**PeopleSoft HRMS 9.2 – Open Enrollment** 

Date Created: 11/7/13 Date Updated: 10/03/18

**Description:** Accessing the Open Enrollment forms allow you to verify, edit, and submit your elections for the new enrollment period.

**Prerequisites:** PeopleSoft credentials are assigned after CEO HR has entered/updated the employee's information into the system and PeopleSoft IT has completed the New User process.

**Additional Notes:** For specific questions, contact Benefits. For technical assistance, please email <a href="PeopleSoft-Tech@stancounty.com">PeopleSoft-Tech@stancounty.com</a>.

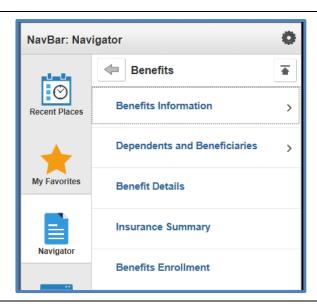
1. Through the **County Intranet**, click the **PeopleSoft link** at the *middle top right* of the webpage.



2. In the center of this page, click the **Login to PeopleSoft link** below the Oracle logo.



Navigation: Navigator > Self Service > Benefits > Benefits Enrollment



# Completing Open Enrollment PeopleSoft HRMS 9.2 – Open Enrollment Date Created: 11/7/13 Date Updated: 10/03/18

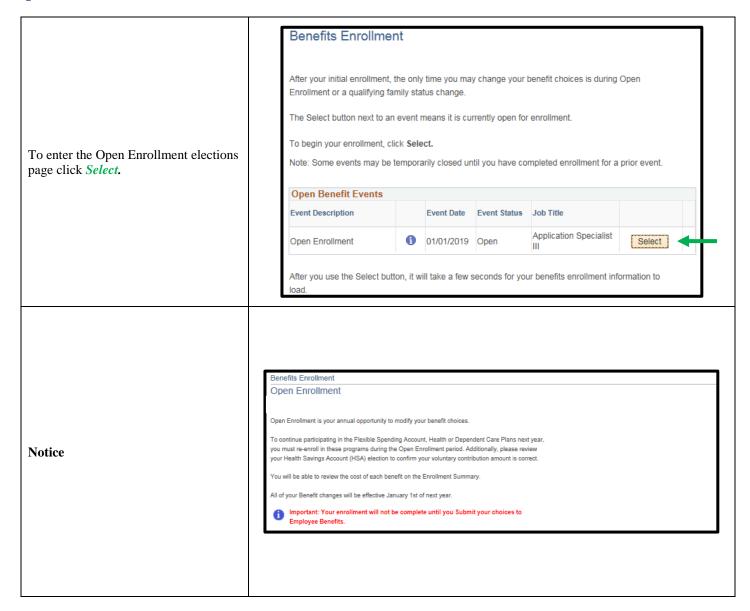
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#### Open Enrollment



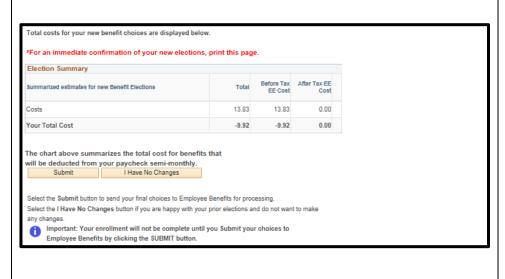
**PeopleSoft HRMS 9.2 – Open Enrollment** 

Date Created: 11/7/13 Date Updated: 10/03/18 **Enrollment Summary** Edit Medical Before Tax EE Cost After Tax EE Cost New: Waive 0.00 Edit Before Tax EE Cost After Tax EE Cost Current: Delta Dental Core Plan:Family New: Delta Dental Core Plan:Family Before Tax EE Cost After Tax EE Cost Edit Current: Vision Service Plan:Family New: Vision Service Plan:Family Edit Before Tax EE Cost After Tax EE Cost Accident Insurance Current: No Coverage New: No Coverage Edit Admin Fee for FSA Before Tax EE Cost After Tax EE Cost Current: No Coverage New: No Coverage Edit Before Tax EE Cost After Tax EE Cost Current: Basic Life Regular: \$10,000 New: Basic Life Regular: \$10,000 Before Tax EE Cost After Tax EE Cost Edit Click *Edit* next to each plan to review Edit Dependent Life Before Tax EE Cost After Tax EE Cost and change your benefit elections. Current: No Coverage New: No Coverage Edit Spousal Life Before Tax EE Cost After Tax EE Cost Current: No Coverage New: No Coverage Edit Employee Critical Illness Before Tax EE Cost After Tax EE Cost Current: No Coverage New: No Coverage Spouse Critical Illness Before Tax EE Cost After Tax EE Cost Edit Current: No Coverage Child Critical Illness Edit Before Tax EE Cost After Tax EE Cost Current: No Coverage New: No Coverage Edit Flex Spending Health - U.S. Before Tax EE Cost After Tax EE Cost Current: No Coverage New: No Coverage Edit Flex Spending Dependent Care Before Tax EE Cost After Tax EE Cost Current: No Coverage New: No Coverage Edit Health Savings Account Before Tax EE Cost After Tax EE Cost Total costs for your new benefit choices are displayed below.

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Click *Submit* to submit all elections or *I have no changes* to submit no changes.



#### **Medical Plans**

#### Benefits Enrollment

#### Medical

The County's medical plan is designed to help maintain wellness and protect you and your family from major financial hardship in the event of illness or injury.

The County offers one medical plan option based on where you live.

0

Important! Your current coverage is: Waive. You will continue with this coverage if you do not make a choice.

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

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

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#### Select an Option

Here Are Your Available Options With Your Semi-Monthly Costs:

#### Overview of all Plans

Select one of the following plans:

If you choose to Waive coverage in this plan, you will receive a \$23.75 Medical Waive Credit, which results in a net earnings for you.

O Health Partners HDHP

This is the Health Partners of Northern California High Deductible Health Plan that is used with an Health Savings Account for employees who live in the local service area. The HDHP provides lower premiums, but has an annual deductible. This means you pay the initial medical expenses including pharmacy costs until your deductible is met.

## Coverage Level Your Total Cost Tax Class Employee Only \$17.80 Before-Tax Employee + Dependent \$35.60 Before-Tax Family \$48.06 Before-Tax

#### O Health Partners EPO

This is the Health Partners of Northern California Exclusive Provider Organization plan for employees who live in the local service area. The EPO plan functions like a traditional HMO plan and may offer employees who are willing to pay a higher monthly premium or who are otherwise unable to participate in the HDHP with HSA option due to having other coverage including Medicare.

Coverage Level	Tour Total Cost	Tax Class
Employee Only	\$85.13	Before-Tax
Employee + Dependent	\$170.26	Before-Tax
Family	\$229.85	Before-Tax

#### O UnitedHealthcare HDHP

This is the UnitedHealthcare High Deductible Health Plan that is used with an Health Savings Account for employees who live outside the local service area. The HDHP provides lower premiums, but has an annual deductible. This means you pay the initial medical expenses including pharmacy costs until your deductible is met.

Coverage Level	Your Total Cost	Ta	ax Class
Employee Only	\$	17.80	Before-Tax
Employee + Dependent	\$	35.60	Before-Tax
Family	\$	48.06	Before-Tax

#### O UnitedHealthcare EPO

This is the UnitedHealthcare Exclusive Provider Organization plan for employees who live outside the local service area. The EPO plan functions like a traditional HMO plan and may offer employees who are willing to pay a higher monthly premium or who are otherwise unable to participate in the HDHP with HSA option due to having other coverage including Medicare.

Coverage Level	Tour Total Cost	Tun Cluss
Employee Only	\$85.13	Before-Tax
Employee + Dependent	\$170.26	Before-Tax
Family	\$229.85	Before-Tax

Waive

Review your plan options and semi-monthly costs and then click the *Radio button* next to your plan choice for the new plan year.

**NOTE:** If you add a new dependent, you will need to submit documentation (marriage license, birth certificate, etc.) to Employee Benefits by the Open Enrollment deadline.

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Review your available dependents at the bottom of the page. Make sure the *Enroll box* is checked next to the dependents you want enrolled in this plan.

Click *Add/Review Dependents Button* if you need to add or edit a dependent.

Add/Review Dependent/Beneficiary Instructions

Enroll Your Dependents

The following list displays all individuals who are currently listed as your dependents. You will be able to add new dependents to your list by providing certification. If an individual is missing from this list, click Add/Review Dependents to determine why they are not eligible or to edit information.

You may enroll qualified dependents for coverage under this plan by checking the Enroll box next to their name. If you are removing a dependent, you will need to uncheck the Enroll box. Only qualified dependents are eligible for this plan.

Dependent Beneficiary

Enroll

Name

Relationship

Spouse

Child

After making your selections and reviewing your dependents are enrolled, click *Update Elections* to save your elections for each plan.

**Discard Changes** if you don't want to save them.



Select the **Update Elections** button to store your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Select the Discard Changes button to ignore all entries made on this page and return to the Enrollment Summary.

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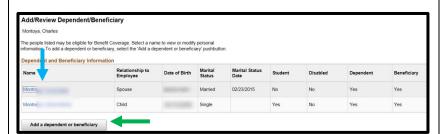
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#### Add/Review Dependent/Beneficiary

To add a new dependent, click Add a dependent or beneficiary button.

To edit an existing dependent, click on their Name.

NOTE: If you are changing a beneficiary to a dependent, for example a Fiance to Spouse, DO NOT add them as a new dependent. Edit and update the current dependent information and forward appropriate documentation to Employee Benefits.

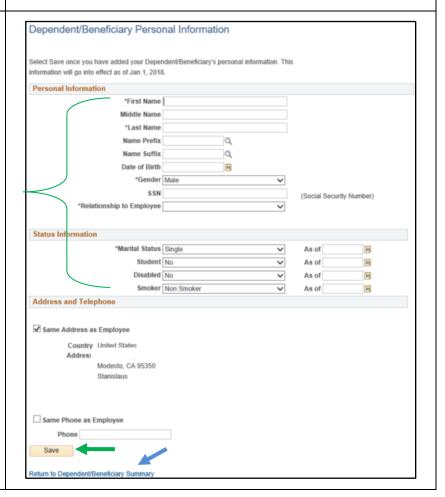


Enter your new dependent information.

Click Save when complete.

Review your new dependent info and click *Return* to *Dependent/Beneficiary Summary*.

**NOTE:** If you add a new dependent, you will need to submit documentation (marriage license, birth certificate, etc.) to Employee Benefits by the Open Enrollment deadline.



#### **PeopleSoft HRMS 9.2 – Open Enrollment**

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Click *Edit* next to each plan to review and change your benefit elections and dependents, following the previous steps for each plan.



#### **PeopleSoft HRMS 9.2 – Open Enrollment**

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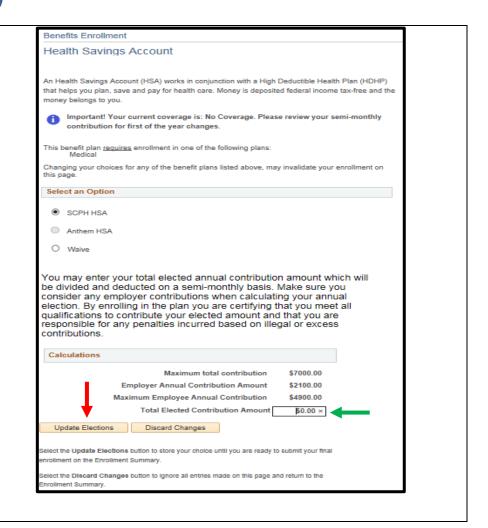
#### Health Savings Accounts (HSA)

Remember, if you selected a High Deductible medical plan, you will need to select a **Health Savings Account**.

You have the option of contributing pretax dollars to your HSA through payroll deduction. Enter the *annual amount of your voluntary contributions* that will be deducted in 24 semi-monthly payments.

NOTE: Remember the County's contribution is included in the annual allowable maximum amount for your HSA. Be sure your Total Elected Contribution plus the County's contribution is not more than the annual allowable maximum.

Click *Update Elections* to save your election.



**PeopleSoft HRMS 9.2 – Open Enrollment** 

Benefits Enrollment

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#### Accident Insurance

If you want to change your Accident Insurance, select the **Radio button** next to your **coverage level** choice.

Enroll Your Dependents will display if you select a coverage level.

Check **Enroll box** to enroll dependent.

To add a new dependent that is not listed, click **Add/Review Dependents**.

<u>Add/Review Dependent/Beneficiary</u> Instructions

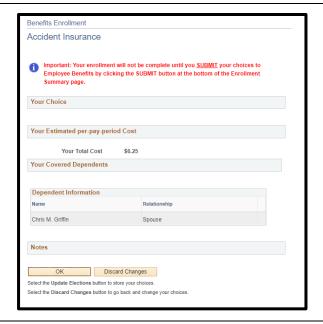
Click *Update Elections* to save your election.

Click *Discard Changes* if you don't want to save them.

Accident Insurance Accident Insurance pays you benefits for specific injuries and events resulting from a covered accident. The benefit amounts paid depend on the type of injury and care received Important! Your current coverage is: No Coverage. Select an Option Here Are Your Available Options With Your Semi-Monthly Costs Overview of all Plans If you are electing to cover your spouse or dependents, be sure to check the Enroll box next to each person to be covered. This plan pays a fixed payment following a covered accident. Benefits can be used however the member chooses - to offset copays/deductibles or to cover lost time from work. Coverage Level Your Total Cost Tax Class \$3.77 Employee + Spouse \$6.25 After-Tax Employee + Child(ren) \$6.85 After-Tax After-Tax Family Waive **Enroll Your Dependents** Dependent Beneficiary Add/Review Dependents Update Elections Discard Changes

**Confirm Information** 

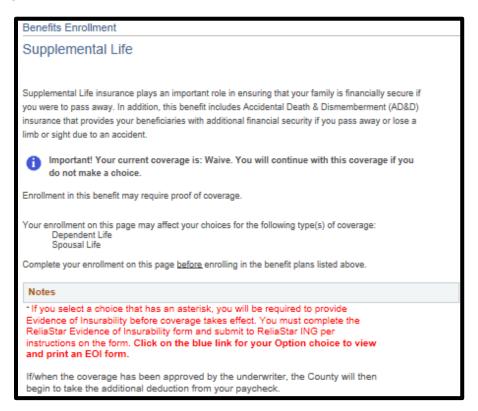
Click OK to save your election.



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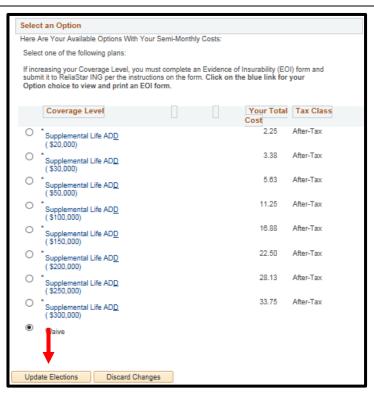
#### Supplemental Life



If you want to change your Supplemental Life Insurance, select the **Radio button** next to your **coverage level** choice.

**NOTE:** An asterisk\* requires an Evidence of Insurability (EOI) form be completed and sent directly to ReliaStar for approval by the underwriter. Click on the **blue link** with the insurance amount to complete and print the EOI form.

Click *Update Elections* to save your election.



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Review and update your life insurance beneficiaries if necessary.

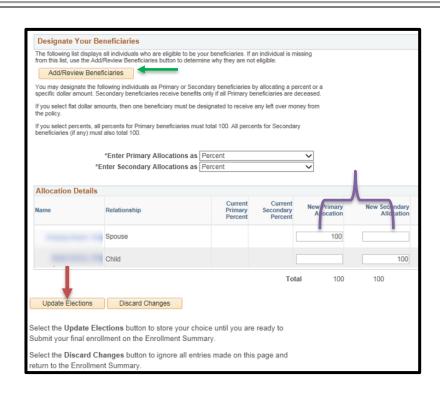
You can designate primary and secondary (contingent) beneficiaries by *allocating* each beneficiary share – primary and secondary percentages must each total 100.

To add a new beneficiary that is not listed, click **Add/Review Beneficiaries**.

<u>Add/Review Dependent/Beneficiary</u> Instructions

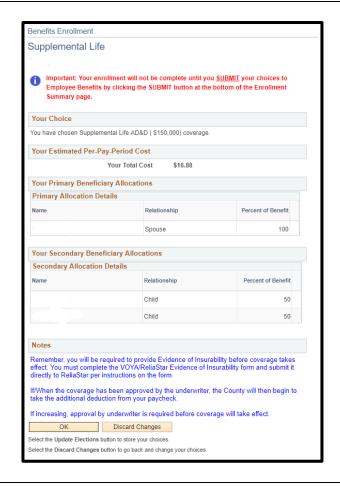
Click *Update Elections* to save your election.

Click *Discard Changes* if you don't want to save them.



**Confirm Information** 

Click **OK** to save your election.



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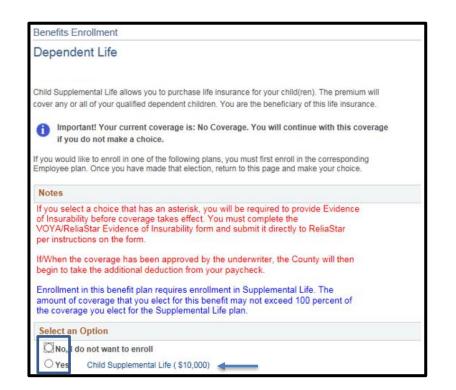
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#### Dependent Life

If you want to change Dependent Life Insurance, select the **Radio button** next to your **coverage level** choice.

**NOTE:** An asterisk\* requires an Evidence of Insurability (EOI) form be completed and sent directly to ReliaStar for approval by the underwriter. Click on the **blue link** with the insurance amount to complete and print the EOI form.

Enrollment in this benefit plan requires enrollment in Employee Supplemental Life for at least the same coverage level or greater.



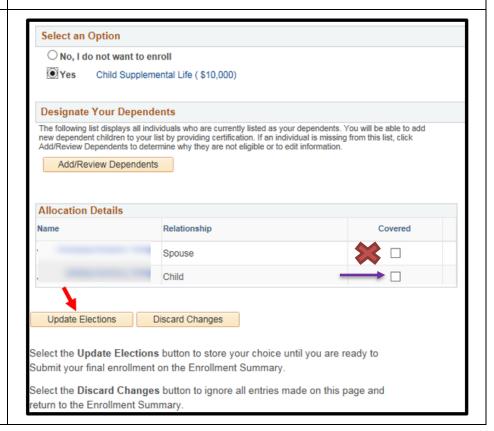
To add a new dependent that is not listed, click **Add/Review Dependents.** 

<u>Add/Review Dependent/Beneficiary</u> Instructions.

Check each Child that should be covered.

**NOTE:** The employee is always the beneficiary for Dependent Life.

Click *Update Elections* to save your election.



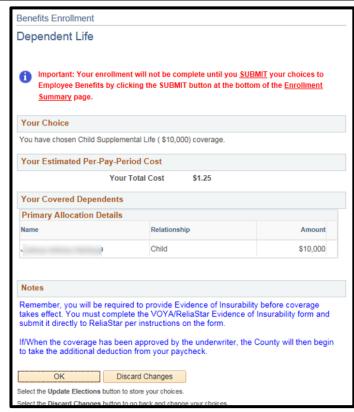
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**Confirm Information** 

Click **OK** to save your election.

Click *Discard Changes* if you don't want to save them.

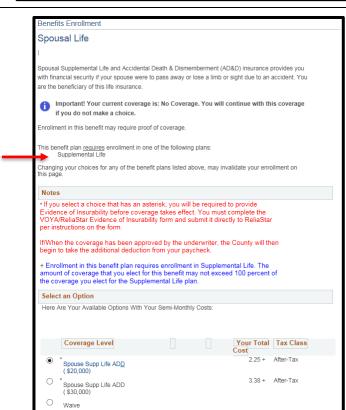


#### Spousal Life

If you want to change Spousal Life Insurance, select the **Radio button** next to your **coverage level** choice.

**NOTE:** An asterisk\* requires an Evidence of Insurability (EOI) form be completed and sent directly to ReliaStar for approval by the underwriter. Click on the **blue link** with the insurance amount to complete and print the EOI form.

Enrollment in this benefit plan requires enrollment in Employee Supplemental Life for at least the same coverage level or greater.



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To add a new dependent that is not listed, click **Add/Review Dependents.** 

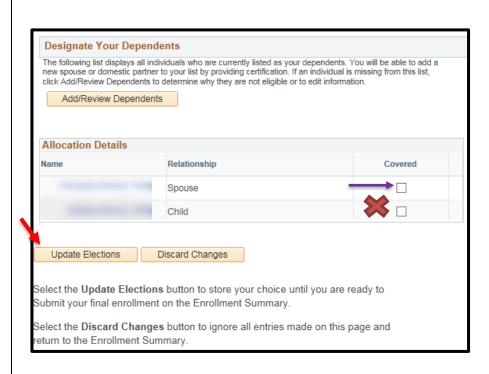
Add/Review Dependent/Beneficiary Instructions

Check **Spouse** that should be covered.

**NOTE:** The employee is always the beneficiary for Spousal Life.

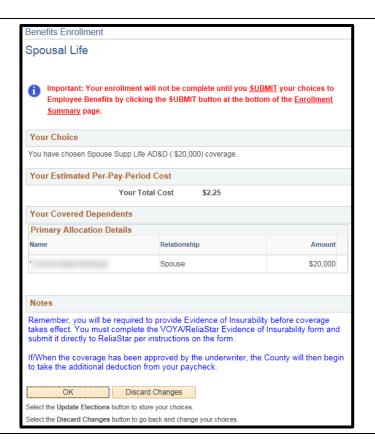
Click *Update Elections* to save your election.

Click *Discard Changes* if you don't want to save them.



**Confirm Information** 

Click **OK** to save your election.



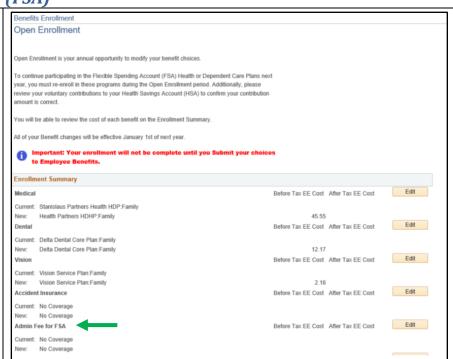
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## Flexible Spending Accounts (FSA)

#### Admin Fee for FSA

When selecting an FSA plan, you must select the *Admin Fee for FSA*. There is a semi-monthly fee associated with this plan.



#### FSA Dependent Care

To elect *FSA Dependent Care*, you must select *Agree Radio button*.

Click OK.



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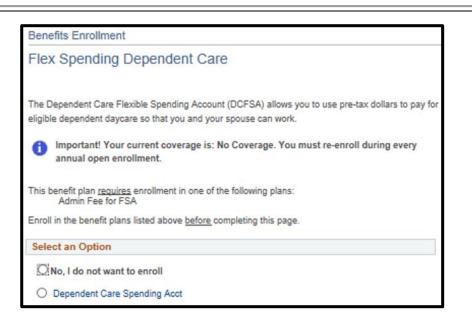
Date Created: 11/7/13 Date Updated: 10/03/18

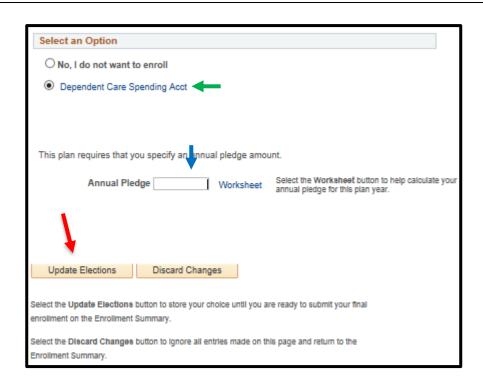
**NOTE:** Admin Fee for FSA must be selected <u>before</u> completing this page.

Select an Option.

Click the *Dependent Care Spending Acct* **Radio button** and indicate *Annual Pledge* amount which will be divided into 24 semi-monthly deductions.

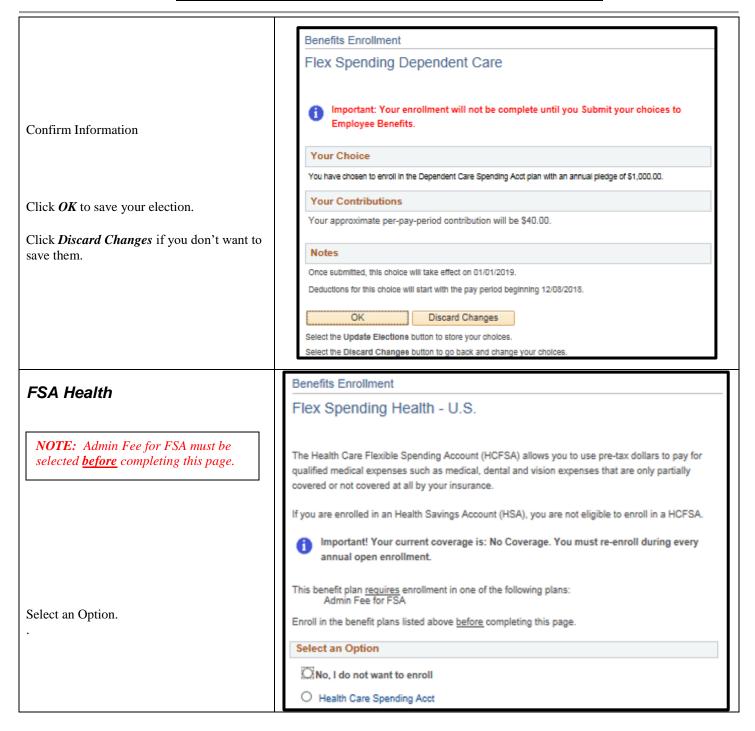
Click *Update Elections* to save your election.





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Select an Option O No. I do not want to enroll Health Care Spending Acct Click the *Health Care Spending Acct* Radio button and indicate Annual **Pledge** amount which will be divided This plan requires that you specify an annual pleatge amount. into 24 semi-monthly deductions Select the Worksheet button to help calculate your Annual Pledge 1000 Worksheet annual pledge for this plan year. Click *Update Elections* to save your election. Click Discard Changes if you don't want to save them. Discard Changes Update Elections Select the Update Elections button to store your choice until you are ready to submit your final enrollment on the Enrollment Summary. Select the Discard Changes button to ignore all entries made on this page and return to the Enrollment Summary. Benefits Enrollment Flex Spending Health - U.S. Important: Your enrollment will not be complete until you Submit your choices to Employee Benefits. **Confirm Information** Your Choice You have chosen to enroll in the Health Care Spending Acct plan with an annual pledge of \$1,000.00. Your Contributions Click **OK** to save your election. Your approximate per-pay-period contribution will be \$40.00. Click Discard Changes if you don't Notes want to save them. Once submitted, this choice will take effect on 01/01/2019. Deductions for this choice will start with the pay period beginning 12/08/2018. Discard Changes Select the Update Elections button to store your choices Select the Discard Changes button to go back and change your choices.

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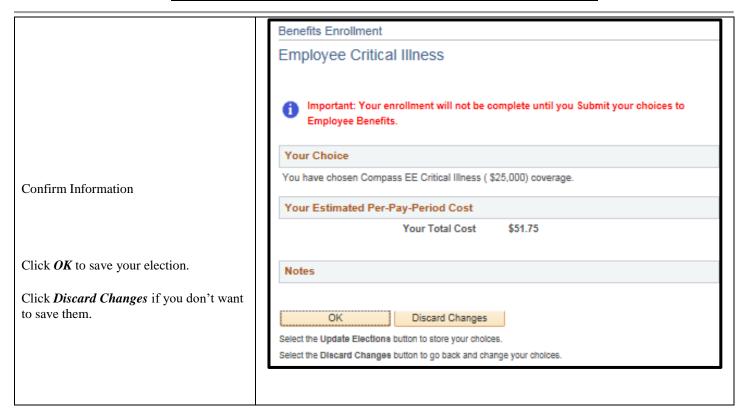
#### Critical Illness

#### **Employee Critical Illness** Benefits Enrollment **Employee Critical Illness** Employee Critical Illness pays a lump sum benefit if you are diagnosed with a covered illness or condition such as cancer or a heart attack. Important! Your current coverage is: No Coverage. Your enrollment on this page may affect your choices for the following type(s) of coverage: Spouse Critical Illness Child Critical Illness Complete your enrollment on this page before enrolling in the benefit plans listed above. Select an Option Here Are Your Available Options With Your Semi-Monthly Costs: Your Total Tax Class Coverage Level Cost 10.35 After-Tax Compass EE Critical Illness (\$5,000) 20.70 After-Tax Compass EE Critical Select an Option. Illness (\$10,000) 31.05 After-Tax Compass EE Critical Illness (\$15,000) 41.40 After-Tax Compass EE Critical Illness (\$20,000) 51.75 After-Tax Compass EE Critical Illness (\$25,000) 62.10 After-Tax Compass EE Critical Illness (\$30,000) Waive Click *Update Elections* to save your election. Update Elections Discard Changes Click Discard Changes if you don't want to save them. Select the Update Elections button to store your choice until you are ready to Submit your final enrollment on the Enrollment Summary.

return to the Enrollment Summary.

Select the Discard Changes button to ignore all entries made on this page and

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#### Spouse Critical Illness

**NOTE:** Enrollment in this benefit plan requires enrollment in Employee Critical Illness for at least the same coverage level or greater.

Employee Critical Illness must be selected *before* completing this page.

Designate Your Dependents will display if you select a coverage level.

Click *Update Elections* to save your election.

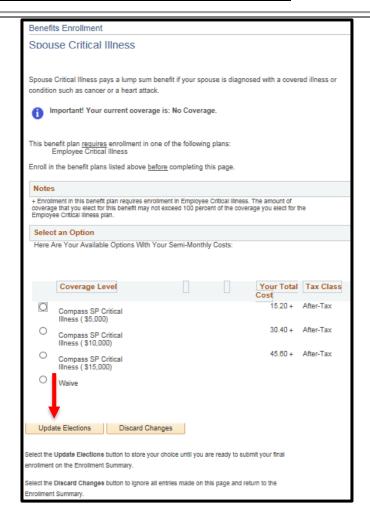
Click *Discard Changes* if you don't want to save them.

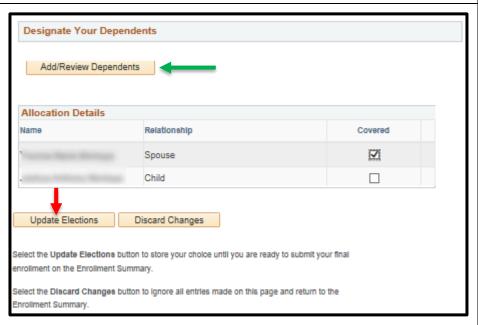
To add a new dependent that is not listed, click **Add/Review Dependents**.

<u>Add/Review Dependent/Beneficiary</u> Instructions

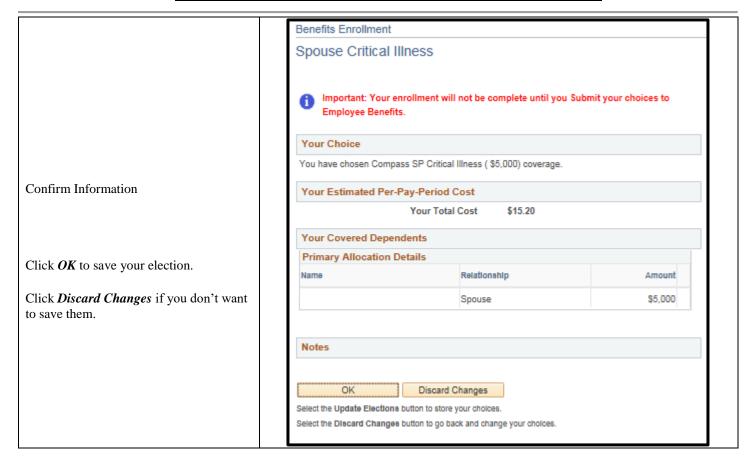
Select spouse to be covered.

Click *Update Elections* to save your election.





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#### Child Critical Illness

**NOTE:** Enrollment in this benefit plan requires enrollment in Employee Critical Illness for at least the same coverage level or greater.

Employee Critical Illness must be selected *before* completing this page.

Designate Your Dependents will display if you select a coverage level.

Click *Update Elections* to save your election.

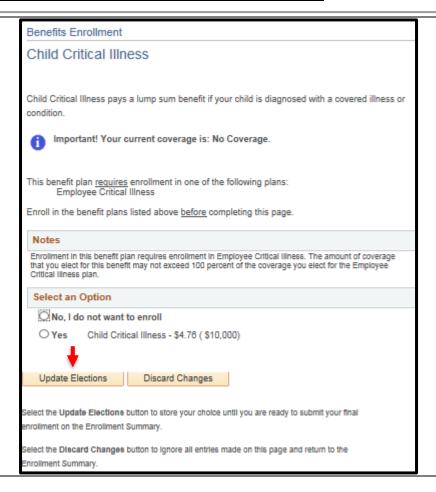
Click *Discard Changes* if you don't want to save them.

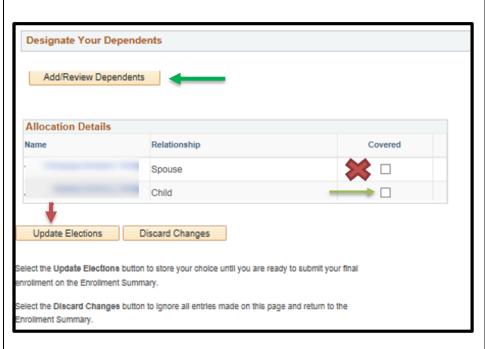
To add a new dependent that is not listed, click **Add/Review Dependents**.

Add/Review Dependent/Beneficiary Instructions

Select Child(ren) to be covered.

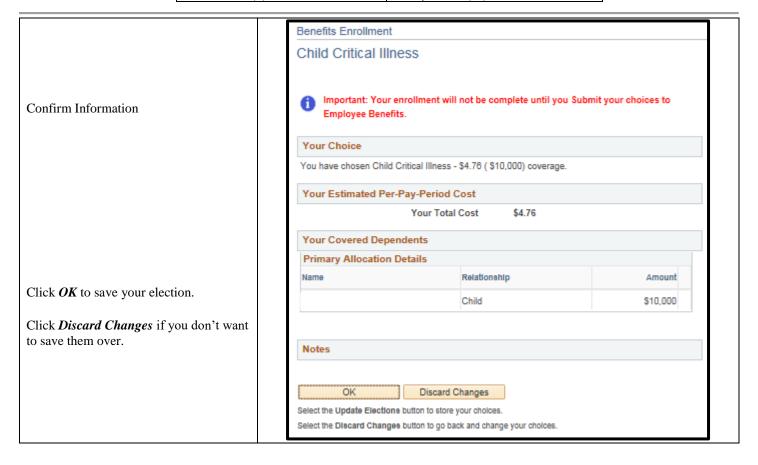
Click *Update Elections* to save your election.





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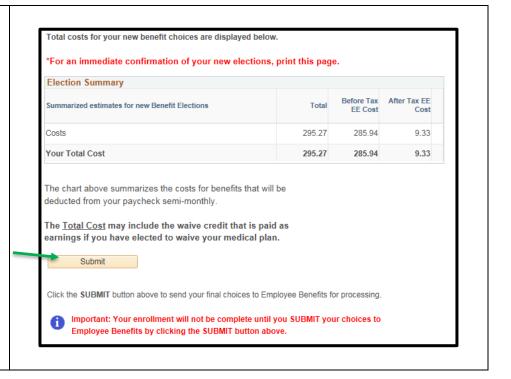


#### Finalizing Benefit Selections

After completing all elections and changes, review your *Election Summary* which reflects your total semi-monthly costs.

**NOTE:** You can print the Enrollment Summary page prior to submitting your elections for an immediate confirmation.

Click Submit.



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**NOTE:** Errors <u>must</u> be addressed and corrected before you can submit your final benefit choices.

Any errors and warnings will display after clicking the submit button.

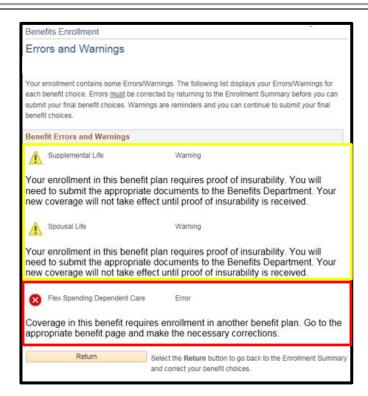
Click *Return* and correct all identified errors.

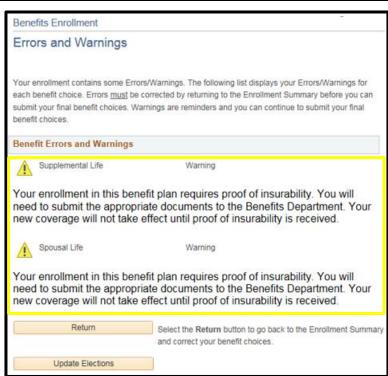
**NOTE:** Warnings are reminders and you can continue to submit your final benefit choices if there are warnings.

Any errors and warnings will display after clicking the submit button.

Click *Return* and correct all identified errors.

Acknowledge the warnings and click *Update Elections* to proceed to the final submit.





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IMPORTANT: You <u>MUST</u> click the submit button on this page to send your final choices to Employee Benefits for finalization and processing.

If you do not click the submit button on this page, any changes you have made will not be submitted for processing.

To authorize and finalize your benefit elections, click submit.

Click Submit.

#### Benefits Enrollment

#### Submit Benefit Choices

You have <u>almost</u> completed your enrollment. If you have no further changes, select the **SUBMIT** button at the bottom of this page to finalize your benefit choices.

Select the CANCEL button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

If you have finalized your benefit elections for the new plan year and are ready to SUBMIT your benefit choices for processing, click the SUBMIT button below. If you do not SUBMIT your benefit choices by clicking on the SUBMIT button on this page before the Open Enrollment deadline, your changes will not be processed by Employee Benefits.

You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until the Open Enrollment deadline. Once you select the SUBMIT button below your benefit choices will be sent to Employee Benefits for finalization and processing.

Once your enrollment is processed by Employee Benefits, you will not be able to make any further benefit changes until the next Open Enrollment period or until you have a qualifying family status change.

#### Authorize Elections

I hereby apply for group benefits provided under my employer's group benefit plan(s) for myself and for the eligible dependents/beneficiaries listed. I understand that I have made an election for my benefits package for the Plan Year indicated. Any choices I have made may only be altered during Open Enrollment or as the result of a change in family status.

I have read and understand the provisions outlined throughout this Benefit Enrollment Session and by submitting these benefit elections acknowledge my understanding and acceptance of these terms. All information that was submitted is correct and true to the best of my knowledge. I understand that it is the basis on which coverage may be issued under the plan. Any misstatements or omissions may result in future claims being denied and/or the policy being rescinded.

I declare for myself and/or my dependent(s) that I am eligible to enroll in these plans and request to be covered. If the group plan requires that contributions be made by me, I authorize Stanislaus County to deduct them from my pay. Should changes take place affecting these statements, I will immediately inform my employer of the change.

I understand that employee personal information is protected under Federal HIPAA Law.

I understand that under the Consolidated Omnibus Budget Reconciliation Act of 1986 (COBRA), I can continue medical, dental and vision insurance benefits for myself and my covered eligible dependents, upon termination of my employment with Stanislaus County. In order to qualify, I know that I, and/or my dependents, cannot be covered by another group health plan through another source. Premium payment obligation begins when County sponsored group coverage ends. I also understand that by submitting below I am only acknowledging notification of my continuation rights under COBRA.

Submit

Cancel

Click the **SUBMIT** button above to send your final choices to Employee Benefits for finalization and processing.

Select the CANCEL button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

PeopleSoft HRMS 9.2 – Open Enrollment

Date Created: 11/7/13 **Submit Confirmation** Benefits Enrollment Submit Confirmation Your benefit choices have been successfully submitted to the Employee Benefits Unit. You will receive a Confirmation Statement before the end of the year. To return to the Benefits Enrollment page, click OK. Click OK. OK Benefits Enrollment After your initial enrollment, the only time you may change your benefit choices is during Open Enrollment or a qualifying family status change. The Select button next to an event means it is currently open for enrollment. To begin your enrollment, click Select. **Your Benefits Enrollment is complete** Note: Some events may be temporarily closed until you have completed enrollment for a prior event. when the event status is Submitted. **Open Benefit Events Event Description** Event Date Event Status Job Title Application Specialist Open Enrollment 1 01/01/2019 Submitted Select After you use the Select button, it will take a few seconds for your benefits enrollment information to