

work: strategy



PeopleSoft 9.2 HCM Series

Fluid Open Enrollment and Life Events

August 22, 2019

Brian J McIntyre, President

See Slide 13-14 for enhancement requests and Q&A research

Firm Profile

- HR Technology Firm Based in Columbia, Maryland
- Staff of HR Practitioners and Oracle HCM Specialists
- Oracle Gold Level Implementation Partner
- Completed 18 PS 9.2 HCM and PT Upgrade Projects
- Over 400+ Successful HR Technology Projects since 2003
- Focus on Talent Management, Self Service, Fluid, and Process Improvement
- Certified HCM Cloud Implementation Specialists

Strategic Services

- Technology Roadmap *HCM Needs Assessment, Vendor Selection, Budget Planning*
- PeopleSoft HCM *Upgrades, Fluid UI, Talent Management, Process Improvement*
- Cloud Services *Project Management, Configuration, Migration, Integration*
- Cloud Apps *Performance, Goals, Succession, Talent Reviews, Compensation*



Agenda

- eBenefits PUM Enhancements
 - [Scheduled Patches/Fixes After PUM 31+](#)
 - Implementation Tips and Best Practices
 - Fluid Open Enrollment Walkthrough
 - Fluid Open Enrollment Activity Guide
 - Fluid Benefits Job Based Events
 - Fluid Life Events Walkthrough
 - Fluid Life Events Activity Guide
-
- Summary



It's
**Open
Enrollment**
time !



Recent News

Recent Enhancements

- ✓ HCM PUM 031 – July 12, 2019
- HCM PUM 032 – October 4, 2019
- PeopleTools 8.57.03 is out !
- Fluid Benefits Open Enrollment
- Fluid Benefits Mobile Changes
- Fluid Benefits Confirm Statements
- Workforce Admin Insight Analytics
- Additional Fluid Approvals
- Fluid Position Management
- OnBoarding HR Dashboard
- Data Privacy Enhancements
- Position Management Enhancements
- Job Transaction Enhancements
- Recruiting Candidate Categories Status
- ELM Access from Employee Snapshot
- Fluid Comp History



9.2 PS eBenefits Enhancements

- Fluid for Annual OE, Life Events, Benefit Details, ACA, Benefits Administrator Functions
- Recent Fluid OE and Online Benefit Confirmation Statement
- Delivered in Multiple PUMs (28-30)
- Fluid Benefits Related Features
 - Open Enrollment
 - Life Events
 - Enrollment / Confirmation Statements
 - Benefits Administrator Tools
 - Employee Benefits Details
 - Total Rewards
- Fluid Enrollment now linked to OnBoarding and Life Events
- Activity Guide Composer

Activity Guide Composer

Template: ENROLLM
Effective Date: 1900-01-01

< Previous Next >

Introduction
● Visited

Activity Guide Type
 Not Started

General Information
 Not Started

Security
 Not Started

Additional Actions
 Not Started

Sub Banner
 Not Started

Select Steps
● Visited

Organize and Configure Steps
 Not Started

Display and Processing
 Not Started

Task: Select Steps

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.

The Category specified for this Activity Guide is **Open Enrollment** and the different steps that can be included for this template are displayed.

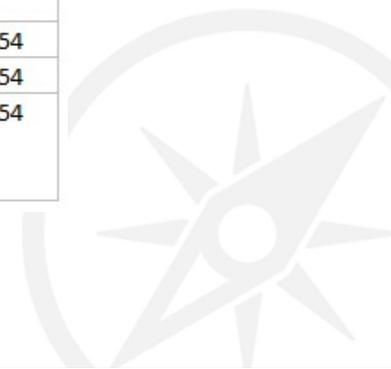
Total Steps for Template: 9

Available Steps 12 rows

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information
Add Step	Available Steps	Home and Mailing Address	Enter home and mailing address changes
Add Step	1	Benefits Summary	Benefits Summary
Add Step	1	Benefits Statements	View Benefits Statements
Add Step	1	Contact Information	Enter valid contact information.
Add Step	1	Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information

PUM Enhancements (Ben Admin, OE)

Product	Feature	Version	Min PT
Benefits Administration	Patch 23147137 provided Benefits Administration Archive Capability. It improved BAS PARTICIPANT table sets performance.	9.2.018	8.53.02
	Enhanced the Benefits Enrollment functionality using the new Fluid technology and the Activity Guide Composer framework (Open Enrollment Activity Guide). The new streamlined interface allows employees to update their benefits with ease.	9.2.028	8.55
	Enhanced the Benefits Enrollment functionality using the new fluid technology. The new streamlined user interface allows employees to update their benefits with ease.	9.2.028	8.54
	Enhanced the View All Plans display on benefits enrollment pages for multiple plans, and provided the ability to expand and collapse plans and display additional plan text.	9.2.029	8.54
	Added the Fluid Benefits Confirmation Statements feature, which allows employees to view their benefits statement data online and optionally create a PDF to save or print. It also allows administrators to view their employees' statements. Customers on PeopleTools 8.55 or above should include bugs 28896075 and 28896083, which contain enhancements to the navigation collections for the Benefits Administrator and Benefit Details tiles.	9.2.029	8.54
	Optimized the Benefits Statements component for small form factor. This feature supports the PeopleTools Drop Zone functionality.	9.2.030	8.54
	Enhanced the Open Enrollment feature to support the PeopleTools Drop Zone functionality.	9.2.030	8.54
	Enhanced the fluid benefits enrollment pages for small form factor optimization.	9.2.030	8.54
	Enhanced the Fluid Benefits Statements feature to add email and alert notifications. Added a new definition to the Push Notifications Server Side Events for BENEFITS notifications.	9.2.030	8.54



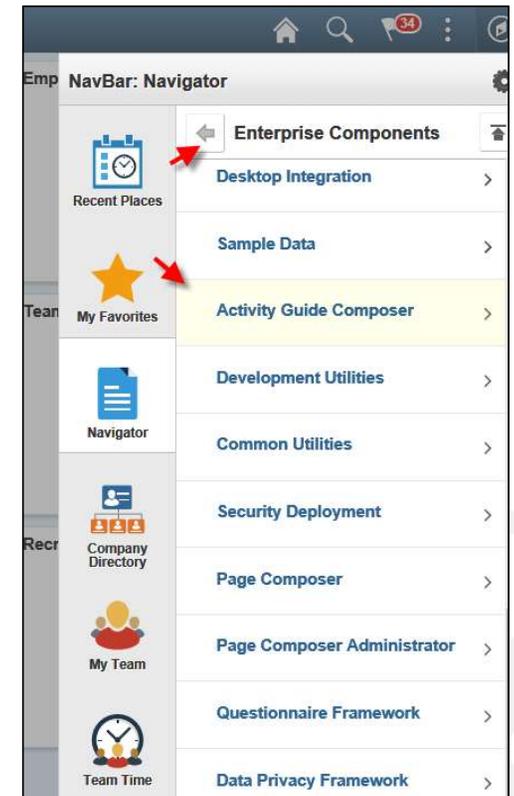
PUM Enhancements (eBenefits)

Product	Feature	Version	Min PT
eBenefits	The Life Event document approval workflow integrates with the HCM Delegation Framework, enabling Benefits Administrators to delegate authority of Life Event document approval. A Benefits Administrator can delegate the authority to approve Life Event documents uploaded by employees to another user if required. The Benefits Administrator can create a delegation request to authorize a proxy to approve documents on his/her behalf. The proxy can accept or reject the delegation request, and can approve, deny, or push back Life Event documents on behalf of the delegator. The delegator can revoke or withdraw the delegated authority when required. Email notifications will be sent to the delegator when new delegation requests are made. The proxy will in turn be notified of any pending approval requests through email.	9.2.002	
	New PeopleSoft Fluid User Interface pages for employee self-service enable employees to view their current benefits summary, enter life event information, and enroll for benefits during open enrollment.	9.2.009	8.54
	Enabled eBenefits Doc Filing push notification in approved, denied, pushback, and needs approval events.	9.2.014	8.53.02
	Delivered the Consent Status Report to comply with IRC Section 6056 Information Reporting by Applicable Large Employers on Employer-Sponsored Health Coverage.	9.2.014	8.53.02
	Delivered Consent Process for the electronic version of Form 1095-C.	9.2.014	8.53.02
	Delivered 4 Fluid Life Event templates and enabled the Fluid Life Event feature.	9.2.023	8.55
	This patch modifies code to deliver the Nav Collection link for the new fluid Dependent Beneficiary component. Prior to this modification the Nav Collection link did not exist.	9.2.024	8.55
	Added Fluid Approvals capability for life event document uploads in eBenefits.	9.2.026	8.54
	Enhanced the Dependent Beneficiary feature to support the PeopleTools Drop Zone functionality.	9.2.030	8.54
	Enhanced the Benefits Summary feature to support the PeopleTools Drop Zone functionality.	9.2.030	8.54



PUM Enhancements (Activity Guide Composer)

Product	Feature	Version	Min PT
General HCM Enhancements	Delivered the Activity Guide Composer framework for Enterprise Components.	9.2.031	8.55.00
	Delivered the PeopleSoft Chatbot related configurations and Integration Framework. More information on PeopleSoft Chatbot integration is available at https://docs.oracle.com/cd/E52319_01/infoportal/chatbot.html	9.2.031	8.57.00
	Enhanced the Page and Field Configurator to include changes on secondary pages, apply configurations to multiple roles, exclude roles from configuration changes and to status configuration sequences as inactive. In preparation for the delivery of configurations to customers, this enhancement reserves sequences 81-99 for Oracle.	9.2.031	8.55.00
	Enhanced the Person Selector to allow Matrix authorization to be listed on the Direct Reports page of Fluid components in Manager Self Service.	9.2.031	8.54.00
	This update disables navigation to the activity guide composer framework in HCM. This framework will now reside under Enterprise Components.	9.2.031	8.55.00



Implementation Considerations

- Timing of Implementation, i.e. October Open Enrollment
 - Life Events, New Hire Enrollment, Annual Open Enrollment
- Existing Ben Admin Programs
 - Plan Types and Options
 - Events – Open Enrollment (OE), Life Events, Job Based Actions
- Other Considerations
 - Current Benefit Customizations
 - Major Plan Design Changes for Upcoming Open Enrollment?
 - Experience with Fluid and Activity Guide Composer

Oracle HR360
Enrollment Period 2/15/2019 - 12/31/2019
Rosanna Channing

Next >

Welcome
● Visited

Acknowledgement
○ Not Started

Personal Information
○ Not Started

Dependent/Beneficiary Info
○ Not Started

Benefits Enrollment
○ Not Started

Benefits Statements
○ Not Started

Summary
○ Not Started

Task: Welcome

Open enrollment is your annual opportunity to modify your benefit choices. The video gives you step by step instruction on how to enroll your benefits.

You have the option of watching the video or selecting to view the video transcript. [View Video Transcript](#)

Open Enrollment:
Plans may stay consistent or change
Benefit offerings may include:

- Medical coverage
- Health savings account (HSA) contributions
- Health reimbursement arrangement (HRA)
- Flexible spending account (FSA)
- Gym memberships
- Wellness programs

hr360

Implementation Steps

Project Preparation

- ✓ Get a Functional Demo
- ✓ Inventory Existing Benefits Plans
- ✓ Play with the Virtual PUM Image
- ✓ Review Activity Guide Composer Tool
- ✓ Review Fluid OE and Life Events Pages, Tiles, Setup
- ✓ Review PeopleBooks and Videos

Implementation Phases

- Conduct an eBenefits Fit Gap
- Build Prototype
- Configure Changes
- Test All Processes / Events

Benefits Open Enrollment
Enrollment Period 2/15/2019 - 12/31/2019
Rosanna Channing

Task: Benefits Enrollment
The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$88.03**
Status: **Pending Review**
*Excess Credit:
Review Enrollment

Full Cost **\$432.03**
General Credits **-\$275.00**
Plan Credits **-\$69.00**

LTD STD
Medical

Benefit Plans

Plan Name	Current Plan	New Plan	Status	Dependents	Pay Period Cost	Action
Wellness Credit	No Coverage	No Coverage	Pending Review		\$0.00	Review
Medical	Enhanced Medical Plan	Enhanced Medical Plan	Pending Review	2 Dependents	\$245.00	Review
Dental	Enhanced Dental Plan	Enhanced Dental Plan	Pending Review	2 Dependents	\$13.88	Review
Vision						
Life						
Supplemental Life						

Implementation Considerations

- Activity Guide Composer
- Clone Sample(s)
- Launch Activity Guide Composer
 - Identify Event Types, Configure Templates with Event Steps
- Revise Employee Communication
 - Preliminary Enrollment Form, Confirmation Statement, Notifications, Activity Guide Text

Activity Guide Composer

Template: WSBENOE
Effective Date: 1900-01-01

Introduction (Visited)
Activity Guide Type (Visited)
General Information (Visited)
Security (Visited)
Additional Actions (Visited)
Sub Banner (Visited)
Select Steps (Visited)
Organize and Configure Steps (Visited)
Display and Processing (Visited)
Review and Activate (Visited)

Task: Select Steps

For this step, you need to select the steps you want to include in your Activity Guide Template.
The Category specified for this Activity Guide is **Open Enrollment** and the different steps that can be included for this template are displayed.

Total Steps for Template: 9

Available Steps

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information
Add Step	1	Available Steps and Mailing Address	Enter home and mailing address changes
Add Step	1	Benefits Summary	Benefits Summary
Add Step	1	Benefits Statements	View Benefits Statements
Add Step	1	Contact Information	Enter valid contact information.
Add Step	1	Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information
Add Step	1	Open Enrollment	Open Enrollment
Add Step	0	Before to start video	Before to start video
Add Step	1	Name	Enter name change information
Add Step	1	Summary Page	Summary Page

Enhancement Requests, Customizations, Challenges

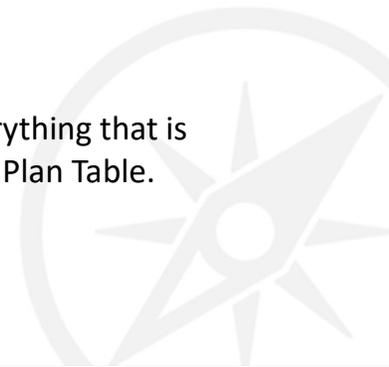
Top Requests

- Make Side Panel Configurable
 - Allow default for Grid vs. List on main page
 - More Resources for Guides
 - More Plan Type Contacts – limit 1 for 1X plans
 - Page Text Areas and Labels not all HTML Compatible
 - Changes to page field display
 - Changes to Alerts
 - More RTF areas – possible Drop Zone usage
-
- Certain bugs fixed at customer sites, but will apply 31+ next few weeks
-
- Dual Life Events/OE Implementations



Additional Q&A, some research still ongoing...

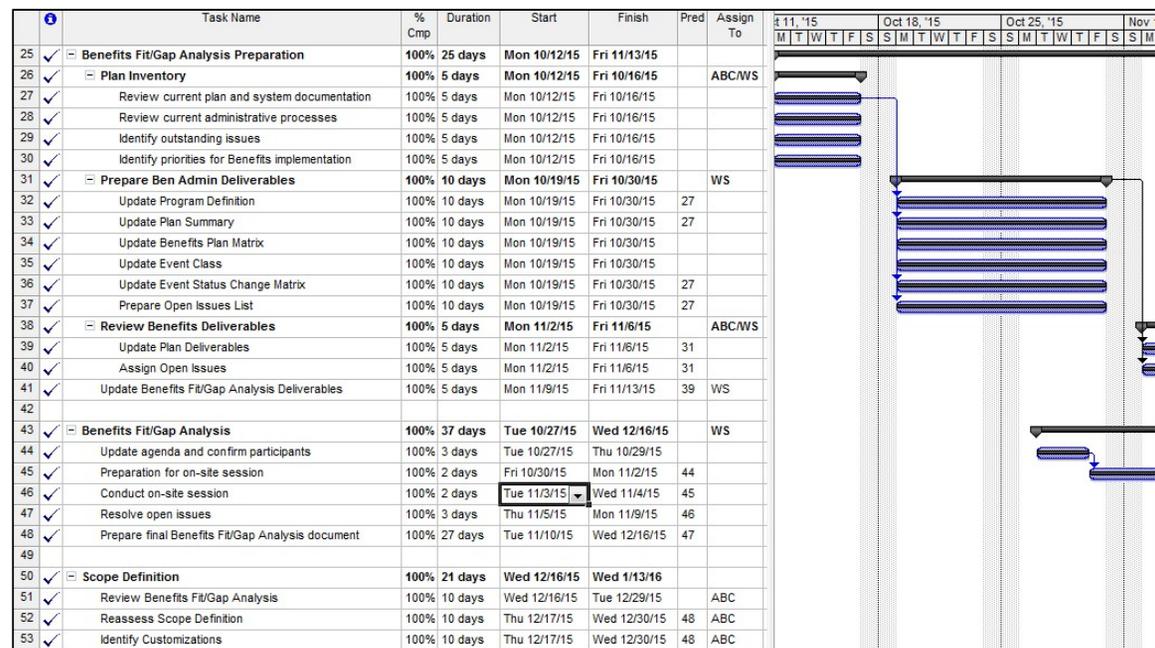
- **Ability to view uploaded documents after event**
 - Yes - Main Menu > Benefits > Review Employee Benefits > Document Upload
 - The documents are stored by Life event Type and Empl ID Type
- **How do you turn on and off the 1x2 Open Enrollment Tile? Is this automatically cleared after the cycle?**
 - Most customers who use the 1x2 Tile, turn on/off manually, via path: Main Menu > PeopleTools > Portal > Structure and Content, then select on the Fluid Structure Content Label
 - Within the Employee Self Service Section of the Tab Content Page you can uncheck/check the box next to the Open enrollment to make the tile visible or not. Checkmark = visible
 - [if you need step by step screenshots, let us know !]
- **Optional OE Employee Access**
 - Direct the employees to the ESS Benefit Details Tile to Access OE from the left menu
- **How do we add the New Hire Enrollments?**
 - You can use the delivered OnBoarding Activity Guide Template
 - Set up different Action/Action Reason Types in the automatic template assignment and link to the Onboarding Framework and AG to guide them through benefit enrollment
 - Please note: Documents uploaded via OnBoarding are not stored within the Benefits Area
- **Can you change the layout of this Overview of All Plans pop-up modal page?**
 - Not without some Customization to the Page. It lists any eligible plans for the employee. Pretty much everything that is on displayed is sourced from the Benefit Plan Table, Sequence seems to be Alpha vs. sequence of Benefit Plan Table.



Project Planning

How Long Should It Take ?

- Brand New Ben Admin/OE (5-6 months)
- Existing Ben Admin/Classic OE (1.0 – 1.5 months)
- Existing Ben Admin/New Online OE (2.0 – 2.5 months)



Sample Benefits Assessment



**PeopleSoft HCM
Benefits Assessment
Release 9.2.029**

Presented to Acme Rocket Company
February 1, 2019



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“eBenefits” Implementation

Benefits Functionality

- Self Service pages for “employees” to view or update benefits information
- Enhanced with Fluid navigation
- Benefits Administrator configuration and processing rules via Workforce Administrator dashboard
- Integrated with Fluid Open Enrollment and Life Events, and Statements
- Initial Design or Assessment step recommended for project planning and configuration

Functionality	Fit	No Fit	N/A	Comments
Benefits Self-Service				
Self-Service Access/Presentation				
Benefits Detail	✓			
Open Enrollment	✓			Remove Credit Pagelet
eBenefits Configuration				
Benefits Literals	✓			
Administrative Contacts	✓			
SPD/Handbook Links		✓		EOI and COB Forms
Dependent Notifications	✓			
Life Event Types			✓	
Benefits Summary	✓			
Dependent/Beneficiary Info		✓		Relationship, Save Edits, Attachments
ACA Form 1095-C			✓	
Benefits Enrollment:				
Enrollment Summary		✓		Benefits Display Updates
Plan Election/Recap		✓		Error Messages Pre-Submit
Benefit Statement				
Online Display		✓		
Printable Document		✓		
Activity Guides				
Templates/Steps	✓			
Tile Access/Entry		✓		
Acknowledgement		✓		Legal Updates Pending
Dependent Attachments/Approval	✓			
eProfile/ePay Updates			✓	
Summary/Status		✓		Online/Printed Document

Fluid Tiles, Dashboards, Pages

Employee Self Service Dashboard

- Open Enrollment Tile/Page
- Benefit Detail Tile/Page
 - Benefits Summary
 - Life Events
 - Dependent/Beneficiary Information
 - Benefit Statements
 - Affordable Care Act

Activity Guide Composer

- Categories
- Templates
- Define Notifications
- Process Notifications
- My Processes

Workforce Administrator Dashboard

- Benefits Administrator Tile / Page
- Employee/Dependent Information
 - Update Dependent/Beneficiary
 - Update ABBRs
 - Maintain Certifications
- Enroll in Benefits
 - Health Benefits
 - Life and ADD Benefits
- Review Employee Benefits
 - Current Benefits Summary
 - Savings Plans
 - Approve Document Upload
 - Review Employee Statements
- Benefits Management
 - Online Confirmation Statements
 - FMLA
 - Review BAS Activity
 - On-demand Event Maintenance
 - Review Processing Messages
 - Update Event Status
- Benefits Configuration
 - Benefits Program
 - Benefit Rates
 - Open Enrollment Definition
 - Benefits Program Table
 - Benefit Plan Table
 - Event Rules
 - Eligibility Rules
 - Life Event Rules
 - Limit Table
 - Schedule Table
 - Benefit Statement Options
 - Administrative Contacts
 - Enrollment Contact Assignment



eBenefits Configuration

- There are self-service parameters set within Base Benefits, Ben Admin and eBenefits that should be added and/or updated. For example, the literals that display on the pages are configured in Base Benefits while the Ben Admin event rules drive display and required data
- Benefit Text – The eBenefits text should be reviewed during implementation and updates will be made using the Text Catalog or Activity Guide Composer in Fluid
- SPD/Handbook Links – PeopleSoft provides URL links at both the program and plan level. If customers would like to use the links, decisions will need to be made on how the information will be presented

The screenshot shows the Oracle eBenefits configuration interface. The top navigation bar includes the Oracle logo, a search bar, and links for 'Advanced Search' and 'Last Search Results'. Below the navigation bar, there are tabs for 'Benefit Program', 'Plan Type and Option', and 'Cost'. The 'Plan Type and Option' tab is active, showing the configuration for Benefit Program 'KU1' and Effective Date '01/01/2005'. The 'Plan Type' section contains several input fields: 'Plan Type' (10), 'DispPinSeq' (10), 'Event Rules ID' (KU1X), 'Waive Coverage' (Allowed with Proof), and 'Dependent Rules ID' (PU1DR). There are also checkboxes for 'HIPAA Plan' and 'COBRA Plan', and a 'Load Cross Plan Values' button. The 'Self-Service Configuration' section is expanded, showing checkboxes for 'Collect Dependent/Beneficiary', 'Collect Fund Allocations', and 'Show if no choice'. A 'Handbook URL ID' field contains the value 'KUBENHANDBOOK' and has a red arrow pointing to its search icon.



Text Catalog Changes

[Favorites](#) > [Main Menu](#) > [Set Up HCM](#) > [Product Related](#) > [eBenefits](#) > [Maintain Text Catalog](#)

ORACLE All Search [Advanced Search](#) [Last Search Results](#)

Search Criteria

Object Owner ID **begins with**

Sub ID **begins with**

Text ID **begins with**

Usage **=**

Include History Correct History

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

Only the first 300 results can be displayed.

[View All](#) 1-100 of 300

Object Owner ID	Sub ID	Text ID	Usage	More Information
HEB	(blank)	1XCOVRG	(blank)	1x plan current coverage: Where %1 = benefit plan name, %2 = coverage code description
HEB	(blank)	1X_ENR_DEP_MAIN_HD	(blank)	1x page dependent section title
HEB	(blank)	1X_PCP_MAIN_HDR	(blank)	1x page primary care provider section title
HEB	(blank)	3XCOVRG	(blank)	3x plan current coverage: Where %1 = benefit plan name, %2 = replacement percent from the plan definition
HEB	(blank)	4XCOVRGAFTER	(blank)	4x plan current coverage: Where %1 = after tax pledge amount
HEB	(blank)	4XCOVRGBEFORE	(blank)	4x plan current coverage: Where %1 = before tax pledge amount
HEB	(blank)	6XCOVRG	(blank)	6x plan current coverage: Where %1 = benefit plan name, %2 = annual pledge



Sample Life Events Configuration

- Identify all possible Benefits Events
- Define rules, associated Event Class and PS templates to clone
- Define required and optional steps for the Activity Guide
- Design self-service presentation, step sequence, and literals/labels
- Fluid Pages will leverage the **Activity Guide Composer** tool
- Identify attachments and approvals for supporting documentation (optional)

Life Event Rules								
Life Event Type		Max Days To Notify	Notify Admin	Require Proof	Approve Docs	Create Event	Action Source	Event Class
MAR	Marriage	31		Y	Y	Y	Manual	FSM
DIV	Divorce	31		Y	Y	Y	Manual	FSC
BIR	Birth	31		Y	Y	Y	Manual	FSC
OTH	Other Status Changes	31		Y	Y	Y	Manual	FSC
HIR	Hire	31		Y	Y	Y	Job	HIR
PGM	Program Change	31		Y	Y	Y	Job	PGM
OE	Open Enrollment	99		Y	Y	Y	OE	OE



Configuration Guide

Life Event Template (Fluid)

Sets the online Activity Guide with text specific to the Life Event Type and direct links to the Action Items (process steps) for each. New templates may be created using the Benefit Clone Utility to copy an existing template with similar requirements.

The screenshot displays the Oracle Activity Guide Composer interface. On the left, a table lists Life Event Templates. The 'Marriage Event' template is highlighted in yellow. On the right, the 'Activity Guide Composer' window is open, showing the 'Introduction' task for the 'Marriage Event' template. A red arrow points to the 'Activity Guide Type' section in the left sidebar.

*Template Title	*Life Event Type	Description	Active	Action
Adoption Event	A	Adoption	<input checked="" type="checkbox"/>	Template Composer
Birth Event	B	Birth	<input checked="" type="checkbox"/>	Template Composer
Divorce Event	D			
Marriage Event	M			

Activity Guide Composer
Template: EF_M4FF
Effective Date: 1900-01-01

Introduction
● Visited

Activity Guide Type
 Not Started

General Information
 Not Started

Security
 Not Started

Additional Actions
 Not Started

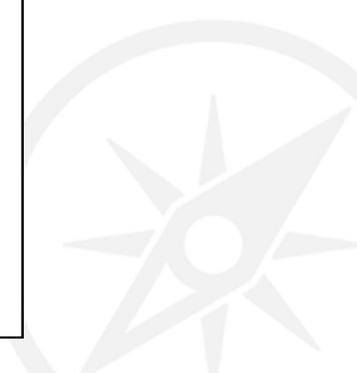
Task: Introduction

Welcome to the Activity Guide Template Composer!

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able to view options and parameters defined for this template.

To modify this template, you can exit the Activity Guide Template Composer and update the template by inserting a new effective dated row. You also have the option of cloning this template to create a completely separate template.

Next >



Configuration Guide

Attachments

Employees may upload required Life Event documents within eBenefits using the PeopleSoft HR Attachment Framework. The framework may be configured to display the list of documents to be uploaded for each Life Event.

Define Authorizations (Set Up HCM>Common Definitions>Attachments>Define Authorization)

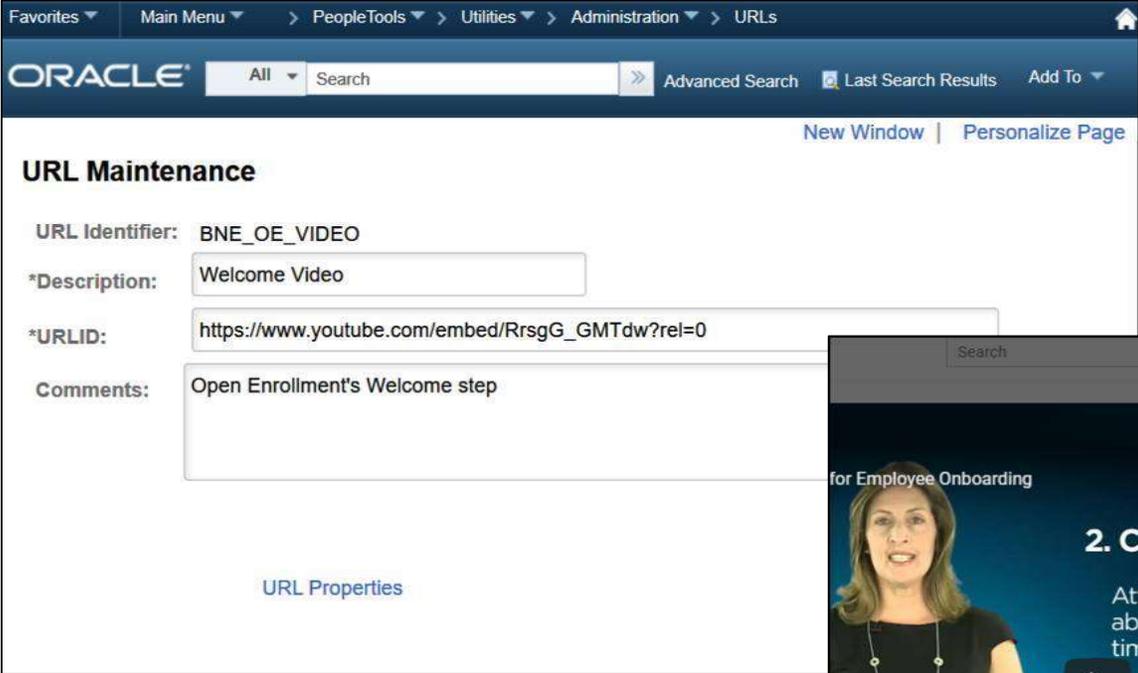
The configured Authorization ID is used to determine if the attachments may be updated or view only.

The image shows two overlapping screenshots from the Oracle PeopleSoft HR Attachment Framework configuration interface. The left screenshot is titled "Define Authorization" and shows the configuration for an Authorization ID named "EDITALL". It includes fields for Description, Short Description, and Comments, all set to "Edit Attachments, Notes, UrIs". Under "Authorization Options", checkboxes are checked for "Edit Attachments", "View Attachments", "Edit Notes", "View Notes", "Edit URLs", and "View URLs". The right screenshot is titled "Define Authorization Entries" and shows the configuration for an Entry ID named "BNL_MARCERT". It includes fields for Effective Date (01/01/1900), Description (Marriage Certificate), Short Description (Marriage C.), and Comments (Marriage Certificate posted here). Below these fields is an "Entry Control" section with checkboxes for Attachments, Notes, and URLs. At the bottom, a table titled "Define Authorization" lists the roles and their associated authorization IDs and descriptions.

*Role Name	Description	*Authorization ID	Description
1 Benefits Administrator	[WF] Benefits Administrator	EDITALL	Edit Attachments, Notes, UrIs
2 Employee	[WF] Employee	EDITALL	Edit Attachments, Notes, UrIs



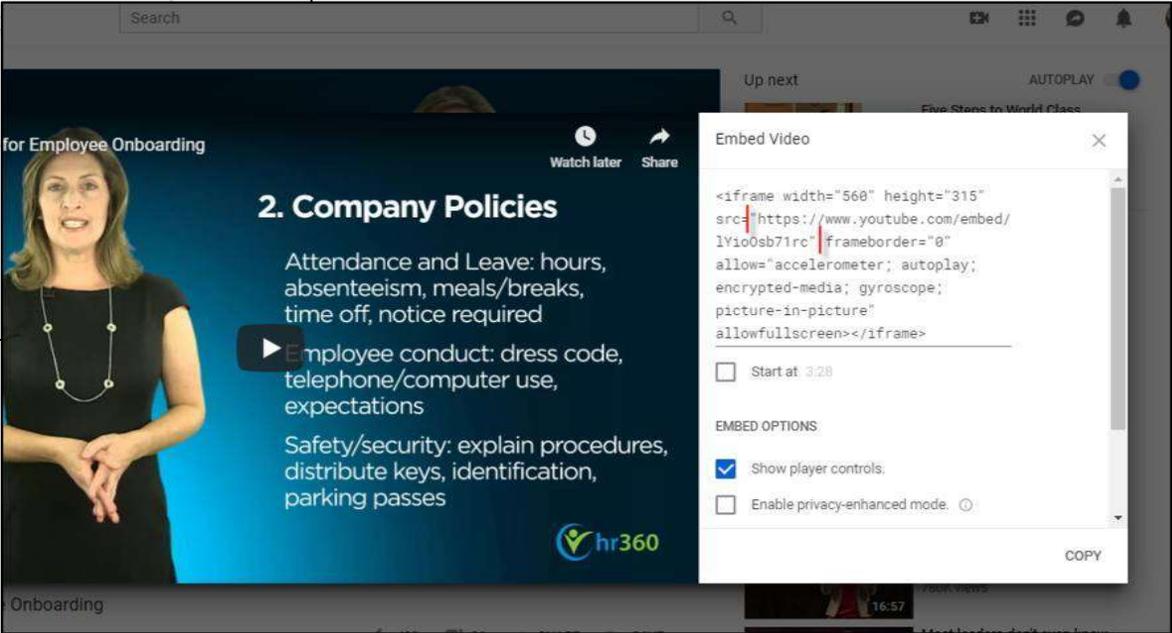
Updating Videos



The screenshot shows the Oracle URL Maintenance interface. At the top, there is a navigation bar with 'ORACLE' logo and a search bar. Below the navigation, the page title is 'URL Maintenance'. The main content area contains the following fields:

- URL Identifier:** BNE_OE_VIDEO
- *Description:** Welcome Video
- *URLID:** https://www.youtube.com/embed/RrsgG_GMTdw?rel=0
- Comments:** Open Enrollment's Welcome step

At the bottom of the page, there is a link labeled 'URL Properties'.



The screenshot shows a video player interface. The video content is titled '2. Company Policies' and features a woman speaking. The video content includes the following text:

- Attendance and Leave: hours, absenteeism, meals/breaks, time off, notice required
- Employee conduct: dress code, telephone/computer use, expectations
- Safety/security: explain procedures, distribute keys, identification, parking passes

The video player includes 'Watch later' and 'Share' buttons. An 'Embed Video' dialog box is overlaid on the video, showing the following HTML code:

```
<iframe width="560" height="315" src="https://www.youtube.com/embed/1Yio0sb71rc" frameborder="0" allow="accelerometer; autoplay; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>
```

The dialog box also includes a 'Start at' field set to 3:28 and 'EMBED OPTIONS' with checkboxes for 'Show player controls' (checked) and 'Enable privacy-enhanced mode' (unchecked). A 'COPY' button is located at the bottom right of the dialog box.

Designing Activity Guide Templates

- Sample Fluid Activity Guides
- Activity Guide Composer Tool
 - \Setup HCM\Common Definitions
 - \Enterprise Components (PUM 31)
 - Template Design
- 6 Template "Categories"
 - HR Administrator
 - **Life Events**
 - Manage Positions
 - **OnBoarding**
 - **Open Enrollment**
 - Create Questionnaire
- Review during Configuration Phase
- Defaulted Number of Optional Steps
- Summary Step is Mandatory

Activity Guide Composer Activity Guide Templates

13 rows

Template	Category	Description	Long Description	Active	Update Template	Clone Template	Delete Template
EF_A1FF	Life Event	Adoption Event	Adoption Event	Yes			
EF_B2FF	Life Event	Birth Event	Birth Event	Yes			
EF_D3FF	Life Event	Divorce Event	Divorce Event	Yes			
EF_M4FF	Life Event	Marriage Event	Marriage Event	Yes			
ENROLLM	Open Enrollment	Open Enrollment	Employee Benefits Enrollment	Yes			
KUENROL	Open Enrollment	Benefits Open Enrollment	Employee Benefits Enrollment with Acknowledgement	Yes			
KUTER01	Human Resources Administrator	Activity Guide for Termination	This Activity Guide will allow an HR Administrator to follow a step-by-step process for termination	Yes			
OBDCAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBDBG11	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	Yes			
OBDSND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes			
OBUS1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes			
POS_DAT	Manage Positions	Manage Position	Manage Position	Yes			
QST000	Create Questionnaire	Create Questionnaire	Activity guide for creating questionnaire.	Yes			

Designing Activity Guide Templates

Open Enrollment Activity Guide Category Steps

Task: Select Steps

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the step.

The Category specified for this Activity Guide is Open Enrollment and the different steps that can be included for this template are displayed.

Total Steps for Template: 9

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information.
Add Step	1	Home and Mailing Address	Enter home and mailing address changes.
Add Step	1	Benefits Summary	Benefits Summary
Add Step	1	Benefits Statements	View Benefits Statements
Add Step	1	Contact Information	Enter valid contact information.
Add Step	1	Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information.
Add Step	1	Open Enrollment	Open Enrollment
Add Step	0	Before to start video	Before to start video
Add Step	1	Name	Enter name change information
Add Step	1	Summary Page	Summary Page
Add Step	0	Summary with Info Only	Summary page without go to steps option
Add Step	1	Welcome instruction and Video	Instruction and Video

Activity Guide Composer Category Default Steps Revised as of PUM 31

Activity Guide Categories

Activity Guide Category	Description
HRADMIN	Human Resources Administrator
LIFEEVENT	Life Event
MANAGEPOSITION	Manage Positions
ONBOARDING	OnBoarding
OPENENROLLMENT	Open Enrollment
QST0000001	Create Questionnaire

Activity Guide Category – OPENENROLLMENT

Activity Guide Category Default Steps (12)			
Description	Long Description	Use	Seq
Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information.		1
Home and Mailing Address	Enter home and mailing address changes.		2
Benefits Summary	Benefits Summary		3
Benefits Statements	View Benefits Statements		4
Contact Information	Enter valid contact information.		5
Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information.		6
Open Enrollment	Open Enrollment		7
Before to start video	Before to start video		8
Name	Enter name change information		9
Summary Page	Summary Page		10
Summary with Info Only	Summary page without go to steps option		11
Welcome instruction and Video	Instruction and Video		12

Designing Activity Guide Templates

Life Event Activity Guide Category Steps

Activity Guide Composer

Template: EF_M4FF
Effective Date: 1900-01-01

Introduction Visited

General Information Not Started

Activity Guide Type Not Started

Security Not Started

Additional Actions Not Started

Sub Banner Not Started

Select Steps Visited

Organize and Configure Steps Not Started

Display and Processing Not Started

Notifications Not Started

Review and Activate Not Started

Task: Select Steps

The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able to add steps.

The Category specified for this Activity Guide is Life Event and the different steps that can be included for this template are displayed.

Total Steps for Template: 14

Available Steps

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	Acknowledgement	Acknowledgement for Life Events
Add Step	1	Home and Mailing Address	Enter home and mailing address changes
Add Step	0	Benefit Enrollment	Start benefits enrollment and enroll for available benefits.
Add Step	1	Benefit Summary	Review your current benefits
Add Step	1	Benefits Statements	View Benefits Statements
Add Step	0	Birth/adoption Date	Enter the date of child birth or date of adoption and submit.
Add Step	1	Contact Information	Enter valid contact information.
Add Step	0	Dependent/Beneficiary Coverage	Review summary information about dependent/beneficiary benefits
Add Step	1	Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information
Add Step	1	Fluid Direct Deposit	Add or update your direct deposit information
Add Step	0	Direct Deposit	Review and change direct deposit information

Activity Guide Category – LIFE EVENT

Activity Guide Category Default Steps (20)			
Description	Long Description	Use	Seq
Acknowledgement	Acknowledgement for Life Events		1
Home and Mailing Address	Enter home and mailing address changes		2
Benefit Enrollment	Start benefits enrollment and enroll for available benefits.		3
Benefit Summary	Review your current benefits		4
Benefits Statements	View Benefits Statements		5
Birth/adoption Date	Enter the date of child birth or date of adoption and submit.		6
Contact Information	Enter valid contact information.		7
Dependent/Beneficiary Coverage	Contact Information		8
Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information		9
Fluid Direct Deposit	Add or update your direct deposit information		10
Direct Deposit	Review and change direct deposit information		11
Document Upload	Upload a proof document, for example, adoption certificate, or enter a note relevant to the event		12
Benefit Election Review	Review benefits election and generate a preliminary Benefits Enrollment Summary Statement containing personal information, dependent/beneficiary, benefits elections, and investment choices.		13
Emergency Contact	Enter emergency contact information		14
Fluid Benefit Enrollment	Start fluid benefits enrollment and enroll for available benefits		15
Marital/Divorce Status	Enter changes in marital status and submit the changes		16
Name	Enter name change information		17
Summary	Summary page where you can review life event step statuses, mark it Complete, and exit the life event		18
Tax Withholding	Review and change tax information		19
Welcome	Instructions on the Welcome page to initiate the life event		20

Designing Activity Guide Templates

OnBoarding Activity Guide Category Steps

The screenshot shows the 'Activity Guide Composer' interface for template 'OBDUSA1'. The 'Task: Select Steps' section is active, showing a list of available steps. The 'Select Steps' task is currently marked as 'Visited'.

Add Step	Added Step Count	Step Definition	Description	Long Description
<input type="checkbox"/>	1	ACA 1095-Consent	The employee will provide consent using Form 1095-C Consent	
<input type="checkbox"/>	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information.	
<input type="checkbox"/>	0	Banking	Enter your bank account and payment distribution information.	
<input type="checkbox"/>	0	Benefits Enrollment	Start benefits enrollment and enroll for available benefits.	
<input type="checkbox"/>	1	Fluid Benefits Enrollment	Start fluid benefits enrollment and enroll for available benefits.	
<input type="checkbox"/>	1	Competencies	Manage competencies and accomplishments in your current profile.	
<input type="checkbox"/>	1	Degrees	Manage degrees in your current profile.	
<input type="checkbox"/>	1	Dependent/Beneficiary Info	Dependent/Beneficiary Information	
<input type="checkbox"/>	0	Direct Deposits	Add or update your direct deposit information.	
<input type="checkbox"/>	1	Fluid Direct Deposits	Add or update your direct deposit information.	
<input type="checkbox"/>	1	Disability	Add or update disability status.	
<input type="checkbox"/>	1	Documents	Download documents preconfigured for the OnBoarding process. All preconfigured documents matching the template will be selected regardless of an assigned Document Group when no Related Data Field 1 value is specified.	

Activity Guide Category – ONBOARDING			
Activity Guide Category Default Steps (36)			
Description	Long Description	Use	Seq
ACA 1095-Consent	The employee will provide consent using Form 1095-C Consent		1
Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information		2
Banking	Enter your bank account and payment distribution information.		3
Benefits Enrollment	Start benefits enrollment and enroll for available benefits.		4
Fluid Benefits Enrollment	Start fluid benefits enrollment and enroll for available benefits.		5
Competencies	Manage competencies and accomplishments in your current profile.		6
Degrees	Manage degrees in your current profile.		7
Dependent/Beneficiary Info	Dependent/Beneficiary Information		8
Direct Deposits	Add or update your direct deposit information.		9
Fluid Direct Deposits	Add or update your direct deposit information.		10
Disability	Add or update disability status.		11
Documents	Download documents preconfigured for the OnBoarding process. All preconfigured documents matching the template will be selected regardless of an assigned Document Group when no Related Data Field 1 value is specified.		12
Documents - Group 1	Document grouping that allows a selected set of documents to be downloaded. The Related Data Field 1 must contain a valid Document Group code that is assigned to one or more Document Configuration templates. All preconfigured documents matching the Template and Document Group will be selected.		13
Documents - Group 2	Document grouping that allows a selected set of documents to be downloaded. The Related Data Field 1 must contain a valid Document Group code that is assigned to one or more Document Configuration templates. All preconfigured documents matching the Template and Document Group will be selected.		14

New Open Enrollment Fluid Tile

The screenshot displays the Oracle Employee Self Service dashboard. At the top, the Oracle logo is on the left, and the text "Employee Self Service" is in the center. On the right, there are navigation icons: a home icon, a search icon, a notification bell with "75", and a refresh icon.

The main content area features several fluid tiles:

- Open Enrollment:** A yellow fluid tile with a red arrow pointing to its left side. It contains the text: "Starts now until 12/31/2019. Your final enrollment must be submitted by 11:59 PM PST, 12/31/2019". Below this is a "Countdown to Open Enrollment Deadline:" section with a digital clock showing "Days HH MM SS" as "230 02 : 31 : 39".
- Company Directory:** A white fluid tile with an icon of a person and a list.
- Time:** A white fluid tile with an icon of a person and a clock.
- Payroll:** A white fluid tile with a green bill icon and the text "Last Pay Date 02/28/2019".
- Personal Details:** A white fluid tile with a photo of a woman.
- Talent Profile:** A white fluid tile with an icon of a person and a star.
- Benefit Details:** A white fluid tile with icons for a person, a house, a cross, and a gear, and the text "Enrollment Ends 12/31/2019".
- Performance:** A white fluid tile with a document icon and the text "6 Current Documents".
- Total Rewards:** A white fluid tile with a pie chart icon and the text "Total Rewards Statement 2018".

Video Content

Benefits Open Enrollment

Enrollment Period 5/1/2018 - 12/31/2019
Rosanna Channing

[Next >](#)

- Welcome**
 Visited
- Acknowledgement**
 Not Started
- Personal Information**
 Not Started
- Dependent/Beneficiary Info**
 Not Started
- Benefits Enrollment**
 Not Started
- Benefits Statements**
 Not Started
- Summary**
 Not Started

Task: Welcome

Open enrollment is your annual opportunity to modify your benefit choices. The video gives you step by step instruction on how to enroll your benefits.

You have the option of watching the video or selecting to view the video transcript. [View Video Transcript](#)



The video player displays a golden egg on a nest of sticks and moss. The text "Grow Your Nest Egg" is written across the bottom of the nest. The video title is "Benefits Welcome Video".



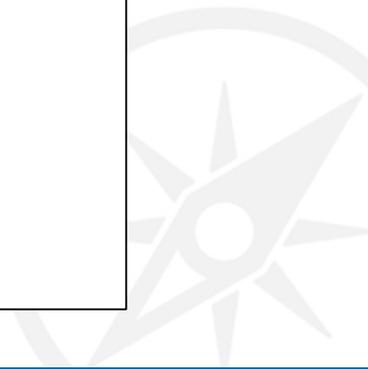
Fluid Acknowledgement/Online Agreement

✕ Exit **Benefits Open Enrollment**

 **Enrollment Period 1/1/2019 - 12/31/2019**
Rosanna Channing

< Previous Next >

Welcome <input checked="" type="radio"/> Visited	Task: Acknowledgement By checking Agree you understand the following: <ul style="list-style-type: none">• You understand that your employer is authorized to make the changes you have requested to your benefits, and that your employer can make the applicable payroll deductions for those benefits.• You understand that you cannot change your benefit elections until the next Open Enrollment period, unless you have a qualified family status change.• You understand that your information is private, but that your employer can provide your relevant information to authorized persons and organizations, such as health care providers, insurance carriers, and other approved internal and external entities.• You are responsible for meeting all program and deadlines for your election. <p>You understand that this serves as a legal and binding agreement</p> Terms and Conditions <input checked="" type="checkbox"/> I Agree <input type="button" value="Save"/>
Acknowledgement <input checked="" type="radio"/> Visited	
Personal Information <input type="radio"/> Not Started	
Dependent/Beneficiary Info <input checked="" type="radio"/> Visited	
Benefits Enrollment <input type="radio"/> Not Started	
Benefits Statements <input checked="" type="radio"/> Visited	
Summary <input type="radio"/> Not Started	



Update Personal Information

✕ Exit **Benefits Open Enrollment** < Previous Next >

 **Enrollment Period 5/1/2018 - 12/31/2018**
Rosanna Channing

Welcome <input type="radio"/> Visited	Personal Information - Home and Mailing Address Home Address 1430 North West Blvd Apt B215 Guttenberg, NJ 07093 Current > Mailing Address 1430 North West Blvd Apt B215 Guttenberg, NJ 07093 Current >
Acknowledgement <input checked="" type="checkbox"/> Complete	
Personal Information <input type="radio"/> Visited	
Name <input type="radio"/> Visited	
Home and Mailing Address <input type="radio"/> Visited	
Contact Information <input type="radio"/> Not Started	
Dependent/Beneficiary Info <input type="radio"/> Visited	
Benefits Enrollment <input type="radio"/> Visited	
Summary <input type="radio"/> Visited	



Update Dependent/Beneficiary Information

Oracle PeopleSoft Benefits Open Enrollment

Enrollment Period 5/1/2018 - 12/31/2018
Rosanna Channing

Welcome
○ Visited

Acknowledgement
✔ Complete

Personal Information
○ Visited

Dependent/Beneficiary Info
○ Visited

Benefits Enrollment
○ Visited

Summary
○ Visited

Dependent/Beneficiary Info

Add Individual

Name	Relationship	Beneficiary	Dependent	
Robert Channing	Spouse	✔	✔	>
Jason Channing	Child	✔	✔	>



Benefits Enrollment Page

Enrollment Page – Card View

✕ Exit
Benefits Open Enrollment
⋮

Change Renewal
Enrollment Period 2/15/2019 - 12/31/2019
Rosanna Channing

< Previous
Next >

- Welcome ● Visited
- Acknowledgement ● Complete
- Personal Information ● Visited
- Dependent/Beneficiary Info ● Visited
- Benefits Enrollment ● Visited
- Benefits Statements ○ Not Started
- Summary ○ Not Started

Task: Benefits Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

▼ **Enrollment Summary**

Your Pay Period Cost **\$88.03**

Status **Pending Review**

*Excess Credit Cash

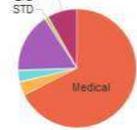
Review Enrollment

Full Cost **\$432.03**

General Credits **-\$275.00**

Plan Credits **-\$69.00**

LTD
STD



Benefit Plans

📄 📅

<p>Wellness Credit</p> <p>Current No Coverage New No Coverage Status Pending Review</p> <p>Pay Period Cost \$0.00</p> <p style="text-align: right;">Review</p>	<p>Medical</p> <p>Current Enhanced Medical Plan New Enhanced Medical Plan Status Visited 👤 2 Dependents</p> <p>Pay Period Cost \$245.00</p> <p style="text-align: right;">Review</p>	<p>Dental</p> <p>Current Enhanced Dental Plan New Enhanced Dental Plan Status Pending Review 👤 2 Dependents</p> <p>Pay Period Cost \$13.88</p> <p style="text-align: right;">Review</p>
<p>Vision</p> <p>Current Enhanced Vision Plan New Enhanced Vision Plan Status Pending Review 👤 2 Dependents</p> <p>Pay Period Cost \$11.50</p> <p style="text-align: right;">Review</p>	<p>Life</p> <p>Current Basic Life Plan New Basic Life Plan \$50,000 Status Pending Review 👤 0 Beneficiaries</p> <p>Pay Period Cost \$0.00</p> <p style="text-align: right;">Review</p>	<p>Supplemental Life</p> <p>Current Suppl Group Life 3x New Suppl Group Life 3x \$270,000 Status Pending Review 👤 1 Beneficiaries</p> <p>Pay Period Cost \$59.40</p> <p style="text-align: right;">Review</p>

Contact Information

Phone
646/350-1111

Email
HCMGENUser1@ap6023fems.us

Address
Benefits Administrator
123 Bowery Street
New York, NY 07666

Resources

[GBI Benefits Handbook](#)



Benefits Enrollment Page

Enrollment Page – List View

✕ Exit
Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019

Rosanna Channing

< Previous
Next >

- Welcome ● Visited
- Acknowledgement ● Complete
- Personal Information ● Visited
- Dependent/Beneficiary Info ● Visited
- Benefits Enrollment ● Visited
- Benefits Statements ○ Not Started
- Summary ○ Not Started

Task: Benefits Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$88.03**

Status **Pending Review**

*Excess Credit Cash

Review Enrollment

Full Cost **\$432.03**

General Credits **-\$275.00**

Plan Credits **-\$69.00**

Benefit Plans

Plan Type	Current	New	Dependents or Beneficiaries	Pay Period Cost	Status	Actions
Wellness Credit	No Coverage	No Coverage		\$0.00	Pending Review	Review
Medical	Enhanced Medical Plan	Enhanced Medical Plan	2 Dependents	\$245.00	Pending Review	Review
Dental	Enhanced Dental Plan	Enhanced Dental Plan	2 Dependents	\$13.88	Pending Review	Review
Vision	Enhanced Vision Plan	Enhanced Vision Plan	2 Dependents	\$11.50	Pending Review	Review
Life	Basic Life Plan	Basic Life Plan \$50,000	0 Beneficiaries	\$0.00	Pending Review	Review
Supplemental Life	Suppl Group Life 3x	Suppl Group Life 3x \$270,000	1 Beneficiaries	\$59.40	Pending Review	Review
AD and D	Flat 25K AD&D	Flat 25K AD&D \$25,000	0 Beneficiaries	\$0.25	Pending Review	Review
Dependent AD and D	Waive	Waive		\$0.00	Pending Review	Review
Dependent Life	Waive	Waive		\$0.00	Pending Review	Review

Contact Information

Phone
646/350-1111

Email
HCMGENUser1@ap6023fems.us

Address
Benefits Administrator
123 Bowery Street
New York, NY 07666

Resources

[GBI Benefits Handbook](#)



Medical Election

Add Dependents, Select Plan Options, View Costs for all Plans

Cancel
Medical
Done

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured. Enrollment in this benefit may require proof of coverage.

▼ Enroll Your Dependents

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

	Dependents	Relationship
<input checked="" type="checkbox"/>	Robert Channing	Spouse
<input checked="" type="checkbox"/>	Jason Channing	Child

Add Dependent

▼ Enroll in Your Plan

The Family Cost showing is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage cost, select the help icon next to each plan option.

Besides any credits listed below, you will receive an additional \$10.00 credit to help with the cost of this benefit. You will only receive this credit if you select one of the following choices.

	Plan Name	Proof of Coverage	Cost (Before Tax)	Cost (After Tax)	Credit (Before Tax)	Credit (After Tax)	Pay Period Cost
<input type="button" value="Select"/>	Waive	Proof Required			\$16.00		\$-16.00
<input type="button" value="Select"/>	Basic Out-of-Network Medical		\$121.00		\$55.00		\$56.00
<input checked="" type="checkbox"/>	Enhanced Medical Plan		\$310.00		\$55.00		\$245.00
<input type="button" value="Select"/>	Medical HMO Plan 2		\$260.00		\$55.00		\$195.00

Overview of All Plans

▼ Select Primary Care Provider

Contact Information

Phone
646/350-2222

Email
HCMBENUser1@ap6023fems.t

Resources

[Aetna U. S. Healthcare General](#)

[Blue Cross/ Blue Shield](#)

[Kaiser Permanente](#)



Cost Summary for All Plan Options

The screenshot shows a web interface for selecting a medical plan. A modal window titled "Overview of Medical Plans" is open, displaying details for two plan options. Red arrows point to the headers of these two sections.

Basic Out-of-Network Medical

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

Coverage Level	Your Costs	Tax Class
Employee Only	6.00	Before-Tax
Employee + Spouse	21.00	Before-Tax
Employee + Child(ren)	46.00	Before-Tax
Family	66.00	Before-Tax
Employee + Domestic Partner	61.00	Before-Tax
Family (with Domestic Partner)	101.00	Before-Tax

Enhanced Medical Plan

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

Coverage Level	Your Costs	Tax Class
Employee Only	20.00	Before-Tax



Add Dependents and Beneficiaries

Cancel **Add Individual Dependent/Beneficiary Information**

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on May 16, 2019.

Name
Elizabeth Channing >
Display Name

Personal Information

Date of Birth: 05/05/2019
*Gender: Female
*Relationship to Employee: Child
Dependent: Yes
Beneficiary: Yes
*Marital Status: Single As of:
*Student: No As of:
*Disabled: No As of:
*Smoker: Non Smoker As of:

Address
1430 North West Blvd
Apt B215 Home Same as mine
Guttenberg, NJ 07093 >

National ID
No data exists
Add National ID



Life Plan Elections

Cancel
Life
Done

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

▼ Enroll in Your Plan

Plan Name
✓ Basic Life Plan (\$50,000)

▼ Designate Your Beneficiaries

You may designate the individuals as primary or secondary beneficiaries by allocating a percent or a specific dollar amount. Secondary beneficiaries receive benefits only if all primary beneficiaries are deceased. If you select flat dollar amount, then one beneficiary must be designated to receive remaining money from the policy. If you select percents, all percents for primary beneficiaries must total 100. All percents for secondary beneficiaries must total 100.

*Primary Allocation

*Secondary Allocation

Beneficiary	Relationship	Current Primary Percentage	Current Secondary Percentage	New Primary Percentage	New Secondary Percentage
Robert Channing	Spouse			<input type="text" value="75"/>	<input type="text" value="0"/>
Jason Channing	Child			<input type="text" value="25"/>	<input type="text" value="0"/>
Total				100	0

Contact Information

Phone
646/350-3333

Email
HCMBENUser2@ap6023fems



Plan Election Updates

Card View: Enrollment Summary balances updated, election status set to "Changed"

✕ Exit
Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019

Rosanna Channing

< Previous
Next >

Welcome
● Visited

Acknowledgement
● Complete

Personal Information
● Visited

Dependent/Beneficiary Info
● Visited

Benefits Enrollment
● Visited

Benefits Statements
○ Not Started

Summary
○ Not Started

Task: Benefits Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$88.03**

Status **Pending Review**

*Excess Credit Review Enrollment

Full Cost **\$432.03**

General Credits **-\$275.00**

Plan Credits **-\$69.00** ➔

Benefit Plans

Wellness Credit

Current No Coverage
New No Coverage
Status **Pending Review**

Pay Period Cost **\$0.00**

Review

Medical

Current Enhanced Medical Plan
New Enhanced Medical Plan
Status ● Changed ➔
2 Dependents

Pay Period Cost **\$245.00**

Review

Dental

Current Enhanced Dental Plan
New Enhanced Dental Plan
Status **Pending Review**
2 Dependents

Pay Period Cost **\$13.88**

Review

Vision

Life

Supplemental Life



List View: Enrollment Summary balances updated, election status set to "Changed"

Plan Election Updates

✕ Exit
Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019

Rosanna Channing

← Previous
Next →

Welcome
● Visited

Acknowledgement
● Complete

Personal Information
● Visited

Dependent/Beneficiary Info
● Visited

Benefits Enrollment
● Visited

Benefits Statements
○ Not Started

Summary
○ Not Started

Task: Benefits Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$88.03** Full Cost **\$432.03**

Status **Pending Review** General Credits **\$-275.00**

*Excess Credit Plan Credits **\$-69.00**

Benefit Plans

Plan Type	Current	New	Dependents or Beneficiaries	Pay Period Cost	Status	Actions
Wellness Credit	No Coverage	No Coverage		\$0.00	Pending Review	<input type="button" value="Review"/>
Medical	Enhanced Medical Plan	Enhanced Medical Plan	2 Dependents	\$245.00	● Changed	<input type="button" value="Review"/>
Dental	Enhanced Dental Plan	Enhanced Dental Plan	2 Dependents	\$13.88	Pending Review	<input type="button" value="Review"/>
Vision	Enhanced Vision Plan	Enhanced Vision Plan	2 Dependents	\$11.50	Pending Review	<input type="button" value="Review"/>
Life	Basic Life Plan	Basic Life Plan \$50,000	2 Beneficiaries	\$0.00	● Changed	<input type="button" value="Review"/>



Review Enrollment Elections and Print Option

Exit
Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019

Rosanna Channing

< Previous
Next >

Welcome
● Visited

Acknowledgement
● Complete

Personal Information
● Visited

Dependent/Beneficiary Info
● Visited

Benefits Enrollment
● Visited

Benefits Statements
○ Not Started

Summary
○ Not Started

Task: Benefits Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$88.03**

Status **Visited**

*Excess Credit Cash

Review Enrollment

Full Cost **\$432.03**

General Credits **\$-275.00**

Plan Credits **\$-69.00**

Benefit Plans

Wellness Credit

Current No Coverage
New No Coverage
Status **Pending Review**

Pay Period Cost **\$0.00**

Review

Medical

Current Enhanced Medical Plan
New Enhanced Medical Plan
Status **Changed**
2 Dependents

Pay Period Cost **\$245.00**

Review

Dental

Current Enhanced Dental Plan
New Enhanced Dental Plan
Status **Pending Review**
2 Dependents

Pay Period Cost **\$13.88**

Review



Review Enrollment Elections

Review Enrollment

Statement Type: Enrollment Preview Description: Open Enrollment 2020

Enrollment Effective Date: 01/01/2020 Statement Issue Date: 05/16/2019

[Print View](#)

This statement confirms your Open Enrollment 2020 benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

[Collapse All](#)

Personal Information

Cost Summary

This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period	\$ 88.03
Full Cost	\$ 432.03
General Credits	\$ -275.00
Plan Credits	\$ -89.00
Excess Credit Rollover To	Cash

Election Summary

The following is a summary of your elections. Select the [Dependent](#) or [Beneficiary](#) hyperlink to view the information associated with each benefit.

Remember: These coverages will remain in effect until the next Benefits Open Enrollment or if you experience a change in family status or employment situation.

Benefit Plan	Coverage Base	Dependents or Beneficiaries	Your Cost Per Pay Period
Wellness Credit			
Enhanced Medical Plan	Family	2 Dependents	\$ 245.00
Enhanced Dental Plan	Family	2 Dependents	\$ 13.80
Enhanced Vision Plan	Family	2 Dependents	\$ 11.50
Basic Life Plan		2 Beneficiaries	\$ 50,000.00

ELECTIONS PREVIEW
OPEN ENROLLMENT 2020
Event Date: 01/01/2020

PERSONAL INFO

Name	Robert Channing	Date of Birth	01/01/1980	Spouse	None	Married Status	Single	Dependent	Yes	Beneficiary	Yes
------	-----------------	---------------	------------	--------	------	----------------	--------	-----------	-----	-------------	-----

DEPENDENTS / BENEFICIARIES

Name	Relationship	Married Status	Dependent	Beneficiary
Robert Channing	Spouse	None	Yes	Yes
Jessie Channing	Child	None	Yes	Yes

DEPENDENTS ENROLLMENTS

Benefit Option	Dependent
Enhanced Medical Plan	Robert Channing Jessie Channing
Enhanced Dental Plan	Robert Channing Jessie Channing
Enhanced Vision Plan	Robert Channing Jessie Channing

BENEFICIARIES DESIGNATIONS

Benefit	Beneficiary	Primary Allocation Percent	Secondary Allocation Percent	Excess
Basic Life	Robert Channing	75%		
	Jessie Channing	25%		
401k Plan	Robert Channing	100%		No
401k Plan	Robert Channing	100%		No

INVESTMENT ALLOCATIONS

Benefit Plan	Investment Option	Percent
401(k) Employee Post-Ret	Money Market	25%
	Asset Allocation Fund	25%
	Bond Fund	25%
	Corporate Stock Fund	25%
Profit Sharing Plan	Money Market	25%
	Capital Fund	25%
	Corporate Stock Fund	25%
	Real Company Fund	25%

Page 2 of 2 5/16/2019 3:16 AM

Enrollment Statement

Update via BI Publisher Report Definition (BEN_ER_STMT01.rtf)

Report Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.
Find an Existing Value | Add a New Value

*Search by begins with

Include History Correct History

Search Results

Report Name	Description	Data Source Type	Data Source ID	Da
BENCFSTMT	Print Ben Confirmation Stmt	XML File	BEN_CF_STATEMENT	Pu
BENCFSTMTVW	Online Ben Confirmation Stmt	XML File	BEN_CF_STATEMENT	Pu
BENERSTMTVW	Review Enrollment Online	XML File	BEN_CF_STATEMENT	Pu

Find an Existing Value | Add a New Value

Definition **Template** Output Properties Security Bursting

Report Name: BENERSTMTVW

Template First 1 of 1 Last

Template ID BENERSTMTVW_1 Default Template

Description

*Language Code Channel

Template Files First 1 of 1 Last

Effective Date 01/06/1900 Use Data Transform

*Status

Template File Use Alt. XML

Benefit Statements

Employees can view current and historical Enrollment Previews and Confirmation Statements

Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019
Rosanna Channing

← Previous Next →

Welcome
● Visited

Acknowledgement
✔ Complete

Personal Information
● Visited

Dependent/Beneficiary Info
● Visited

Benefits Enrollment
● Visited

Benefits Statements
● Visited

Summary
○ Not Started

Task: Benefits Statements

Statement Type: Enrollment Preview

1 row

Event Date	Issue Date	Enrollment Event	Statement Type
01/01/2020	05/16/2019	Open Enrollment 2020	Enrollment Preview

Summary of Enrollment Steps

✕ Exit
⋮
Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019

Rosanna Channing

← Previous

- Welcome
● Visited
- Acknowledgement
✔ Complete
- ▶ Personal Information
● Visited
- Dependent/Beneficiary Info
● Visited
- Benefits Enrollment
● Visited
- Benefits Statements
● Visited
- Summary
● Visited

Task: Summary

If you have submitted your enrollment, review your elections on the Benefits Statements step and keep a copy of your elections as a record. If you have not completed your elections, go to the Benefits Enrollment step and complete your elections and select the Submit Enrollment button.

You can return to this event before 11:59PM PST, 12/31/2019 by selecting the Open Enrollment tile on Employee Self Service. Once the open enrollment period ends, your elections will be validated and finalized. If you did not submit your elections, your enrollment will be based on the default options. Contact your benefits administrator if you have further question.

Steps 8 rows

Step	Status	Date Completed	Go to Step
Welcome	● Visited		Go to Step
Acknowledgement	✔ Complete	05/16/2019	Go to Step
Name	● Visited		Go to Step
Home and Mailing Address	○ Not Started		Go to Step
Contact Information	○ Not Started		Go to Step
Dependent/Beneficiary Info	● Visited		Go to Step
Benefits Enrollment	● Visited		Go to Step



Complete and Submit Final Elections

Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019
Rosanna Channing

[Previous](#)
[Next](#)

[Submit Enrollment](#)

Task: Benefits Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

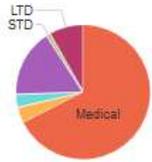
Enrollment Summary

Your Pay Period Cost **\$88.03** Full Cost **\$432.03**

Status **Submitted** General Credits **-\$275.00**

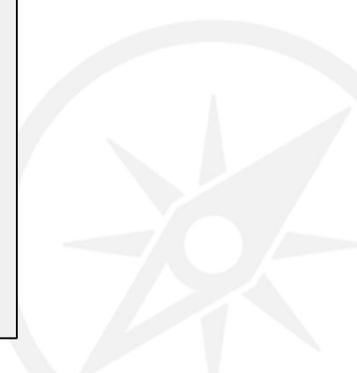
*Excess Credit: Plan Credits **-\$69.00**

[Review Enrollment](#)



Benefit Plans

Benefit Category	Current Plan	New Plan	Status	Dependents	Pay Period Cost	Action
Wellness Credit	No Coverage	No Coverage	Pending Review		\$0.00	Review
Medical	Enhanced Medical Plan	Enhanced Medical Plan	Changed	2 Dependents	\$245.00	Review
Dental	Enhanced Dental Plan	Enhanced Dental Plan	Pending Review	2 Dependents	\$13.88	Review
Vision	Enhanced Vision Plan	Enhanced Vision Plan	Visited	2 Dependents		
Life	Basic Life Plan	Basic Life Plan \$50,000	Changed	2 Beneficiaries		
Supplemental Life	Suppl Group Life 3x	Suppl Group Life 3x \$270,000	Visited	1 Beneficiaries		



Elections Submitted Alert

Exit
Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019

Rosanna Channing

< Previous
Next >

- Welcome ● Visited
- Acknowledgement ● Complete
- Personal Information ● Visited
- Dependent/Beneficiary Info ● Visited
- Benefits Enrollment ● Visited
- Benefits Statements ● Visited
- Summary ● Visited

Task: Benefits Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

▼ Enrollment Summary

Your Pay Period Cost **\$88.03**

Status: Visited

*Excess Credit ▼

Review Enrollment

Full Cost **\$432.03**

General Credits **-\$275.00**

Plan Credits **-\$69.00**

Benefit Plans

📄
📅

Plan Type	Current	Pay Period Cost	Status	Actions
Wellness Credit	No Coverage	\$0.00	Pending Review	Review
Medical	Enhanced Medical Plan	\$245.00	● Changed	Review
Dental	Enhanced Dental Plan	\$13.88	Pending Review	Review
Vision	Enhanced Vision Plan	\$11.50	Visited	Review
Life	Basic Life Plan	\$0.00	● Changed	Review
Supplemental Life	Suppl Group Life 3x	\$59.40	Visited	Review
AD and D	Flat 25K AD&D	\$0.25	● Changed	Review
Dependent AD and D	Waive	\$0.00	Visited	Review
Dependent Life	Waive	\$0.00	Pending Review	Review

Contact Information

Phone
646/350-1111

Email
HCMGENUser1@ap6023fems.us

Address
Benefits Administrator
123 Bowery Street
New York, NY 07665

Resources

[GBI Benefits Handbook](#)

Done
Benefits Alerts
View

Your benefit choices have been successfully submitted to the Benefits Department.

Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary

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invest wisely. deliver more.

View and Print Submitted Enrollment Elections

View Submitted Enrollment

Statement Type **Enrollment Preview**

Enrollment Effective Date **01/01/2020**

Description **Open Enrollment 2020**

Statement Issue Date **05/16/2019**

[Print View](#)

This statement records your Open Enrollment 2020 benefit selections and pay period costs, dependent information, and beneficiary information at the time your enrollment is submitted. If an error has been made in recording your elections, please correct your elections before the event is closed. For further question, contact your benefits administrator. Please keep the statement for your records until you receive a confirmation statement.

Statement Sections

[Collapse All](#)

▶ **Personal Information**

▼ **Cost Summary**

This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period	\$ 88.03
Full Cost	\$ 432.03
General Credits	\$ -275.00
Plan Credits	\$ -69.00
Excess Credit Rollover To	Cash

A pie chart illustrating the cost breakdown. The largest slice is blue and labeled 'Medical'. Other smaller slices are green (LTD), cyan (STD), and orange (AD/D).

▼ **Election Summary**

The following is a summary of your elections. Select the Dependent or Beneficiary hyperlink to view the information associated with each benefit.

Remember: These coverages will remain in effect until the next Benefits Open Enrollment or if you experience a change in family status or employment situation.

Benefit Plan	Coverage Base	Dependents or Beneficiaries	Your Cost Per Pay Period
Wellness Credit			
Enhanced Medical Plan	Family	2 Dependents	\$ 245.00

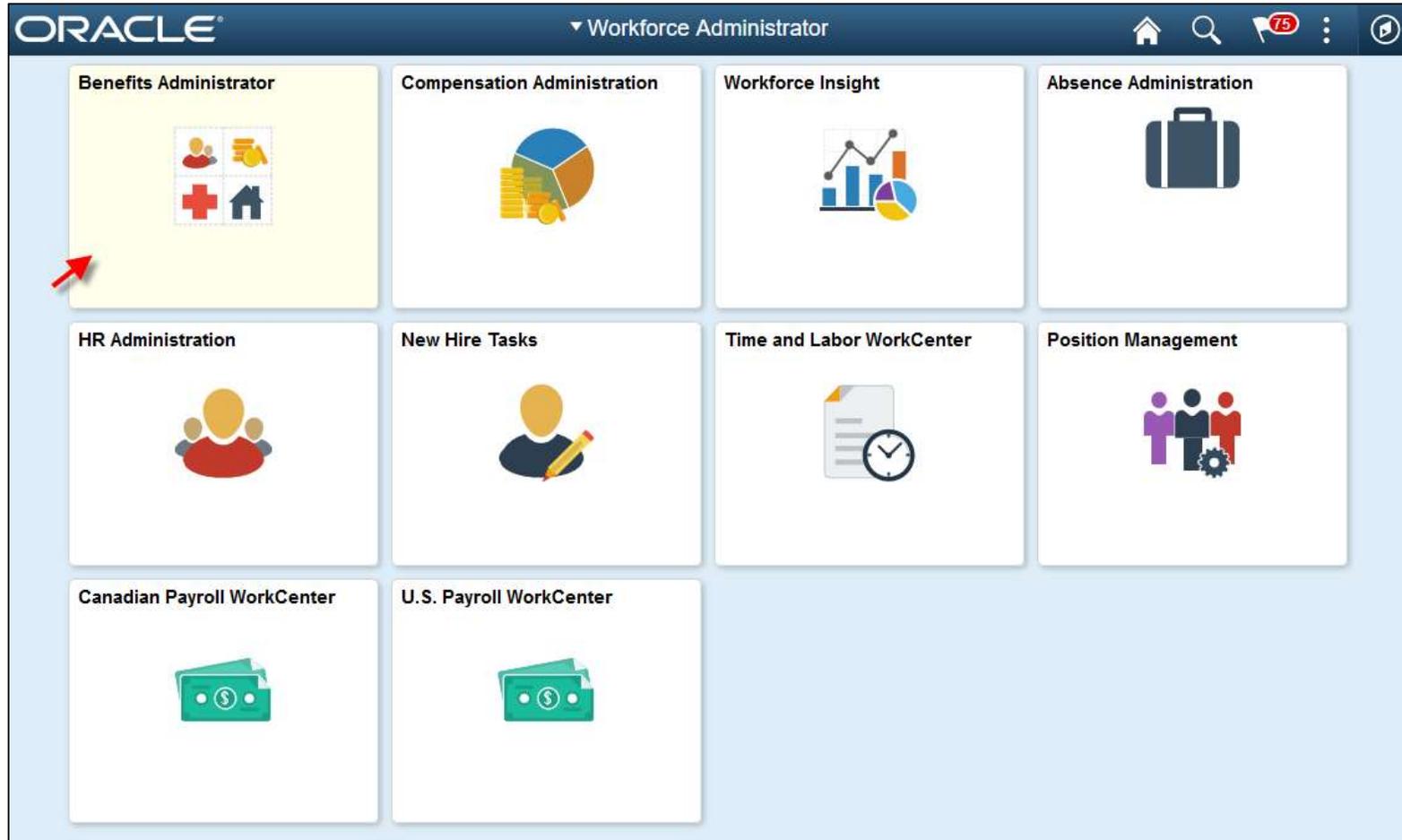


Creating Fluid Confirmation Statements



Creating Confirmation Statements

Benefits Administrator role has access to Confirmation Statement process



Confirm Statement Printing Options

The screenshot displays the 'Benefits Administrator' interface. On the left, a navigation menu lists various options, with 'Benefits Statement Options' highlighted and a red arrow pointing to it. The main content area is titled 'Benefits Statement Options' and shows the following configuration details:

- Statement Type: Confirmation Statement
- Schedule ID: [Empty]
- Statement Control: 1 of 1 | View All
- *Effective Date: 01/01/1900
- *Report Name for Viewing: BENCFSTMTVW (Online Ben Confirmation Stmt)
- Report Name for Printing: BENCFSTMT (Print Ben Confirmation Stmt)
- Employees Per File: [Empty]
- Self Service Configuration:
 - Available in Self Service
 - Email Notification

At the bottom of the configuration area, there is a toolbar with the following buttons: Save, Return to Search, Previous in List, Next in List, Add, Update/Display, Include History, and Correct History. A red arrow also points to the 'Benefits Statement Options' menu item.



Confirmation Statements

Create Benefit Confirmation Statements for all employees or individual employees

The screenshot shows the 'Benefits Administrator' interface. The left sidebar has 'Online Confirmation Statements' selected. The main area is titled 'Online Confirmation Statements' and contains the following sections:

- Run Control ID:** WS
- Report Manager:** Process Monitor
- Run:** Button
- Schedule ID:** KU19 (with a search icon and the text '(Leave blank for all schedules)')
- Statement Process Selection:** Radio buttons for 'Online Only' (selected), 'Online and Print', and 'Print Only'. A checkbox for 'Draft' is also present.
- Process Status to Include:** Checkboxes for 'Election Error' and 'Finalized - Enrolled' (checked).
- Participants Selection:** A checkbox for 'Include All Employees' (unchecked). Below it is a table with columns: *Empl ID, First Name, Last Name, Ben Record, and Event ID. The table contains one row: 1, KU0046, Rosanna, Channing. There are search icons and plus/minus buttons for the Ben Record and Event ID columns. A red arrow points to the 'KU0046' value in the *Empl ID column.

At the bottom of the page are buttons: Save, Return to Search, Previous in List, Next in List, Notify, Add, and Update/Display.



Employees Can Now View Statements

Employees view statements from the Benefit Details tile

Employee Self Service **Benefit Details**

Rosanna Channing
Senior Accounting Manager

Benefit Statements

Statement Type 2 rows

Event Date	Issue Date	Job Title	Enrollment Event	Statement Type
01/01/2019	02/28/2019	Senior Accounting Manager	Open Enrollment 2019	Confirmation Statement
01/01/2018	12/07/2018	Senior Accounting Manager	Open Enrollments 2018	Confirmation Statement

Designing the Confirmation Statement

Update via BI Publisher Report Definition (BEN_CF_STMT01.rtf)

Report Name: BENCFSTMTVW

Template ID: BENCFSTMTVW_1

Description: Benefits statement

*Language Code: English

Channel: []

Effective Date: 01/30/2019

*Status: Active

Template File: BEN_CF_STMT01_workstrategy.rtf

Buttons: Upload, Preview, Use Alt. XML

ACME ROCKET COMPANY

GLOBAL BUSINESS INSTITUTE
 GBI US Fulltime Benefits Program

Antonio Santos
 Administrative Assistant
 Employee ID: KU0010

Cost Summary

RECORD_TYPE	Amount
Total Cost	\$ 154.80
Minus Flexible Credits	\$ -109.48
Total Pay Period Deduction From Pay	\$ 57.50

Election Summary

Benefit	Coverage	Category Base	Your Pay Period Cost
Enhanced Medical Plan	Family		\$ 71.54
Enhanced Dental	Family		\$ 4.13
Standard Vision Plan	Family		\$ 2.08
Basic Life		\$ 50,000	
Supplemental Life 2x Salary		\$ 133,000	\$ 2.46
AD and D 25K		\$ 25,000	\$ 0.06
Flex Spending Health - US		\$ 2,500	\$ 53.19

Dependents and Beneficiaries

Name	Date of Birth	Relationship	Marital Status	Dependent	Beneficiary
Megan Santos	1965-10-12	Spouse	Married	Yes	Yes
Marguerite Santos	1992-03-16	Child	Single	Yes	No
Sean Santos	1998-09-17	Child	Single	Yes	No
Samuel Santos	2000-05-01	Child	Single	Yes	No

Customizing the BI Publisher Confirmation Statement .rtf

```

<?xml version="1.0" encoding="UTF-8"?>
- <BEN_CF_STMT>
  - <STATEMENT_HEADER>
    <NAME_DISPLAY>Antonio Santos</NAME_DISPLAY>
    <EMPLID>KU0010</EMPLID>
    <CONFIRM_DATE>11/25/2016</CONFIRM_DATE>
    <EVENT_DT>01/01/2017</EVENT_DT>
    <EVENT_YR>2017</EVENT_YR>
    <COMPANY_DESCR>GLOBAL BUSINESS INSTITUTE</COMPANY_DESCR>
    <EVENT_DESCR>Open Enrollment</EVENT_DESCR>
    <SHOW_INVESTMENTS>Yes</SHOW_INVESTMENTS>
    <FILE_SEQ>1</FILE_SEQ>
    <JOB_DESCR>Administrative Assistant</JOB_DESCR>
    <PROGRAMNAME>GBI US Fulltime Benefits Program</PROGRAMNAME>
    <COST_LBL>Your Pay Period Cost</COST_LBL>
  - <PERSONAL_INFO>
    <NAME_DISPLAY>Antonio Santos</NAME_DISPLAY>
    <HOME_ADDRESS>4689 Z Street, Sacramento, CA 94246</HOME_ADDRESS>
    <MAIL_ADDRESS>4689 Z Street, Sacramento, CA 94246</MAIL_ADDRESS>
    <EMAIL_ADDR>antonio.santos@oracle.com</EMAIL_ADDR>
    <GENDER>Male</GENDER>
    <MARITAL_STATUS>Married</MARITAL_STATUS>
    <BIRTHDATE>1963-03-09</BIRTHDATE>
    <SERVICE_DT>2010-07-15</SERVICE_DT>
    <EMERGENCY_PHONE>925/445-0922</EMERGENCY_PHONE>
    <WORK_PHONE>925/222-1000</WORK_PHONE>
    <HOME_PHONE>925/598-2944</HOME_PHONE>
  </PERSONAL_INFO>
  - <DEPENDENTS>
    <DEPENDENT_NAME>Megan Santos</DEPENDENT_NAME>
    <BIRTHDATE>1965-10-12</BIRTHDATE>
    <RELATION_DESCR>Spouse</RELATION_DESCR>
    <MARITAL_STATUS>Married</MARITAL_STATUS>
    <DEPENDENT>Yes</DEPENDENT>
    <BENEFICIARY>Yes</BENEFICIARY>
  </DEPENDENTS>
  - <DEPENDENTS>
    <DEPENDENT_NAME>Marguerite Santos</DEPENDENT_NAME>
    <BIRTHDATE>1992-03-18</BIRTHDATE>
    <RELATION_DESCR>Child</RELATION_DESCR>
    <MARITAL_STATUS>Single</MARITAL_STATUS>
    <DEPENDENT>Yes</DEPENDENT>
    <BENEFICIARY>No</BENEFICIARY>
  </DEPENDENTS>
  </DEPENDENTS>
  </STATEMENT_HEADER>
  </BEN_CF_STMT>
  
```

ACME ROCKET COMPANY

for-eachEmployee
 COMPANY_DESCR: GLOBAL BUSINESS INSTITUTE
 PROGRAMNAME: GBI US Fulltime Benefits Program

Your **EVENT_YR** Benefits Confirmation Statement
 Election Type: **EVENT_DESCR**
 Effective Date: **EVENT_DT**
 Statement issue Date: **CONFIRM_DT** EC
 Statement issue Date: **DRAFT** EC

NAME_DISPLAY
 JOB_DESCR: Administrative Assistant
 Employee ID: **EMPLID**

This statement confirms your recent benefit elections. These coverages will remain in effect until you experience a change in family status or in your employment situation. If an error has been made in recording your elections, please contact your benefits administrator. Please keep a copy of this form for your records.

Personal Information

Home Address	HOME_ADDRESS
Mailing Address	MAIL_ADDRESS
Email Address	EMAIL_ADDR
Gender	GENDER
Marital Status	MARITAL_STATUS
Birthdate	BIRTHDATE
Service Date	SERVICE_DT

Cost Summary

FEPCOST_TYPE	Amount
	AMOUNTend

Election Summary

Benefit	Coverage	Category Base	COST_LBL
FEPLAN	OPTION	CATEGORY	COST end

Benefit

Benefit	Pre-Tax	After Tax	Voluntary Amt	Voluntary Pct
FEBENEFIT_PLAN	PRETAX	AFTERTAX	VOLUNTARY_AMT	VOLUNTARY_PCTend

Dependents and Beneficiaries

Name	Date of Birth	Relationship	Marital Status	Dependent	Beneficiary
FEDEPENDENT_NAME	BIRTHDATE	RELATION	MAR_STAT	DEPE	BENEF end

Dependent Enrollments

Benefit Option	Dependent
for-eachBENEFIT_OPTION	DEPENDENT
end	

Beneficiary Designations

Primary Allocation	Secondary Allocation
--------------------	----------------------

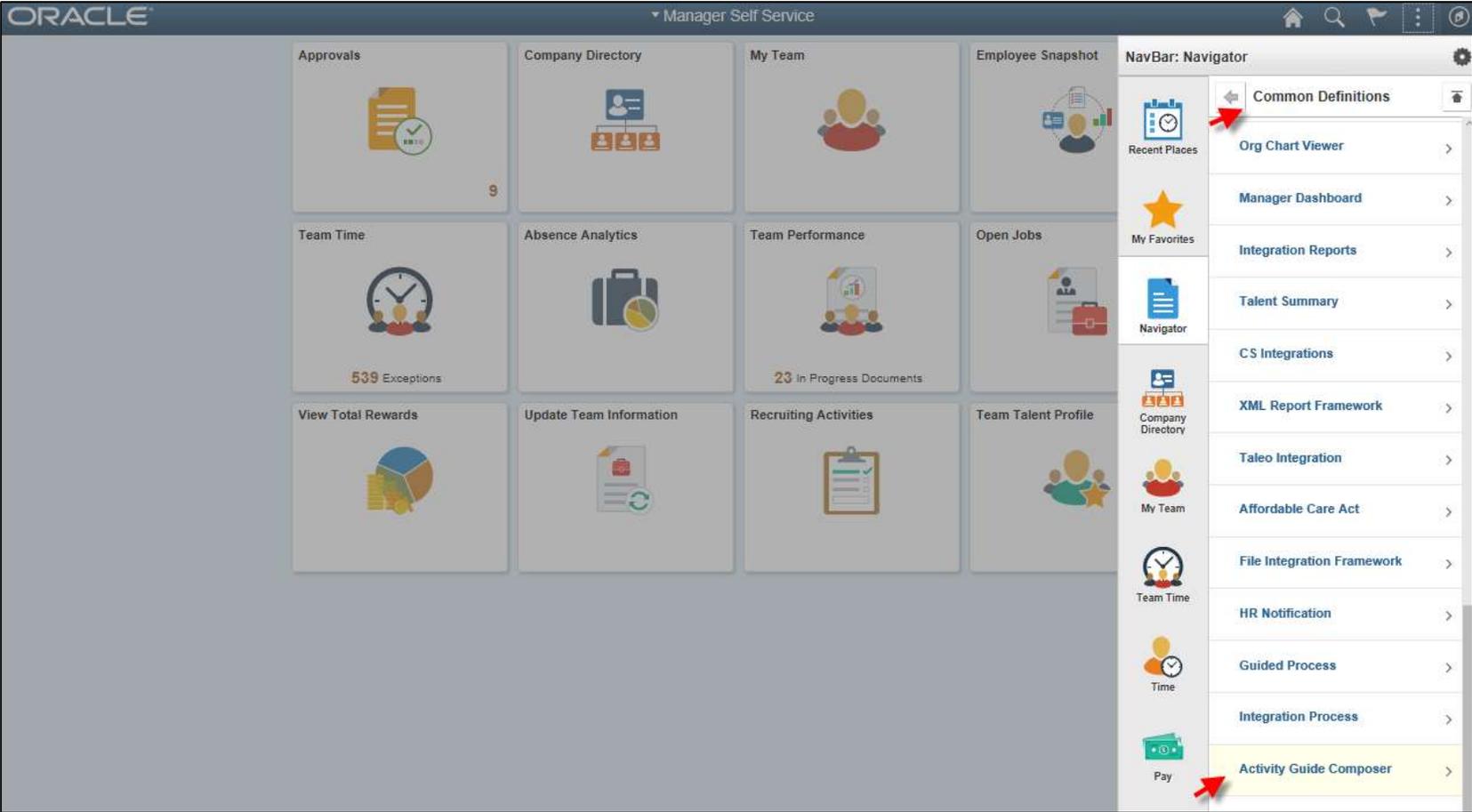


Activity Guide Composer Open Enrollment



Fluid Activity Guide Composer

* PUM 31 – AG Composer moved to Enterprise Components



AGC Template Category

Oracle Activity Guide Composer Categories search interface. Includes search criteria, search button, and search results table.

Search Criteria

Search by: Activity Guide Category begins with

Include History Correct History

Search Advanced Search

Search Results

Activity Guide Category	Description
HRADMIN	Human Resources Administrator
LIFEEVENT	Life Event
MANAGEPOSITION	Manage Positions
ONBOARDING	OnBoarding
OPENENROLLMENT	Open Enrollment
QST0000001	Create Questionnaire

Oracle Activity Guide Composer Category details page for OPENENROLLMENT. Includes tabs for Category, Security, Context, Actions, Images, Assignees, Steps, and Notifications. The Steps tab is selected and highlighted with a red arrow.

Activity Guide Category: OPENENROLLMENT

Effective Date: 01/01/1900
Description: Open Enrollment
*Step Definition Rule: Not Applicable

Steps (1 of 12)

*Step: ACKNOWLEDGEMEN
*Description: Acknowledgement
*Long Description: Employee needs to acknowledge this step before they can review/edit sensitive information
*Service Type: PS Component
*Service Id: HC_ACKNOWLEDGEMENT_FL
 Fluid
 Required

▶ Post Processing PeopleCode ?
▶ AWE Integration ?

Fluid Configuration is Here !

Activity Guide Templates

13 rows

Add Activity Guide Template

Template	Category	Description	Long Description	Active	Update Template	Clone Template	Delete Template
EF_A1FF	Life Event	Adoption Event	Adoption Event	Yes			
EF_B2FF	Life Event	Birth Event	Birth Event	Yes			
EF_D3FF	Life Event	Divorce Event	Divorce Event	Yes			
EF_M4FF	Life Event	Marriage Event	Marriage Event	Yes			
ENROLLM	Open Enrollment	Open Enrollment	Employee Benefits Enrollment	Yes			
KUENROL	Open Enrollment	Benefits Open Enrollment	Employee Benefits Enrollment with Acknowledgement	Yes			
KUTER01	Human Resources Administrator	Activity Guide for Termination	This Activity Guide will allow an HR Administrator to follow a step-by-step process for termination	Yes			
OBDCAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBGDL1	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	Yes			
OBSTND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes			
OBUSA1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes			
QST0000	Create Questionnaire	Create Questionnaire	Activity guide for creating questionnaire.	Yes			
WSTESTB	Human Resources Administrator	TESTWSBJM	WS Test Activity Guide	Yes			



Clone the Template

Activity Guide Templates

13 rows

Cancel **Clone Template** Continue

Template ENROLLM
Description Open Enrollment

New Template Details

*Template WSROLL2
*Description WS Enrollment
*Effective Date 02/26/2019

Select the effective date of the template to clone.

Available Templates 1 row

Effective Date	Description
01/01/1900	Open Enrollment

Cloned

Activity Guide Templates

14 rows

Add Activity Guide Template

Template	Category	Description	Long Description	Active	Update Template	Clone Template	Delete Template
EF_A1FF	Life Event	Adoption Event	Adoption Event	Yes			
EF_B2FF	Life Event	Birth Event	Birth Event	Yes			
EF_D3FF	Life Event	Divorce Event	Divorce Event	Yes			
EF_M4FF	Life Event	Marriage Event	Marriage Event	Yes			
ENROLLM	Open Enrollment	Open Enrollment	Employee Benefits Enrollment	Yes			
KUENROL	Open Enrollment	Benefits Open Enrollment	Employee Benefits Enrollment with Acknowledgement	Yes			
KUTER01	Human Resources Administrator	Activity Guide for Termination	This Activity Guide will allow an HR Administrator to follow a step-by-step process for termination	Yes			
OBDCAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBDBL1	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	Yes			
OBSTND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes			
OBUSA1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes			
QST0000	Create Questionnaire	Create Questionnaire	Activity guide for creating questionnaire.	Yes			
WSROLL2	Open Enrollment	WS Enrollment	Employee Benefits Enrollment	Yes			
WSTESTB	Human Resources Administrator	TESTWSBJM	WS Test Activity Guide	Yes			



Update New Steps and Attributes

Total Steps in Enrollment AGC Category (12)

✕ Exit
Activity Guide Composer

Template: WSROLL2
Effective Date: 2019-01-01

< Previous
Next >
Save

Introduction
● Visited

Activity Guide Type
● Visited

General Information
● Visited

Security
● Visited

Additional Actions
● Visited

Sub Banner
● Visited

Select Steps
● Visited

Organize and Configure Steps
○ Not Started

Display and Processing
○ Not Started

Review and Activate
○ Not Started

Task: Select Steps

For this step, you need to select the steps you want to include in your Activity Guide Template.

The Category specified for this Activity Guide is **Open Enrollment** and the different steps that can be included for this template are displayed.

Total Steps for Template 9

Available Steps 12 rows

Add Step	Added Step Count	Step Definition Description	Long Description
<input type="button" value="Add Step"/>	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information
<input type="button" value="Add Step"/>	1	Home and Mailing Address	Enter home and mailing address changes
<input type="button" value="Add Step"/>	1	Benefits Summary	Benefits Summary
<input type="button" value="Add Step"/>	1	Benefits Statements	View Benefits Statements
<input type="button" value="Add Step"/>	1	Contact Information	Enter valid contact information.
<input type="button" value="Add Step"/>	1	Dependent/Beneficiary Info	Add and/or modify dependent/beneficiary information
<input type="button" value="Add Step"/>	1	Open Enrollment	Open Enrollment
<input type="button" value="Add Step"/>	0	Before to start video	Before to start video
<input type="button" value="Add Step"/>	1	Name	Enter name change information
<input type="button" value="Add Step"/>	1	Summary Page	Summary Page

Change Design, Steps, Prototype

✖ Exit
Activity Guide Composer

Template: WSROLL2
Effective Date: 2019-01-01

< Previous
Next >

- Introduction
● Visited
- Activity Guide Type
● Visited
- General Information
● Visited
- Security
● Visited
- Additional Actions
● Visited
- Sub Banner
● Visited
- Select Steps
● Visited
- Organize and Configure Steps
● Visited
- Display and Processing
 Not Started
- Review and Activate
 Not Started

Task: Organize and Configure Steps

Save

For this step, you will assign a description to each step and specify the order in which the steps need to be completed.

Since the Activity Guide Type is **Vertical Non Sequential**, you can create a group step. A group step provides you the ability to organize one or more steps into a group. A step assigned to the group step is considered a sub step.

You are also able to define additional attributes for your steps (i.e. Required, Start Date, Due Date, etc.) and the dependencies between certain steps to control the order of how steps are completed.

Finally, you are able to delete steps. If you need to add steps, you can always return to Select Steps and add more steps.

Selected Steps 10 rows

Add Group Step

Step Type	Move Up	Move Down	Step Description	Configure Group Step	Configure Attributes	Configure Dependencies	Configure Page Text	Step Details	Delete Step
Step		▼	<input type="text" value="Welcome"/>		⚙️	🔗	⌂	ℹ️	🗑️
Group Step	⬆️	⬇️	<input type="text" value="Personal Information"/>	⚙️	⚙️				🗑️
Sub Step		▼	<input type="text" value="Name"/>		⚙️	🔗		ℹ️	🗑️
Sub Step	⬆️	▼	<input type="text" value="Home and Mailing Address"/>		⚙️	🔗		ℹ️	🗑️
Sub Step	⬆️		<input type="text" value="Contact Information"/>		⚙️	🔗		ℹ️	🗑️
Step	⬆️	▼	<input type="text" value="Dependent/Beneficiary Info"/>		⚙️	🔗		ℹ️	🗑️
Step	⬆️	▼	<input type="text" value="Benefits Summary"/>		⚙️	🔗		ℹ️	🗑️
Step	⬆️	▼	<input type="text" value="Benefits Enrollment"/>		⚙️	🔗		ℹ️	🗑️

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invest wisely. deliver more.

Configure Page Message Text

The screenshot displays the 'Activity Guide Composer' application window. A 'Configure Page Text' dialog box is open, showing the configuration for a page message. The 'Step Description' is 'Welcome'. The 'Available Text Placeholders' field contains the text: '%BNE_OE_CTX_VW-FROM_DT%, %BNE_OE_CTX_VW-TO_DT%, %BNE_OE_CTX_VW-DESCR120%, %PERSONAL_DATA-NAME_DISPLAY%'. The 'Page Text' field is a rich text editor with a toolbar and a text area. The text area contains the message: 'Open enrollment is your annual opportunity to modify your benefit choices. The video gives you step by step instruction on how to enroll your benefits.' A red arrow points to the text in the text area.

Save and Activate

The screenshot shows the 'Activity Guide Composer' application window. The title bar includes an 'Exit' button, the application name 'Activity Guide Composer', and a flag icon. Below the title bar, the 'Template' is 'WSROLL2' and the 'Effective Date' is '2019-01-01'. A '< Previous' button is located in the top right corner of the main content area.

The interface is divided into two main sections. On the left is a vertical navigation pane with the following steps, each marked as 'Visited':

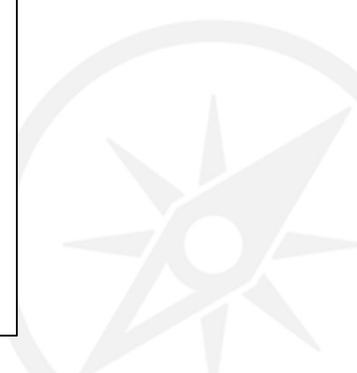
- Introduction
- Activity Guide Type
- General Information
- Security
- Additional Actions
- Sub Banner
- Select Steps
- Organize and Configure Steps
- Display and Processing
- Review and Activate** (highlighted in green)

The main content area is titled 'Task: Review and Activate'. It contains the following text:

Your activity guide template is activated.

If you need to make additional changes, you can inactivate activity guide template and return to any step in the Activity Guide Composer and make additional changes.

Below the text is a green button labeled 'Deactivate Activity Guide'.



Fluid eBenefits Life Events



eBenefits Life Events

- Guided on-line process
- **New** Fluid Activity Guide Composer
- Builds Step by Step Activity Guide, Sequence, Edits, and Notifications
- Configure “templates” to meet HR processes and policies
- Delivered Life Events for marriage, birth, divorce and adoption
- Clone Utility for Life Event template
- Still need Ben Admin
 - Event Classes
 - Event Rules

The screenshot shows the 'Activity Guide Composer' interface. At the top, it displays 'Template EF_M4FF' and 'Effective Date 1900-01-01'. There are 'Previous' and 'Next' navigation buttons. The left sidebar contains a list of sections: Introduction (Visited), Activity Guide Type (Visited), General Information (Not Started), Security (Not Started), Additional Actions (Not Started), Sub Banner (Not Started), **Select Steps (Visited)** (highlighted with a red arrow), Organize and Configure Steps (Not Started), Display and Processing (Not Started), and Review and Activate (Not Started). The main content area is titled 'Task: Select Steps' and contains instructions: 'The Activity Guide Template accessed is system data. System data is delivered and maintained by Oracle. You will only be able view the options defined for this step.' and 'The Category specified for this Activity Guide is Life Event and the different steps that can be included for this template are displayed.' Below this, it shows 'Total Steps for Template: 14' and a table of 'Available Steps' with 20 rows.

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	0	Acknowledgement	Acknowledgement for Life Events
Add Step	1	Home and Mailing Address	Enter home and mailing address changes
Add Step	0	Benefit Enrollment	Start benefits enrollment and enroll for available benefits.
Add Step	1	Benefit Summary	Review your current benefits
Add Step	1	Benefits Statements	View Benefits Statements
Add Step	0	Birth/adoption Date	Enter the date of child birth or date of adoption and submit.
Add Step	1	Contact Information	Enter valid contact information.
Add Step	0	Dependent/Beneficiary Coverage	Review summary information about dependent/beneficiary benefits

Employee Access via Benefit Details Tile

The screenshot displays the Oracle Employee Self Service interface. At the top, the Oracle logo and 'Employee Self Service' are visible. The dashboard is organized into a grid of tiles:

- OnBoarding**: Features an icon of three people.
- Open Enrollment**: Shows a countdown timer for enrollment ending on 12/31/2019. The timer displays 167 days, 14 hours, and 10 minutes and 56 seconds remaining.
- Company Directory**: Includes an icon of a person with a list below.
- Time**: Features an icon of a person and a clock.
- Payroll**: Shows an icon of a stack of money and indicates the last pay date as 02/28/2019.
- Personal Details**: Contains a profile picture of a woman.
- Talent Profile**: Includes an icon of a person with a star.
- Benefit Details**: Features an icon with a person, a plus sign, and a house. It indicates that enrollment ends on 12/31/2019. A red arrow points to this tile.
- Performance**: Shows an icon of a document with a chart and indicates 2 current documents.
- Total Rewards**: Includes an icon of a pie chart and a stack of coins, with a link to the Total Rewards Statement for 2018.

Select Life Events Menu Item

Employee Self Service **Benefit Details**

Rosanna Channing
Senior Accounting Manager

Life Events

There are some events that involve you as the Employee or your family members.
Review the choices and select the appropriate Event. Then enter the date of your event.

Employee

- I got married
- I had a baby
- I adopted or gained legal custody/guardianship of a child
- I got divorced/legally separated

*As Of

Start Life Event

Navigate Through Activity Guide Steps

- Step by step design using Fluid Activity Guide Composer
- Contains helpful instructional information
- Life Event Welcome page text can be updated as necessary
- Activity Guide on left highlights required and optional steps for the life event
- Activity Guide includes icons to track the status of each step
- Action buttons in the top right also guide the user through the process

Exit Marriage Event

Cancel Next >

Welcome to Marital Event
Complete

Marital Status
Not Started

Document Upload
Not Started

Benefit Summary
Not Started

Personal Information
Not Started

Dependent/Beneficiary Info
Not Started

Pay and Compensation
Not Started

Direct Deposit
Not Started

Benefit Enrollment
Not Started

Benefits Statements
Not Started

Summary
Not Started

Task: Welcome to Marital Event

Rosanna Channing

A marital status change is a good time to reconsider your health care coverage, tax withholdings, and other important information.

This guide will take you through all the steps necessary to ensure that your personal profile, benefits, and payroll information are updated to reflect this event in your life.

Enter Marriage Information

- Select Marriage Event Type
- Enter Event Date

Marriage

Cancel | < Previous | Next >

Save

Task: Marital Status

Current

Change Marital Status

*New Status

*As Of 07/01/2019

Civil Partnership
Common-Law
DissDeclLost Civil Partner
Dissolved Civil Partnership
Divorced
Head of Household
Married
Separated
Single
Surviving Civil Partner
Unknown
Widowed

Welcome to Marital Event
Complete

Marital Status
In Progress

Document Upload
Not Started

Benefit Summary
Not Started

Personal Information
Not Started

Dependent/Beneficiary Info
Not Started

Pay and Compensation
Not Started

Direct Deposit
Not Started

Benefit Enrollment
Not Started

Benefits Statements
Not Started

Summary
Not Started

Document Upload Step

The screenshot shows a web application interface for a 'Marriage Event'. The top navigation bar includes an 'Exit' button, the title 'Marriage Event', and 'Previous' and 'Next' buttons. The sidebar on the left lists various sections: 'Welcome to Marital Event' (Complete), 'Marital Status' (Complete), 'Document Upload' (Visited), 'Benefit Summary' (Not Started), 'Personal Information' (Not Started), 'Dependent/Beneficiary Info' (Not Started), 'Pay and Compensation' (Not Started), 'Benefit Enrollment' (Not Started), 'Benefit Election Review' (Not Started), and 'Summary' (Not Started). The main content area is titled 'Document Definition - New Attachment' and contains the following elements:

- Instructions:** You have chosen to enter a new attachment.
- Selection Criteria:**
 - Description: Marriage Certificate
 - *Subject: Marriage Certificate
 - Attachment:
-
- Go To: [Life Events - Document Upload](#)

Add Marriage Certificate

The screenshot shows a web application window titled "Marriage Event". On the left is a navigation sidebar with a list of sections: "Welcome to Marital Event" (Complete), "Marital Status" (Complete), "Document Upload" (Visited), "Benefit Summary" (Not Started), "Personal Information" (Not Started), "Dependent/Beneficiary Info" (Not Started), "Pay and Compensation" (Visited), "Benefit Enrollment" (Visited), "Benefit Election Review" (Visited), and "Summary" (Visited). The "Document Upload" section is highlighted in green.

The main content area is titled "Document Definition - New Attachment". It contains the following sections:

- Instructions:** "You have chosen to enter a new attachment."
- Selection Criteria:** A form with the following fields:
 - Description:** "Marriage Certificate"
 - *Subject:** "Marriage Cert"
 - Attachment:** A button labeled "Add Attachment"

A "File Attachment" dialog box is open in the foreground. It has a title bar with "File Attachment" and a close button. The dialog contains a text input field with the path "Z:\Business Development\Marketing - Presentations\la.l" and a "Browse..." button. Below the input field are two buttons: "Upload" and "Cancel". A red arrow points to the "Upload" button.



Add Marriage Certificate

The screenshot shows a web application window titled "Marriage Event". On the left is a navigation sidebar with a list of sections: "Welcome to Marital Event" (Complete), "Marital Status" (In Progress), "Document Upload" (Visited), "Benefit Summary" (Not Started), "Personal Information" (Not Started), "Dependent/Beneficiary Info" (Not Started), "Pay and Compensation" (Not Started), "Benefit Enrollment" (Not Started), "Benefit Election Review" (Not Started), and "Summary" (Not Started). The "Document Upload" section is highlighted in green. The main content area is titled "Document Definition - New Attachment". It contains an "Instructions" section stating "You have chosen to enter a new attachment." and a "Selection Criteria" section with a table:

Description	Marriage Certificate
*Subject	<input type="text" value="Marriage Certificate"/>
Attachment	Sample_Marriage_Certificate.pdf View Attachment

Below the table is a "Save" button and a "Go To" link for "Life Events - Document Upload". A red arrow points to the "View Attachment" button.

Document Added

x Exit
Marriage Event

Cancel | < Previous | Next >

- x Welcome to Marital Event
✔ Complete
- x Marital Status
 Not Started
- ✔ Document Upload
✔ Complete
- Benefit Summary
 Not Started
- ▶ Personal Information
 Not Started
- Dependent/Beneficiary Info
 Not Started
- ▶ Pay and Compensation
 Not Started
- Direct Deposit
 Not Started
- Benefit Enrollment
 Not Started
- Benefits Statements
 Not Started
- Summary
 Not Started

Saving Page x

Instructions

You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

Life Event Documents

Marriage Certificate

Add Attachment
Add Note

Attachments

☰ Q
1-1 of

Select	Sequence	Created	Author	Entry ID	Subject	Status
<input type="checkbox"/>	1	02/27/2019 6:24PM	Rosanna Channing	Marriage Certificate	Marriage Certificate	Submitted

Select All | Deselect All

Delete



Review Current Benefit Elections

✕ Exit
Marriage Event
⋮

Cancel | ← Previous | Next →

- ✱ Welcome to Marital Event
 Complete
- ✱ Marital Status
 Not Started
- Document Upload
 Complete
- Benefit Summary
 Visited
- ▶ Personal Information
 Not Started
- Dependent/Beneficiary Info
 Not Started
- ▶ Pay and Compensation
 Not Started
- Direct Deposit
 Not Started
- Benefit Enrollment
 Not Started
- Benefits Statements
 Not Started

Task: Benefit Summary

As Of

Refresh

Type of Benefit	Plan Description	Coverage or Participation	
Medical	Enhanced Medical Plan	Family	>
Dental	Enhanced Dental Plan	Family	>
Vision	Enhanced Vision Plan	Family	>
Life	Basic Life Plan	\$50000	>
Supplemental Life	Suppl Group Life 3x	Salary X 3	>
AD and D	Flat 25K AD&D	\$25000	>
Dependent AD and D		Waived	
Dependent Life		Waived	
Supplemental AD and D		Waived	
Short-Term Disability	Short Term Disability - 80%	80% of Salary	>
Long-Term Disability	Standard Long-Term Disability	50% of Salary	>



Personal Information Review / Update Contact Info

✕ Exit
Marriage Event
← Previous
Next →

- * **Welcome to Marital Event**
✔ Complete
- * **Marital Status**
✔ Complete
- **Document Upload**
○ Visited
- **Benefit Summary**
○ Visited
- **Personal Information**
○ Visited
- **Name**
○ Not Started
- **Home and mailing Address**
○ Not Started
- **Contact Information**
○ Visited
- **Emergency Contact**
○ Not Started
- **Dependent/Beneficiary Info**
○ Not Started
- **Pay and Compensation**
○ Visited
- **Benefit Enrollment**
○ Visited

Personal Information - Contact Information

Phone

+

Number	Extension	Type	Preferred
925.694.8990		Business	>
925.694.7959		Home	>
925.694.7959		Main	✔ >

Email

+

Email Address	Type	Preferred
HCMGENUser6@ap6023fems.us.oracle.com	Business	✔ >

Instant Message

+

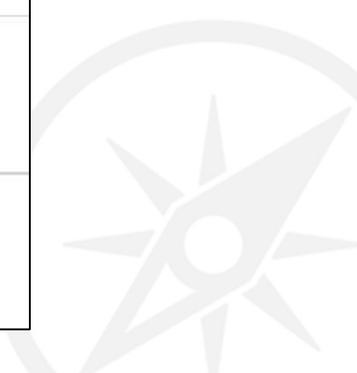
ID	Protocol	Domain	Preferred
VickiZinn	YAHOO	YAHOO	✔ >



Review / Update Payroll Info Step

✕ Exit
Marriage Event
← Previous
Next →

<p>✖ Welcome to Marital Event ✔ Complete</p> <p>✖ Marital Status ✔ Complete</p> <p>✔ Document Upload ✔ Complete</p> <p>○ Benefit Summary ○ Visited</p> <p>▶ Personal Information ○ Visited</p> <p>○ Dependent/Beneficiary Info ○ Visited</p> <p>▲ Pay and Compensation ○ Visited</p> <p style="background-color: #c6e0b4;">○ Tax Withholding ○ Visited</p> <p>○ Direct Deposit ○ Not Started</p> <p>○ Benefit Enrollment ○ Not Started</p> <p>○ Benefit Election Review ○ Not Started</p>	<h3>Pay and Compensation - Tax Withholding</h3> <p>Company Global Business Institute Status Active</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #f2f2f2;"> <th>Form Type</th> <th>Jurisdiction</th> <th colspan="3">Withholding Details</th> </tr> </thead> <tbody> <tr style="background-color: #fff9c4;"> <td>Federal</td> <td>Federal</td> <td>Tax Status</td> <td>Single</td> <td>Withholding Allowances 0</td> </tr> <tr style="background-color: #fff9c4;"> <td></td> <td></td> <td>Additional Amount</td> <td>0.00</td> <td>Additional Allowances</td> </tr> <tr style="background-color: #fff9c4;"> <td></td> <td></td> <td>Additional Percentage</td> <td></td> <td>Other</td> </tr> <tr> <td>State</td> <td>New York</td> <td>Tax Status</td> <td>Single</td> <td>Withholding Allowances 0</td> </tr> <tr> <td></td> <td></td> <td>Additional Amount</td> <td>0.00</td> <td>Additional Allowances</td> </tr> <tr> <td></td> <td></td> <td>Additional Percentage</td> <td></td> <td>Other</td> </tr> <tr> <td>Local</td> <td>NEW YORK</td> <td>Tax Status</td> <td>Single</td> <td>Withholding Allowances</td> </tr> <tr> <td></td> <td></td> <td>Additional Amount</td> <td></td> <td>Additional Allowances</td> </tr> <tr> <td></td> <td></td> <td>Additional Percentage</td> <td></td> <td>Other</td> </tr> </tbody> </table>	Form Type	Jurisdiction	Withholding Details			Federal	Federal	Tax Status	Single	Withholding Allowances 0			Additional Amount	0.00	Additional Allowances			Additional Percentage		Other	State	New York	Tax Status	Single	Withholding Allowances 0			Additional Amount	0.00	Additional Allowances			Additional Percentage		Other	Local	NEW YORK	Tax Status	Single	Withholding Allowances			Additional Amount		Additional Allowances			Additional Percentage		Other
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		Additional Amount	0.00	Additional Allowances																																															
		Additional Percentage		Other																																															
State	New York	Tax Status	Single	Withholding Allowances 0																																															
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Local	NEW YORK	Tax Status	Single	Withholding Allowances																																															
		Additional Amount		Additional Allowances																																															
		Additional Percentage		Other																																															



Begin Enrollment Step

The screenshot shows a web application window titled "Marriage Event". At the top right, there are buttons for "Cancel", "< Previous", and "Next >". The main content area is divided into two sections. On the left is a sidebar with a list of steps: "Welcome to Marital Event" (Complete), "Marital Status" (Complete), "Document Upload" (Complete), "Benefit Summary" (Visited), "Personal Information" (Not Started), "Dependent/Beneficiary Info" (Complete), "Pay and Compensation" (Visited), "Direct Deposit" (Visited), "Benefit Enrollment" (Visited), "Benefits Statements" (Not Started), and "Summary" (Not Started). The "Benefit Enrollment" step is highlighted in green. The main content area is titled "Task: Benefit Enrollment" and contains the following text: "Now we're ready to prepare your benefit options, based upon the Life Event information that you've entered. Your information will be analyzed to see if there is any impact to your eligibility for benefits, and determine whether changes to your existing enrollments are allowed. Select the 'Start My Enrollment' pushbutton to begin your benefit enrollment." Below this text is a button labeled "Start My Enrollment" with a red arrow pointing to it.



Enrollment for Marriage Event

Benefit Details
Marriage Event

Cancel < Previous Next >

- ★ Welcome to Marital Event Complete
- ★ Marital Status Complete
- Document Upload Complete
- Benefit Summary Visited
- Personal Information Not Started
- Dependent/Beneficiary Info Not Started
- Pay and Compensation Not Started
- Direct Deposit Not Started
- Benefit Enrollment Visited
- Benefits Statements Not Started
- Summary Not Started

Task: Benefit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Submit Enrollment

▼ Enrollment Summary

Your Pay Period Cost **\$28.15**

Status **Pending Review**

*Excess Credit Cash

Review Enrollment

Full Cost **\$210.00**

General Credits **-\$150.00**

Plan Credits **-\$31.85**

Benefit Plans

Wellness Credit	Medical	Dental
<p>Current No Coverage</p> <p>New No Coverage</p> <p>Status Pending Review</p> <p>Pay Period Cost \$0.00</p> <p style="text-align: right;">Review</p>	<p>Current Medical HMO Plan 2</p> <p>New Medical HMO Plan 2</p> <p>Status Pending Review</p> <p>1 Dependents</p> <p>Pay Period Cost \$27.23</p> <p style="text-align: right;">Review</p>	<p>Current Dental DMO</p> <p>New Dental DMO</p> <p>Status Pending Review</p> <p>1 Dependents</p> <p>Pay Period Cost \$3.11</p> <p style="text-align: right;">Review</p>
Vision	Life	Supplemental Life
<p>Current Waive</p> <p>New Waive</p> <p>Status Pending Review</p> <p>0 Dependents</p> <p>Pay Period Cost \$0.00</p> <p style="text-align: right;">Review</p>	<p>Current Basic Life Plan</p> <p>New Basic Life Plan \$50,000</p> <p>Status Pending Review</p> <p>1 Beneficiaries</p> <p>Pay Period Cost \$0.00</p> <p style="text-align: right;">Review</p>	<p>Current Suppl Group Life 1x</p> <p>New Suppl Group Life 1x \$150,000</p> <p>Status Pending Review</p> <p>1 Beneficiaries</p> <p>Pay Period Cost \$145.38</p> <p style="text-align: right;">Review</p>

Contact Information

Phone [646/350-1111](tel:6463501111)

Email HCMGENUser1@ap6023fems.us

Address
Benefits Administrator
500 George Washington Pkway
New York, NY 07666

Resources

[GBI Benefits Handbook](#)



Dependent Added

Cancel
Medical

All of our medical choices promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured. Enrollment in this benefit may require proof of coverage.

▼ Enroll Your Dependents

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

	Dependents	Relationship
<input checked="" type="checkbox"/>	Erik Mathers	Spouse
<input checked="" type="checkbox"/>	Johnny Mathers	Child

Add Dependent

▼ Enroll in Your Plan

The Family Cost showing is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage cost, select the help icon next to each plan option.

Besides any credits listed below, you will receive an additional \$4.62 credit to help with the cost of this benefit. You will only receive this credit if you select one of the following choices.

	Plan Name	Proof of Coverage	Cost (Before Tax)	Cost (After Tax)	Credit (Before Tax)	Credit (After Tax)	Pay Period Cost
<input type="checkbox"/>	Waive	Proof Required			\$7.38		\$-7.38
<input checked="" type="checkbox"/>	Medical HMO Plan 2		\$120.00		\$25.38		\$90.00

Overview of All Plans

▼ Select Primary Care Provider

Enrollment in this plan requires that you select a primary care provider. You must indicate whether or not you have already established a relationship with this provider, since some providers are not accepting new patients.

*Your Primary Care Provider ID

I have visited this provider before Yes

Use the same provider for all dependents Yes

[Primary Care Provider List](#)

Dependents	Primary Care Provider ID	Visited this provider before
Erik Mathers	<input type="text" value="HH2321"/>	<input checked="" type="checkbox"/> Yes
Johnny Mathers	<input type="text" value="HH2321"/>	<input checked="" type="checkbox"/> Yes



Changed Coverage Indicated

Benefit Details
Marriage Event

- ★ Welcome to Marital Event
✔ Complete
- ★ Marital Status
✔ Complete
- Document Upload
✔ Complete
- Benefit Summary
● Visited
- Personal Information
○ Not Started
- Dependent/Beneficiary Info
○ Not Started
- Pay and Compensation
○ Not Started
- Direct Deposit
○ Not Started
- Benefit Enrollment
● Visited
- Benefits Statements
● Visited
- Summary
○ Not Started

Task: Benefit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Submit Enrollment

Enrollment Summary

Your Pay Period Cost **\$90.92**

Status **Pending Review**

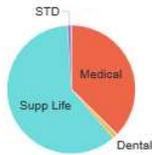
*Excess Credit Cash

Review Enrollment

Full Cost **\$272.77**

General Credits **-\$150.00**

Plan Credits **-\$31.85**



Benefit Plans

Wellness Credit

Current No Coverage
New No Coverage
Status **Pending Review**

Pay Period Cost **\$0.00**

Review

Medical

Current Medical HMO Plan 2
New Medical HMO Plan 2
Status **Changed** ←
👤 2 Dependents

Pay Period Cost **\$90.00**

Review

Dental

Current Dental DMO
New Dental DMO
Status **Pending Review**
👤 1 Dependents

Pay Period Cost **\$3.11**

Review

Vision

Current Waive
New Waive
Status **Pending Review**
👤 0 Dependents

Pay Period Cost **\$0.00**

Review

Life

Current Basic Life Plan
New Basic Life Plan \$50,000
Status **Pending Review**
👤 1 Beneficiaries

Pay Period Cost **\$0.00**

Review

Supplemental Life

Current Suppl Group Life 1x
New Suppl Group Life 1x \$150,000
Status **Pending Review**
👤 1 Beneficiaries

Pay Period Cost **\$145.38**

Review



Enrollment Elections Submitted

Marriage Event

Task: Benefit Enrollment Submit Enrollment

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$90.92** Full Cost **\$272.77**
Status **Visited** General Credits **-\$150.00**
*Excess Credit **Cash** Plan Credits **-\$31.85**

Review Enrollment

Benefits Alerts Done View

Your benefit choices have been successfully submitted to the Benefits Department.
Select View to review your Election Preview statement, Done to return to the Benefits Enrollment Summary

Wellness Credit

Current	No Coverage
New	No Coverage
Status	Pending Review

2 Dependents

Pay Period Cost	\$0.00	Review
-----------------	--------	--------

Pay Period Cost	\$90.00	Review
-----------------	---------	--------

Pay Period Cost	\$3.11	Review
-----------------	--------	--------

Vision

Current	Waive
New	Waive
Status	Pending Review

0 Dependents

Life

Current	Basic Life Plan
New	Basic Life Plan \$50,000
Status	Pending Review

1 Beneficiaries

Supplemental Life

Current	Suppl Group Life 1x
New	Suppl Group Life 1x \$150,000
Status	Pending Review

1 Beneficiaries



Election Preview Statement

Benefit Details **Marriage Event** Cancel < Previous Next >

Task: Benefits Statements

Statement Type

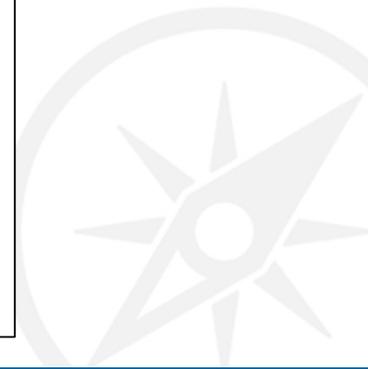
Event Date	Issue Date	Job Title	Enrollment Event	Statement Type
02/23/2019	02/28/2019	Finance Director	US Event Maintenance	Enrollment Preview

1 row

Navigation:

Left Panel:

- Welcome to Marital Event Complete
- Marital Status Complete
- Document Upload Complete
- Benefit Summary Visited
- Personal Information Not Started
- Dependent/Beneficiary Info Not Started
- Pay and Compensation Not Started
- Direct Deposit Not Started
- Benefit Enrollment Complete
- Benefits Statements** Visited
- Summary Not Started



Online Enrollment Preview

Benefits Statement

Statement Type **Enrollment Preview**

Enrollment Effective Date **02/23/2019**

Description **US Event Maintenance**

Statement Issue Date **02/28/2019**

[Print View](#)

This statement confirms your US Event Maintenance benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

[Collapse All](#)

Personal Information

This is your personal information currently on file. It is important that the data shown is complete and correct. If this information is not correct, update the information through the Personal Information or contact your Benefits Administrator.

Contact Information

Name	Betty Locherty
Mailing Address	643 Robinson St , Buffalo, NY 74940
Email Address	HCMGENUser1@ap6023fems.us.oracle.com

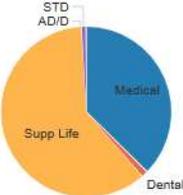
Eligibility Information

Home Address	343, Hill stone road , Buffalo, NY 74940
Gender	Female
Marital Status	Married
Birth Date	07/06/1945
Service Date	04/07/1989

Cost Summary

This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period	\$ 90.92
Full Cost	\$ 272.77
General Credits	\$ -150.00
Plan Credits	\$ -31.85
Excess Credit Rollover To	Cash



STD AD/D	Medical
Supp Life	Dental



Review Step Summary and Complete Life Event

* Benefit Details
Marriage Event

- * Welcome to Marital Event
● Complete
- * Marital Status
● Complete
- Document Upload
● Complete
- Benefit Summary
● Visited
- Personal Information
○ Not Started
- Dependent/Beneficiary Info
○ Not Started
- Pay and Compensation
○ Not Started
- Direct Deposit
○ Not Started
- Benefit Enrollment
● Complete
- Benefits Statements
● Visited
- Summary
● Visited

Task: Summary

Congratulations! You have completed your Marriage Event!

You may need to update the following documentation if you are changing your name:
 Drivers License, Social Security, Passport, Bank Accounts, Credit Cards, Voter Registration Card.

If you are moving, you may want to update address with the Post Office.

Select the Complete pushbutton to end this event.

Steps 13 rows

Step	Status	Date Completed	Required	Go to Step
Welcome to Marital Event	● Complete	02/28/2019	Yes	<input type="button" value="Go to Step"/>
Marital Status	● Complete	02/28/2019	Yes	<input type="button" value="Go to Step"/>
Document Upload	● Complete	02/28/2019	No	<input type="button" value="Go to Step"/>
Benefit Summary	● Visited		No	<input type="button" value="Go to Step"/>
Name	○ Not Started		No	<input type="button" value="Go to Step"/>
Home and mailing Address	○ Not Started		No	<input type="button" value="Go to Step"/>
Contact Information	○ Not Started		No	<input type="button" value="Go to Step"/>
Emergency Contact	○ Not Started		No	<input type="button" value="Go to Step"/>
Dependent/Beneficiary Info	○ Not Started		No	<input type="button" value="Go to Step"/>
Tax Withholding	○ Not Started		No	<input type="button" value="Go to Step"/>
Direct Deposit	○ Not Started		No	<input type="button" value="Go to Step"/>
Benefit Enrollment	● Complete	02/28/2019	No	<input type="button" value="Go to Step"/>
Benefits Statements	● Visited		No	<input type="button" value="Go to Step"/>

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invest wisely. deliver more.

Common Enhancements

eBenefits Presentation/Entry

- Benefit Election Review/Confirmation Print Updates
- Coverage Allowed to Highest Level without Evidence of Insurability
 - Top Idea for Advanced Benefits in My Oracle Support
 - Does the Enhancement Cover Your Requirements?
- Insurance Increment Entry (rather than Salary Multiples)
- Dependent/Beneficiary Required Fields (DOB, SSN)

Plan Requirements for Employee Designations

- Smoker Status – Credit for Non-Smokers
- Annual Wellness Initiatives – Credit for Healthy Lifestyles
- Dependent Health Coverage Surcharge – Deduction if Coverage Available with Dependent Employer

Benefits Open Enrollment

Enrollment Period 2/15/2019 - 12/31/2019
Rosanna Channing

Task: **Benefits Enrollment** (Status: Pending Review)

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost	\$88.03
Full Cost	\$432.03
General Credits	\$-275.00
Plan Credits	\$-69.00

*Excess Credit: Cash

Review Enrollment

Benefit Plans

Wellness Credit

Current No Coverage

Summary

Don't Forget

- Effective Dates – Must Coordinate Dates for Plans, Events and Payroll
- Configuration – Many Related Rules in Base Ben, Ben Admin, eBenefits, AWE and Payroll
- HR/Payroll Coordination – Review Action/Reason Events, Pay Calendars, and Deductions
- Dual Year Enrollment – Other Current Year Actions during Annual Enrollment
- Documentation – For Planning and Audit of Configuration Changes, Rules Mapping, and Reference Guides

Get More Information

- WorkStrategy can build your eBenefits Life Events Implementation Plan
- Get a copy of our sample Project Plan (MPP)



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PeopleSoft HCM 9.2 Upgrades
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