setup process, under Step Definition.

Clicking the **Start** button activates the Change Marital Status link and enables the employee to move to that step in the process.

### Marital Status Change Page

| | |
|---|---|
| Usage | Used to enter changes in marital status |
| Object Name | HR_EE_MAR_STATUS |
| Navigation | Click **Start** on the Marriage Life Event page. |




Marital Status Change page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Appearing after the page title and employee's name is an instructional text block presenting marital status change information to the employee.

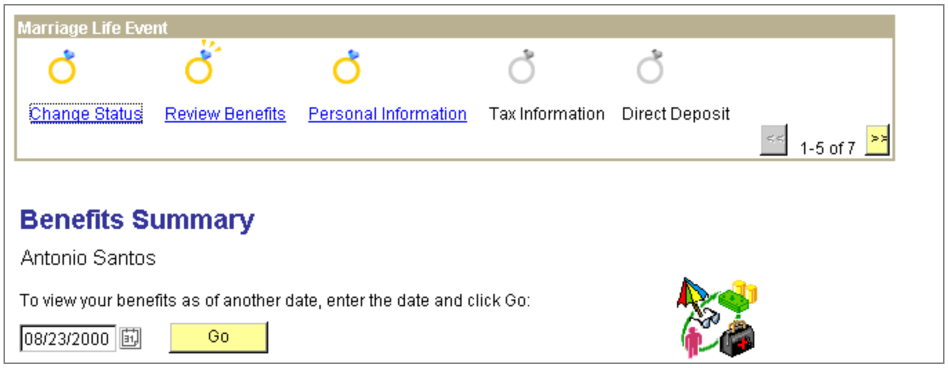
The next area of the page contains the employee's current marital status, followed by a line enabling the employee to select a new marital status from the available options, and a box to enter the new status effective date.

Clicking the **Submit** button, located below the date box, transmits the change in marital status to the organization's Human Resource Department. The employee must click the **Submit** button to make the changes effective.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Review Benefits Page

| | |
|---|---|
| Usage | Used to review current benefits. |
| Object Name | W3EB_GRID |
| Navigation | Click **Next** on the Marital Status Change page. |




Review Benefits page (1 of 3)

| Type of Benefit | Plan Description | Coverage or Participation |
|---|---|---|
| Medical | Basic In-Network Medical | Family |
| Dental | Enhanced Dental Plan | Family |
| Vision | Standard Vision Plan | Family |
| Life | Basic Life Plan | $50,000 |
| Supplemental Life | Suppl Group Life 2x | 2 X Salary |
| AD/D | Flat 25K AD&D | $25,000 |
| Dependent AD/D | Dependent Accidental Death | $5,000 |
| Dependent Life | Dpnd Life - Specify Covrg | 1 X Salary |
| Supplemental AD/D | Supplemental AD/D - $500K | $500,000 |
| Short-Term Disability | Short Term Disability - 50% | 50% of Salary |
| Long-Term Disability | Standard Long-term Disability | 50% of Salary |
| 401(k) | 401(k) Employer Pct Match | 3% Before Tax |
| 401(k) | 401(k) Employer Pct Match | $200 After Tax |

Review Benefits page (2 of 3)

| | | |
|---|---|---|
| Profit Sharing | Profit Sharing Plan | Not Contributing |
| Employee Stock Purchase | GBI Company ESPP Program | 1% After Tax |
| Sick | GBI Sick Leave Plan | - - - - - |
| Vacation | GBI Vacation Time | - - - - - |
| Flex Spending Health - U.S. | Healthcare FSA | $2,000 Pledge |
| Flex Spending Dependent Care | Dependent Care FSA | $2,400 Pledge |
| Pension Plan 1 - U.S. | GBI Pension Plan | $100 Contribution |
| Vacation Buy | Vacation Buy | 8 Hours Bought |

Enroll in Benefits

Back Next

Review Benefits page (3 of 3)

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Appearing next on the page is the name of the employee, followed by a line of text informing the user to enter a new date in order to review information in effect as of that date.

The page then displays a summary of the employee's benefits arranged as follows:

| | |
|---|---|
| **Type of Benefit** | The benefit plan type, such as medical, dental, vision, and so on. Clicking on any benefit plan takes the employee to a page displaying plan details. |
| **Plan Description** | The name of the benefit plan as defined on the Benefit Plan table. |
| **Coverage or Participation** | The level or value of coverage. Level of coverage applies to medical when the coverage code describes the number of covered family members. |

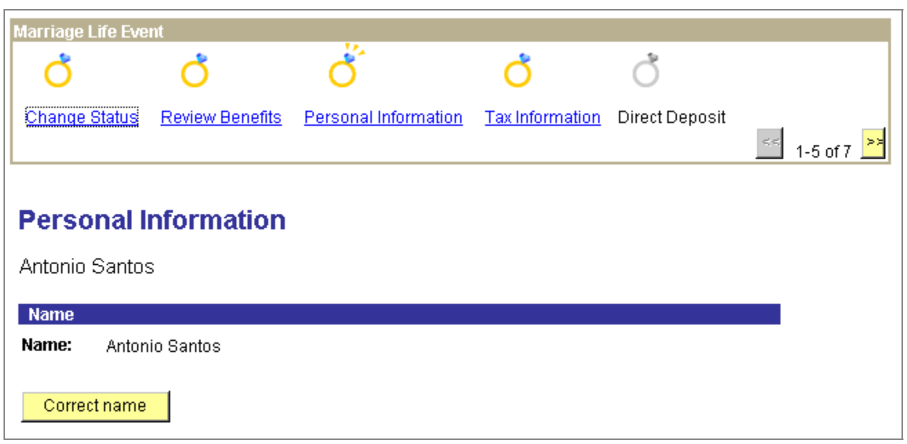
A benefit plan type listed in the table may also be a link to the provider's pages, or, if Authoria PS is installed, to the Authoria PS pages.

If Authoria PS is installed, links to a benefits program overview, other benefits, and to an Authoria PS search page will appear.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Personal Information Page

| | |
|---|---|
| Usage | Used to review and change personal information. |
| Object Name | HR_EE_PERS_INFO |
| Navigation | Click **Next** on the Review Benefits page. |




Personal Information page (1 of 5)

**Home Address**

**Country:** United States

**Address 1:** 4689 Z Street

**Address 2:**

**Address 3:**

**City:** Sacramento

**County:** **Postal:** 94246

**State:** CA California

**Mailing Address**

**Country:**

**Address 1:**

**Address 2:**

**Address 3:**

**City:**

**County:** **Postal:**

**State:**

Correct home/mailing addresses

Personal Information page (2 of 5)

**Phone Numbers**

| Phone Type | Phone Number | Primary Phone |
|---|---|---|
| FAX | 925/867-2341 | ☐ |

Correct phone numbers

**Emergency Contacts**

| Name | Relationship to Employee | Primary Contact |
|---|---|---|
| | Other | ☐ |

Correct emergency contacts

**Email Addresses**

| Email Type | Email Address |
|---|---|
| Home | SantosA@hotmail.com |

Correct email addresses

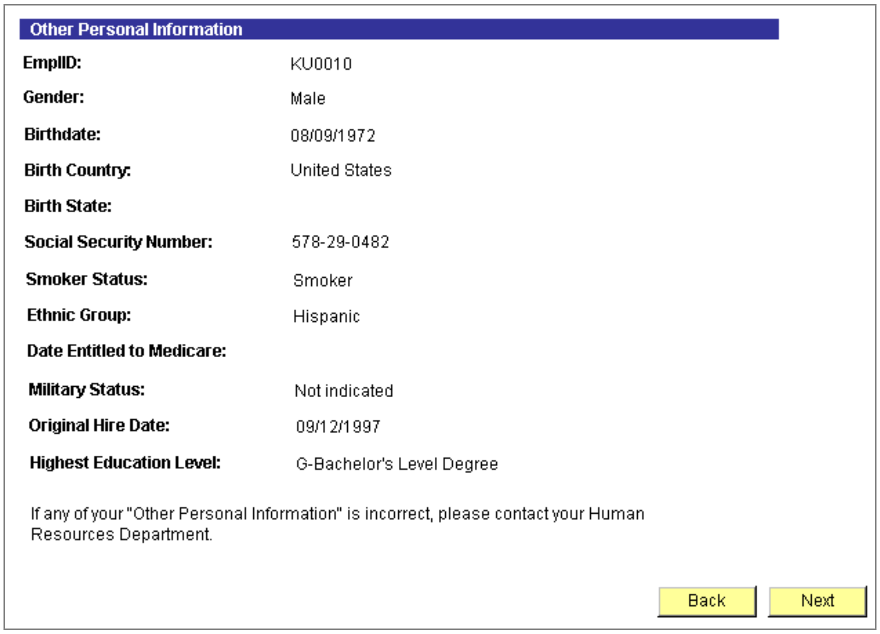
Personal Information page (3 of 5)

**Marital Status**

**Marital Status:** Married **As of:** 09/12/1997

Correct marital status

Personal Information page (4 of 5)



Personal Information page (5 of 5)

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

On the Personal Information page, the employee will be able to review the displayed personal information. To correct any of the displayed information, users click the **Correct….** button within the appropriate section, and they will be taken to pages enabling corrections to be made to their personal information. Information in the **Other Personal Information** section is not available for employees to directly enter corrections.

The following page sections allow corrections to the displayed information:

- Employee Name Change
- Home & Mailing Address
- Phone Numbers
- Emergency Contact Information
- Email Address
- Marital Status

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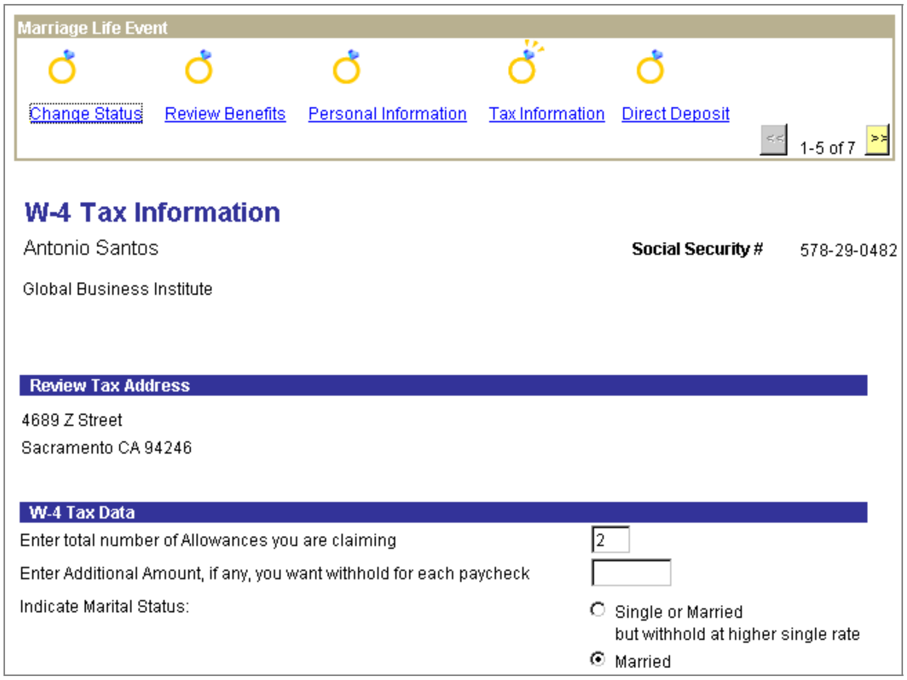
For more information about correcting personal information, see Personal Data Component.

---

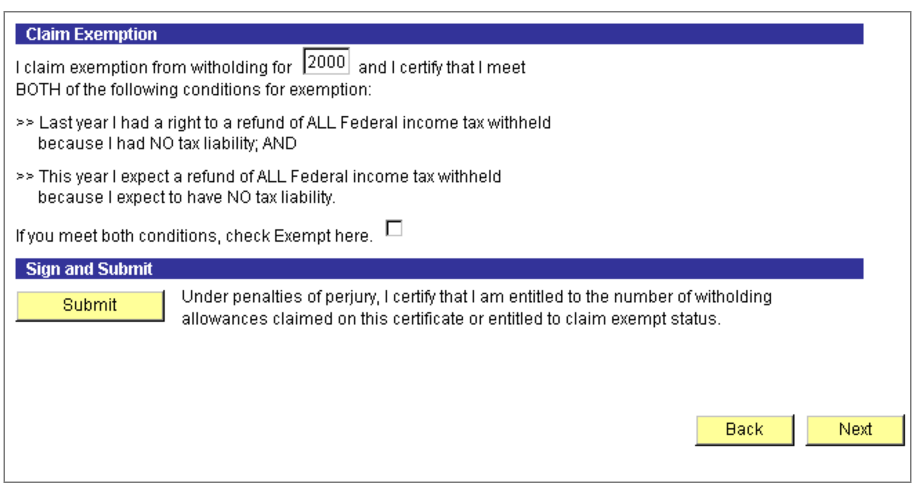
Appearing last on the page are buttons labeled Back and **Next.** Clicking the Back button returns the user to the preceding page, and clicking the **Next** button moves the user to the next step in the life events process.

## Tax Information Page

| | |
|---|---|
| Usage | Used to review and change W-4 tax information. |
| Object Name | PY_IC_W4_DATA |
| Navigation | Click **Next** on the Personal Information page. |




Tax Information Page (1 of 2)




Tax Information Page (2 of 2)

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Next on the page are sections enabling the user to review and change relevant tax information.

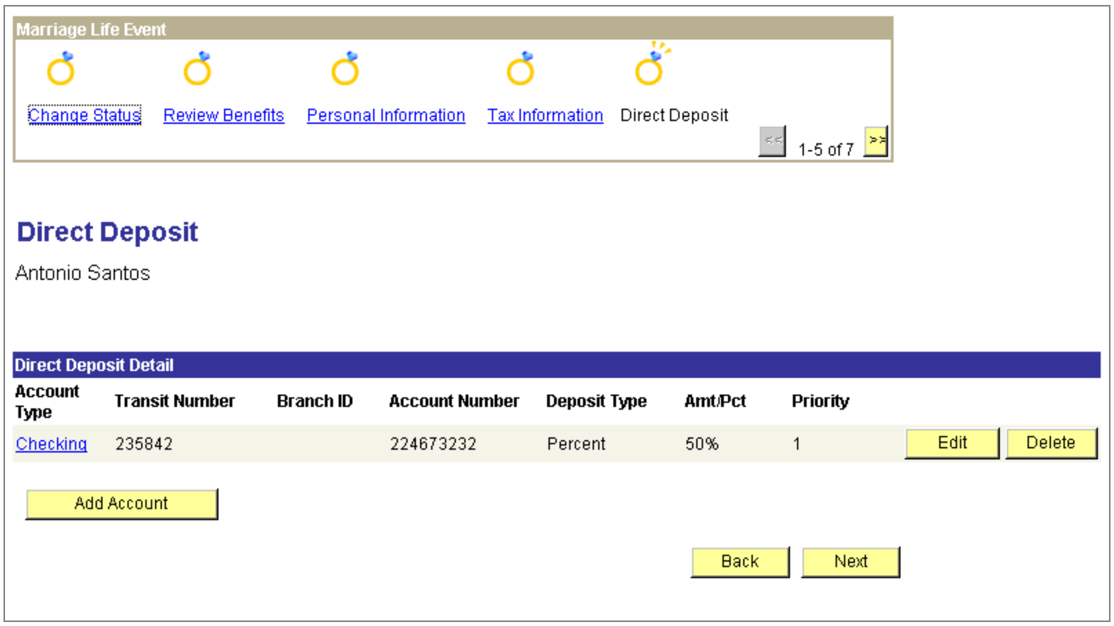
For more information about the tax information page, see Using W-4 Tax Information.

When satisfied with the existing or revised information, users click the **Submit** button.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Direct Deposit Page

| | |
|---|---|
| Usage | Used to review direct deposit information. |
| Object Name | PY_IC_DD_LIST |
| Navigation | Click **Next** on the Tax Information page. |




Direct Deposit page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

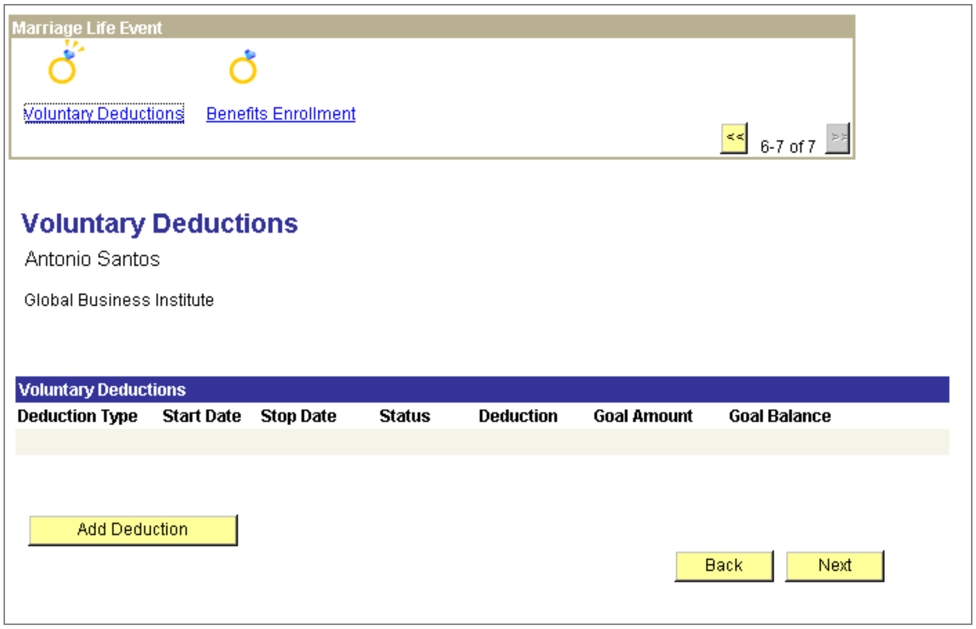
Appearing after the page title and employee's name is a section enabling the employee to review, direct deposit information. If employees need to edit or delete direct deposit information, they should click the **Edit** or **Delete** buttons.

For more information about Direct Deposit pages, including Edit and Delete pages, see Using Direct Deposit.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Voluntary Deductions Page

| | |
|---|---|
| Usage | Used to review and change voluntary deduction information. |
| Object Name | PY_IC_DED_LIST |
| Navigation | Click **Next** on the Direct Deposit page. |




Voluntary Deductions page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Appearing after the page title and employee's name is a section enabling the employee to review and edit voluntary deduction information.

---

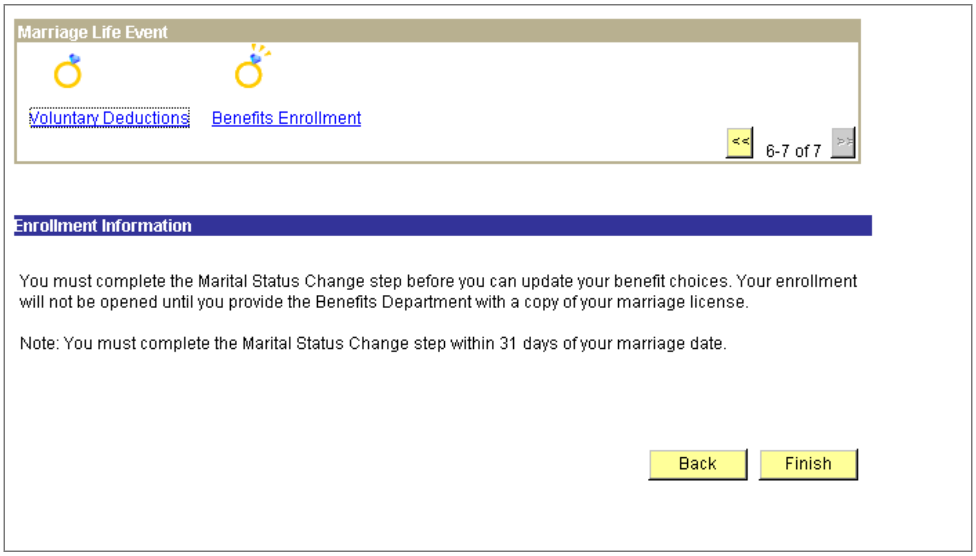
For more information about the Voluntary Deduction page, including the Add Deduction page, see Using Voluntary Deductions.

---

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Enrollment Information Page

| | |
|---|---|
| Usage | Used to provide employee with birth/adoption event process information. |
| Object Name | W3EB_ENR_ELECTN |
| Navigation | Click **Next** on the Voluntary Deductions page. |



Enrollment Information page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

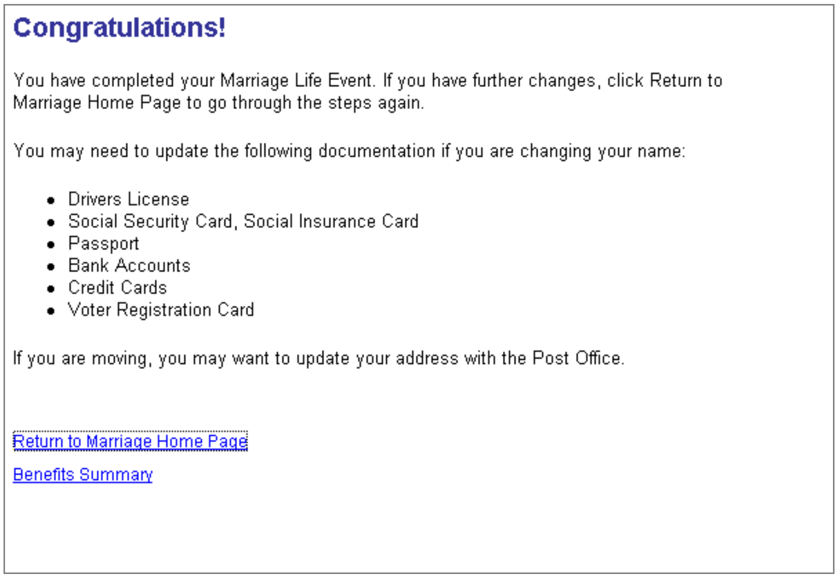
Next on the page is a section presenting information to the user regarding notification of the event to the HR department, and other relevant enrollment information.

A Benefits Department communicates their enrollment process and how an employee will be notified when their enrollment is open for changes in the text area. This text area is stored in the message catalog (3001, 447).

Users may click **Back** button to return to the previous page, or **Finish** to complete the life events process.

## Congratulations Page

| | |
|---|---|
| Usage | Used to provide employee with confirmation of the completion of the life events process and to provide other relevant event information. |
| Object Name | W3EB_MARR_FINISH |
| Navigation | Click **Finish** on the Enrollment Information page. |




Congratulations! Page

This page confirms that the employee has successfully completed the marriage life events process, and provides relevant event suggestions to the employee. The text area is stored as HTML Object W3EB_MARR_FINISH.

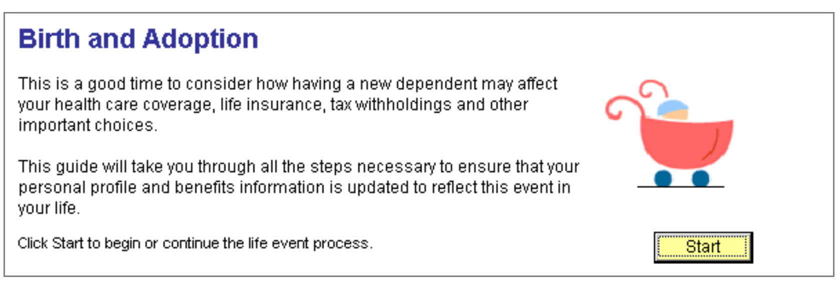
At the bottom of the page are links taking the user to the Marriage Life Event Page and to the Benefits Summary Page.

## Birth/Adoption Life Event Pages

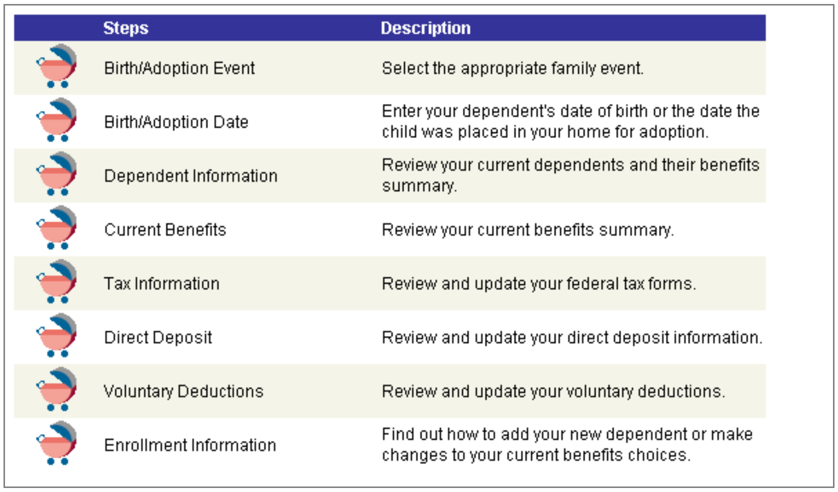
There are several steps an employee will need to consider when having or adopting a child.. Each step is represented with a separate page, and the employee is guided through the process as follows.

### Birth and Adoption Life Event Page

| | |
|---|---|
| Usage | Used to begin the birth/adoption life events process |
| Object Name | W3EB_BRTH_START |
| Navigation | **Self Service, eBenefits, Life Event, Birth/Adoption** |




Birth and Adoption page (1 of 2)



| Steps | Description |
|---|---|
| Birth/Adoption Event | Select the appropriate family event. |
| Birth/Adoption Date | Enter your dependent's date of birth or the date the child was placed in your home for adoption. |
| Dependent Information | Review your current dependents and their benefits summary. |
| Current Benefits | Review your current benefits summary. |
| Tax Information | Review and update your federal tax forms. |
| Direct Deposit | Review and update your direct deposit information. |
| Voluntary Deductions | Review and update your voluntary deductions. |
| Enrollment Information | Find out how to add your new dependent or make changes to your current benefits choices. |

Birth and Adoption page (1 of 2)

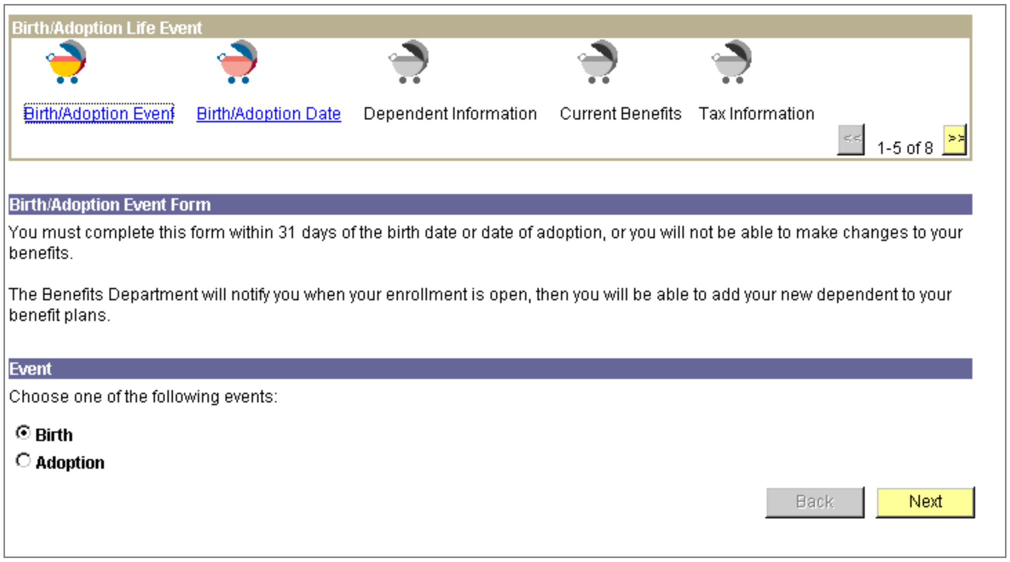
Listed first on the page is a text area describing the process, and instructing the employee to click the **Start** button in order to begin or continue the process. The button name will change to **Continue** if the employee previously began the process and has returned at a later time. This text area is stored in the message catalog (3001, 301).

Immediately below the **Start** button a list of activities appears, and their associated descriptions, that an employee needs to complete when moving through the birth/adoption life events process. The text for each step and description is defined during the Activity Guide setup process, under Step Definition.

Clicking the **Start** button enables the employee to move to first step in the process.

### Birth/Adoption Event Page

| | |
|---|---|
| Usage | Used to notify the HR department of a birth/adoption. |
| Object Name | W3EB_BRTH_ADPT_EVT |
| Navigation | Click **Start** on the Birth Adoption page. |



Birth/Adoption Event page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

### Birth/Adoption Event Form

This block of text presents information to the user regarding notification of the event to the HR department, and other relevant enrollment information. This text area is stored in the message catalog (3001, 303).

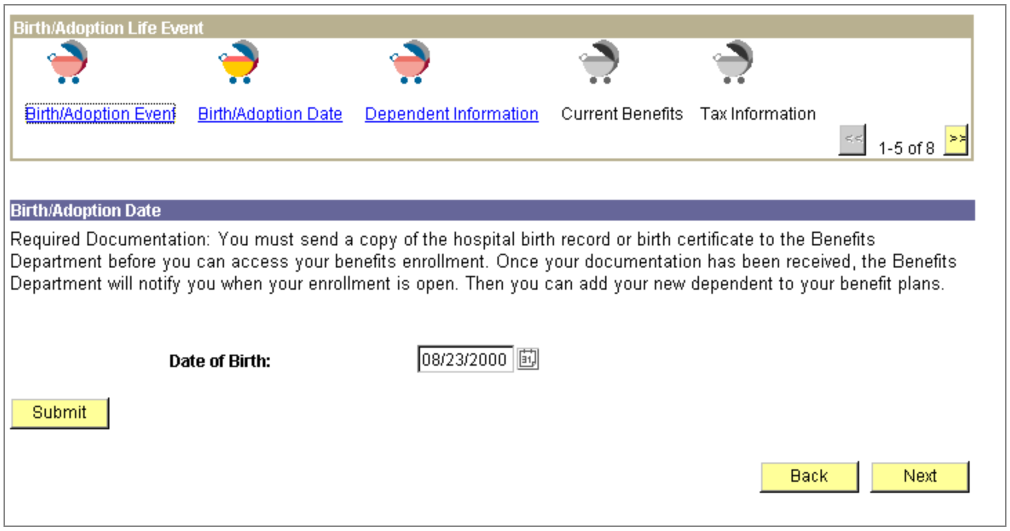
### Event

This section of the page enables the user to choose between a birth or an adoption event.

When users have read the information and made an event choice, they click the **Next** button to continue the process.

## Birth/Adoption Date Page

| | |
|---|---|
| Usage | Used to notify the HR department of the date of a birth/adoption. |
| Object Name | W3EB_BRTH_ADPT_DT |
| Navigation | Click **Next** on the Birth Adoption Event page |



Birth/Adoption Date page

The page shown is for a birth event date, but is similar in layout and organization to the adoption event date page.

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

### Birth/Adoption Date

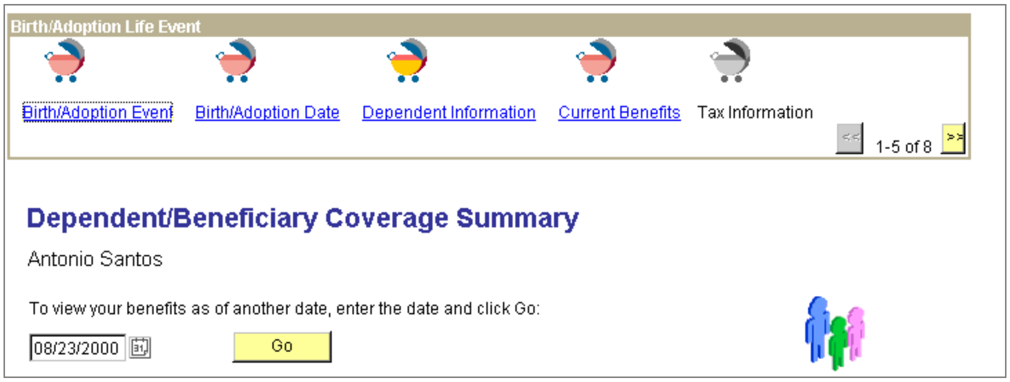
This block of text presents information to the user regarding notification of the event to the HR department, and other relevant enrollment information. This text area is stored in the message catalog (3001, 304 for adoption or 3001, 459 for birth).

Users enter the date of birth (or adoption) in the space provided, and then click the **Submit** button. When the employee clicks the **Submit** button, a workflow message is sent to the Benefits Administrator.

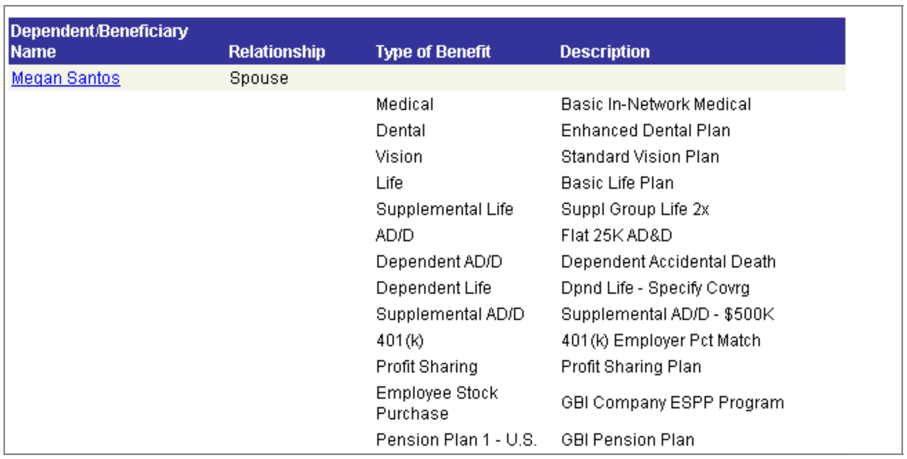
To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Dependent Information Page

| | |
|---|---|
| Usage | Used to review dependent/beneficiary benefits coverage summary information. |
| Object Name | W3EB_DEPBEN_SUM |
| Navigation | Click **Next** on the Birth/Adoption Date page. |

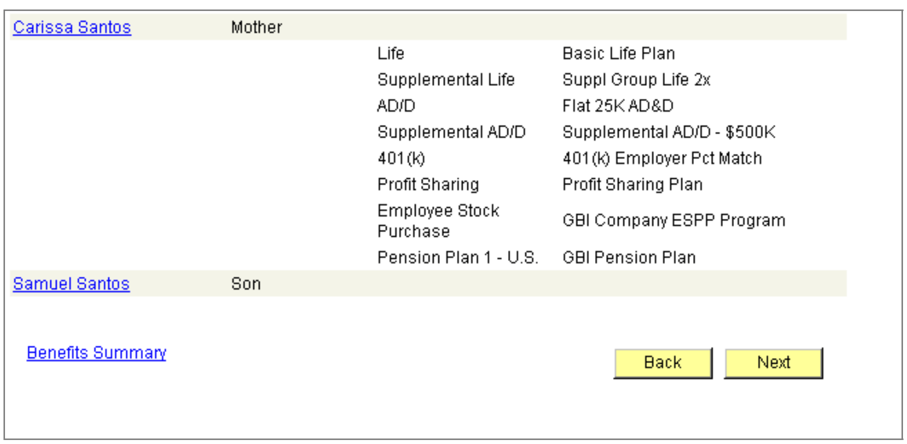



Dependent Information page (1 of 3)



| Dependent/Beneficiary Name | Relationship | Type of Benefit | Description |
|---|---|---|---|
| Megan Santos | Spouse | | |
| | | Medical | Basic In-Network Medical |
| | | Dental | Enhanced Dental Plan |
| | | Vision | Standard Vision Plan |
| | | Life | Basic Life Plan |
| | | Supplemental Life | Suppl Group Life 2x |
| | | AD/D | Flat 25K AD&D |
| | | Dependent AD/D | Dependent Accidental Death |
| | | Dependent Life | Dpnd Life - Specify Covrg |
| | | Supplemental AD/D | Supplemental AD/D - $500K |
| | | 401(k) | 401(k) Employer Pct Match |
| | | Profit Sharing | Profit Sharing Plan |
| | | Employee Stock Purchase | GBI Company ESPP Program |
| | | Pension Plan 1 - U.S. | GBI Pension Plan |

Dependent Information page (2 of 3)



| | | | |
|---|---|---|---|
| Carissa Santos | Mother | | |
| | | Life | Basic Life Plan |
| | | Supplemental Life | Suppl Group Life 2x |
| | | AD/D | Flat 25K AD&D |
| | | Supplemental AD/D | Supplemental AD/D - $500K |
| | | 401(k) | 401(k) Employer Pct Match |
| | | Profit Sharing | Profit Sharing Plan |
| | | Employee Stock Purchase | GBI Company ESPP Program |
| | | Pension Plan 1 - U.S. | GBI Pension Plan |
| Samuel Santos | Son | | |



Dependent Information page (3 of 3)

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

**Dependent/Beneficiary Name** This is the name of dependent or beneficiary. The name is also a link to the Dependent/Beneficiary Summary Page for the person.

**Relationship** This is the relationship of dependent/beneficiary to employee.

**Type of Benefit** This is the benefit plan type in which dependent/beneficiary is enrolled.

**Description** This is the description of benefit plan type for dependent/beneficiary.

The Dependent Beneficiary Coverage Summary page is a compilation of an employee's dependents and beneficiaries for all applicable plan types for which they are eligible.

Deceased dependents and beneficiaries will be filtered out from display unless they have a current beneficiary allocation or enrollment record.

The summary displays all dependents and beneficiaries, regardless of whether the dependent or beneficiary is actually enrolled in a plan. A text message will appear underneath individuals that have no enrollments.

Clicking on any name in the **Name** column takes the user to the Dependent/Beneficiary Summary Page.

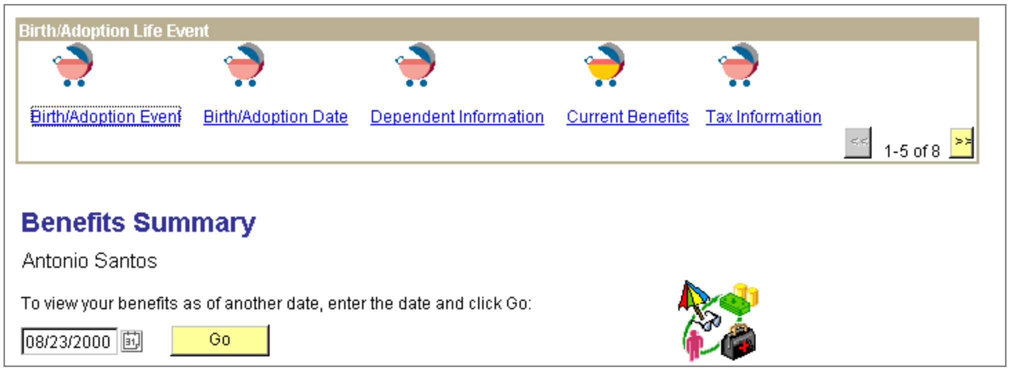
For more information about the Dependent/Beneficiary Personal Information page, see Dependent/Beneficiary Management.

At the bottom of the page is a link taking the user to the Benefits Summary Page.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Current Benefits Page

| | |
|---|---|
| Usage | Used to review benefit summary information. |
| Object Name | W3EB_GRID |
| Navigation | Click **Next** on the Dependent Information page. |




Current Benefits page (1 of 3)

| Type of Benefit | Plan Description | Coverage or Participation |
|---|---|---|
| Medical | Basic In-Network Medical | Family |
| Dental | Enhanced Dental Plan | Family |
| Vision | Standard Vision Plan | Family |
| Life | Basic Life Plan | $50,000 |
| Supplemental Life | Suppl Group Life 2x | 2 X Salary |
| AD/D | Flat 25K AD&D | $25,000 |
| Dependent AD/D | Dependent Accidental Death | $5,000 |
| Dependent Life | Dpnd Life - Specify Covrg | 1 X Salary |
| Supplemental AD/D | Supplemental AD/D - $500K | $500,000 |
| Short-Term Disability | Short Term Disability - 50% | 50% of Salary |
| Long-Term Disability | Standard Long-term Disability | 50% of Salary |
| 401(k) | 401(k) Employer Pct Match | 3% Before Tax |
| 401(k) | 401(k) Employer Pct Match | $200 After Tax |
| Profit Sharing | Profit Sharing Plan | Not Contributing |
| Employee Stock Purchase | GBI Company ESPP Program | 1% After Tax |
| Sick | GBI Sick Leave Plan | - - - - - |
| Vacation | GBI Vacation Time | - - - - - |

Current Benefits page (2 of 3)

| | | |
|---|---|---|
| Vacation | GBI Vacation Time | - - - - - |
| Flex Spending Health - U.S. | Healthcare FSA | $2,000 Pledge |
| Flex Spending Dependent Care | Dependent Care FSA | $2,400 Pledge |
| Pension Plan 1 - U.S. | GBI Pension Plan | $100 Contribution |
| Vacation Buy | Vacation Buy | 8 Hours Bought |

Enroll in Benefits

Back Next

Current Benefits page (3 of 3)

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Appearing next on the page is the name of the employee, followed by a line of text informing the user to enter a new date in order to review information in effect as of that date.

The page then displays a summary of the employee's benefits arranged as follows:

**Type of Benefit** The benefit plan type, such as medical, dental, vision, and so on. Clicking on any benefit plan takes the employee to a page displaying plan details.

**Plan Description** The name of the benefit plan as defined on the Benefit Plan table.

**Coverage or Participation** The level or value of coverage. Level of coverage applies to medical when the coverage code describes the number of covered family members.

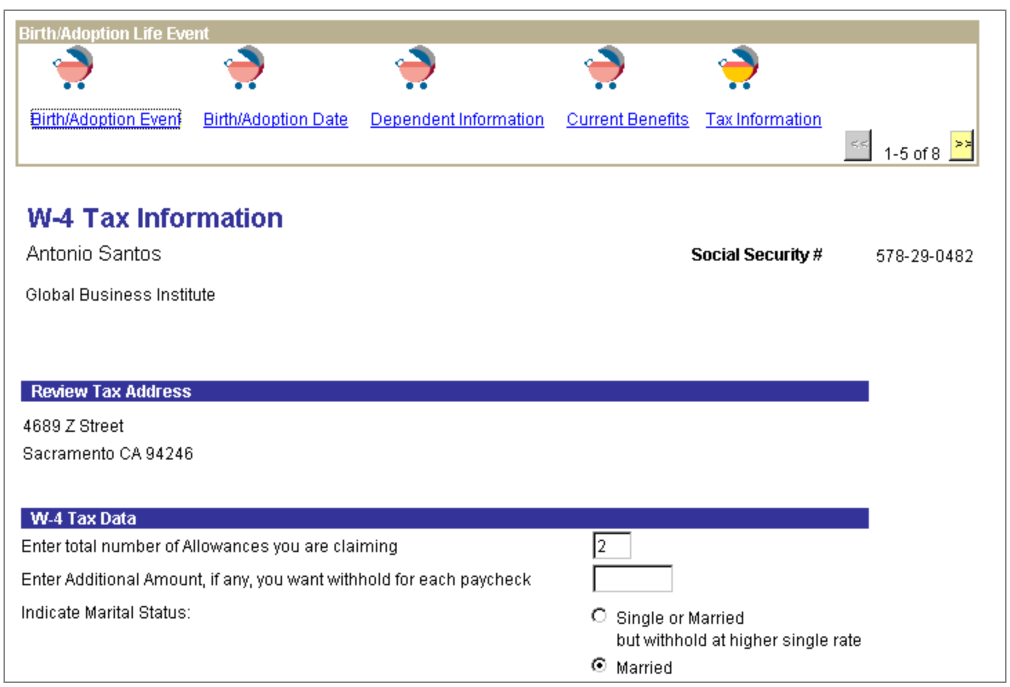
A benefit plan type listed in the table may also be a link to the provider's pages, or, if Authoria PS is installed, to the Authoria PS pages.

If Authoria PS is installed, links to a benefits program overview, other benefits, and to an Authoria PS search page will appear.

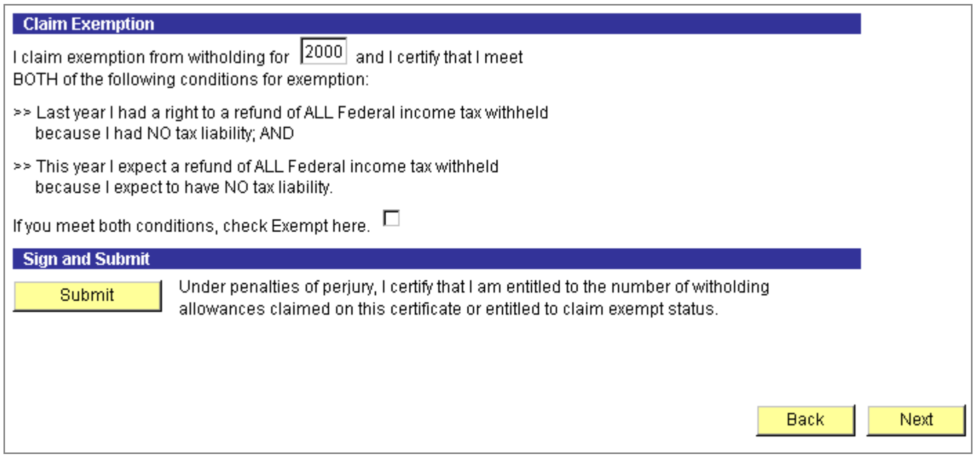
To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Tax Information Page

| | |
|---|---|
| Usage | Used to review and change W-4 tax information. |
| Object Name | PY_IC_W4_DATA |
| Navigation | Click **Next** on the Benefits Summary page. |




Tax Information page (1 of 2)



Tax Information page (2 of 2)

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Next on the page are sections enabling the user to review and change relevant tax information.

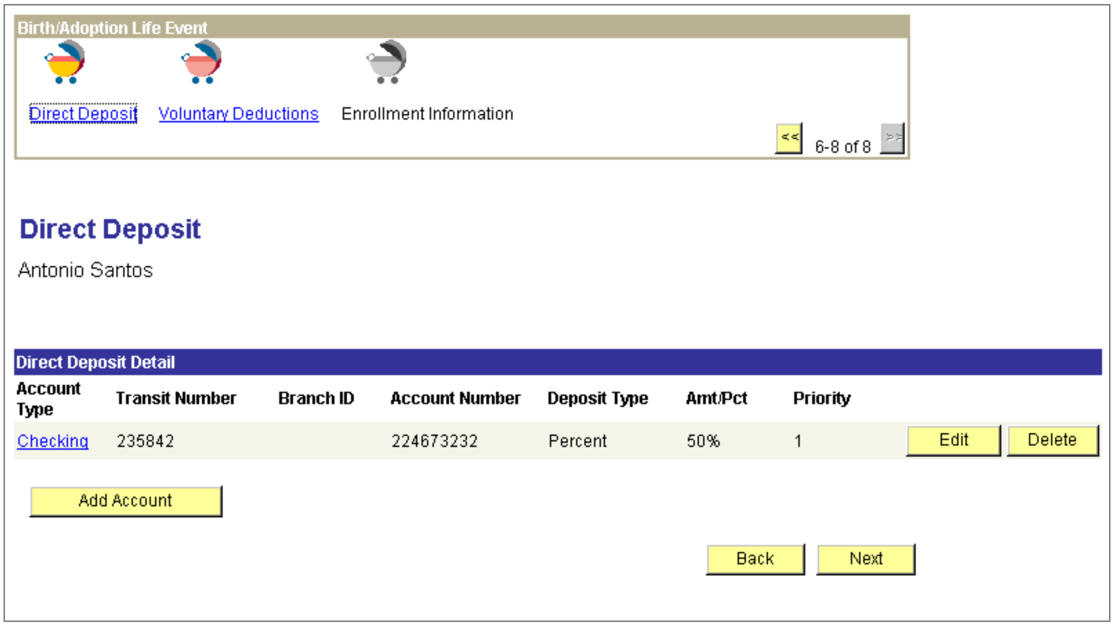
For more information about the tax information page, see Using W-4 Tax Information.

When satisfied with the existing or revised information, users click the Submit button.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Direct Deposit Page

| | |
|---|---|
| Usage | Used to review and change direct deposit information. |
| Object Name | PY_IC_DD_LIST |
| Navigation | Click **Next** on the Tax Information page. |




Direct Deposit page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Appearing after the page title and employee's name is a section enabling the employee to review, edit, and delete direct deposit information.

---

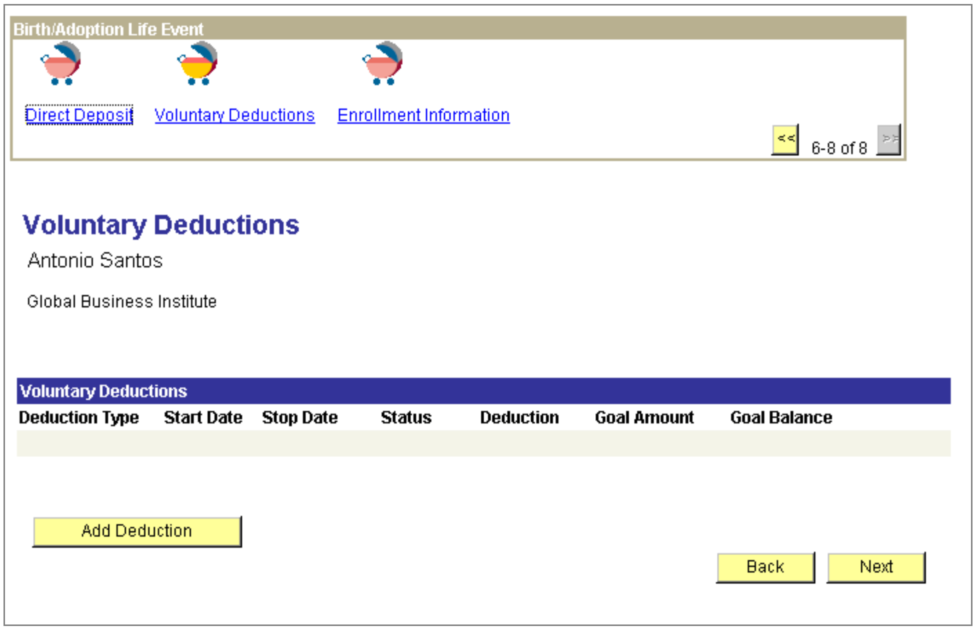
For more information about the direct deposit page, including Edit and Delete pages, see Direct Deposit Page.

---

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

### Voluntary Deductions Page

| | |
|---|---|
| Usage | Used to review and change voluntary deduction information. |
| Object Name | PY_IC_DED_LIST |
| Navigation | Click **Next** on the Direct Deposit page. |




Voluntary Deductions page

Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

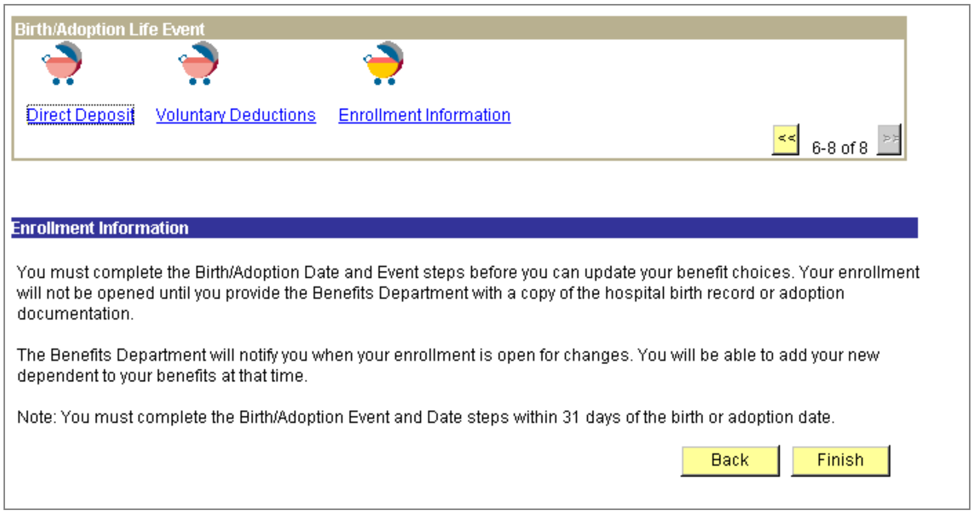
Appearing after the page title and employee's name is a section enabling the employee to review and edit voluntary deduction information.

For more information about the Voluntary Deductions, including the Add Deduction page, see Voluntary Deductions Page.

To continue the life events process, users click the **Next** button, or click the **Back** button to return to the previous page.

## Enrollment Information Page

| | |
|---|---|
| Usage | Used to provide employee with birth/adoption event process information. |
| Object Name | W3EB_BIRTH_FINAL |
| Navigation | Click **Next** on the Voluntary Deductions page. |



Enrollment Information page

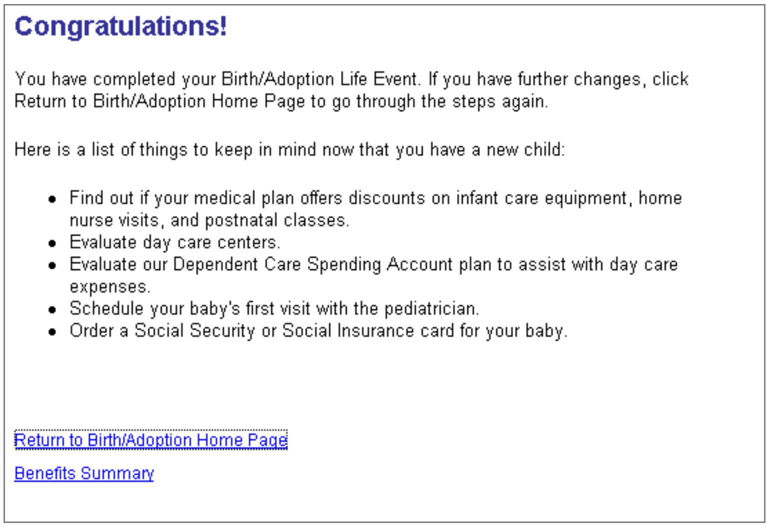
Appearing first on the page is a row of icons representing the steps in the life events process, with all accessible steps highlighted, and the remaining steps unavailable. As the user completes certain steps, other steps become available.

Next on the page is a section presenting information to the user regarding notification of the event to the HR department, and other relevant enrollment information.  A Benefits Department communicates their enrollment process and how an employee will be notified when their enrollment is open for changes in the text area. This text area is stored in the message catalog (3001, 450).

Users may click **Back** button to return to the previous page, or **Finish** to complete the life events process.

## Congratulations Page

| | |
|---|---|
| Usage | Used to provide employee with confirmation of the completion of the life events process and to provide other relevant event information. |
| Object Name | W3EB_BRTH_FINISH |
| Navigation | Click **Finish** on the Enrollment Information page. |




Congratulations! Page

This page confirms that the employee has successfully completed the birth/adoption life events process, and provides relevant event suggestions to the employee. This text area is stored as HTML Object W3EB_BRTH_FINISH.

At the bottom of the page are links taking the user to the Birth and Adoption Life Event Page and to the Benefits Summary Page.

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