Lifeworks
Admin Portal
Citycounty Insurance Services

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Document Version 1.0

Document Revision History

Version	Date	Author	Description
1.0		Cheryl Suchanick	Initial document

Table of Contents

Lifeworks is the trademark of Morneau Shepell, Ltd. All other product names referenced herein are the trademarks or service marks of their respective companies.

1 Overview

1.1 Background

Lifeworks (LW) is used by Morneau Shepell clients as a tool in the administration of benefit plans. The purpose of the Lifeworks Admin Portal procedures manual is to provide guidance for the effective use of the Lifeworks Admin Portal benefits administration features.

This icon may be found throughout this document and is used to indicate additional information that is of note.

This icon may be found in this document to point out important information about the process.

1.2 Intended Audience

The intended audience of this document is the Manager who will use LW's functions on a regular basis.

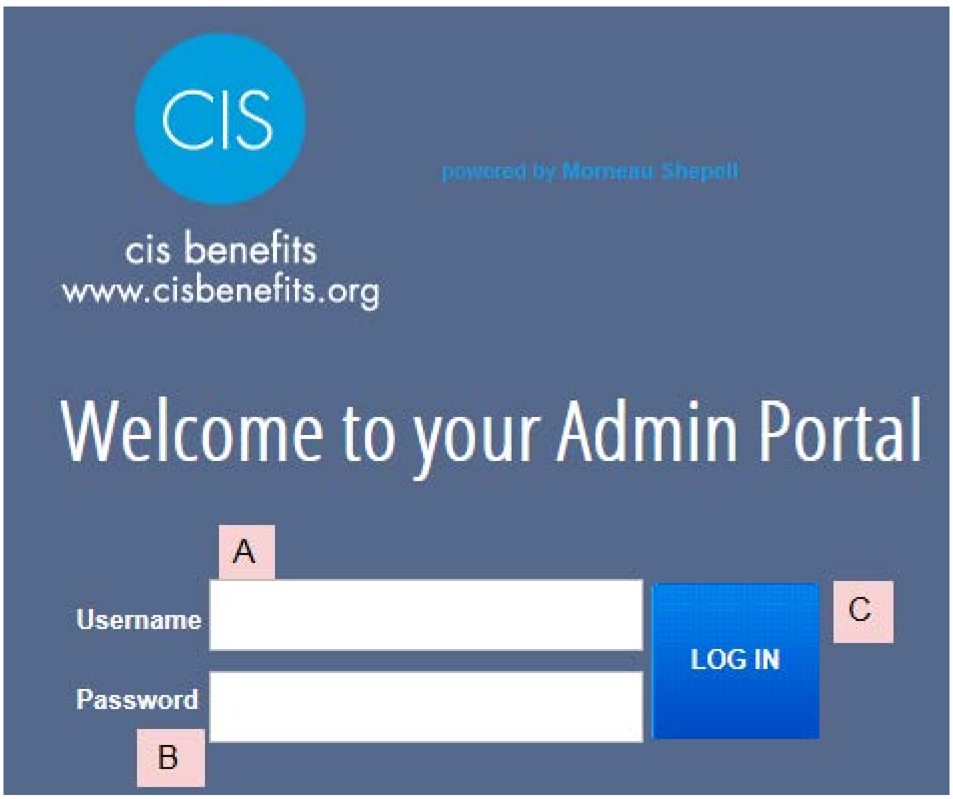
All screen captures are edited to ensure privacy of employee information.

2 Lifeworks Admin Portal System Basics

System Login

This section describes the steps designated users will use to log in to the Lifeworks Admin Portal. All users have been assigned a user id and password. If you are unable to locate your user name and password, contact the CIS Benefits Staff.

Enter your given Username **(A)** and Password **(B),** then click on the Log In button **(C)** to enter the Lifeworks Admin Portal.



Upon login, the user is directed to the Main screen. This is also referred to as the Welcome screen. If the user navigates from this screen without selecting a new record in the Employee Search box, the data displayed on the screens will be for the last employee that was viewed by the user and will remain as such until a new employee record is selected.

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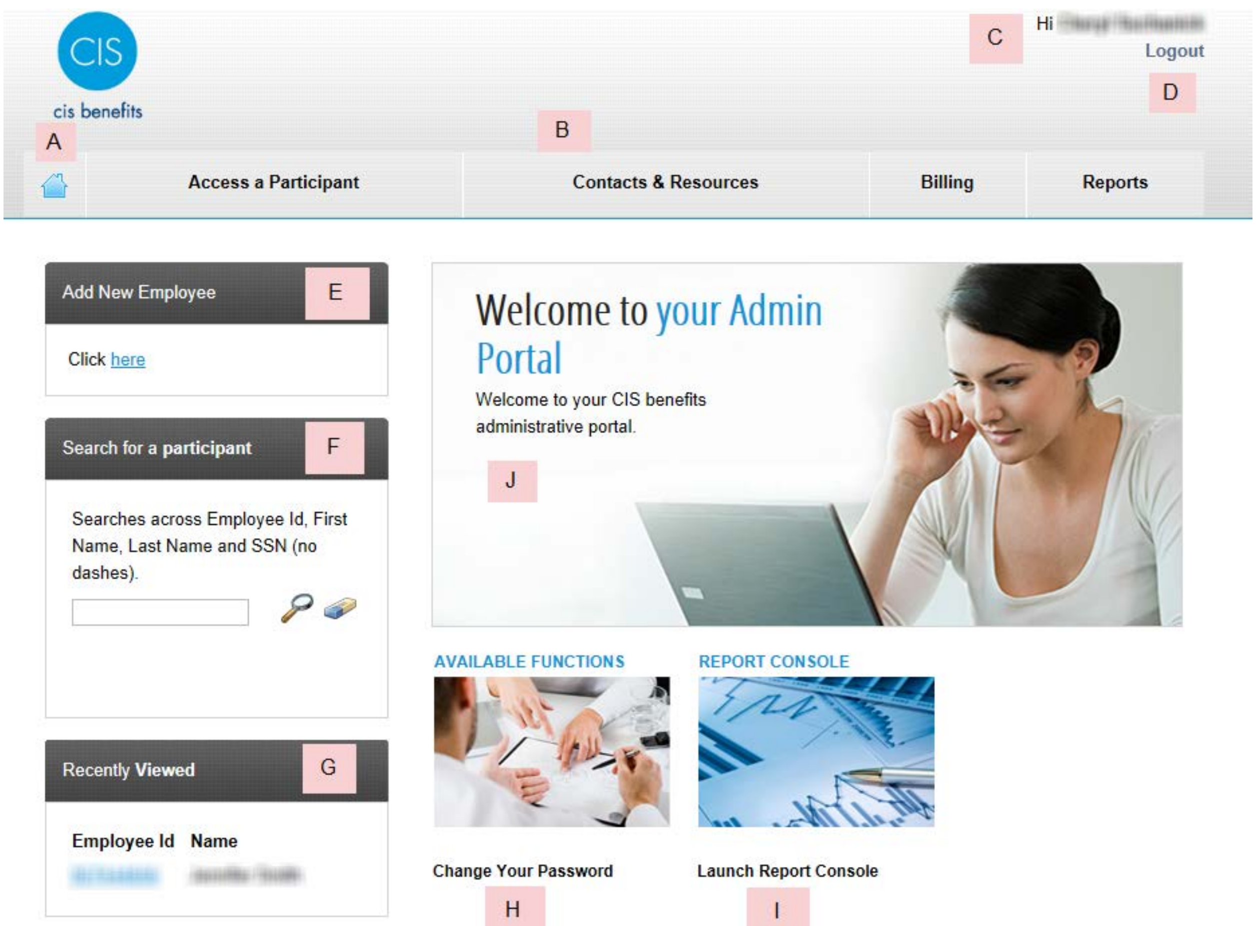
3 Welcome Screen (Home)

Upon login, the Welcome Screen will be displayed as shown below. To get back to this page from anywhere in the Portal, click on the icon. The options in the navigation menu will vary according to your defined role and security within the system. Some users will have access to all of the menus, and some will only have access to Billing and Reports, for example.

If any expected menu options do not display it is due to security restrictions/provisions for your user role in the system. Contact the CIS Benefits Staff for support.

Welcome Screen (Home):



Below is a high-level summary of what is on the Welcome Screen. These will all be covered in more detail as we drill down into the screens.

A- Home: If you click on this "home" icon , no matter where you are in the portal, you will be taken back to the Welcome Screen.

B- Menu: The menu runs left to right across the main page. The menu items that you have access to will depend on your security settings. Some will only see the Billing and Reports, others may see all of the menu items. If you have questions about your security settings, please contact the CIS Benefits Staff for support.

C- Login Name: Your login name will always appear in the upper right-hand corner of the portal. This is currently greyed out for security reasons, but when you log in, this will not be greyed out. If your login name is Robert Smith, it will say "Robert Smith".

D- Logout link: When clicking on the "Logout" link, you will automatically be logged out of the Lifeworks Admin Portal.

E- Add New Employee: This is where you add a New Employee to the portal. This is also the "Newly Eligible" event. Please refer to Section 4.8.3 for more information.

F- Search for a participant: This is where you search for a specific employee. You can search by Employee ID, First Name, Last Name, and SSN. You can also search for an employee by clicking on "Access a Participant" from the menu bar. This is covered in more detail on Page 9.

G- Recently Viewed: The recently viewed box will always display the last four employee records that were viewed.

H- Change Your Password: Click on this link in order to change your security password. The CIS Password requirements are:

a. Minimum of 8 characters

b. At least 1 alpha

c. At least 1 upper case letter

d. At least 1 number

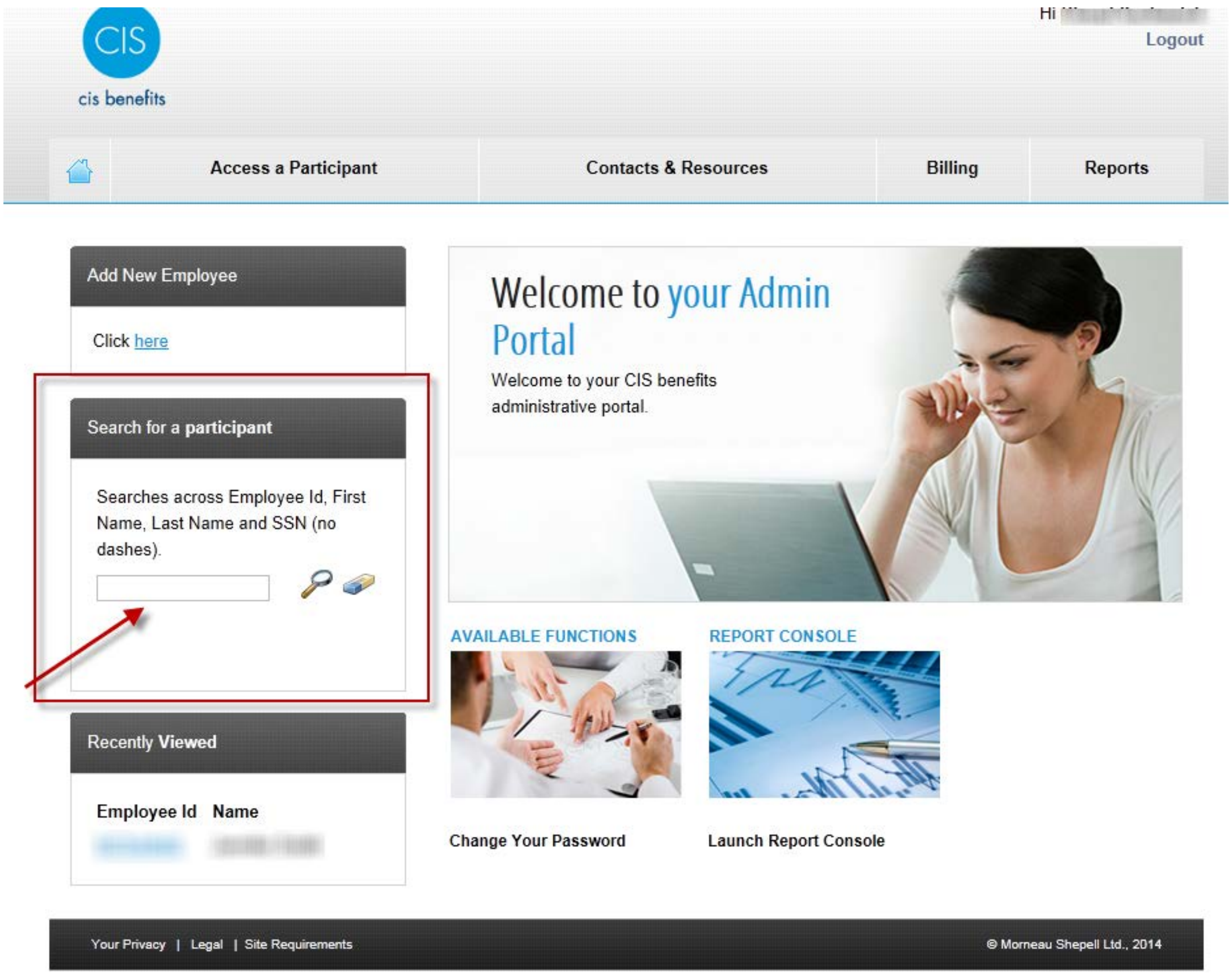
I- Launch Report Console: Coming soon.

J- Welcome to your Admin Portal: This will appear in the middle of the screen when you are at the Welcome Screen (Home).

4 Access a Participant

There are two ways to view Participant information: 1) The “Search for a Participant” box on the Welcome Page and 2) The “Access a Participant” link on the Welcome Page menu bar.

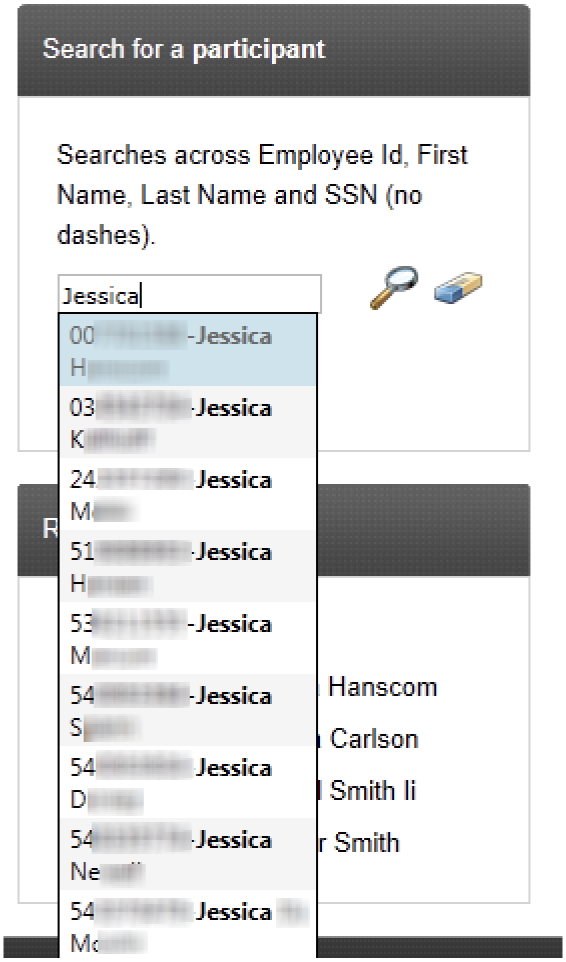
4.1 Seach for a participant from the Welcome Screen



To search for a Participant, enter one of the following:

Employee ID: In the case of CIS members, the Employee Id is the SSN.

First Name: If the full name is Jessica Smith, enter “Jessica”. There will likely always be more than one result when entering just the first name. Below is an example of what the list will look like when entering search criteria with more than one result:



This will happen anytime there is more than one result for any piece of search criteria (Employee ID, First Name, Last Name, or SSN)

Last Name: Self explanatory- enter the Last Name of the Participant.

SSN: If entering the SSN as search criteria, be sure to enter the SSN with no dashes.

If the results haven't shown up in a list after entering the search criteria, click on the magnifying glass  to retrieve the record. If at any point, the criteria entered needs to be remove, just click on the eraser icon 

After entering the search criteria, you will then be taken to the Participant Information console, which houses the Demographic Info, Contact Info, Employee Communications, Employment, Benefits, and Events data.

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Access a Participant	Contacts & Resources	Billing	Reports

You are viewing:
Cynthia C[redacted]

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Basic Information

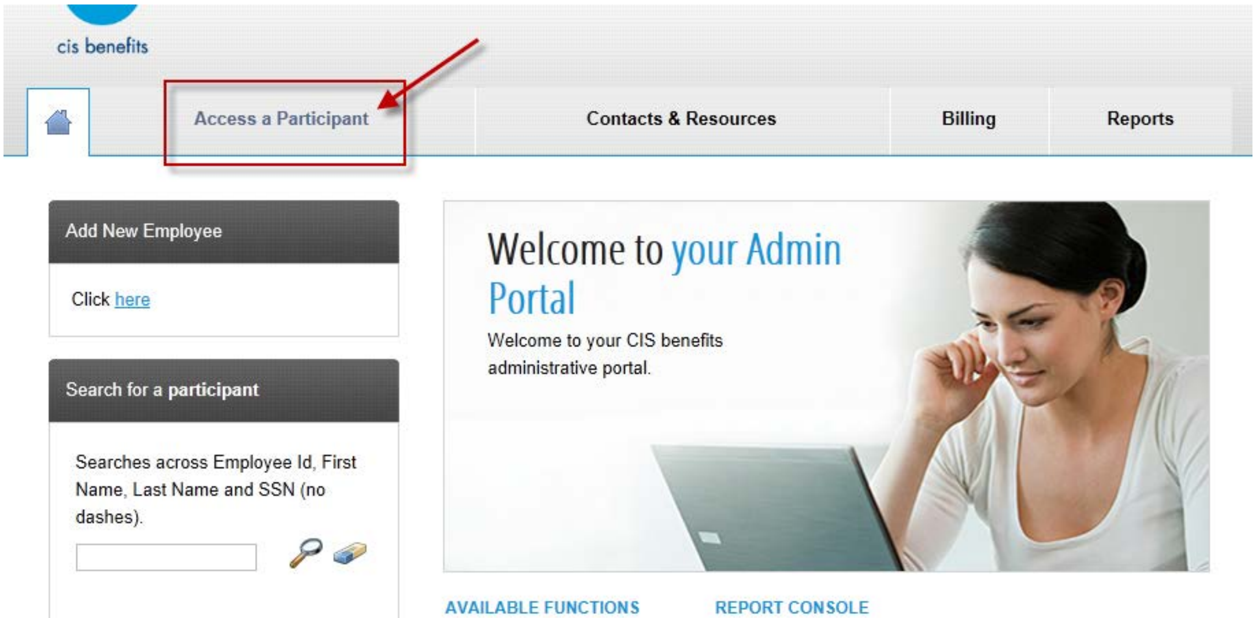
Name	Cynthia [redacted]		
SSN	[redacted]	**Employee Id**	[redacted]
Date of Birth	09/26/1950		
Gender	Female		
Contact Preference			
Marital Status	Married		

Employee Additional Data

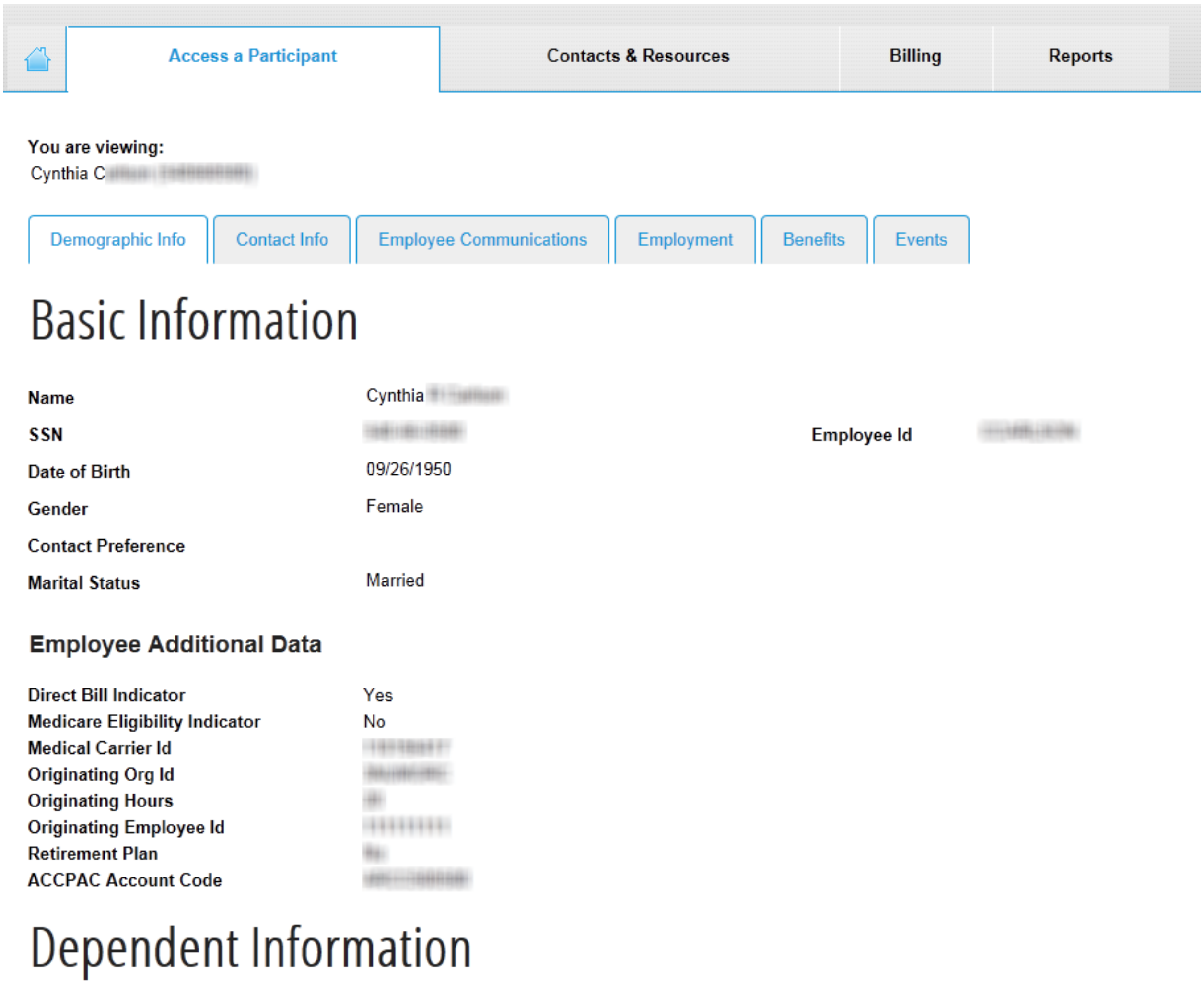
Direct Bill Indicator	Yes
Medicare Eligibility Indicator	No
Medical Carrier Id	[redacted]
Originating Org Id	[redacted]
Originating Hours	[redacted]
Originating Employee Id	[redacted]
Retirement Plan	[redacted]
ACCPAC Account Code	[redacted]

Dependent Information

4.2 Access a Participant



By clicking on the “Access a Participant” link, you are automatically taken to the Participant Information console, which houses the Demographic Info, Contact Info, Employee Communications, Employment, Benefits, and Events data.



4.3 Demographic Information Screen

The Demographic Info tab displays:

Basic Information (A) such as name, SSN, Date of Birth, and Marital Status

Employee Additional Data (B) such as Medical Carrier Id, Direct Bill Indicator, and Retirement

Dependent Information (C) that displays name, SSN, Date of Birth, etc. of any Dependents on File. If there are no Dependents on File, the screen will say “No dependents exist on record”.

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Access a Participant | Contacts & Resources | Billing | Reports

You are viewing:
Cynthia C

This will always be displayed, so you know which Participant you are viewing

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Basic Information

A

Name	Cynthia		
SSN		**Employee Id**	
Date of Birth	09/26/1950		
Gender	Female		
Contact Preference			
Marital Status	Married		

Employee Additional Data

B

Direct Bill Indicator	Yes
Medicare Eligibility Indicator	No
Medical Carrier Id	
Originating Org Id	
Originating Hours	
Originating Employee Id	
Retirement Plan	
ACCPAC Account Code	

Dependent Information

C

No dependents exist on record.

If there are dependents on file, they will be displayed as follows:

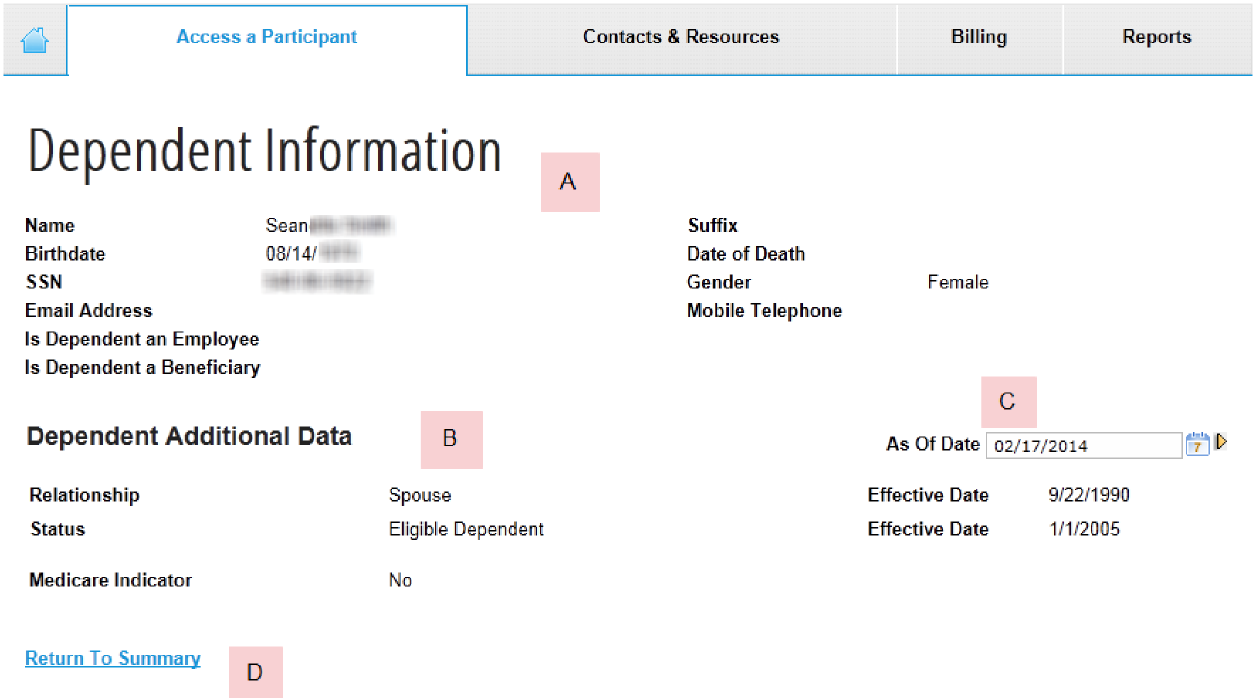
Dependent Information

C

First Name	Middle Initial	Last Name	Dependent SSN	Relationship	Date of Birth	Date of Death	Gender	Status
Sean		S		Spouse	08/14/		Female	Eligible Dependent
Al		S		Child	07/26/		Female	Eligible Dependent
Brock		S		Child	08/21/		Male	Eligible Dependent

To view detailed **Dependent Information**, click on the First Name- that link will take you to a separate Dependent Information screen.

4.3.1 Dependent Information Screen



A: Basic Dependent Information such as Name, Birthdate, SSN, Email Address, etc is stored here.

B: Dependent Additional Data such as Dependent Relationship, Dependent Status, etc. is stored here.

C: As Of Date: The user can change the “As Of Date” by entering the date here and clicking on the arrow. The initial display will be as of the current system date, however, if the user wanted to see dependent information as of 01/01/2014- they would enter “01/01/2014” and click the arrow to view as of that date.

D: Return To Summary: Clicking on the “Return To Summary” link will take the user back to the main Demographic Information Screen.

4.4 Contact Information Screen

The Contact Info tab displays:

Address Information (A) such as Address Type, Street Address, City, State, Zip Code, Begin and End Dates, and a link to View All Addresses.

Email Address Information (B) such as Email Type, Primary Email indicator, Email Address, Begin and End Dates, and a link to View All Email Addresses.

Telephone Information (C) such as Telephone Type, Primary Telephone indicator, Telephone Number, Begin and End Dates, and a link to View All Telephone Numbers.

You are viewing:
Cynthia C[redacted]

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Contact Information

Address Information

A

Address Type	Mailing		
Address Line 1	[redacted]	**City**	[redacted]
		State	New York
		Zip Code	[redacted]
Country	United States	**County**	
Begin Date	1/1/1900	**End Date**	

View All Addresses

Email Address Information

B

Email Type	Personal		
Primary	Yes		
Email Address	cistest@morneaushepell.com		
Begin Date	09/01/2012	**End Date**	

View All Email Addresses

Telephone Information

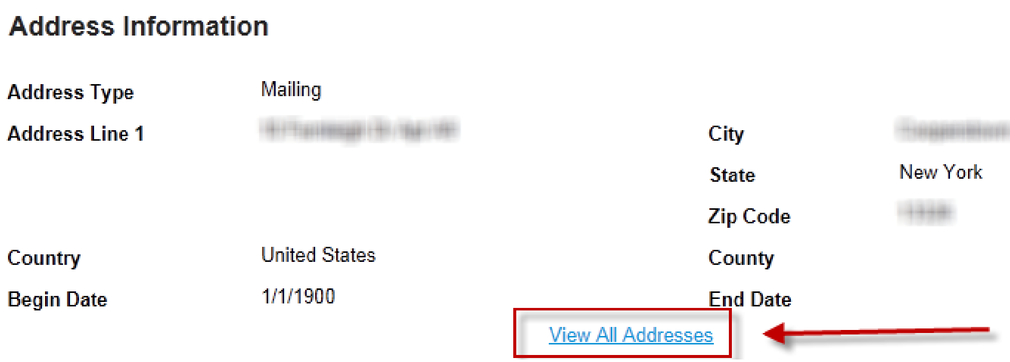
C

Telephone Type	Home		
Primary			
Telephone Number	[redacted]		
Begin Date	01/01/1900	**End Date**	

View All Telephone Numbers

4.4.1 Address Information

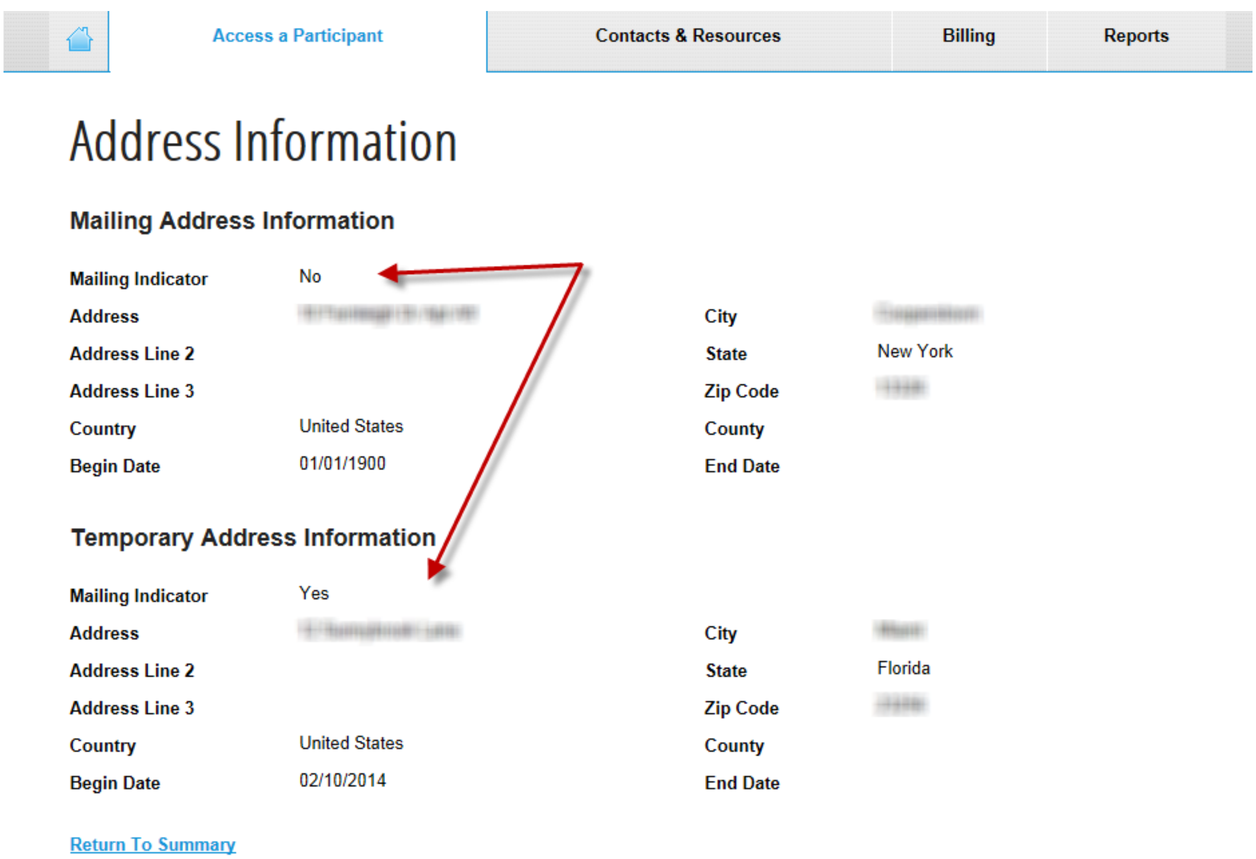
There is a link at the bottom of the Address Information section – to “View All Addresses”. Often times a Participant could have a “Mailing” address and a “Temporary” address.



View All Addresses Screen

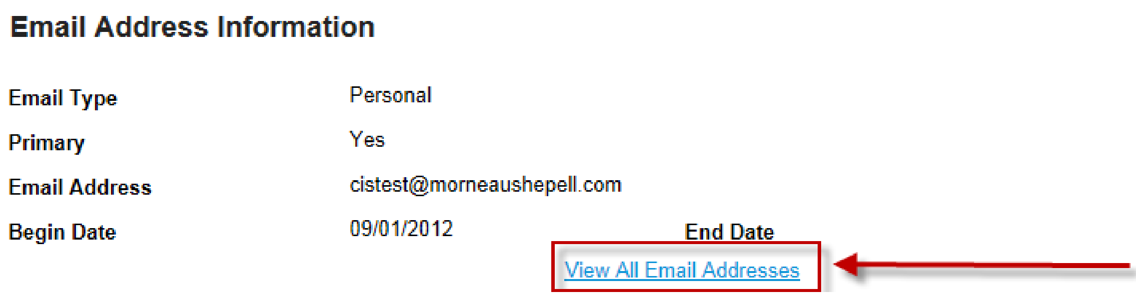
If there is more than one mailing address, they will display when clicking on the “View All Addresses” link from the main Contact Information screen.

If there are two addresses, one of the mailing indicators will be “Yes” – which will be the primary address to mail to at the current time. The other address will have an indicator of “No”.



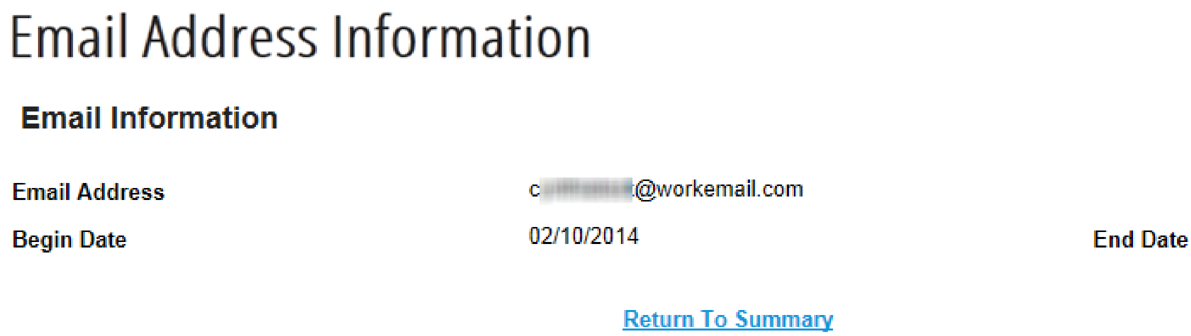
4.4.2 Email Address Information

There is a link at the bottom of the Email Address Information section – to “View All Email Addresses”. Often times Participants have more than one email address on file.



View All Email Addresses Screen

To view all email addresses, click on the “View All Email Addresses” link.



4.4.3 Telephone Information

There is a link at the bottom of the Telephone Information section – to “View All Telephone Numbers”. Often times Participants have more than one telephone number on file.

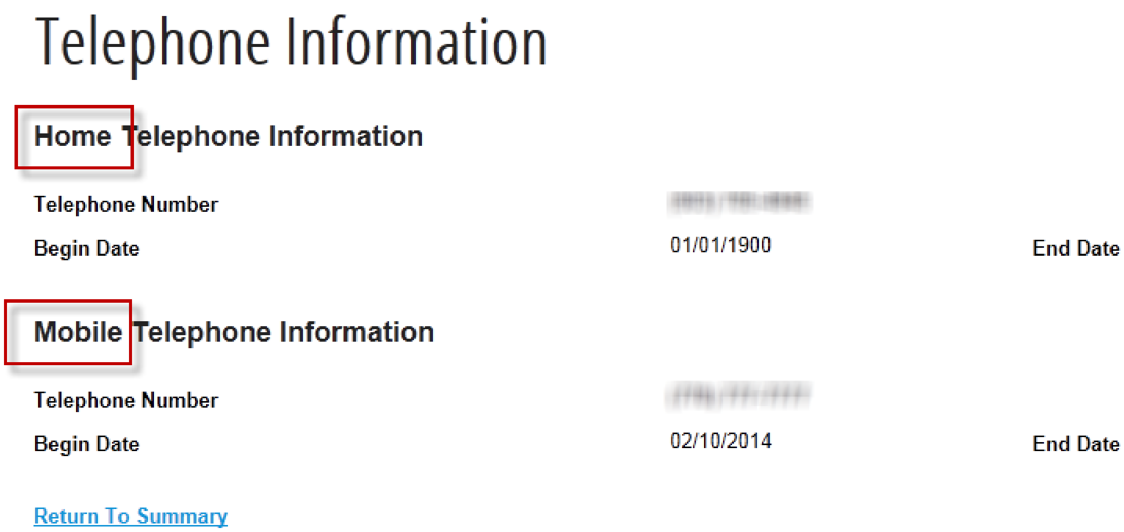
The Primary telephone number will be displayed on the main Contact Info screen – with the Primary Indicator of “Yes”.

View All Telephone Numbers Screen

If there is more than one telephone number, they will display when clicking on the “View All Addresses” link from the main Contact Information screen.

If there are two addresses, the telephone number from the main Contact Information screen is the Primary.

The red boxes indicate which type of telephone number it is.



4.5 Employee Communications Screen

The Employee Communications tab displays any correspondence made to the Participant from CIS (for example, an Annual Enrollment Confirmation), or any documents that the Participant themselves have uploaded to this site for CIS.

You are viewing:
[illegible]

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Employee Communications

Below are the documents that have been generated, uploaded, or are required documents that have not yet been received.

Correspondence

Description	Date Generated	Delivery Method
Enrollment Confirmation A	01/10/2014	printed

Documents provided or not yet received.

Document Description	Effective Date	Document Type
[illegible] - courtOrder B	01/10/2014	Court Order

A: Correspondence- In this example, the Participant has an Benefits Enrollment Confirmation dated 1/10/2014. To view, click on the link.

B: Documents provided or not yet received- in this example, the Participant uploaded a court order. To view, click on the link.

4.6 Employment Screen

The Employment tab displays basic Employment Information such as the Organization the Participant is employed at, their Employment Status, Scheduled Hours, Job Title, Pay Frequency, etc. It also displays Salary Information including their Annual Salary, Pay Frequency (also known as Earnings Rate), and their Salary Amount per Pay Frequency.

You are viewing:
[illegible]

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Employment Information

Organization	3SAMCOG - Mid-Columbia Council of Governments, Staff
Employment Status	Active
Employment Reason	Active
Scheduled Hours	37.5
Job Title	[illegible]
Job Classification	[illegible]
Pay Frequency	Semi Monthly
Regular Temp Status	Regular

Salary Information

Org	Mid-Columbia Council of Governments, Staff
Salary	[illegible]
Earnings Rate	Monthly
Annual Salary	[illegible]

4.7 Benefits Information Screen

The Benefits tab provides the Benefits Election History for the Participant- including Medical, Dental, Vision, Life Insurance, and Flexible Spending Accounts. Each Benefit displays the Plan, Option chosen, Effective Date, Coverage Amount Elected (if applicable), Monthly Cost to the Participant, Monthly Cost to the Employer, and the Employer Name.

To view the Benefit Election History by a specific As Of Date **(A),** enter the date and click on the orange arrow **As Of Date** 02/18/2014. The initial display will be as of the current system date, however, if the user wanted to see benefit information as of 01/01/2014- they would enter "01/01/2014" and click the arrow to view as of that date.

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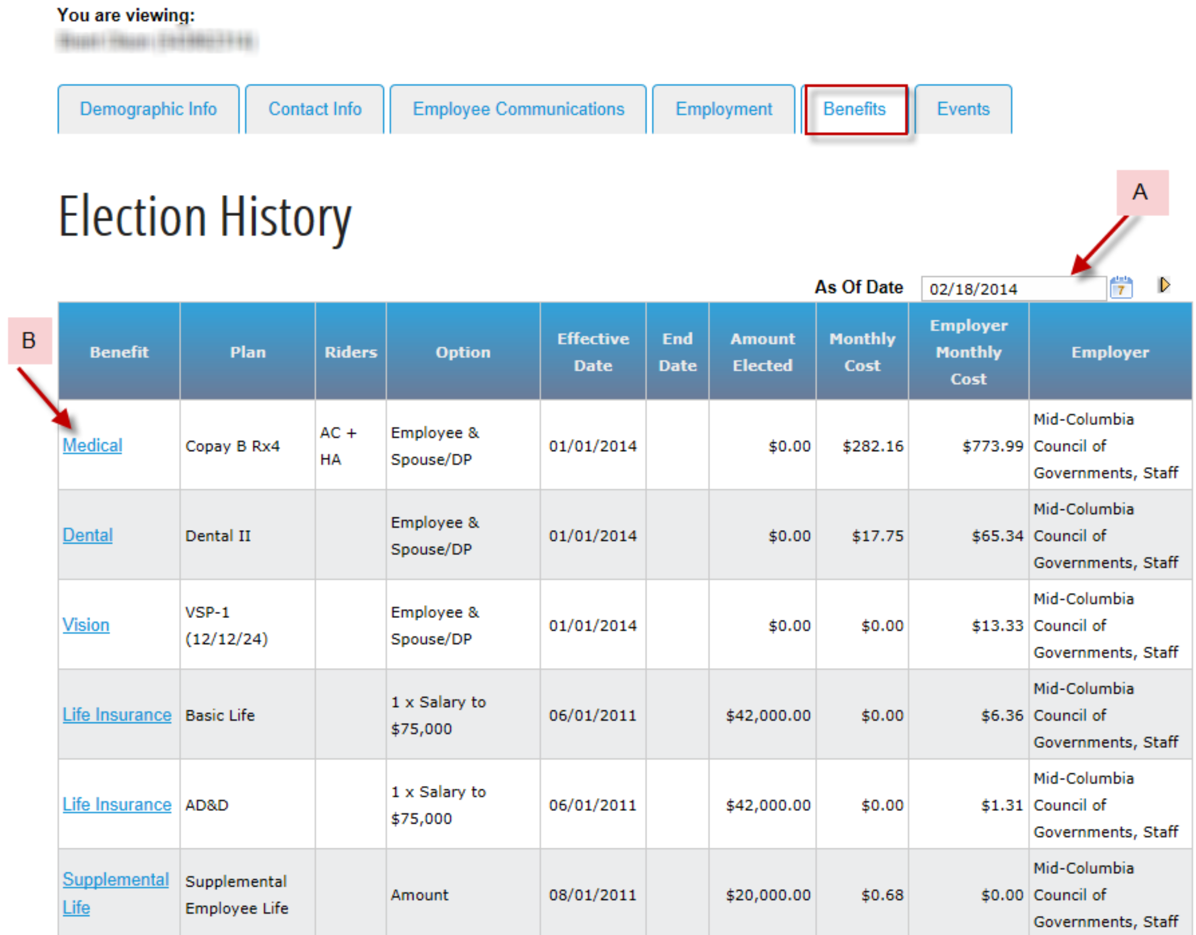


Benefit	Plan	Riders	Option	Effective Date	End Date	Amount Elected	Monthly Cost	Employer Monthly Cost	Employer
Medical	Copay B Rx4	AC + HA	Employee & Spouse/DP	01/01/2014		$0.00	$282.16	$773.99	Mid-Columbia Council of Governments, Staff
Dental	Dental II		Employee & Spouse/DP	01/01/2014		$0.00	$17.75	$65.34	Mid-Columbia Council of Governments, Staff
Vision	VSP-1 (12/12/24)		Employee & Spouse/DP	01/01/2014		$0.00	$0.00	$13.33	Mid-Columbia Council of Governments, Staff
Life Insurance	Basic Life		1 x Salary to $75,000	06/01/2011		$42,000.00	$0.00	$6.36	Mid-Columbia Council of Governments, Staff
Life Insurance	AD&D		1 x Salary to $75,000	06/01/2011		$42,000.00	$0.00	$1.31	Mid-Columbia Council of Governments, Staff
Supplemental Life	Supplemental Employee Life		Amount	08/01/2011		$20,000.00	$0.68	$0.00	Mid-Columbia Council of Governments, Staff

To view the Benefit coverage in detail, click on the link **(B)** under "Benefit". This link will take you to the "Benefit Details" screen.

4.7.1 Election History Screen

The Election History screen provides additional benefits coverage detail. This examples shows the additional Medical coverage:

Benefit Details

Election Details

A

Benefit	Medical
Plan	Copay B Rx4
Option	Employee & Spouse/DP
Formula	Benefits Cost
Coverage Effective Date	01/01/2014
Date Elected	01/09/2014
Amount Elected	$0.00
Amount In Force	$0.00
Amount Pended	$0.00

Cost Details

B

Employee Pay Period Cost	$282.16
Monthly Cost	0
Employer Pay Period Cost	$773.99
Pended EE Cost Pay Period	$0.00
Monthly Cost	0

Plan Features

C

Alt Care
Hearing Aid

Associated Dependents

D

First Name	Last Name	Coverage Effective Date	Coverage Term Date	Pay Period Cost	Employer Pay Period Cost
[redacted]	[redacted]	01/01/2014		$0.00	$0.00

Return To Summary

E

The Election Details **(A)** section provides the Benefit Plan, Plan, Option (coverage- Employee, Employee + Spouse, Employee + Family, etc), Coverage Effective Date, The Date Elected, etc.

The Cost Details **(B)** section provides the cost of the benefit (in this case, Medical)- including the breakdown of per pay period cost for the Employee and the Employer.

The Plan Features **(C)** section provides any special features that the plan may have. In this case, it is Alternative Care, and Hearing Aid benefits.

The Associated Dependents **(D)** section lists the Dependents associated with that specific benefit- in this case, Medical. There is one dependent covered under this benefit with the Participant- effective 1/1/2014.

To go back to the main Benefits Summary screen, click on the "Return To Summary" link **(E).**

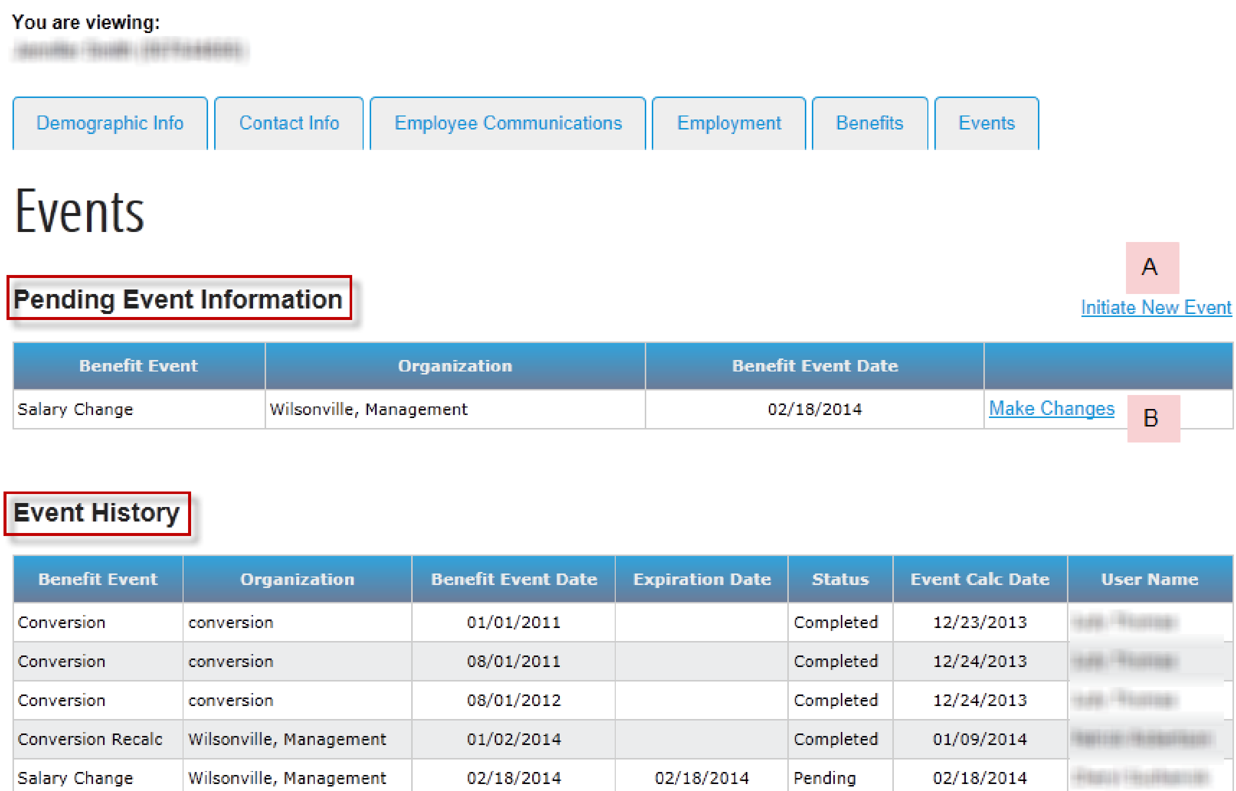
4.8 Events Information Screen

The Events tab displays the history of all Events that were ran, as well as any Pending Events.

"Conversion" Events were used solely to load conversion data- they are not to be removed for any reason.

To Initiate a New Event **(A),** click on the link "Initiate New Event". This will take you through the Event Process, which will be covered in section **3.8.1.**

To make changes to a Pending Event **(B)**, click on the "Make Changes" link. This will be covered in the next section, Section **3.8.2.**



Benefit Event	Organization	Benefit Event Date	
Salary Change	Wilsonville, Management	02/18/2014	Make Changes

Benefit Event	Organization	Benefit Event Date	Expiration Date	Status	Event Calc Date	User Name
Conversion	conversion	01/01/2011		Completed	12/23/2013	[illegible]
Conversion	conversion	08/01/2011		Completed	12/24/2013	[illegible]
Conversion	conversion	08/01/2012		Completed	12/24/2013	[illegible]
Conversion Recalc	Wilsonville, Management	01/02/2014		Completed	01/09/2014	[illegible]
Salary Change	Wilsonville, Management	02/18/2014	02/18/2014	Pending	02/18/2014	[illegible]

The following is a list of events that can be run via the Lifeworks Admin Portal:

Note: When initiating a new event, the EFFECTIVE DATE of the event needs to be the date that the event occurred. The system will calculate the coverage effective date (if applicable).

Newly Eligible: This event creates the employment record (to tie the Employee to the Employer) and enroll the newly eligible employee. Once this event is initiated, the employee will be able to enroll in their benefits via the Employee Self Service Portal.

Rehire: This event is used to enroll a former employee in benefits- but this only applies if the former employee is rehired with the same month with the same employer. Any benefits that were previously in effect will be reinstated, with no election changes permitted.

Salary Change: This event is used to update a member's salary and trigger any changes to benefits that are based on salary.

Termination of Employment: This event is used to terminate employment for an employee once the status is entered into Lifeworks. This updates both the employment data and terminate coverage. The effective date of the Termination Event needs to be the employee's last date worked.

Subsidy: This event allows the Employer to indicate when the former employee should receive a subsidy. They will define the begin and end date as well as the amount of the subsidy. This subsidy amount will be defined either as a percent or flat dollar amount.

Change in Employee Group/Transfer: This event is used for transfers from one employee group to another employee group within the same employer.

Retiree Enrollment: This event is used to give retirement eligible participants the opportunity to enroll in Retiree Coverage (medical, dental, vision, and both retiree life/retiree dep life plans only). This will be provided at the time of termination from active employment. This event will run AFTER the termination event has been run to end their active benefits.

Employment Status Change: This event is processed for participants who are losing or gaining eligibility due to a change in hours worked per week.

Begin Leave: This event places a participant on Leave of Absence status. It updates both the employment data and notifies CIS to adjust the billing.

Death of a Spouse/Domestic Partner: This event is used to remove a deceased spouse or domestic partner from benefits. This will be used for active employees as well as COBRA participants.

Death of a Child: This event is used to remove a deceased child from benefits. This will be used for active employees as well as COBRA participants.

Death of an Employee: This event is used to drop an employee from benefits and provide a COBRA enrollment opportunity for the surviving spouse (if applicable).

4.8.1 Initiating New Events for a Current Employee

When initiating a new event for a current employee, the list of available events to run will be different than someone who is a new employee, for example. Your employment status, marital status, if you have a new child or dependent, etc- that will all play into what events can be run.

Click on the "Initiate New Event" link on the main Events screen

You will then be given a choice of events on the "Report A Change" page that can be run. In this example, we will choose <u>"Termination of Employment"</u>

You are viewing:

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Report a Change

Begin Leave

Change in Employee Group/Transfer

Death of a Child

Death of a Spouse/Domestic Partner

Death of an Employee

Employment Status Change

New Enrollment

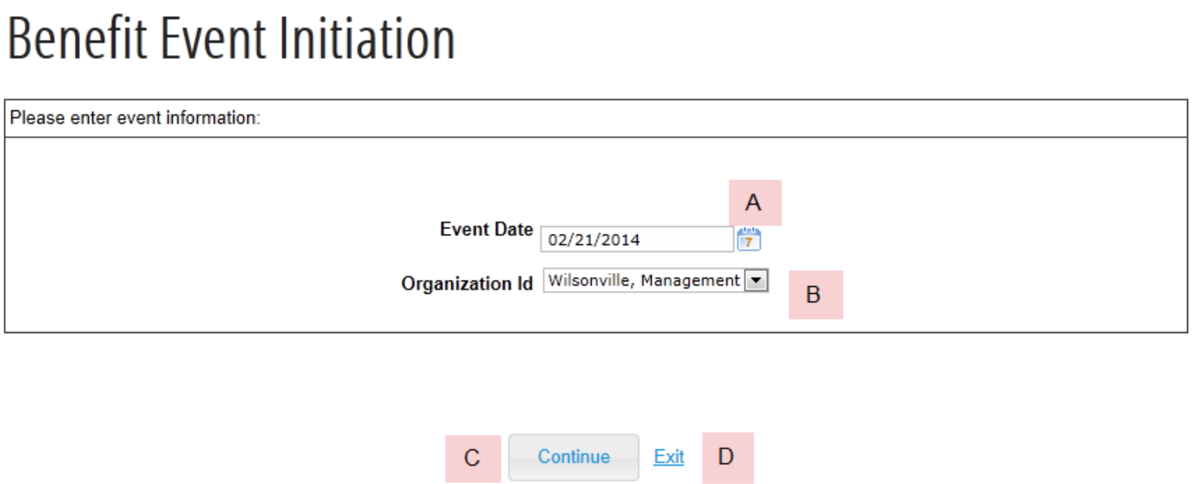
Retiree Enrollment

Return From Leave

Salary Change

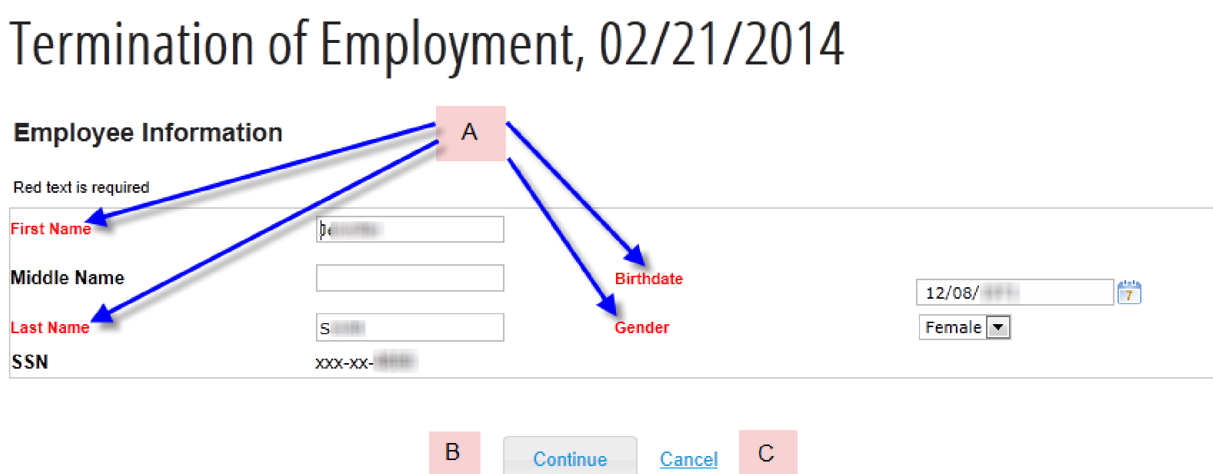
Severance/Subsidy

Termination of Employment



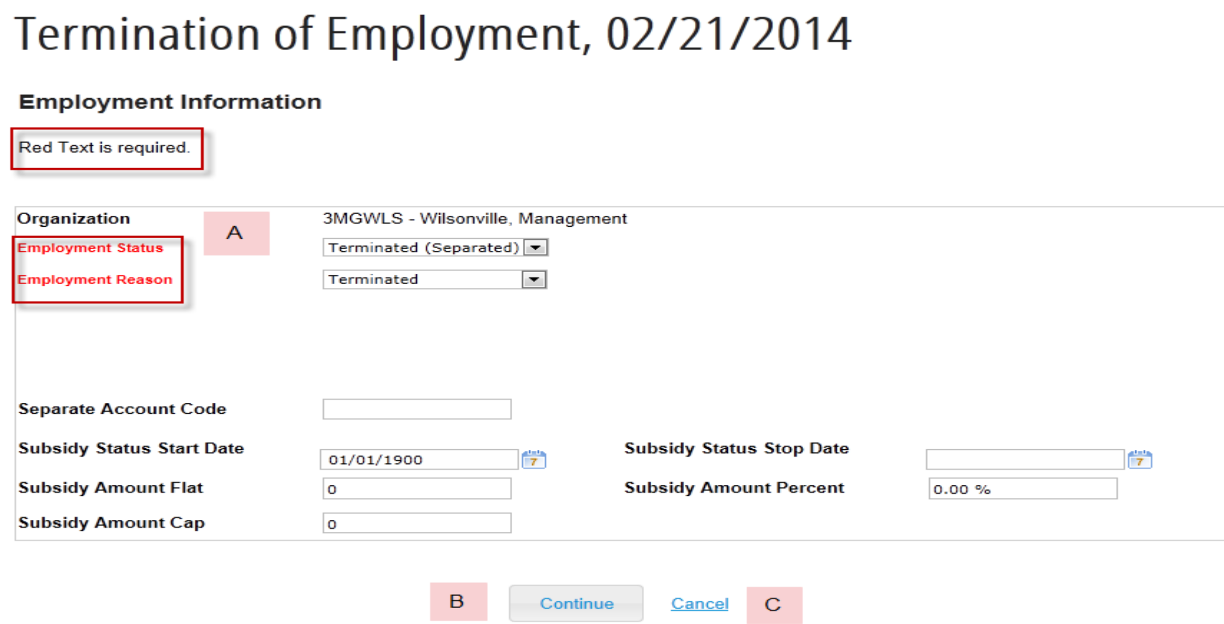
First, enter the Event Date **(A)** - in this example it is 2/21/2014. ADD TO THIS. The Organization Id will automatically populate **(B)** with the Organization that the Participant is affiliated with. To continue, hit the Continue button **(C).** If you didn't intend to initiate this event, simply click on the Exit button **(D).**

Example: Termination Event, Review Employee Information



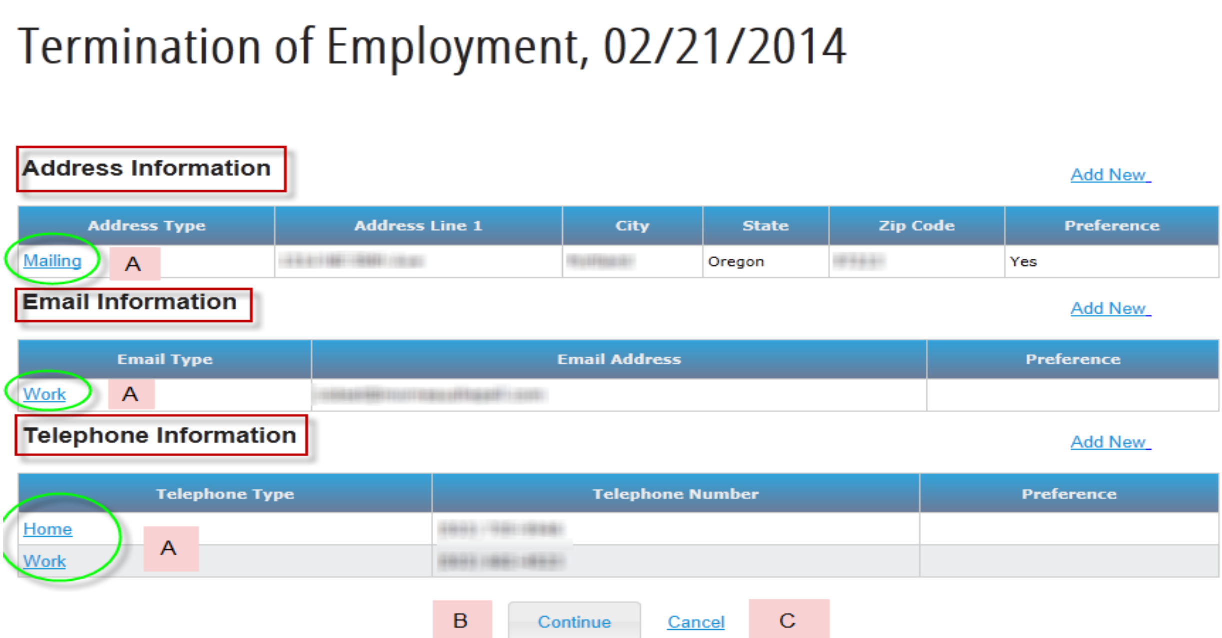
First, review the Employee Information listed. There are fields in **RED (A)** are required – review and be sure that this information is correct before proceeding. Make any changes as necessary. To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.

Example: Termination Event, Review Employment Information



Next, review the Employment Information listed. There are fields in **RED (A)** are required – review and be sure that this information is correct before proceeding When choosing the Termination Event, the Employment Status of “Terminated (Separated)” will automatically be populated. Choose the Employment Reason from the dropdown box – in this example, “Terminated” was chosen. Make any changes as necessary. To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.

Example: Termination Event, Review Address, Email, and Telephone Contact Information



Next, review the Address, Email and Telephone Information, and make changes as necessary. By clicking on the links under "Address Type", "Email Type", and "Telephone Type" **(A),** changes can be made. To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.

Example: Termination Event, Verify All Information Screen

Termination of Employment, 02/21/2014

Verify Information

Employee Information

A

Make Changes

First Name	[redacted]		
Middle Name		**Birthdate**	12/08/[redacted]
Last Name	[redacted]	**Gender**	Female
SSN	xxx-xx-[redacted]		

Organization Information

A

Make Changes

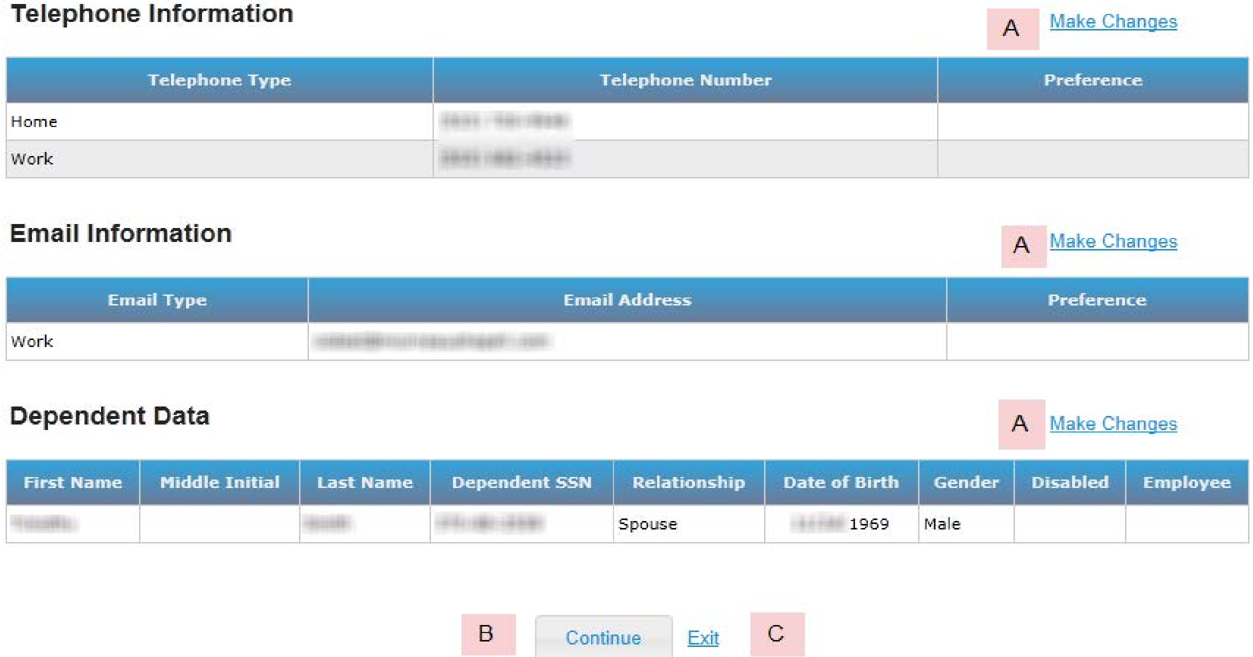
Organization	[redacted]		
Employment Status	Terminated (Separated)		
Employment Reason	Terminated	**Most Recent Hire Date**	6/21/2005
Pay Frequency	Monthly	**Regular Temp Status**	Regular
Separate Account Code			
Severance Start Date		**Severance Stop Date**	
Severance Amount Flat	0	**Severance Amount Percent**	0.00 %
Severance Amount Cap	0		
Subsidy Status Start Date	1/1/1900	**Subsidy Status Stop Date**	
Subsidy Amount Flat	0	**Subsidy Amount Percent**	0.00 %
Subsidy Amount Cap	0		

Address Information

A

Make Changes

Address Type	Address Line 1	City	State	Zip Code	Preference
Mailing	[redacted]	[redacted]	Oregon	[redacted]	Yes



Next, you are at the Verify Screen, prior to the event bring processed. Make changes as necessary by clicking on the "Make Changes" link to the right of each section **(A).** To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.

After verifying the event information, the event will either complete immediately, go into Pending status and complete that night, or it will go to a Pending Status for a period of time.

Here is the listing of how each event processes:

Newly Eligible: Goes into Pending Status

Rehire: Pends first, then completes at the end of the day

Salary Change: Pends first, then completes at the end of the day

Terminate Employment: Automatically completes

Subsidy: Pends first, then completes at the end of the day

Transfer: Goes into Pending Status

Retiree Enrollment: Goes into Pending Status

Employment Status Change: Pends first, then completes at the end of the day

Commence Leave: Pends first, then completes at the end of the day

Death of a Dependent: Goes into Pending Status

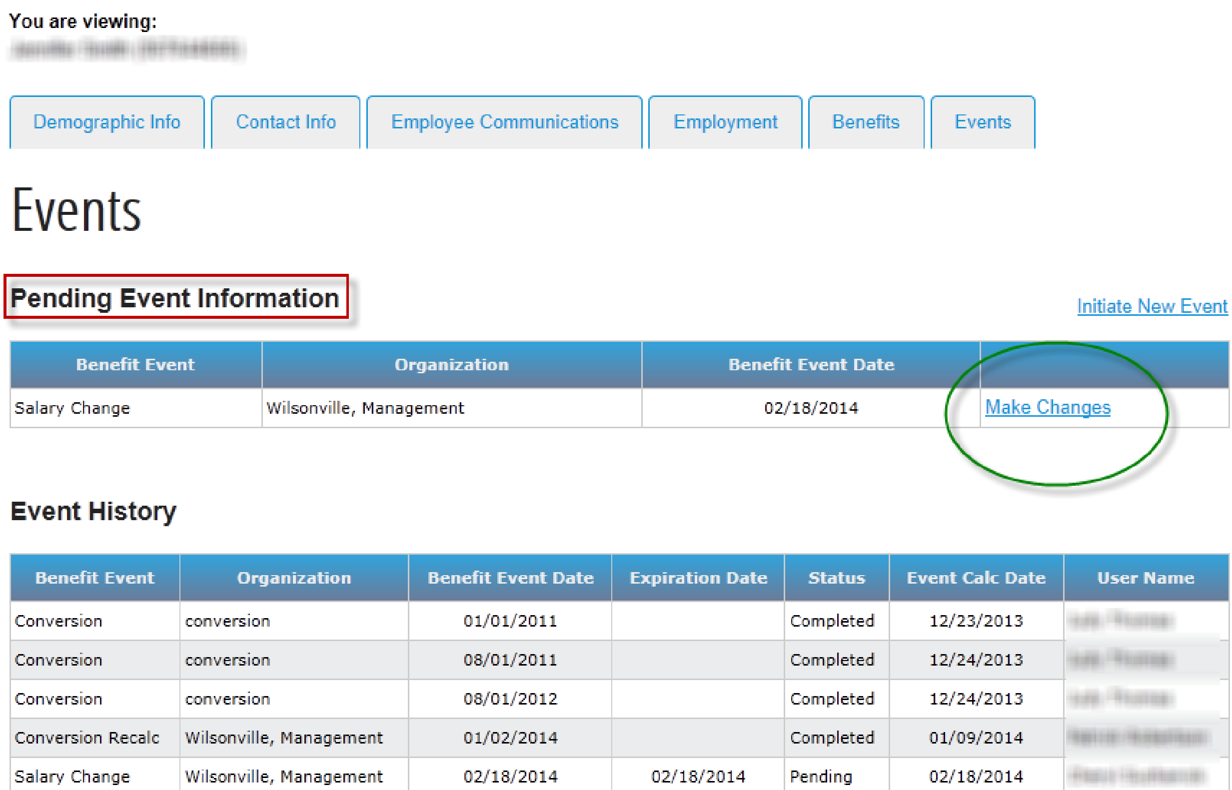
Death of a Retiree or COBRA Participant: Goes into Pending Status

Death of an Employee AUTO COMPLETE: Goes into Pending Status

4.8.2 Pending Events for a Current Employee- Making Changes

When an event is still in a "Pending" status, changes can still be made to the event.

Click on the "Make Changes" link on the Events tab, and verify that the Employee Information entered is correct.


You are viewing:

[illegible]

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Events

Pending Event Information

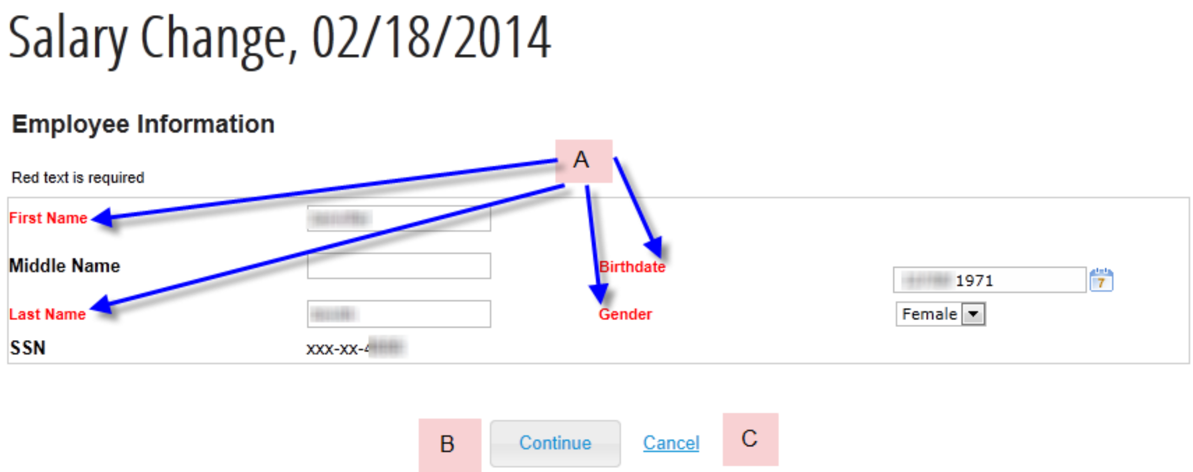
Initiate New Event

Benefit Event	Organization	Benefit Event Date	
Salary Change	Wilsonville, Management	02/18/2014	Make Changes

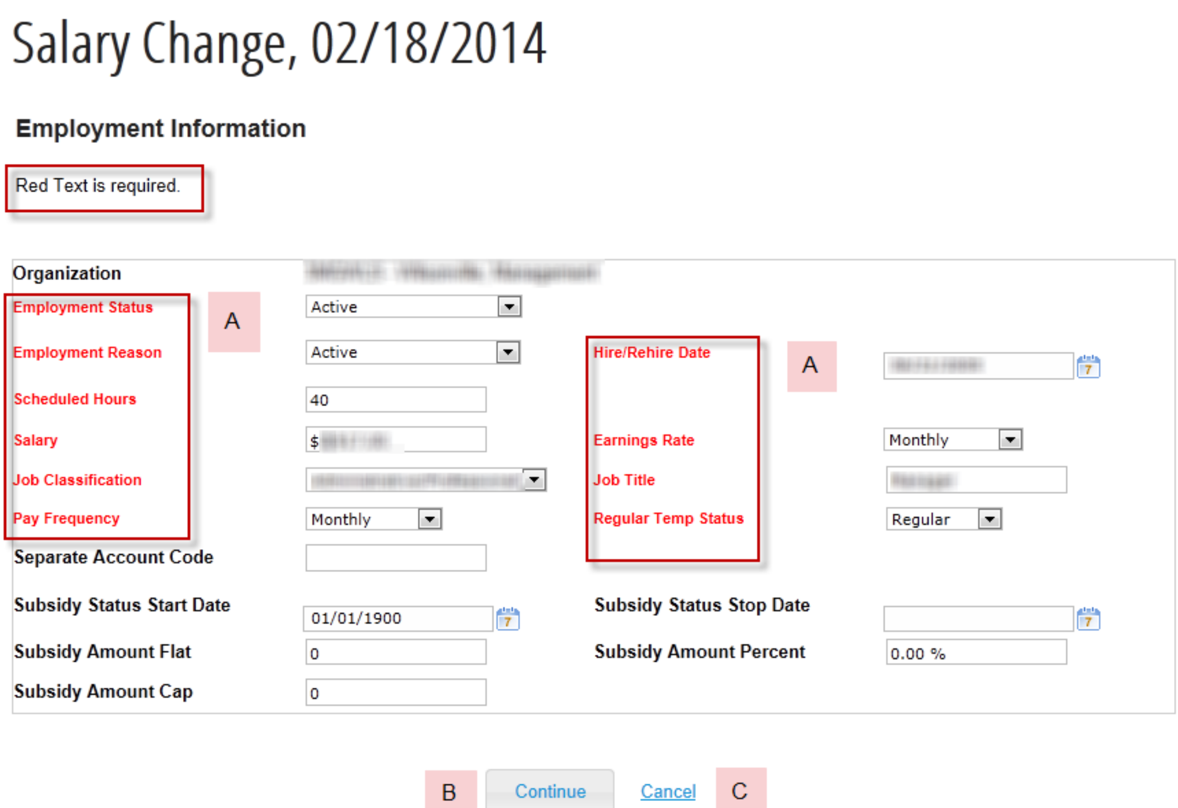
Event History

Benefit Event	Organization	Benefit Event Date	Expiration Date	Status	Event Calc Date	User Name
Conversion	conversion	01/01/2011		Completed	12/23/2013	[illegible]
Conversion	conversion	08/01/2011		Completed	12/24/2013	[illegible]
Conversion	conversion	08/01/2012		Completed	12/24/2013	[illegible]
Conversion Recalc	Wilsonville, Management	01/02/2014		Completed	01/09/2014	[illegible]
Salary Change	Wilsonville, Management	02/18/2014	02/18/2014	Pending	02/18/2014	[illegible]

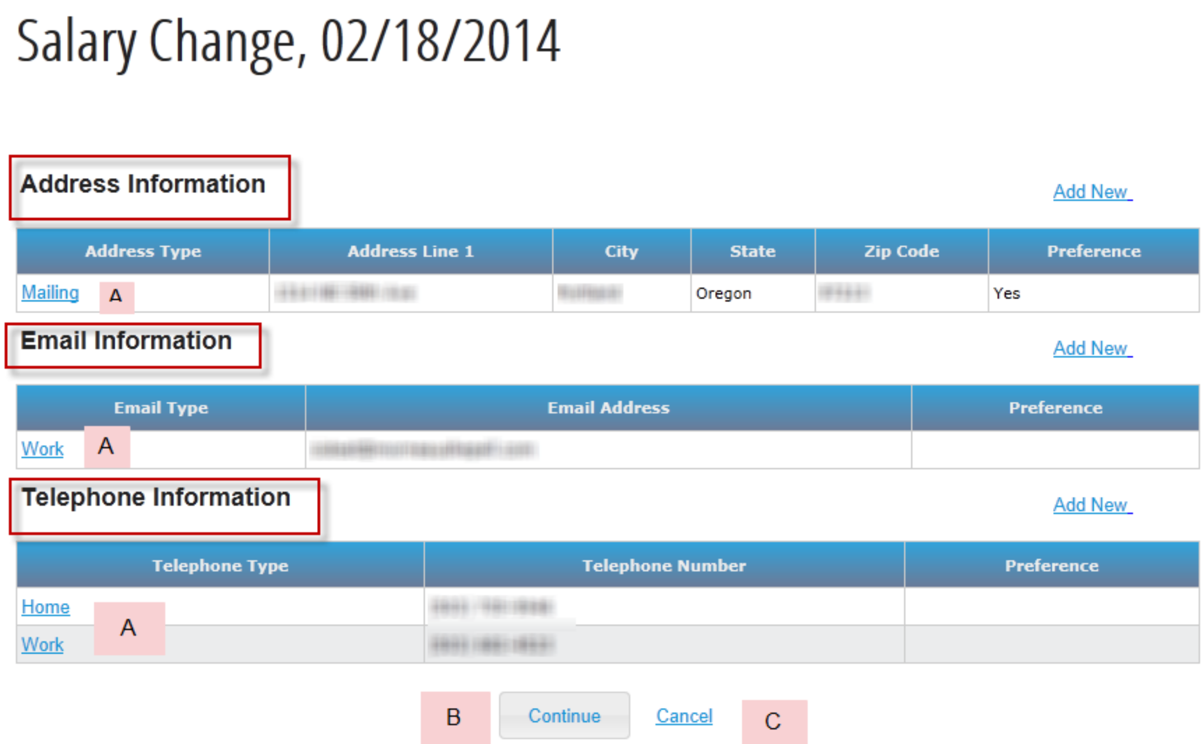
Just like in the Initiate New Event flow, when you make a change to a Pending Event, Employee Information, Employment Information, and ______ need to be verified. Make sure that all fields in RED (the required fields) are filled out, and make any changes as necessary.



Re-review the Employee Information listed. There are fields in **RED (A)** are required – review and be sure that this information is correct before proceeding. Make any changes as necessary. To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.



Re-review the Employment Information listed. There are fields in **RED (A)** are required – review and be sure that this information is correct before proceeding Make any changes as necessary. To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.



Next, review the Address, Email and Telephone Information, and make changes as necessary. By clicking on the links under "Address Type", "Email Type", and "Telephone Type" **(A),** changes can be made. To continue, hit the Continue button **(B)**, or Cancel **(C)** to exit.

MORNEAU SHEPELL

Salary Change, 02/18/2014

Verify Information

Employee Information

A

Make Changes

First Name	[redacted]		
Middle Name		**Birthdate**	12/08/[redacted]
Last Name	[redacted]	**Gender**	Female
SSN	[redacted]		

Organization Information

Make Changes

A

Organization	[redacted]		
Employment Status	Active		
Employment Reason	Active	**Most Recent Hire Date**	[redacted]
Scheduled Hours	40		
Job Classification	[redacted]	**Job Title**	Manager
Pay Frequency	Monthly	**Regular Temp Status**	Regular
Separate Account Code			
Severance Start Date		**Severance Stop Date**	
Severance Amount Flat	0	**Severance Amount Percent**	0.00 %
Severance Amount Cap	0		
Subsidy Status Start Date	1/1/1900	**Subsidy Status Stop Date**	
Subsidy Amount Flat	0	**Subsidy Amount Percent**	0.00 %
Subsidy Amount Cap	0		

Salary Information

A

Make Changes

Salary	[redacted]
Earnings Rate	Monthly
Annual Salary	[redacted]

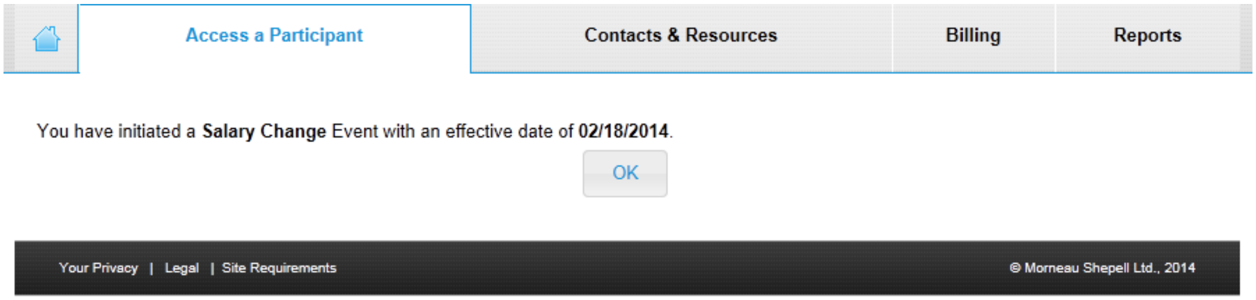
Address Information

Make Changes

A

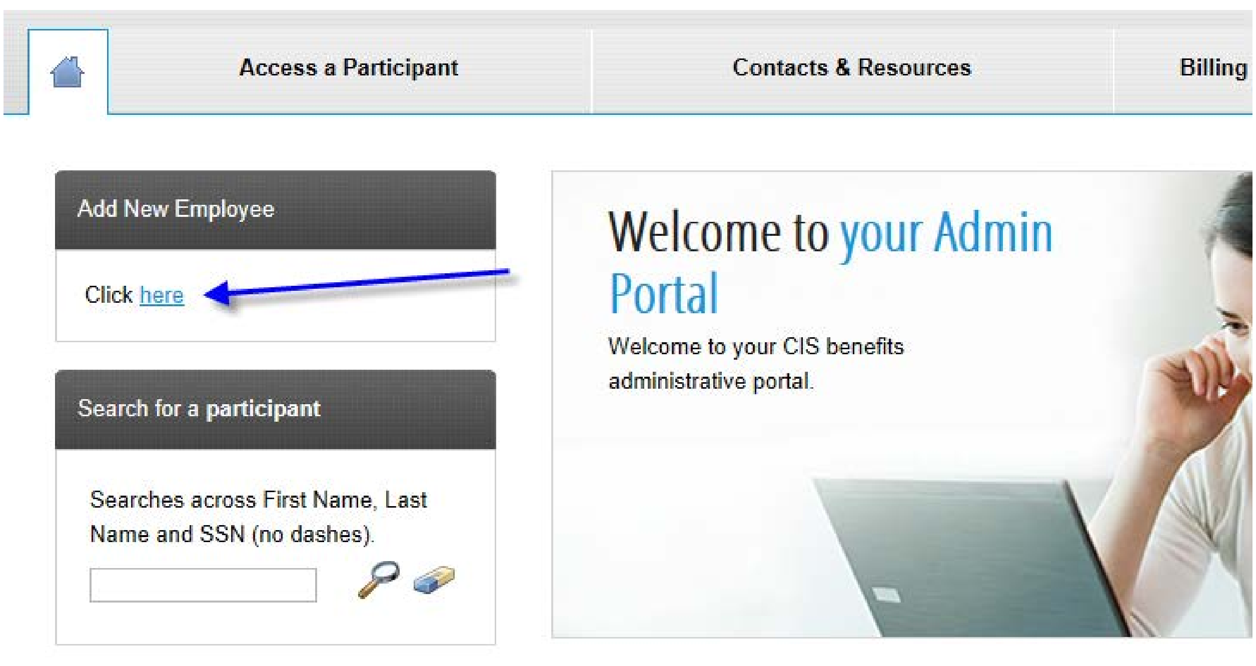
Next, you are at the Verify Screen, prior to the event bring processed. Make changes as necessary by clicking on the "Make Changes" link to the right of each section **(A).** To continue, hit the Continue button, or Cancel button to exit.

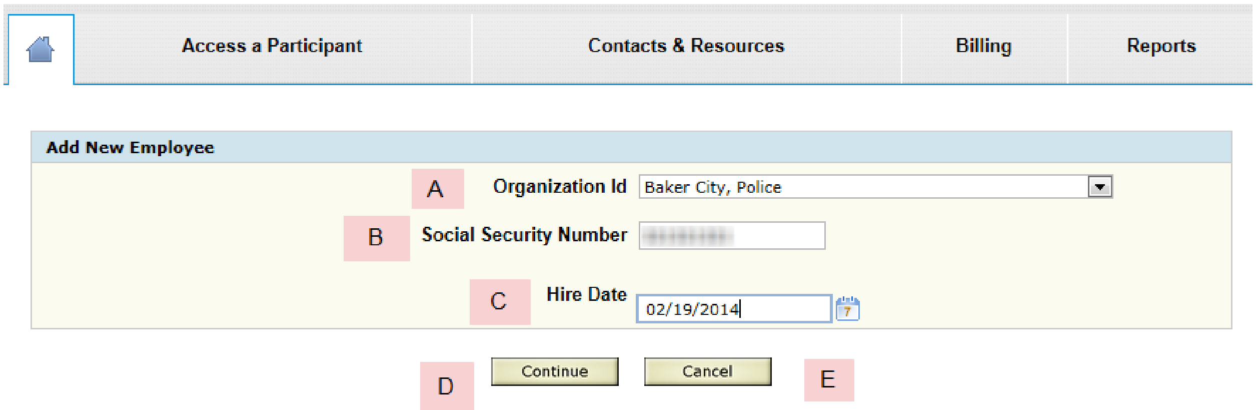
Once completed, this confirmation screen will show:



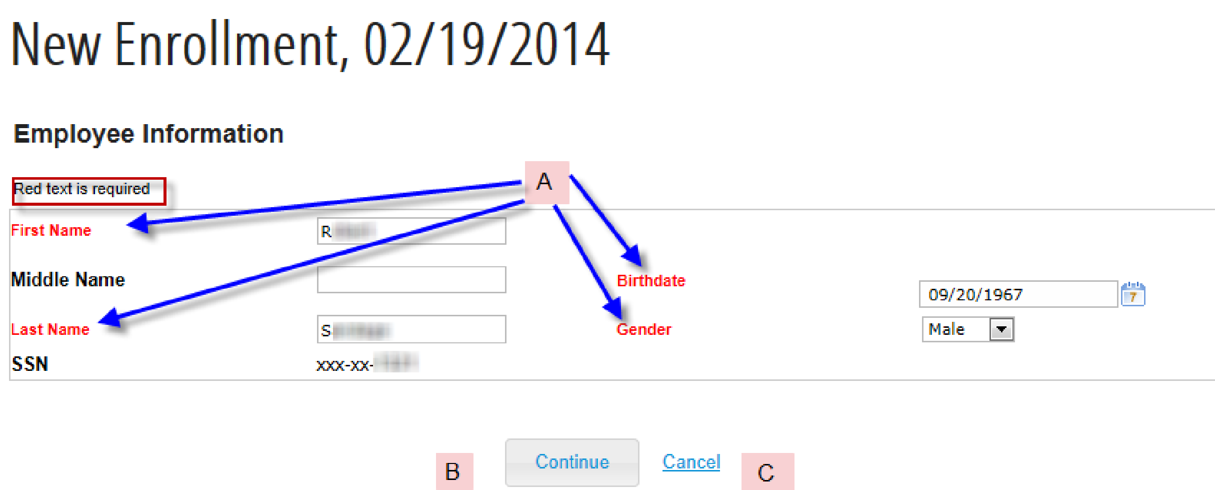
4.8.3 Add New Employee (Newly Eligible Event)

To add a new employee click on the link in the "Add New Employee" box on the Welcome Screen. This "Add New Employee" link is also known as the **Newly Eligible** Event.

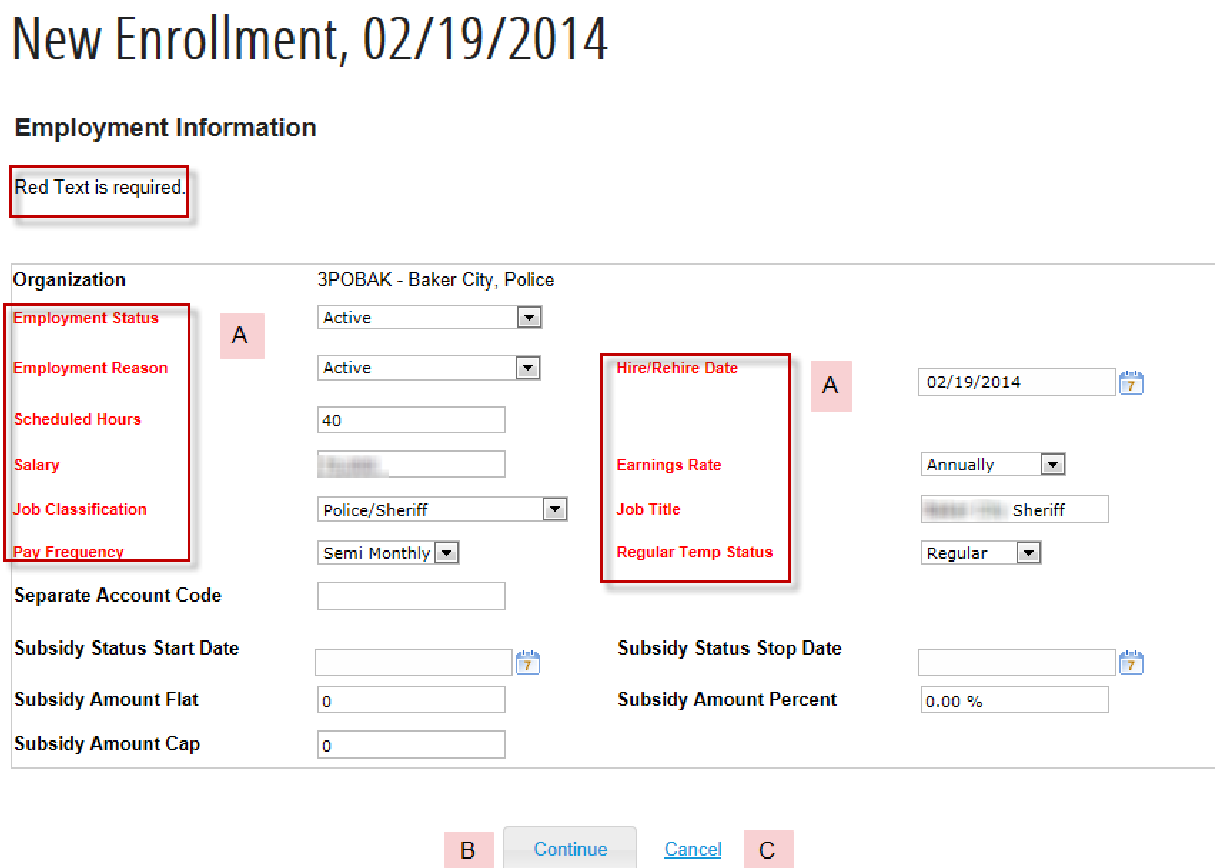




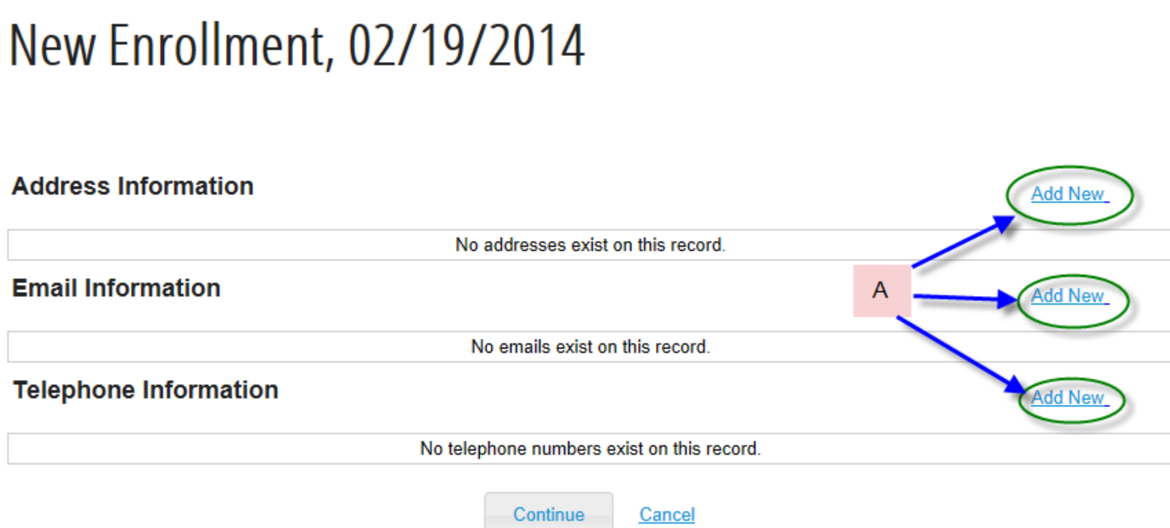
Next, choose the Organization Id from the dropdown box **(A),** enter the Social Security Number for the new employee **(B),** and the hire date **(C).** Hit the Continue button **(D)** to continue, or cancel button to cancel the add **(E).**



Next, enter the Employee Information- the Name, SSN, Birthdate, and Gender of the New Employee- taking in consideration that all the fields in **RED (A)** are required. Hit Continue **(B)** to continue, or the Cancel link **(C)** to Cancel.

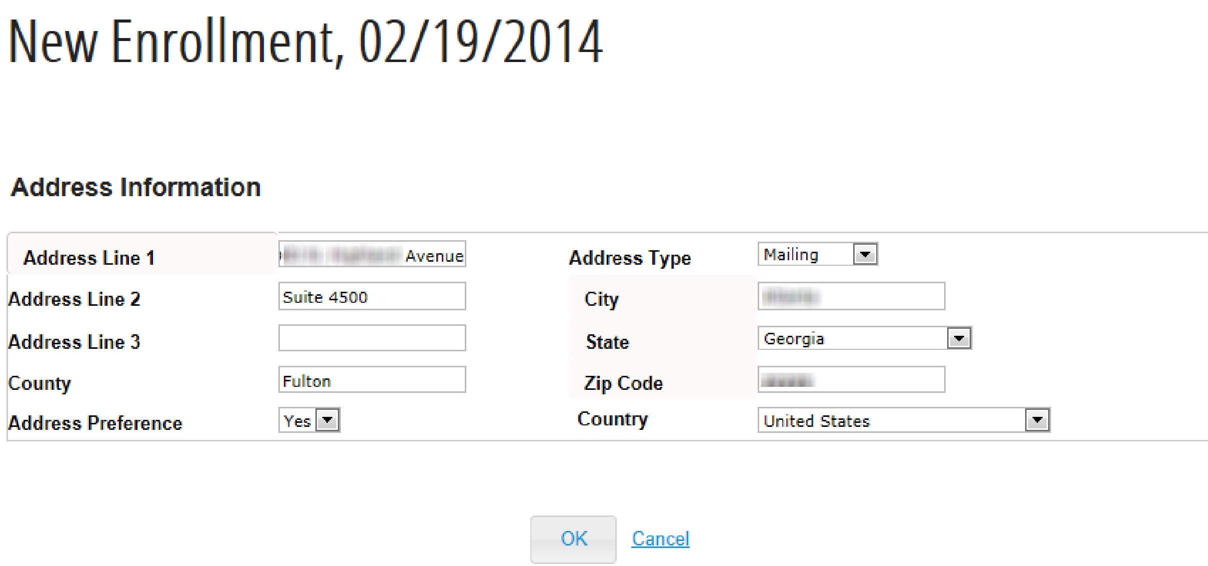


Next, enter the Employment Information- Employment Status, Employment Reason, Scheduled Hours, etc. keeping in mind that all fields in **RED (A)** are required. Hit Continue **(B)** to continue, or Cancel **(C)** to cancel.

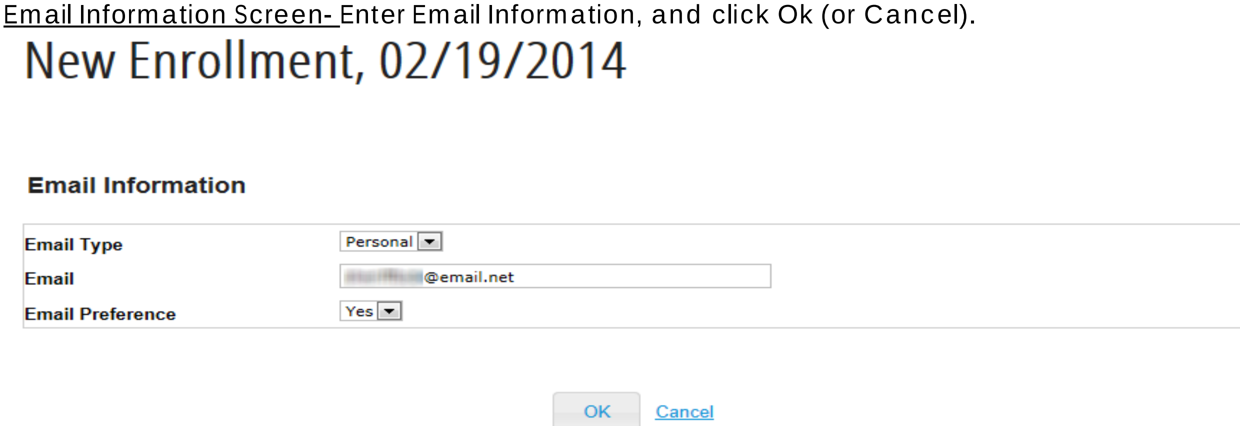


Next, add the Address, Email and Telephone information for the New Employee by clicking on each of the “Add New” links.

Address Information Screen- Enter Address information, and click Ok (or Cancel).



Email Information Screen- Enter Email Information, and click Ok (or Cancel).



Telephone Information Screen- Enter the Telephone Information, and click Ok (or Cancel).

New Enrollment, 02/19/2014

Telephone Information

Telephone Type	Mobile
Telephone Number	404[redacted]
Preference	Yes

OK Cancel

After entering Address, Email, and Telephone Information, the screen will look like this:

New Enrollment, 02/19/2014

Address Information

Add New

Address Type	Address Line 1	Address Line 2	City	State	Zip Code	Preference
Mailing	[redacted] Highland Avenue	[redacted]	[redacted]	Georgia	[redacted]	Yes

Email Information

Add New

Email Type	Email Address	Preference
Personal	[redacted]@email.net	Yes

Telephone Information

Add New

Telephone Type	Telephone Number	Preference
Mobile	(404) [redacted]	Yes

A Continue Cancel B

Click Continue **(A)** to continue, or Cancel **(B)** to cancel.

Verify Screen

New Enrollment, 02/19/2014

Verify Information

Employee Information

A [Make Changes]

First Name	R[redacted]		
Middle Name		**Birthdate**	09/20/[redacted]
Last Name	S[redacted]	**Gender**	Male
SSN	xxx-xx-[redacted]		

Organization Information

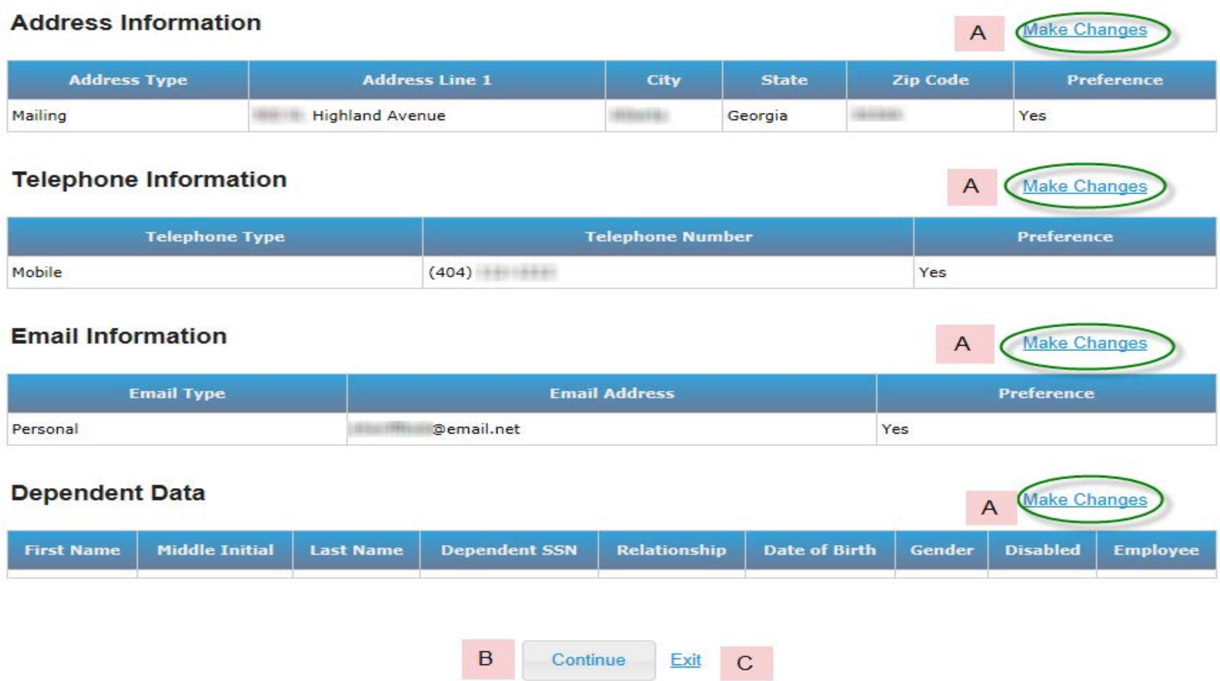
A [Make Changes]

Organization	3POBAK - Baker City, Police		
Employment Status	Active		
Employment Reason	Active	**Most Recent Hire Date**	2/19/2014
Scheduled Hours	40		
Job Classification	Police/Sheriff	**Job Title**	[redacted] Sheriff
Pay Frequency	Semi Monthly	**Regular Temp Status**	Regular
Separate Account Code			
Severance Start Date		**Severance Stop Date**	
Severance Amount Flat	0	**Severance Amount Percent**	0.00 %
Severance Amount Cap			
Subsidy Status Start Date		**Subsidy Status Stop Date**	
Subsidy Amount Flat	0	**Subsidy Amount Percent**	0.00 %
Subsidy Amount Cap	0		

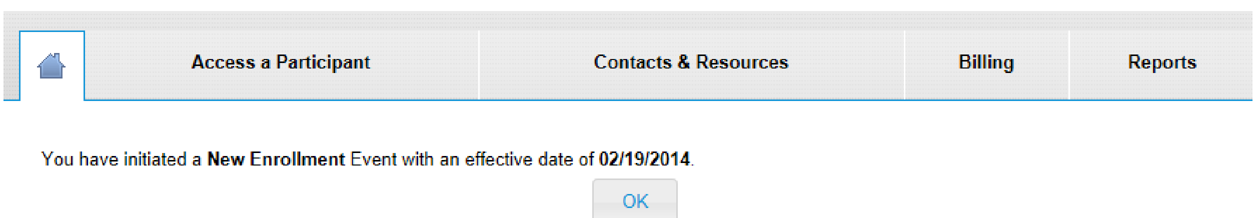
Salary Information

A [Make Changes]

Salary	$[redacted]
Earnings Rate	Annually
Annual Salary	$[redacted]



Verify that all the enrollment information on the Verify Information screen is correct. To make any changes, click on the "Make Changes" links **(A)** next to the applicable section. Click Continue **(B)** to continue, or Exit **(C)** to cancel.



Once the enrollment is complete, the screen will state that a New Enrollment Event has been initiated with the effective date.

The Events Tab now displays a Pending Event of "New Enrollment". If no changes are made to the Pending Event, it will complete on its own. Now that the Newly Eligible Event has been run, the New Employee will be able to complete their Benefits Elections via the Employee Self Service website.

You are viewing:
[redacted]

Demographic Info | Contact Info | Employee Communications | Employment | Benefits | Events

Events

Pending Event Information

Initiate New Event

Benefit Event	Organization	Benefit Event Date	
New Enrollment	[redacted] Police	02/19/2014	Make Changes

Event History

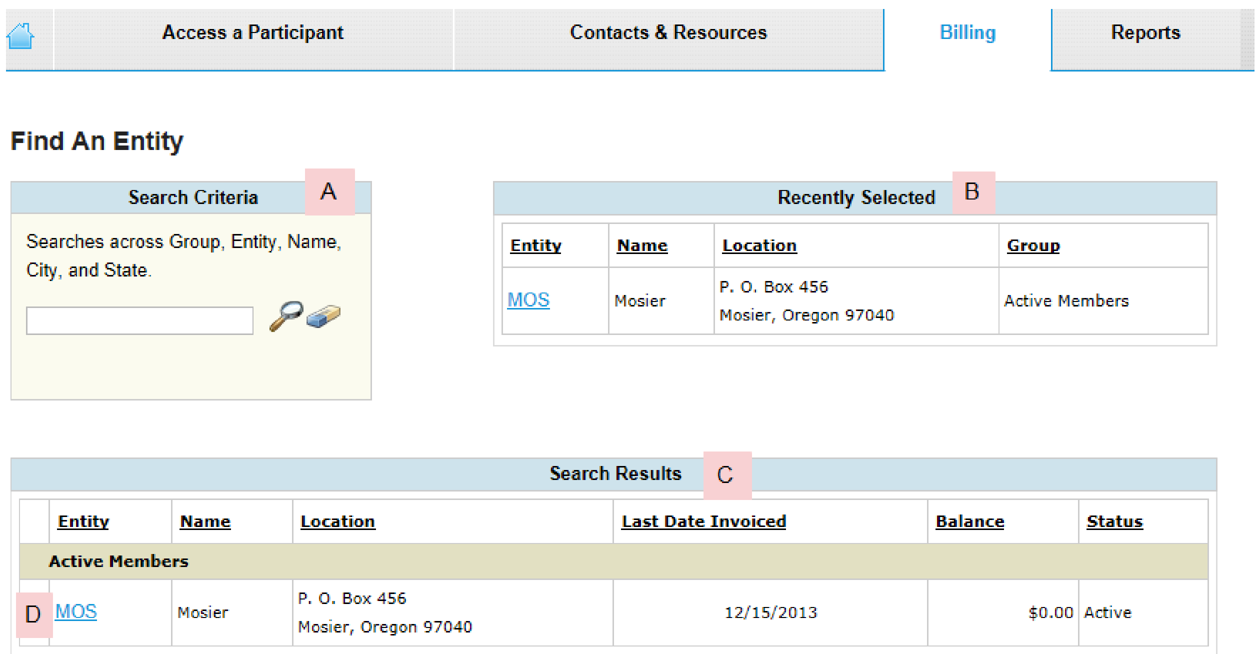
Benefit Event	Organization	Benefit Event Date	Expiration Date	Status	Event Calc Date	User Name
New Enrollment	[redacted] Police	02/19/2014	04/01/2014	Pending	02/19/2014	Cheryl Suchanick

5 Contacts & Resources

The Contacts & Resources screen provides contact information for the CIS Benefits Hotline.

6 Billing

The main billing screen provides a Search Window (A) if searching for a specific entity, a Recently Selected window (B) which displays the most recent entities viewed, and (C), the actualy entity search results.

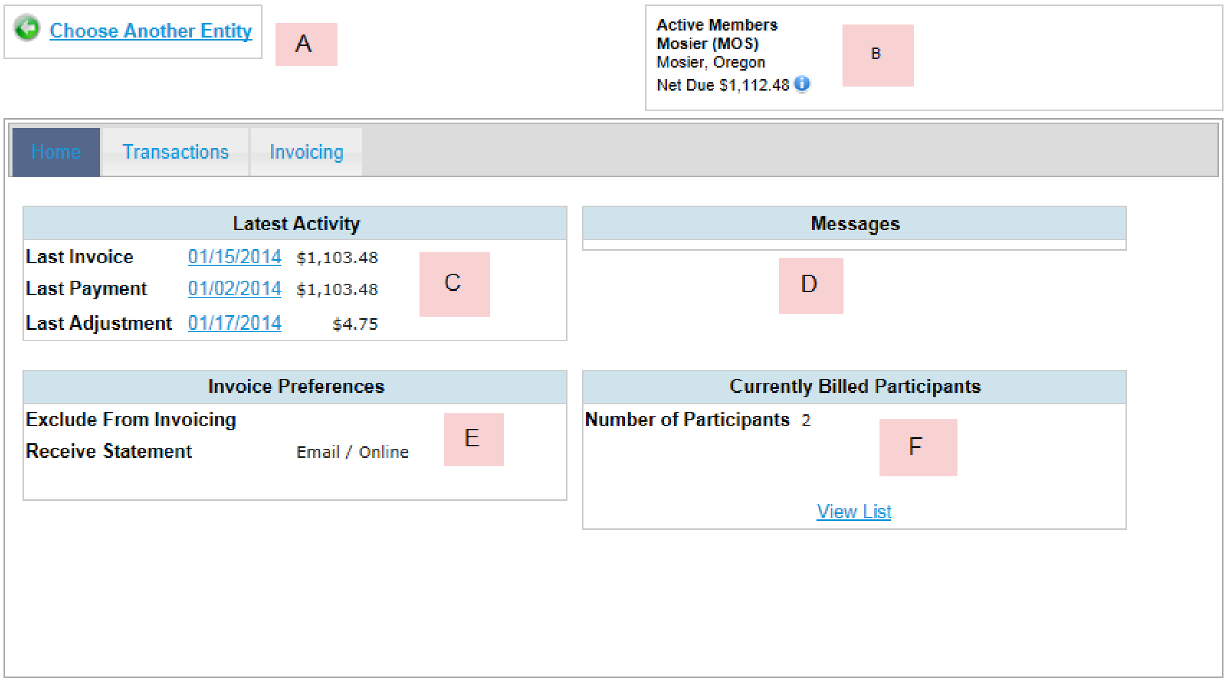


The Billing section will only display the Entities that the specific user who is logged in- is tied to. So, for example, this user in the example above is only tied to the Entity "MOS" for Mosier.

To view the Entity Details, click on the link under Entity ("MOS").

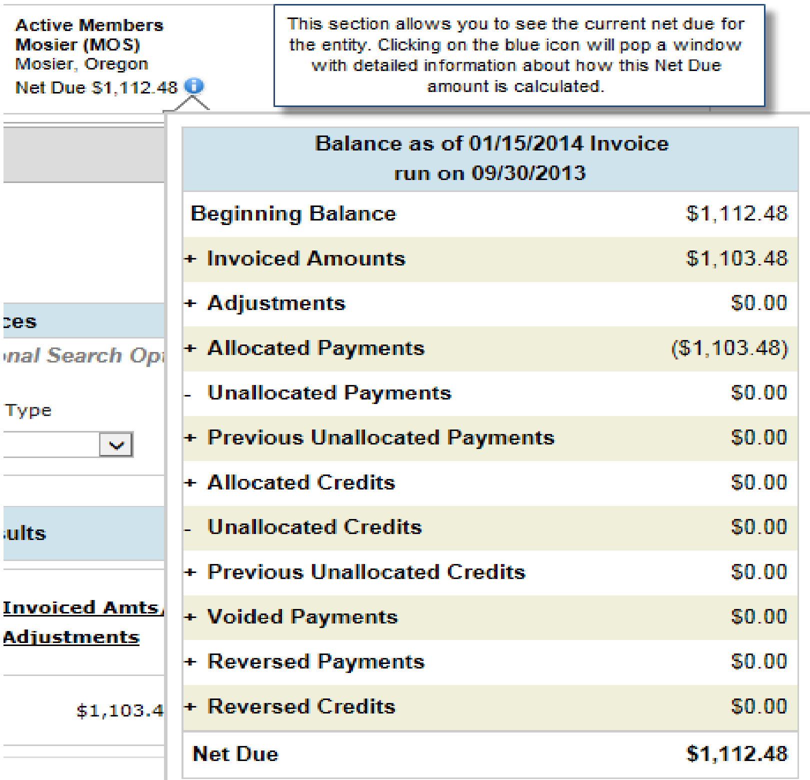
HOME BILLING SCREEN

This **Home** Billing screen allows you to view the most current information for an entity.



A: Use the **Choose Another Entity** link to exit the Billing Screen.

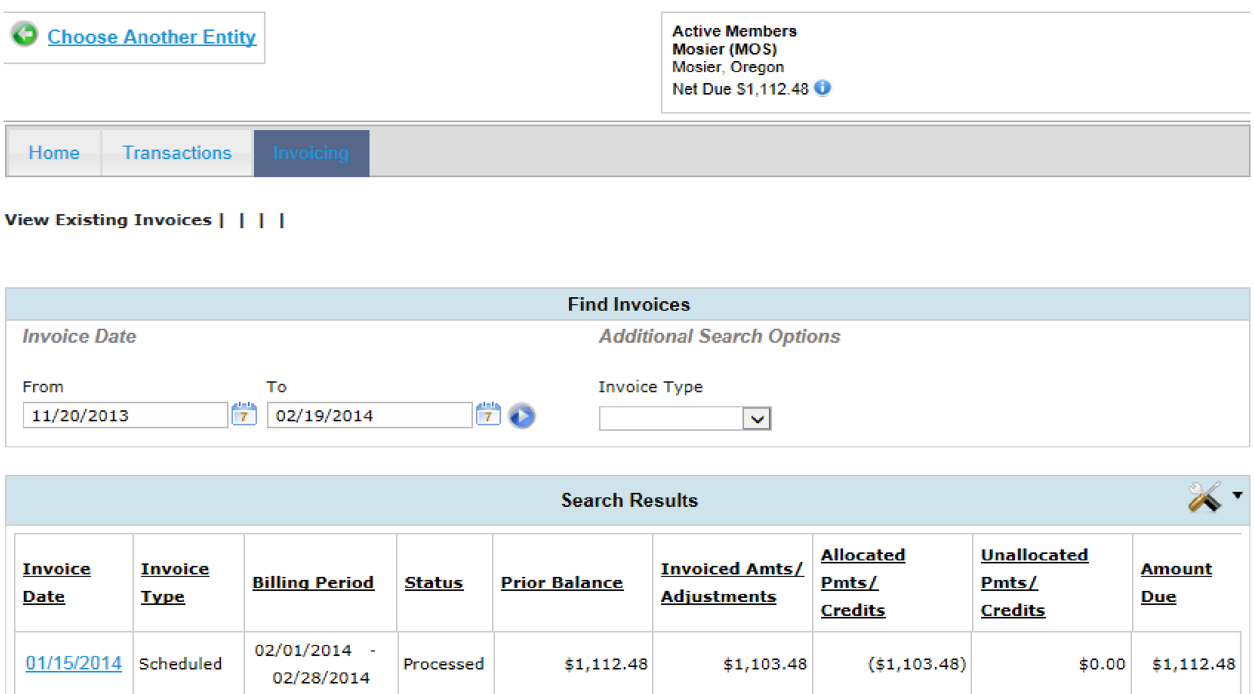
B: The Net Due section shows the current Invoice Net Due amount – if you click on the blue icon, will provide further details:



Balance as of 01/15/2014 Invoice run on 09/30/2013	
Beginning Balance	$1,112.48
+ Invoiced Amounts	$1,103.48
+ Adjustments	$0.00
+ Allocated Payments	($1,103.48)
- Unallocated Payments	$0.00
+ Previous Unallocated Payments	$0.00
+ Allocated Credits	$0.00
- Unallocated Credits	$0.00
+ Previous Unallocated Credits	$0.00
+ Voided Payments	$0.00
+ Reversed Payments	$0.00
+ Reversed Credits	$0.00
Net Due	**$1,112.48**

C: The Latest Activity section allows you to access the invoicing tab by clicking on the link to Last Invoice. It also allows you to access the last payment made, and the last adjustment.

Last Invoice:



Invoice Date	Invoice Type	Billing Period	Status	Prior Balance	Invoiced Amts/ Adjustments	Allocated Pmts/ Credits	Unallocated Pmts/ Credits	Amount Due
01/15/2014	Scheduled	02/01/2014 - 02/28/2014	Processed	$1,112.48	$1,103.48	($1,103.48)	$0.00	$1,112.48

Last Payment:

MORNEAU SHEPELL

Home | Transactions | Invoicing

Find a Payment | Add New Payment

Find Payments

Date Posted

Date Filter: Custom Date Range
From: 11/20/2013
To: 02/19/2014

Additional Search Options

Source

Status

Search Results

Date Posted	Date Received	Source	Status	Amount Received	Amount Allocated	Amount Refunded
01/20/2014	01/02/2014	Payment ACCPAC	Allocated	$1,103.48	$1,103.48	$0.00
			Totals	**$1,103.48**	**$1,103.48**	**$0.00**

Last Adjustment:

Find an Adjustment | Add New Adjustment

Find Adjustments

Date Entered

Date Filter: Custom Date Range
From: 11/20/2013
To: 02/19/2014

Additional Search Options

Status

Employee (Last, First) or Person ID

Reason

Search Results

Date Entered	Description	Reason	Status	Person ID	Name	Amount
01/17/2014	Conversion Balance Correction	Conversion Billing Balance	Invoiced	[redacted]	[redacted]	$4.75
01/17/2014	Conversion Balance Correction	Conversion Billing Balance	Invoiced	[redacted]	[redacted]	$4.25
					Total	**$9.00**

D: The **Messages** section will provide information if there are transactions that apply to the entity.

E: Invoice Preferences: This section shows whether or not someone is excluded from invoicing, and how the Statements are sent.

F: The Currently Billed Participants shows the number of Participants that are currently being billed, and a link to view the list of Participants. This is the pop-up window that lists the Participants when the link is clicked:

Current Participants

Person ID	Name	Effective Date	End Date
541643025	Irving, Barbara	09/01/2013	
572216982	Fitzpatrick, Kathleen	09/01/2013	

INVOICING BILLING SCREEN

The Invoicing screen allows the user to view the invoice details.

Home | Transactions | Invoicing

View Existing Invoices | | | |

Find Invoices

Invoice Date — *Additional Search Options*

From: 11/20/2013 To: 02/19/2014 — Invoice Type:

Search Results

A Invoice Date	B Invoice Type	C Billing Period	Status	Prior Balance	Invoiced Amts/ Adjustments	Allocated Pmts/ Credits	Unallocated Pmts/ Credits	Amount Due
01/15/2014	Scheduled	02/01/2014 - 02/28/2014	Processed	$1,112.48	$1,103.48	($1,103.48)	$0.00	$1,112.48

A: The Invoice Date is the date the invoice was created. Click on the link to see more details and to access the actual statement. See the following page for additional details.

B: The Invoice Type indicates how the invoice was generated. If the invoice type is not Scheduled, that will indicate the client team has done special processing. Questions on invoices with an invoice type of On Demand or Adjustment Only should be directed to the client team.

C: The Billing Period indicates the date range for the invoice.

Invoice Details Screen

Invoice Details

Invoice Date	01/15/2014	**Status**	Processed	View Statement (A)
Type	Scheduled	**Invoice ID**	6	Download Details to Excel (B)
Billing Period	02/01/2014 - 02/28/2014			
Run by	[redacted]			

Invoice Transactions

View/Group By — Employee (Last, First) or Person ID — Transaction Type — Billing Item (C)

ID (D)	Transaction Date	Transaction Type	Item	Coverage	Billing Period	Person ID	Name	Amount
561212	01/21/2014	Invoice	Full Vision Premium	Vision/ VSP-1 (12/12/24) Employee	02/01/2014 - 02/28/2014	[redacted]	[redacted]	$9.34
561211	01/21/2014	Invoice	Full Medical Premium	Medical/ Copay B Rx4 Employee	02/01/2014 - 02/28/2014	[redacted]	[redacted]	$494.77
561210	01/21/2014	Invoice	Full Dental Premium	Dental/ Dental V	02/01/2014 - 02/28/2014	572216982	[redacted]	$47.63
							Total	**$1,103.48**

A: To view the **Statement**, click on the link "View Statement" – a PDF of the participant Statement wil pop up, and you can save down a copy of your own.

cis benefits
www.cisbenefits.org

Monthly Benefits Invoice **February, 2014**

Mosier

Active

Group : Staff

Employee	Plan Name	Option		Premium	Adjustment
[redacted]	Regence Copay B Rx4 Alt Care	Employee		$494.77	$0.00
	ODS Dental V	Employee		$47.63	$0.00
	VSP-1 (12/12/24)	Employee		$9.34	$0.00
			Total :	**$551.74**	**$0.00**
			Net Total :	**$551.74**	
[redacted]	Regence Copay B Rx4 Alt Care	Employee		$494.77	$0.00
	ODS Dental V	Employee		$47.63	$0.00
	VSP-1 (12/12/24)	Employee		$9.34	$0.00
			Total :	**$551.74**	**$0.00**
			Net Total :	**$551.74**	
			Staff Total :	**$1,103.48**	**$0.00**
			Staff Net Total :	**$1,103.48**	

B: Click the link "Download Details to Excel" download the details of the invoice to Excel

Invoice Date	Member	Member Group	PPT Name	Benefit	Plan	Option	GL Codes	Amount	Premium/Adjustment
1/15/2014	Mosier	Staff	[illegible]	Dental	ODS Dental V	Employee		47.63	Premium
1/15/2014	Mosier	Staff	[illegible]	Medical	Regence Copay B Rx4 Alt Care	Employee		494.77	Premium
1/15/2014	Mosier	Staff	[illegible]	Vision	VSP-1 (12/12/24)	Employee		9.34	Premium
1/15/2014	Mosier	Staff	[illegible]	Dental	ODS Dental V	Employee		47.63	Premium
1/15/2014	Mosier	Staff	[illegible]	Medical	Regence Copay B Rx4 Alt Care	Employee		494.77	Premium
1/15/2014	Mosier	Staff	[illegible]	Vision	VSP-1 (12/12/24)	Employee		9.34	Premium

C: To view by Invoice Transaction by certain groups, click on the dropdown box “View/Group By”:

View/Group By

Grouped By Item
Grouped By Employee
Grouped By Item, Billing Period, Employee
Grouped By Item, Invoice, Billing Period, Employee

To view a specific employee only, type in the Employee or Person ID in the box

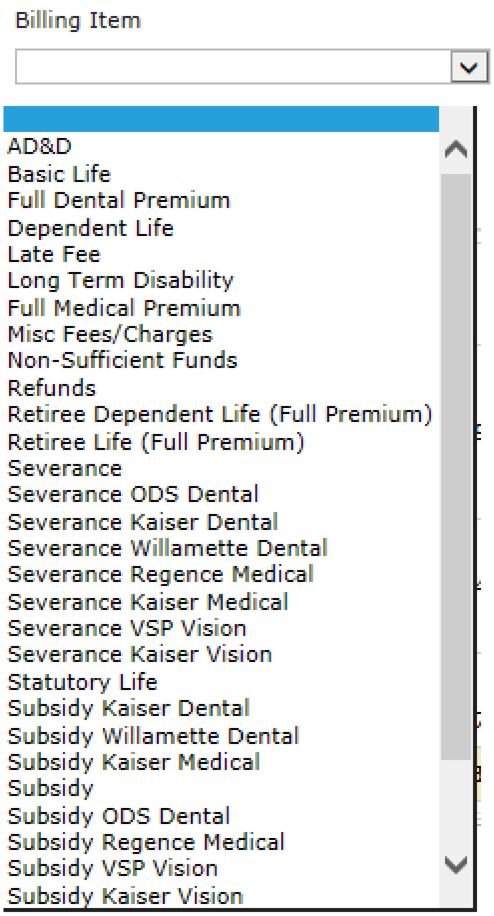
Employee (Last, First) or Person ID

To view by Transaction Type, click on the dropdown box “Transaction Type”

Transaction Type

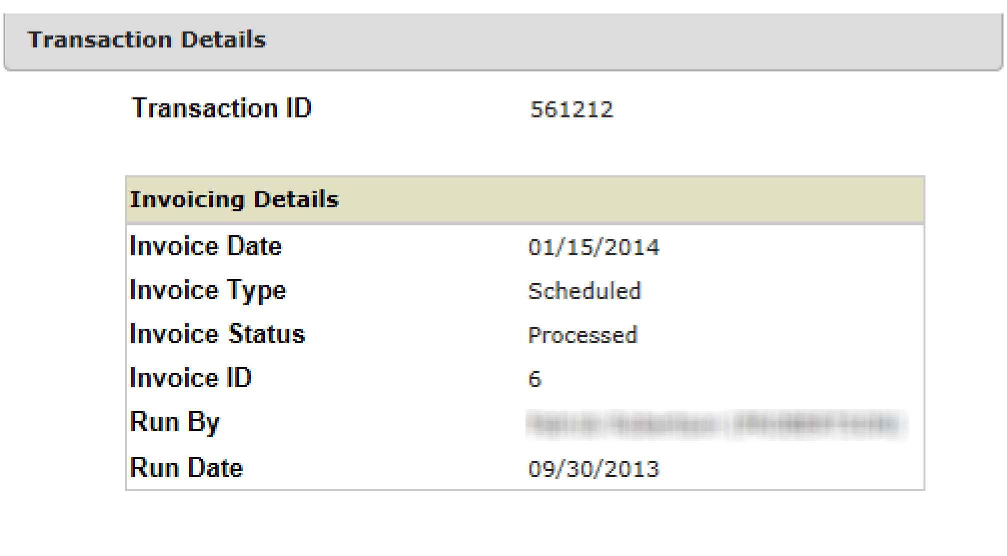
Invoice
Invoice Credit
Adjustment
Adjustment Credit
Backout Invoice
Backout Invoice Credit
Backout Adjustment
Backout Adjustment Credit
Backout Credit
Backout Reallocation Credit
Backout Payment
Credit
Reallocation Credit
Reversed Credit
Write-off Credit
Payment
Reversed Payment
Voided Payment
Backout Write-off Credit

To view by Billing Item, click on the dropdown box "Billing Item"



All of these search/group options here are also on the Transactions Billing Screen.

D: To view a specific Transaction ID, click on the ID # link:

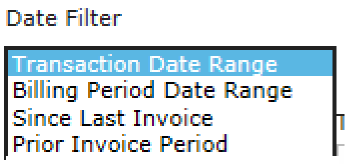


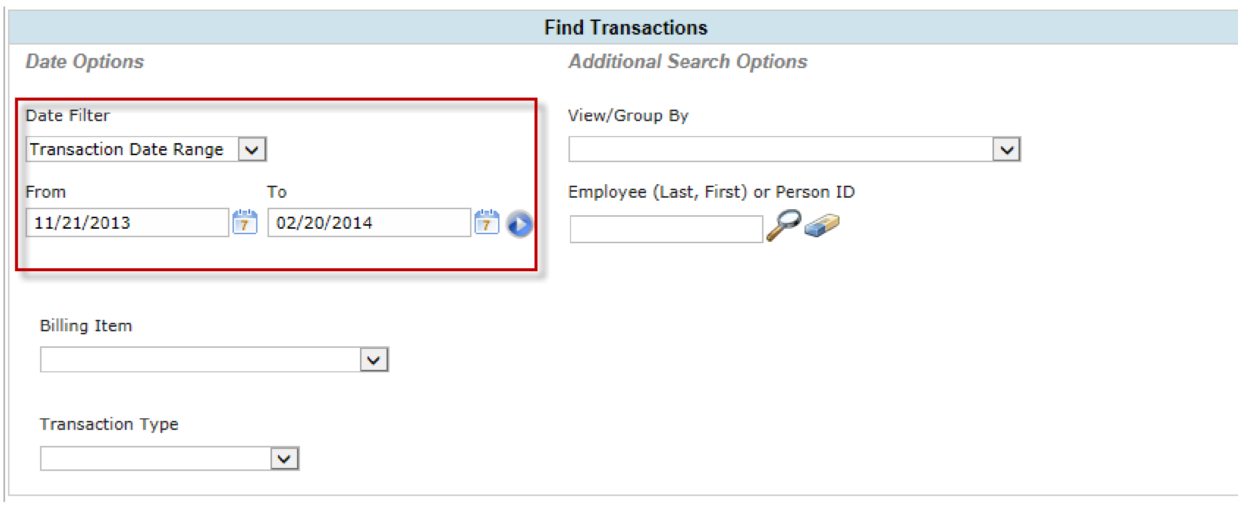
You can also view Transaction specifics via the Transactions Billing Screen.

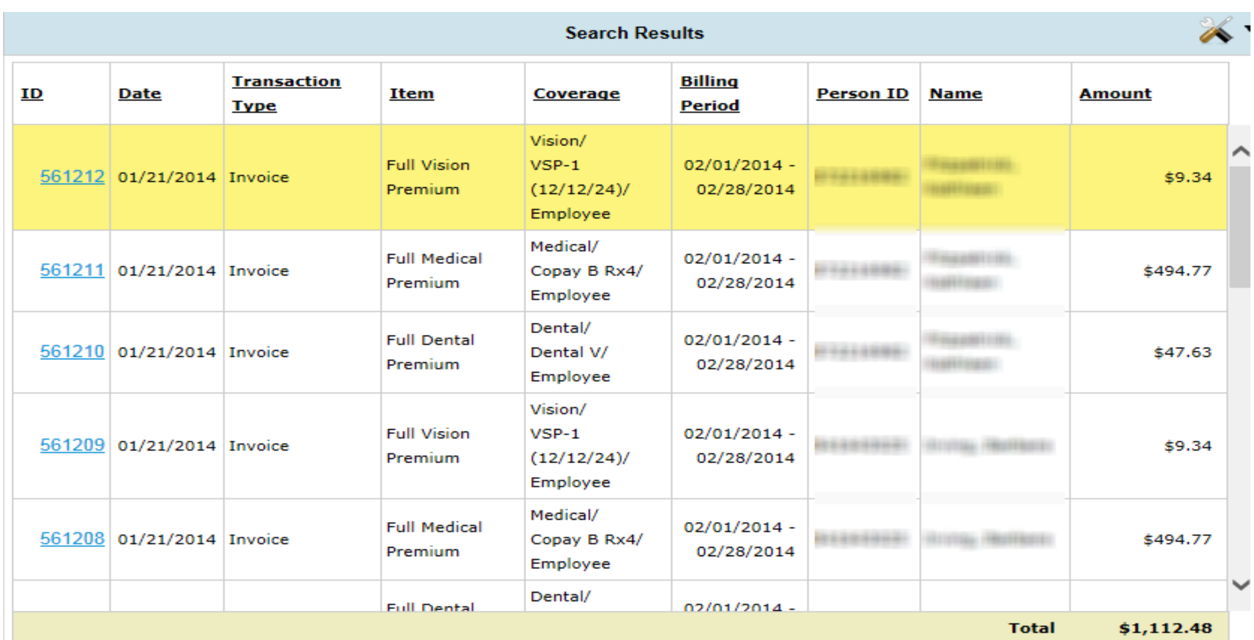
TRANSACTIONS BILLING SCREEN

The Transactions Screen allows the user to view all transactions for a certain date range, and will allow you to answer questions regarding if a payment has been posted for a particular invoice. This screen provides a lot of the same detail as the Invoice Billing Screen, such as the sorting by Billing Item, Transaction Type, Employee or Person ID, and Group- are the same features as the Invoice Billing Screen.

The user can also filter by Date. Select from the dropdown to filter by Transaction Date Range, Billing Period Date Range, Since Last Invoice, and Prior Invoice Period.






Search Results

ID	Date	Transaction Type	Item	Coverage	Billing Period	Person ID	Name	Amount
561212	01/21/2014	Invoice	Full Vision Premium	Vision/ VSP-1 (12/12/24)/ Employee	02/01/2014 - 02/28/2014	[illegible]	[illegible]	$9.34
561211	01/21/2014	Invoice	Full Medical Premium	Medical/ Copay B Rx4/ Employee	02/01/2014 - 02/28/2014	[illegible]	[illegible]	$494.77
561210	01/21/2014	Invoice	Full Dental Premium	Dental/ Dental V/ Employee	02/01/2014 - 02/28/2014	[illegible]	[illegible]	$47.63
561209	01/21/2014	Invoice	Full Vision Premium	Vision/ VSP-1 (12/12/24)/ Employee	02/01/2014 - 02/28/2014	[illegible]	[illegible]	$9.34
561208	01/21/2014	Invoice	Full Medical Premium	Medical/ Copay B Rx4/ Employee	02/01/2014 - 02/28/2014	[illegible]	[illegible]	$494.77
			Full Dental	Dental/	02/01/2014 -			
							Total	$1,112.48

7 Reports

COMING SOON.