CIS-CONNECT ADMINISTRATOR QUICK GUIDE

Quick Guide to the CIS-Connect System – Revised March 2021

To assist members with how to navigate the CIS-Connect enrollment system

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CIS-CONNECT - BENEFITS ENROLLMENT SYSTEM

Accessing CIS-Connect

To access the online enrollment system, CIS-Connect, go to the CIS Benefits website www.cisbenefits.org and click on the CIS-Connect Login button. CIS-Connect can also be accessed from the Benefits Admin Portal page on the CIS website https://cisoregon.org/member/benefits/adminportal.

Administrator User Role

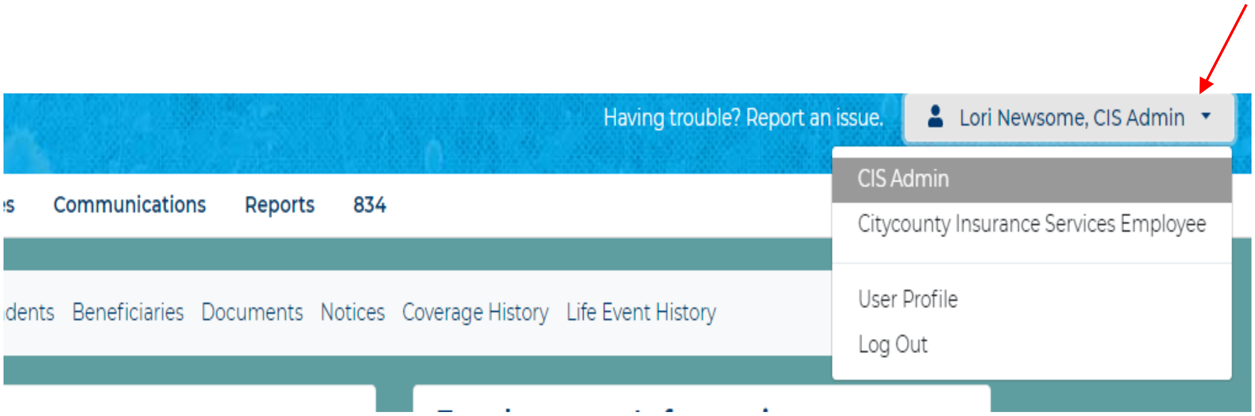
Each employer is set up with one Primary Employer Admin User and there can only be one. If you're having problems accessing the system, it may be because you are not the person identified as the Primary Employer Admin User. Please contact CIS to confirm who your designated Primary Admin User is.

The Primary Employer Admin person is the only one that can add/delete Employer Admin Users or Key Contacts. Employer Admin Users are employees who should have access to the system and Key Contacts are those that should receive copies of member updates and other employer communications. Employer Admin Users and Key Contacts are updated under the Employer Profile tab. If someone should have Employer Admin User access but is not an employee or doesn't work the minimum required benefits eligibility hours, contact CIS to request access.

The Primary Admin User will assign "User Roles" to each person provided access to CIS-Connect. The roles are defined as follows and you should only select one role:

Admin - Edit	Full edit access for all screens
Admin – View Only	View only access for all screens
Finance	Access to Billing tab & billing Invoice (on home page)
Finance + View	Access to Billing tab, billing invoices (on home page) and view only access to employee records
Employee	All employees will default to this role unless changed to one of the other roles outlined above.

If you have more than one "User Role" (e.g., employee & Admin User), you can toggle between roles by selecting a role from the drop-down menu in the upper right corner.



How to Add Admin Users or Key Contacts

After signing onto CIS-Connect, you should be on the Employer Profile tab. If not, click Employer Profile in the navigation bar. Then scroll down to the Key Contacts or Employer Admin User boxes.

Admin Users

An employee must be in the system before he/she can be added as an Admin User. There are limited circumstances where a non-employee can be added as an Admin User. If that circumstance applies to you, or if the employee works less than the minimum required benefits eligibility hours, please contact CIS staff.

<u>Adding Admin Users</u>

In the Employer Admins box, click the “+Add” button

- The active button should be checked so leave it checked
- Using the drop-down arrow in the “Employee” box, search for the employee you are adding admin access for
- Choose the appropriate role for the employee
- Click “Save”

<u>Deleting Admin Users</u>

To delete an Admin User, click the box on the left next to the employee’s name and then click the “Delete” button. You cannot delete or change the Primary Admin User. If that needs to change, please contact CIS. If an employee is deleted as a Primary Admin User, please also delete them as a Key Contact, if applicable.

Key Contacts

There are four “roles” for adding Key Contacts and they are defined as follows:

Agent
- For employers who pay a commission to an agent and want their agent to receive copies of the member updates.

Finance
- For employees who should receive only the email that tells them when the bills have been posted.

Primary
- This should be the same person identified as the Primary Admin User.

Secondary
- This is any other employee that should receive copies of the member updates.

<u>We encourage you to have more than one person receiving the member updates.</u> Many times, the information is time-sensitive and if the Primary contact is out, no one else knows of the needed action.

<u>Adding Key Contacts</u>

In the Key Contacts box, click on the “+Add” button

- Using the drop-down arrow click on the “Type” of contact
- Add the individual’s First & Last Name
- Add the Job Title
- Add the Email address where the member updates should be sent
- Add the work phone number
- Check the box for “Receive Employee Notices” if the contact should be copied on employee notices
- Click “Save”

<u>Deleting Key Contacts</u>

To delete a Key Contact, click the box on the left next to the individual’s name and then click the “Delete” button.

How to Turn On/Off Receiving Copies of Employee “Action Needed” Reminder Emails

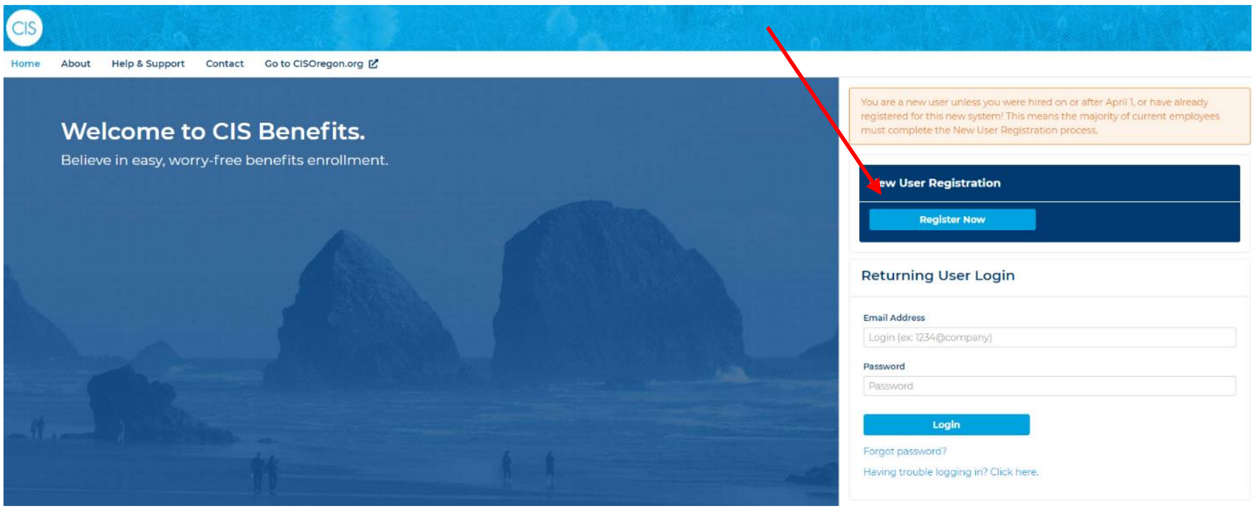
If you want to turn on or off receiving copies of the notices emailed to employees:

- Click on Employer Profile
- In the Key Contacts box, click on the View button to the left of the contact to be edited
- Check the box for “Receive Employee Notices” if you want to be copied on emailed employee notices

- Uncheck the box for “Receive Employee Notices” if you don’t want to be copied on emailed employee notices
- Click “Save”

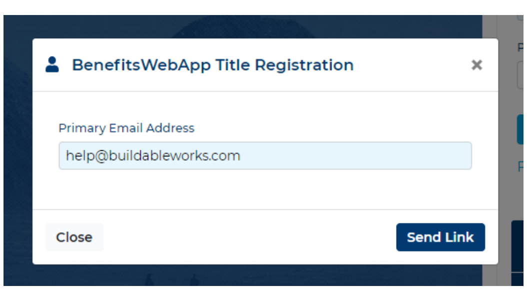
New User Registration Process

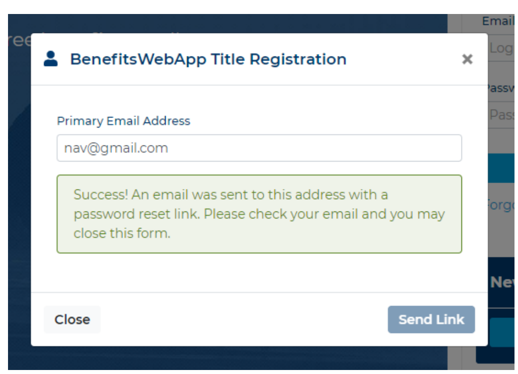
Once you’ve been added to the system by either CIS Admin or an Employer Admin, all users (including employees) will go through the same registration process to set-up their password and complete the dual-factor authentication process. All users must use the email address entered in the system by the employer or CIS to register.



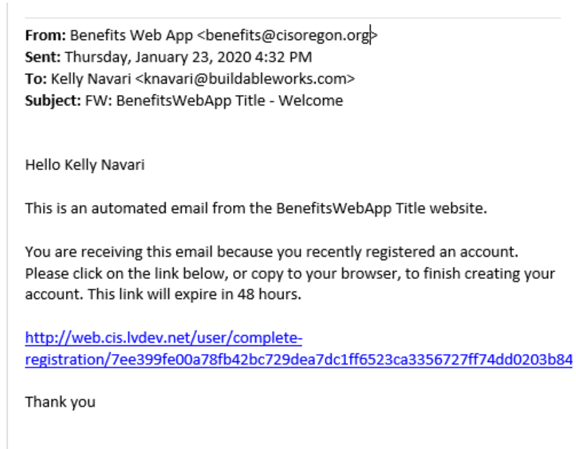
Step 1 – Click the “Register Now” button under New User Registration.

Step 2 – A pop-up window will appear asking for the email address that was used to set up your account. For most people, this will be their work email address. Enter the Email Address and click “Send Link”. A success message will appear if the email address is associated with an employee. If the email is not found, either the user has not yet been set up or the email address entered by the employer is different than what the employee is using.





Step 3 – Go to your email account to retrieve the registration email that was sent. Find the link in the body of the email and click on the link.


From: Benefits Web App <benefits@cisoregon.org>
Sent: Thursday, January 23, 2020 4:32 PM
To: Kelly Navari <knavari@buildableworks.com>
Subject: FW: BenefitsWebApp Title - Welcome

Hello Kelly Navari

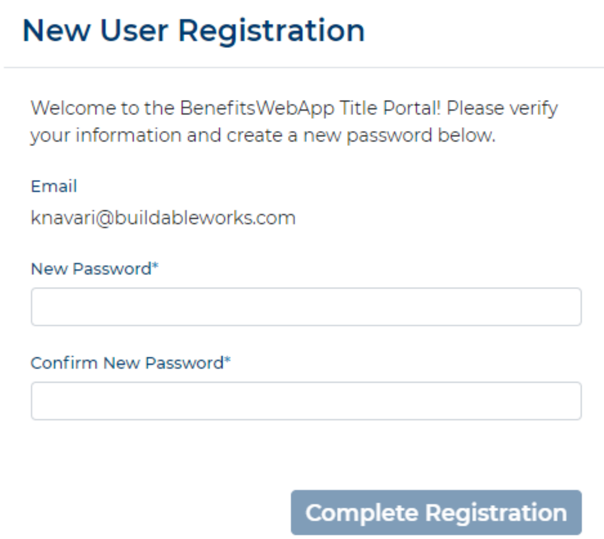
This is an automated email from the BenefitsWebApp Title website.

You are receiving this email because you recently registered an account. Please click on the link below, or copy to your browser, to finish creating your account. This link will expire in 48 hours.

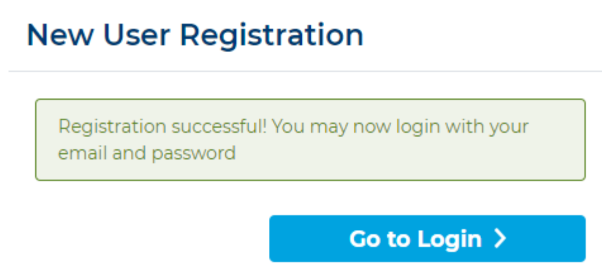
http://web.cis.lvdev.net/user/complete-registration/7ee399fe00a78fb42bc729dea7dc1ff6523ca3356727ff74dd0203b84

Thank you

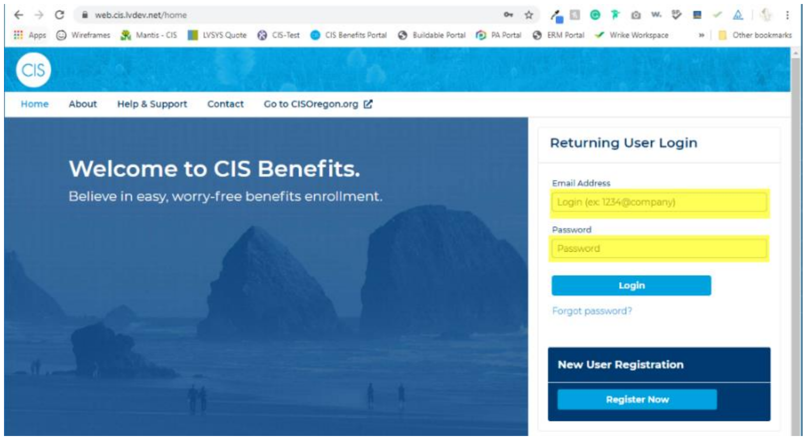
Step 4 – The link will take you back to the system where you can enter your password. Enter your new password twice and click “Complete Registration”.



Step 5 – When your registration is successful, a green success message will appear along with a new button. Click the “Go to Login >” button to continue.



Step 6 – You will be returned to the home/login screen where you can now enter your “Email Address” and new “Password” and click “Login” to access the system for the first time.

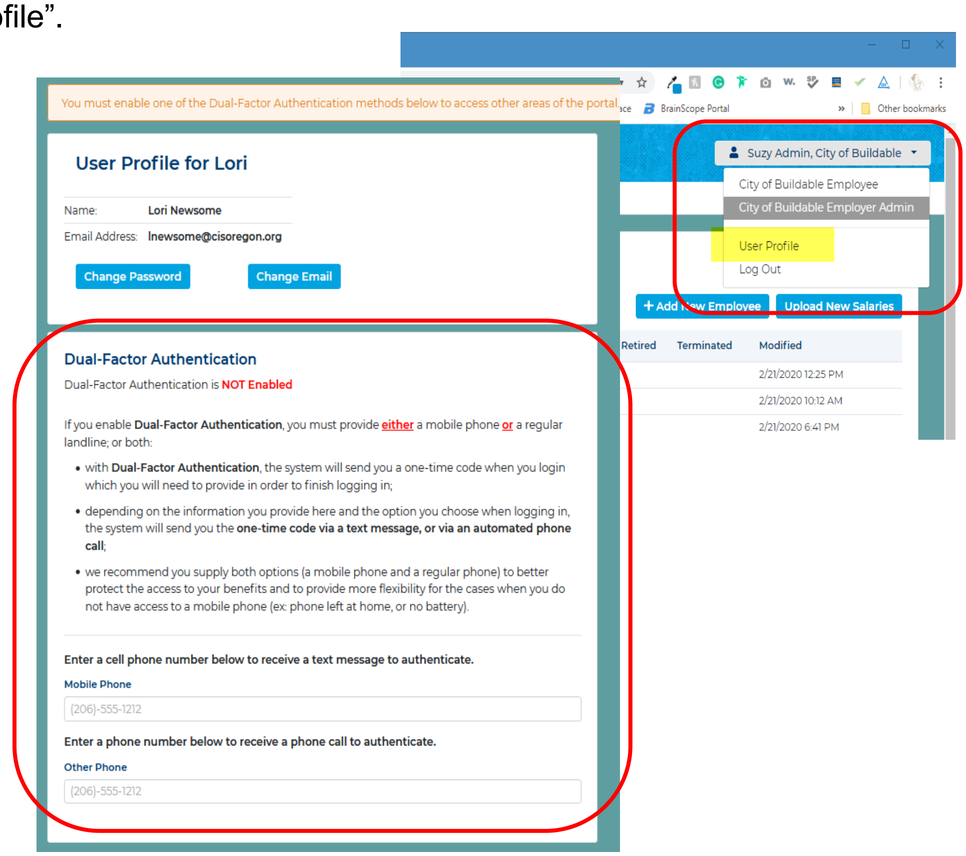


Step 7 – You will then be brought to the page to set up the Dual Factor Authentication.

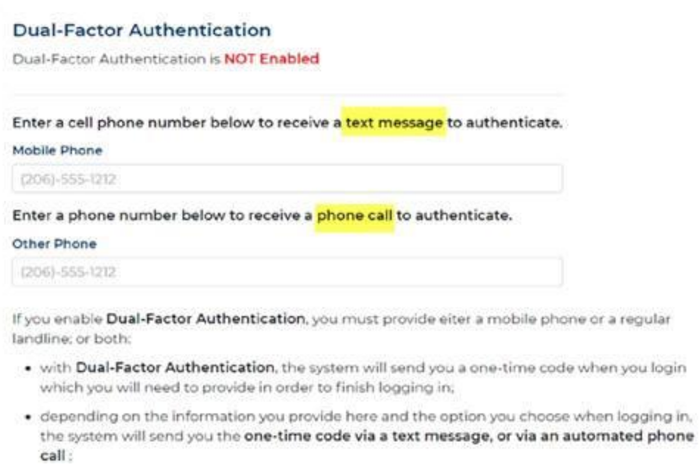
Dual Factor Authentication (DFA)

DFA is required once a week for Employer Administrators. DFA is required every time for employees.

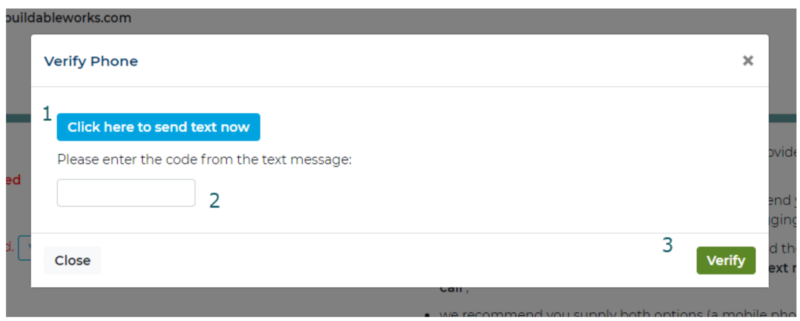
1. On the User Profile page which will load the first time you log in or you can access by clicking on the username in the top right-hand corner of the screen and click on “User Profile”.



2. Enter your cell phone number in the “Mobile Phone” field provided. Click “Verify now with a Text Message” or “Verify now with a phone call”. Click to verify now.



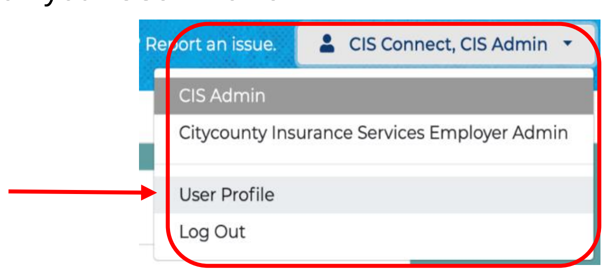
3. Click the “Click here to send text now” button in the pop-up window to receive a code. Enter the code in the field provided and click “verify”. This will take you back to the Admin Screen User Profile.



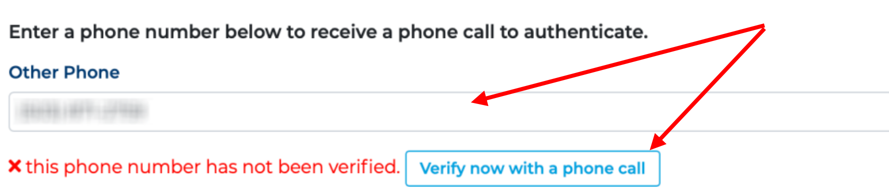
4. Click the “Enable Dual Factor Authentication” button and you will receive a success message.

Note: Adding a second DFA can be useful in case your primary method is not available (e.g., cell phone left at home).

1. To verify a second DFA method, click on your User Profile.

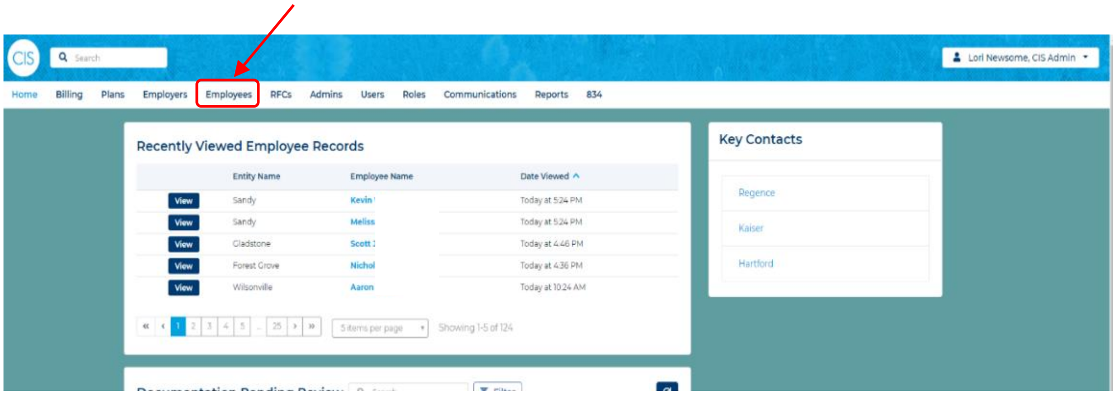


2. Then scroll down to the Other Phone field and click on the “Verify now” button.

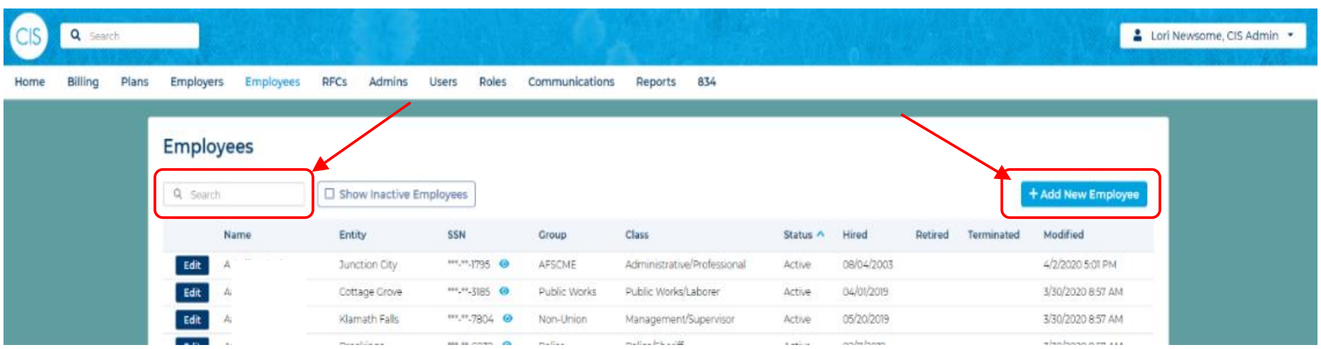


Adding a New Employee

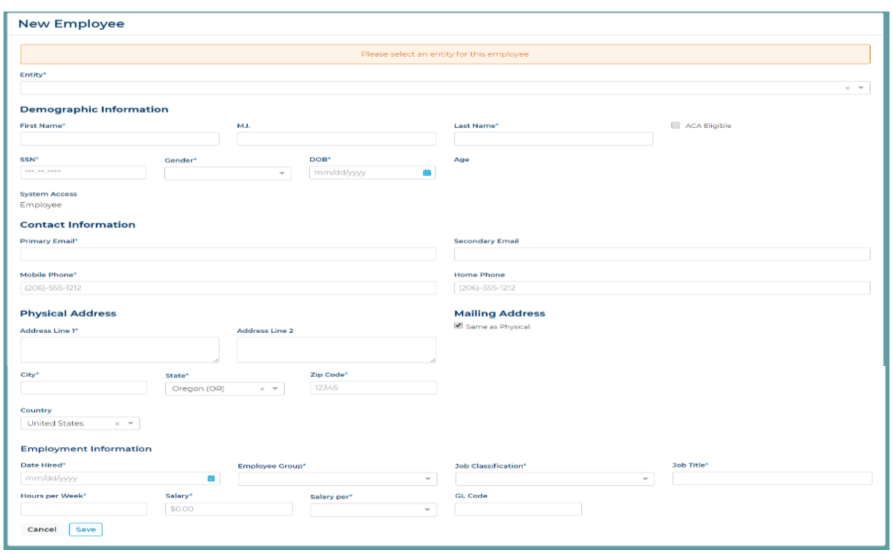
1. Using the Main Navigation bar, click on the “Employees” tab.



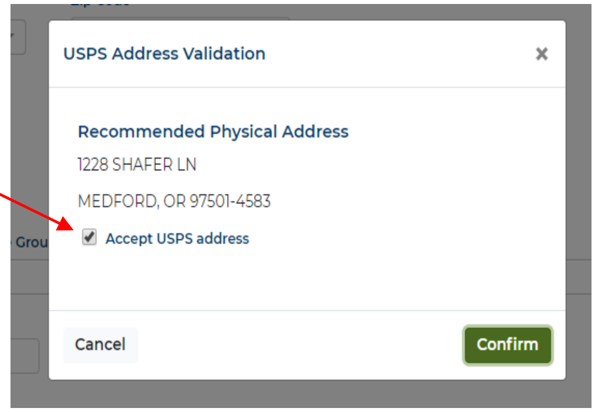
2. Try searching for the employee first to see if they are already in the system. If not, click on the “+Add New Employee” button.



3. Fill out the employee information (all fields with an * are required) and click “Save”.

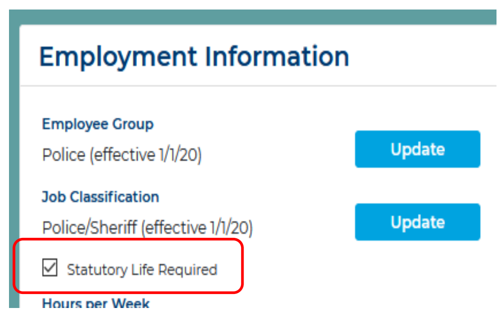


4. A US Postal Service address validation screen will pop-up. If the system can't find a match, a message will appear that says, "We were unable to find an address that matches your input." You will want to double-check the address. If it is correct, you can click "Confirm" to continue.



   - Once entered, the employee will receive an email with instructions on how to Register for access to CIS-Connect and complete the New Hire event.

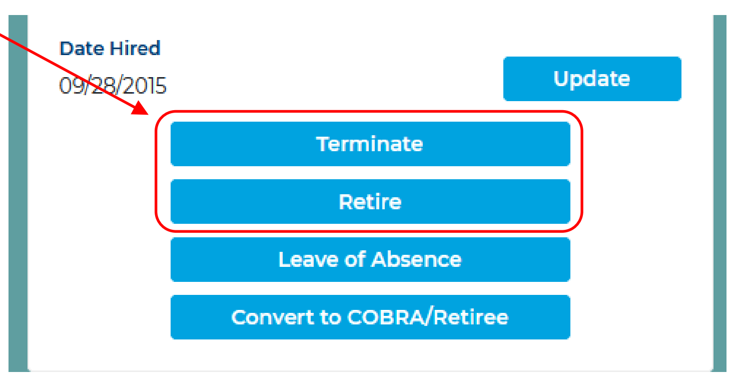
5. Statutory Life – for Firefighters, Voluntary Firefighters, Police/Sheriff, or Police/Sheriff Reservists who need Statutory Life, bring up the employee's account and check the Statutory Life Required box.



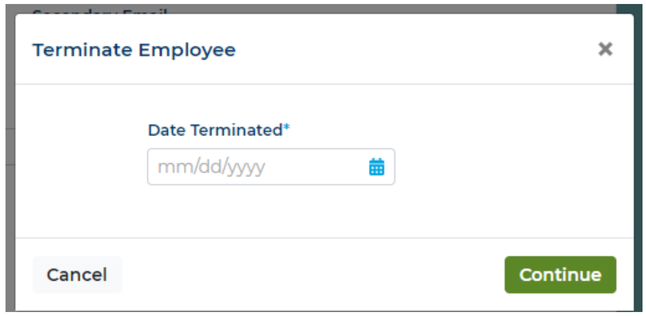
Terminating or Retiring an Employee

The last day of coverage is calculated from the termination or retirement date entered. Coverage will go through the end of the month of the date entered. For example, 3/1/2018 will calculate a termination date of 3/31/2018.

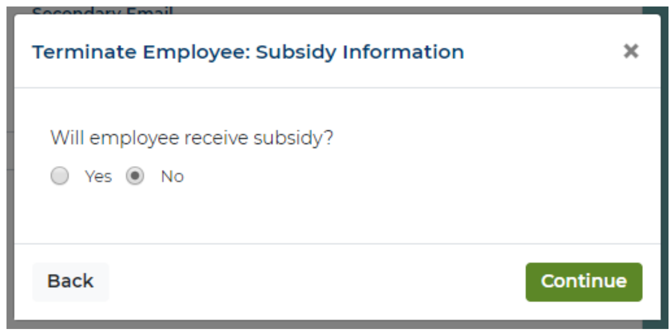
1. Once you have brought up the employee, click on either the "Terminate" or "Retire" button.



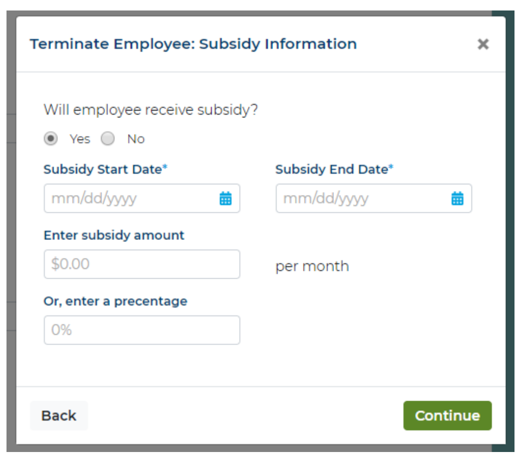
2. Enter the termination/retirement date and click the “Continue” button.



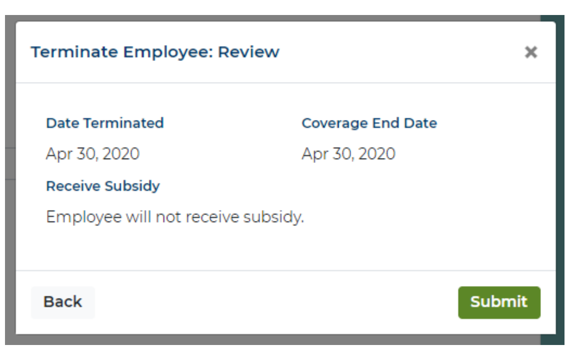
3. Subsidy Information:
   - If you are not adding a subsidy, click the “Continue” button.



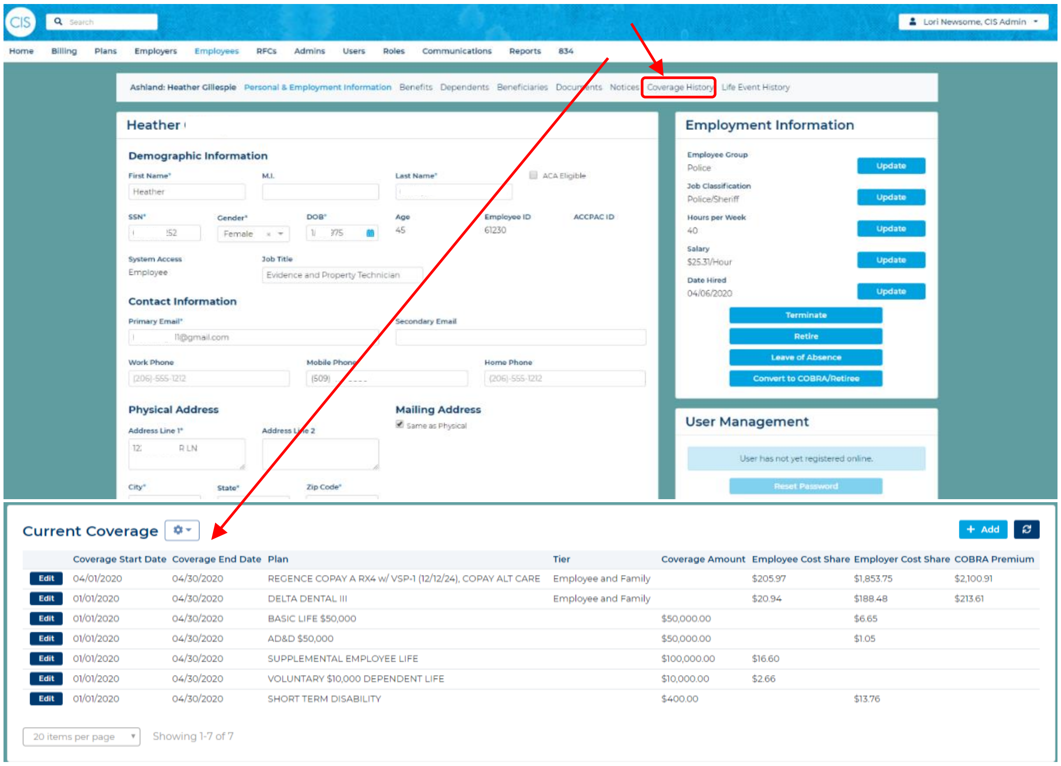
   - If adding a subsidy, click “Yes” and add in the start date, end date (if available), the percentage or flat amount and click the “Continue” button.



4. If all is correct on the review screen, click “Submit”.

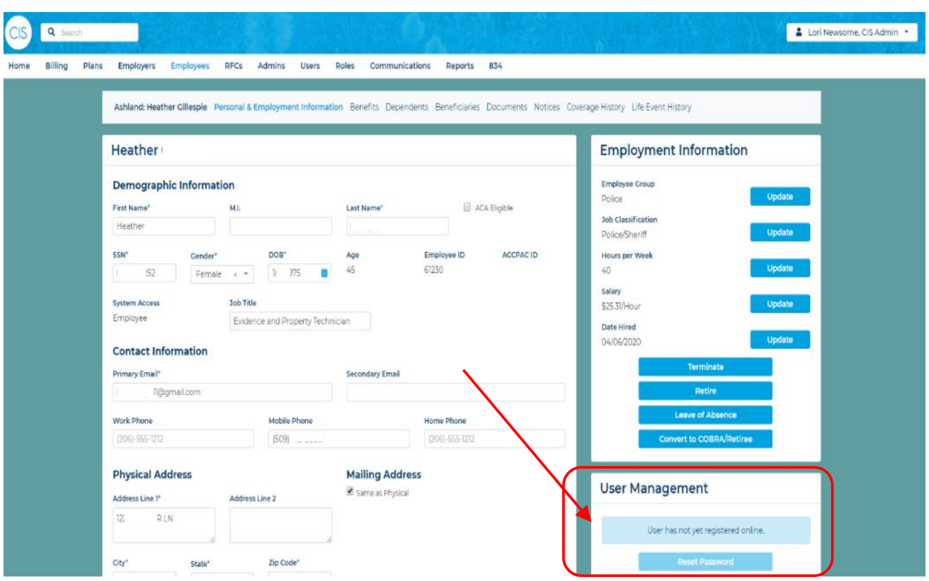


5. If the termination/retirement is a future date, you will see the Coverage End Date populated under the Current Coverage card on the employment page. If the coverage end date has already passed, click on the “Coverage History” page to view.



Resetting an Employee’s Password

1. On the employee’s page look in the User Management box.

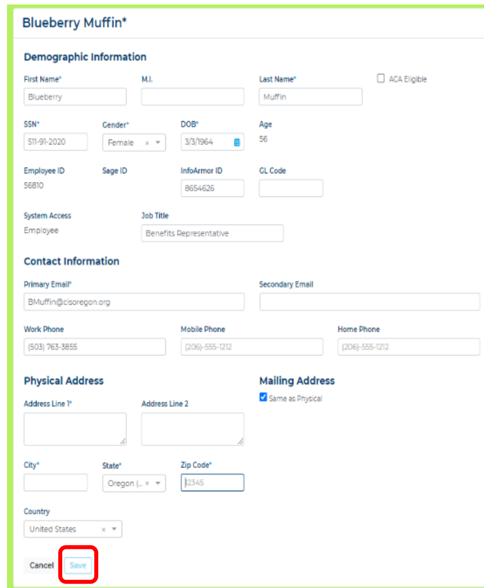


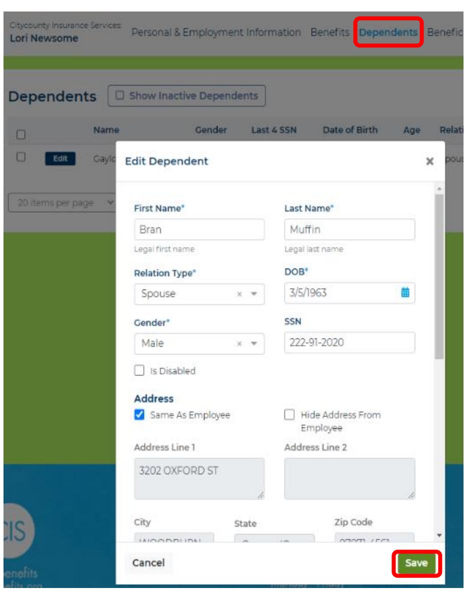
2. If the employee has registered, click on the “Reset Password”. If the employee has not yet registered, direct the employee to the www.cisbenefits.org website to register.

Updating an Employee’s Demographics

Note: If employee’s SSN or Date of Birth needs correction, you cannot update these fields. You **must** notify CIS Benefits to correct.

1. Once you’ve brought up the employee
   - For the employee, type over the information in the field that needs to be changed and click the “Save” button.
   - Note that the employee’s Job Title is in this area and not in the Employment Information box.





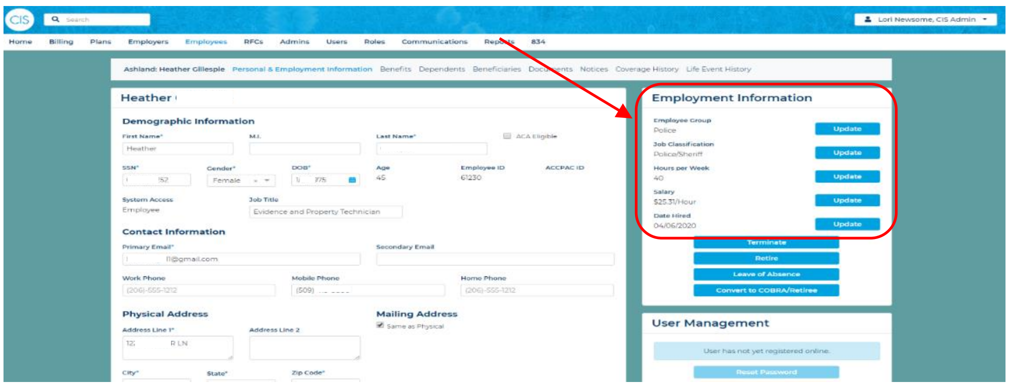
- For a dependent, click on Dependents and then click on the Edit button next to the dependent’s name. Then type in the field with the new information and click the “Save” button. (Employers nor employees can currently change SSNs.)

Leave of Absence

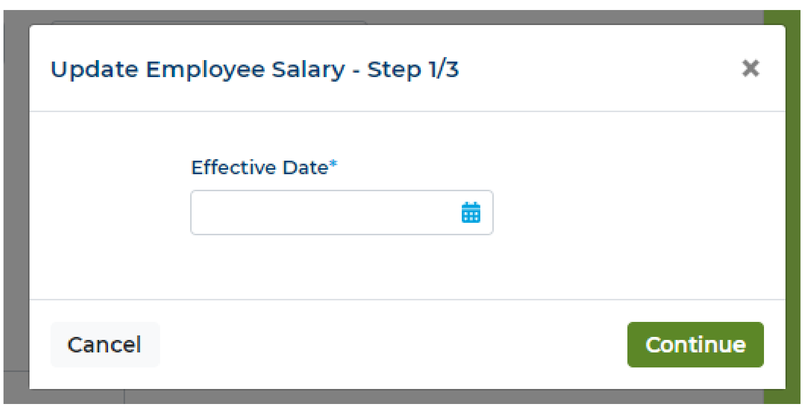
Please contact the Benefits Team when you have an employee going out <u>for any type of leave</u>.

Change in Employment Information or Individual Salary

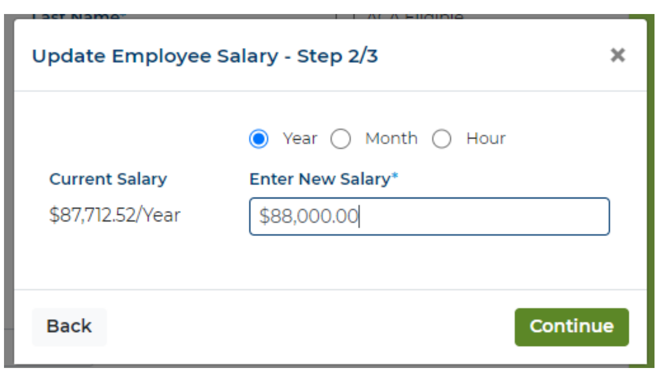
1. On the employee's page click on the button that corresponds to the change needed.



2. Enter the effective date and click the "Continue" button.



3. Enter the change and click the "Continue" button.



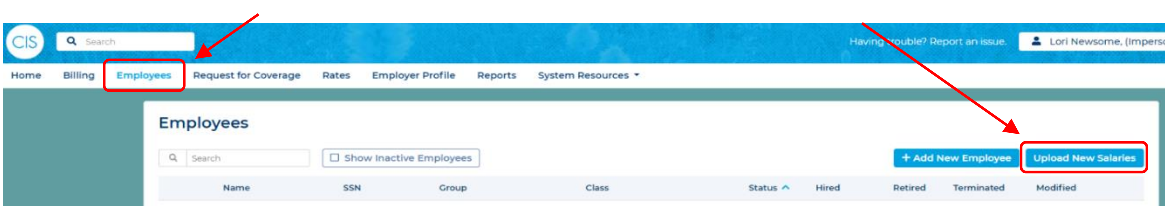
4. Review the changes and click “Back” to correct or “Submit” to complete.

5. This will make any necessary changes for salary based Basic Life, AD&D, and LTD plans and will open an enrollment event for the employee if a change in Employee Group or Hours makes the employee eligible for benefits.

Mass Salary Changes

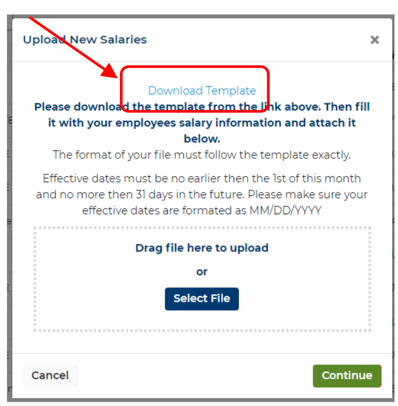
For an individual salary change, see the **Change in Employment Information or Individual Salary** section.

1. From your home screen, click on the “Employees” tab, then click on the “Upload New Salaries” button.



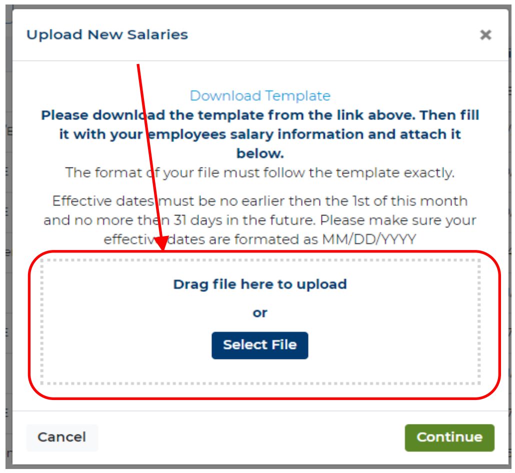
2. In the Pop-Up screen, click on

   "Download Template”.



3. Sort and remove any employees who will not have a salary change. Add the new salaries and the effective date:
    a. Effective date can only be the first of the current month or the first of the following month using MM/DD/YYYY format.
    b. Frequency – remember to change the frequency if changing to a different frequency from what is in the system currently (e.g., Current salary is per Year but the new salary is per Hour).

4. Save the spreadsheet in **.csv format**, upload the spreadsheet, and click the "Continue" button.

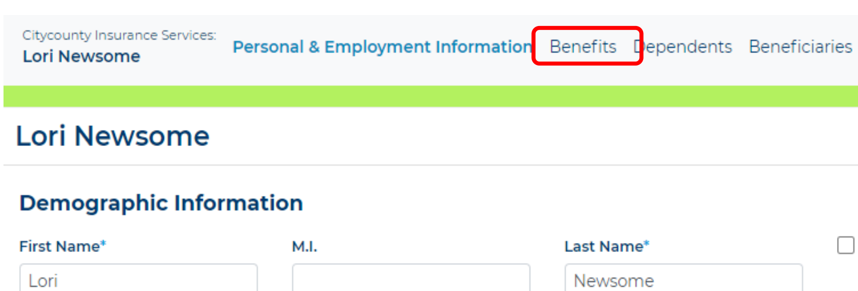


Qualified Medical Child Support Order

The employer will receive notification when an employee is required to provide coverage to a dependent due to a court order. If the employee does not meet exempt status, call CIS Benefits and we will assist you with completing the form and adding the dependent(s). For any dependent added as a "QMSCO", the coverage is effective the first of the month following the date of the Order.

Death of an Employee or Dependent

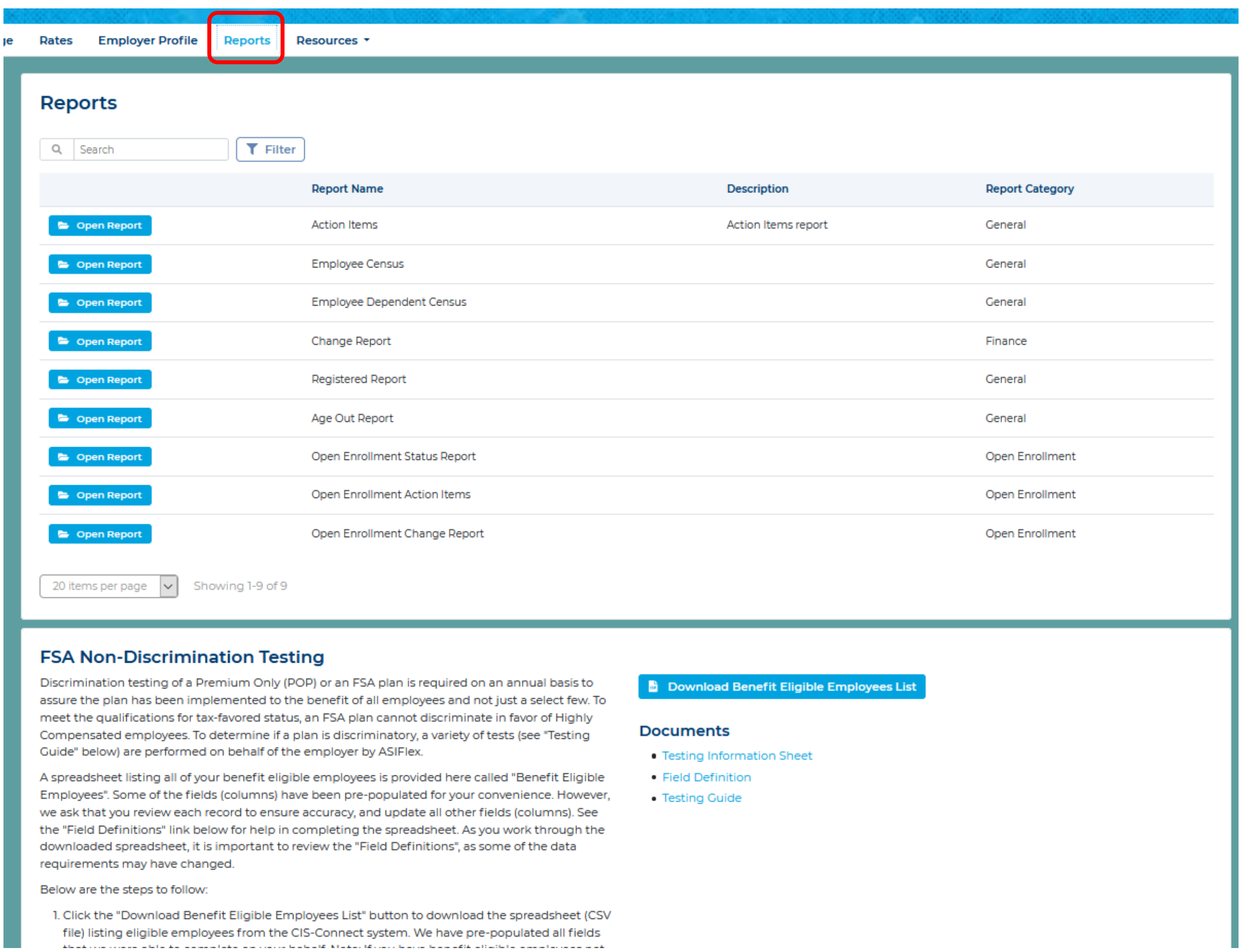
1. On the employee's page click on Benefits.



2. On the Benefits page, click on the event in the Update Benefits box.

Reports and Pre-Tax Plan Compliance Testing

Click on Reports from the top of the CIS-Connect Employer Admin account.



Action Items – Shows all employees with outstanding actions needing to be completed by the employee or waiting for CIS approval.

Employee Census – Shows all employees and their benefit enrollments.

Employee Dependent Census – Shows all employees and their covered dependents and their benefits enrollments.

Change Report – Shows any employee who submitted an enrollment change during the time frame entered.

Registered Report – List of all employees, their registered email, and if they have registered for their account. If the primary email needs to be changed, use this report to update. Updating the email in the employee's account will not update the required user log in.

Age Out Report – Shows any children aging off of coverage (turning 26) and any employees and spouses who are turning age 65.

Open Enrollment Status Report – Shows all employee Open Enrollment event statuses.

Open Enrollment Action Items – Shows all employees with outstanding actions needing to be completed by the employee or waiting for CIS approval for Open Enrollment only.

Open Enrollment Change Report – Shows Open Enrollment benefit changes made by employee that will impact January's payroll.

FSA Non-Discrimination Testing – Required annual testing for employers who take out an employee's healthcare premiums pre-tax (Premium Only Plan) or offer the Healthcare or Dependent Care Pre-Tax Plans (FSA).

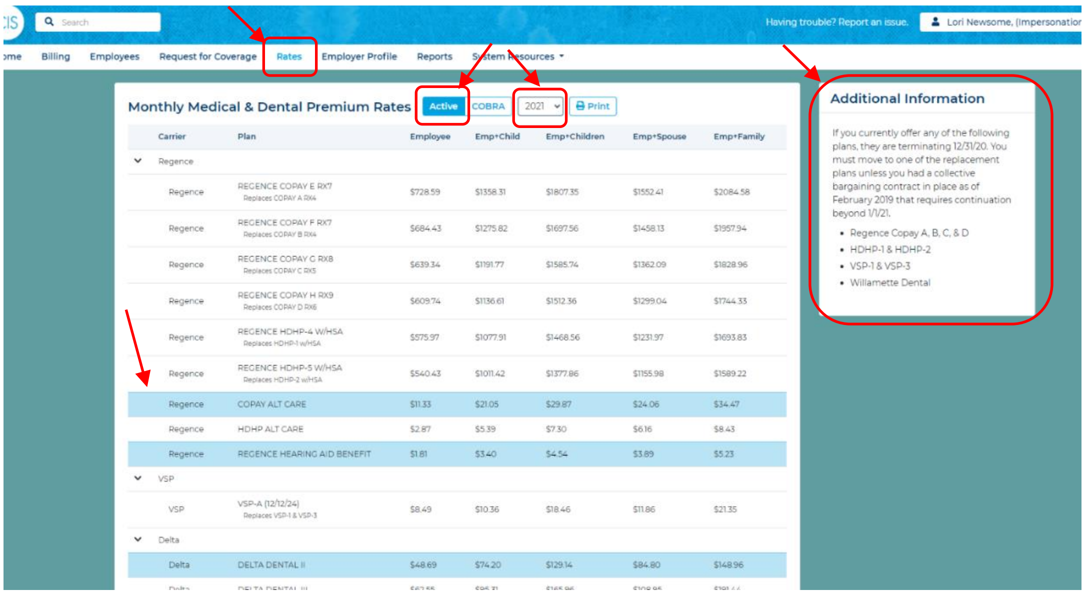
Monthly Billing

Bills are run monthly and reflect the current charges and any adjustments entered in the system through 5:00 p.m. on the 15th of each month. Changes or adjustments entered after this time will be reflected on the next month's bill. The bills are available in both PDF and Excel formats.

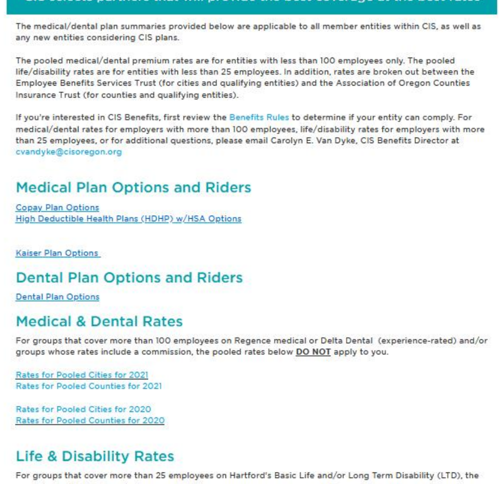
Employers must use the Interactive Invoice Summary to submit payment. If not paying as billed, add notes for any adjustments made. If you need to make a change or have questions about your bill, contact Kelsie Perry at kperry@cisoregon.org or 503-763-3844.

Plans and Rates

Rates - on the Main Navigation bar, click on the "Rates" tab then select the rate type and year.



Plans – You can find a comparison of all medical/dental plans offered on the CIS website under CIS Benefits/Plans and Rates (https://cisoregon.org/Benefits/PlansRates).



Note: In future, you will be able to find your current plan offerings on CIS-Connect