

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 | <i>HCM Needs Assessment, Vendor Selection, Budget Planning</i>      |
| • PeopleSoft HCM     | <i>Upgrades, Fluid UI, Talent Management, Process Improvement</i>   |
| • Cloud Services     | <i>Project Management, Configuration, Migration, Integration</i>    |
| • Cloud Apps         | <i>Performance, Goals, Succession, Talent Reviews, Compensation</i> |



## 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



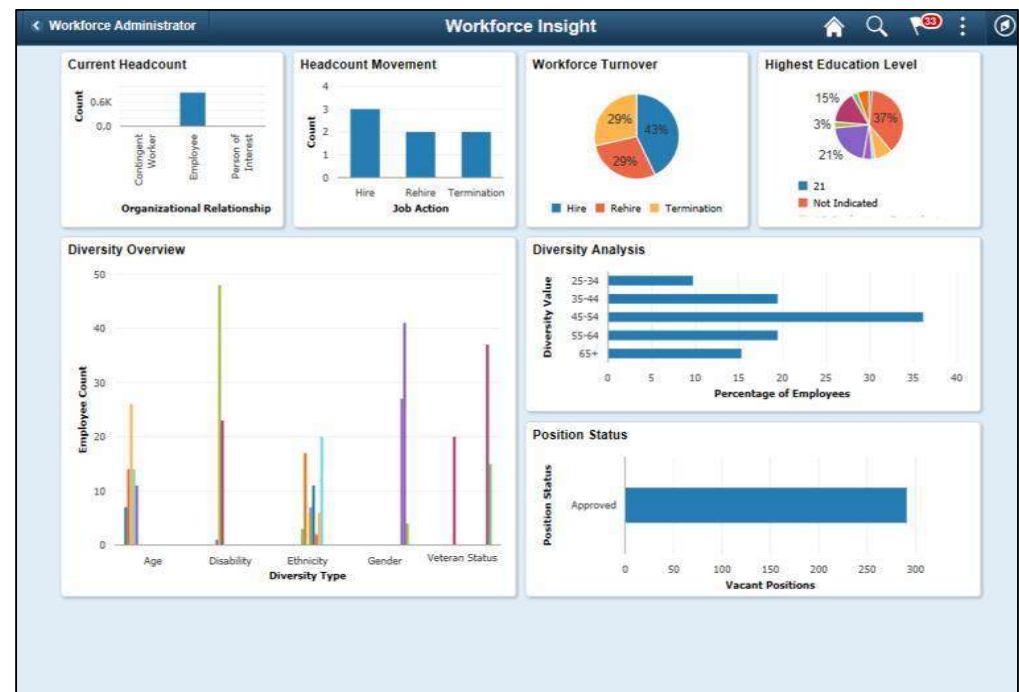
It's  
**Open  
Enrollment**  
time !



## 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



# MOS Fluid Benefit Enrollment Updates Page

## PeopleSoft HCM Fluid Benefits Enrollment Information (Doc ID 2527623.1)

 **PeopleSoft HCM Fluid Benefits Enrollment Information (Doc ID 2527623.1)**

**In this Document**  
[Details](#)  
[Actions](#)  
[Documentation is available with the following:](#)  
[Fluid Benefits Enrollment Bugs & current status from Development:](#)  
[Work is actively in progress, please open a Service Request and escalate if these issues are preventing your Open Enrollment:](#)  
[Contacts](#)  
[References](#)

**APPLIES TO:**  
PeopleSoft Enterprise HCM Benefits Administration - Version 9.2 to 9.2 [Release 9]  
Information in this document applies to any platform.

**DETAILS**  
Enhancements to the Fluid Benefits Enrollment are now available. This document provides a link to available documentation as well as a link to the Fluid Benefits Enrollment page.  
This Document is dynamic and it is expected that it will be continually updated, as such, please monitor this knowledge article applet.

**ACTIONS**  
**Documentation is available with the following:**

Feature	Documentation	Included in HCM 9.2 Image
Fluid Benefits Statement	<a href="#">Installation Document</a>	<a href="#">Bug 28895997</a> - PUM 29
	<a href="#">Supplemental Document</a>	
Fluid Benefits Enrollment	<a href="#">Installation Document</a>	<a href="#">Bug 28528775</a> - PUM 28
	<a href="#">Supplemental Document</a>	
Open Enrollment Activity Guide	<a href="#">Installation Document</a>	<a href="#">Bug 28539304</a> - PUM 28

### Fluid Benefits Enrollment Bugs & current status from Development:

Knowledge Article/Description	Bug ID	Included in HCM 9.2 Image
When the Benefit Enrollment Resource section is configured with a link, it does not open. However, this same link works when clicked within the Benefit Plan Tile such as Medical etc.	<a href="#">Bug 29610396</a>	PUM 31
Review Enrollment Button on Fluid Self Service Benefit Enrollment Summary Displays Nothing <a href="#">Document 2517051.1</a>	<a href="#">Bug 29474041</a>	PUM 31
Fluid Benefit Enrollment Error: "A SQL Error occurred. Please consult your system log for details" <a href="#">Document 2515859.1</a>	<a href="#">Bug 29461876</a>	PUM 31
ENROLLMENT AND CONFIRMATION STATEMENTS NOT SHOWING CORRECT SERVICE DATE	<a href="#">Bug 29767257</a>	PUM 31
FL ONLINE CONFIRMATION STATEMENT 2X PAY PERIOD CALCULATION ISSUE	Bug 29766330	PUM 31
eBenefits Fluid: Review Enrollment Displays Incorrect Per Pay Period Costs For 6x Plans <a href="#">Document 2537886.1</a>	<a href="#">Bug 29711121</a>	PUM 31
FLUID BEN ENROLLMENT - RELATED ACTIONS VISIBLE UNDER DEP BENIFICIARY STEP	Bug 29507479	PUM 31
Compile People Code Error In The Review Employee Benefits Section occurs in environments on earlier than 8.55.14 Tools Patch. <a href="#">Document 2532887.1</a>	<a href="#">Bug 29637625</a>	PUM 31
Need to prevent P1 29 Functionality For Benefits Enrollment Preview From Working <a href="#">Document 2532384.1</a>	<a href="#">Bug 29666392</a> <a href="#">Bug 29821548</a>	PUM 31
Online Confirmation Statement Process Leaves Behind The Files XML Files With Protected Health Information Data <a href="#">Document 2535671.1</a>	<a href="#">Bug 29666929</a>	PUM 31

## 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)

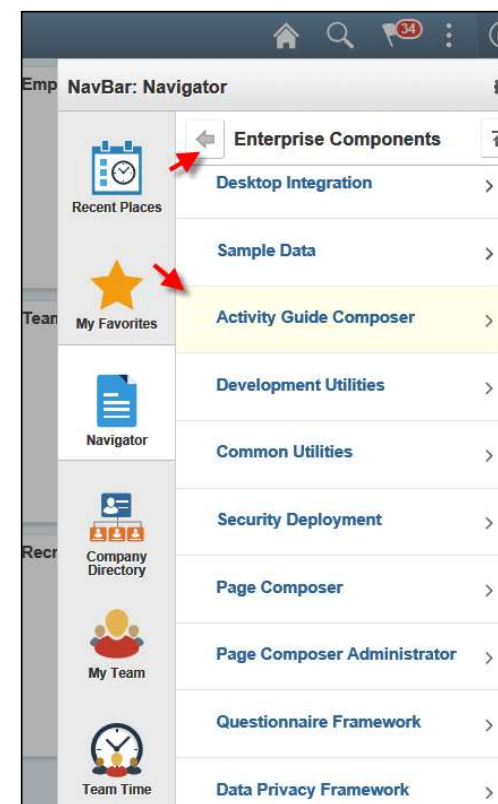
Product	Feature	Version	Min PT
eBenefits	The Life Event document approval workflow integrates with the HCM Delegation Framework, enabling Benefits Administrators to delegate authority of Life Event document approval. A Benefits Administrator can delegate the authority to approve Life Event documents 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





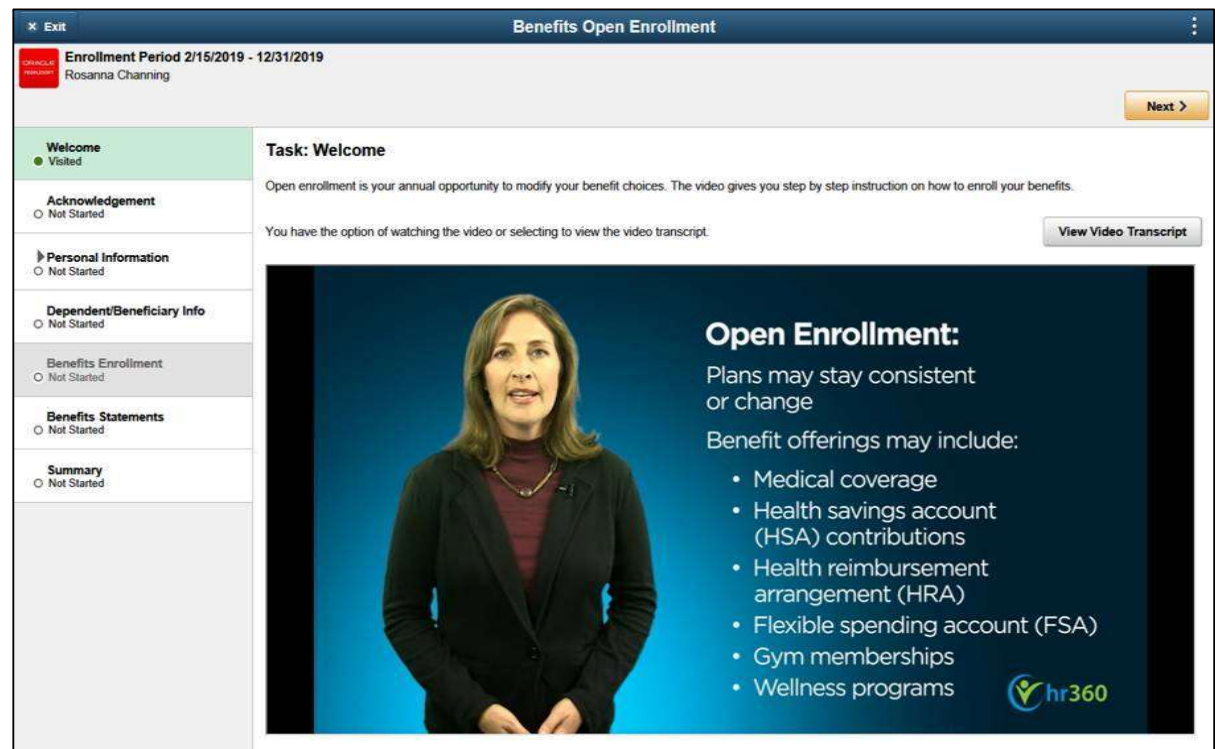
## PUM Enhancements (Activity Guide Composer)

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 <a href="https://docs.oracle.com/cd/E52319_01/infoportal/chatbot.html">https://docs.oracle.com/cd/E52319_01/infoportal/chatbot.html</a>	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



# 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

The screenshot displays the 'Benefits Open Enrollment' interface for Rosanna Channing during the enrollment period of 2/15/2019 to 12/31/2019. The interface includes a sidebar with navigation links: Welcome (Visited), Acknowledgement (Complete), Personal Information (Not Started), Dependent/Beneficiary Info (Not Started), Benefits Enrollment (Visited), Benefits Statements (Not Started), and Summary (Not Started). The main content area is titled 'Task: Benefits Enrollment' and includes a 'Submit Enrollment' button. Below this, the 'Enrollment Summary' section shows the 'Your Pay Period Cost' as \$88.03, 'Full Cost' as \$432.03, 'General Credits' as -\$275.00, and 'Plan Credits' as -\$69.00. The status is 'Pending Review' with an 'Excess Credit' dropdown set to 'Cash' and a 'Review Enrollment' button. A pie chart on the right shows the cost breakdown, with 'Medical' being the largest portion. The 'Benefit Plans' section is divided into three columns: 'Wellness Credit', 'Medical', and 'Dental'. Each column shows the current plan, new plan, status, and pay period cost. The 'Wellness Credit' plan has a cost of \$0.00. The 'Medical' plan has a cost of \$245.00. The 'Dental' plan has a cost of \$13.88. Each plan has a 'Review' button. At the bottom, there are links for 'Vision', 'Life', and 'Supplemental Life'.

Plan Type	Current Plan	New Plan	Status	Pay Period Cost	Action
Wellness Credit	No Coverage	No Coverage	Pending Review	\$0.00	Review
Medical	Enhanced Medical Plan	Enhanced Medical Plan	Pending Review	\$245.00	Review
Dental	Enhanced Dental Plan	Enhanced Dental Plan	Pending Review	\$13.88	Review

## 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

< Previous   Next >

Save

**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

12 rows

# Enhancement Requests, Customizations, Challenges

## Top Requests

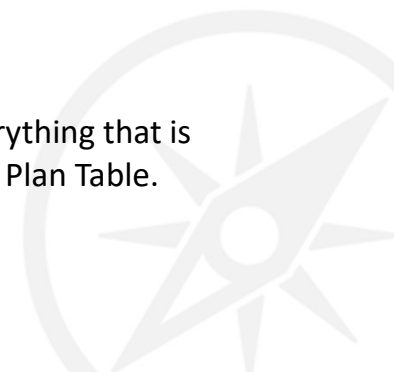
- Make Side Panel Configurable
  - Allow default for Grid vs. List on main page
  - More Resources for Guides
  - More Plan Type Contacts – limit 1 for 1X plans
  - Page Text Areas and Labels not all HTML Compatible
  - Changes to page field display
  - Changes to Alerts
  - More RTF areas – possible 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...

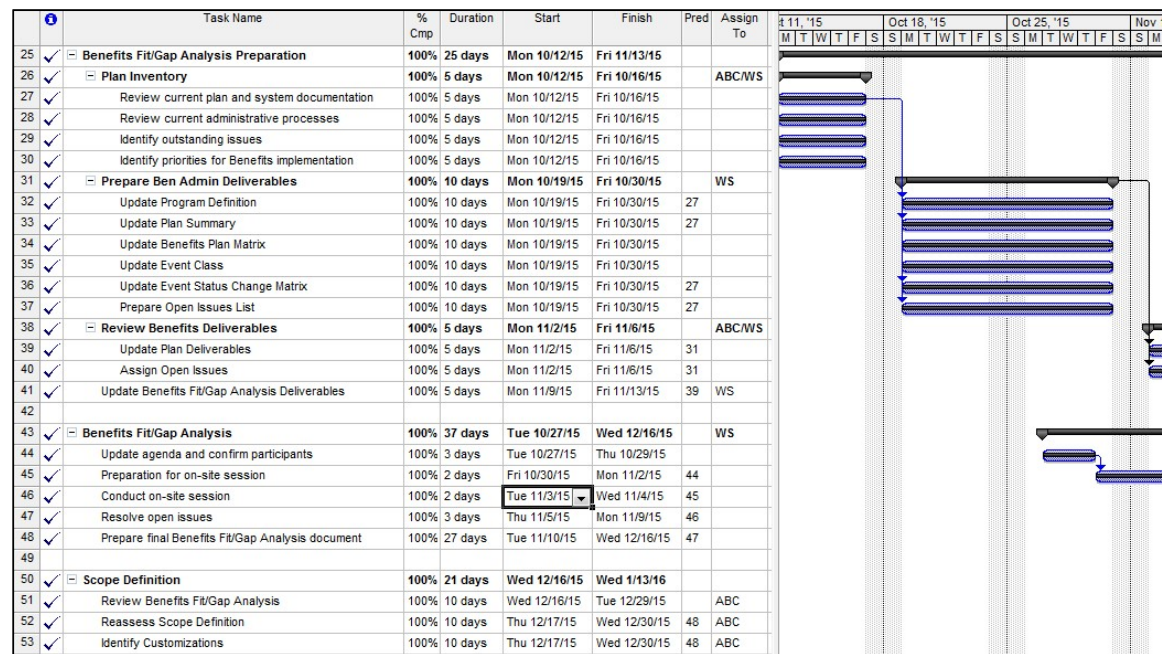
- **Ability to view uploaded documents after event**
  - Yes - Main Menu > Benefits > Review Employee Benefits > Document Upload
  - The documents are stored by Life event Type and Empl ID Type
- **How do you turn on and off the 1x2 Open Enrollment Tile? Is this automatically cleared after the cycle?**
  - 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
<b>Benefits Self-Service</b>				
Self-Service Access/Presentation				
Benefits Detail	✓			
Open Enrollment	✓			Remove Credit Pagelet
<b>eBenefits Configuration</b>				
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			✓	
<b>Benefits Enrollment:</b>				
Enrollment Summary		✓		Benefits Display Updates
Plan Election/Recap		✓		Error Messages Pre-Submit
<b>Benefit Statement</b>				
Online Display		✓		
Printable Document		✓		
<b>Activity Guides</b>				
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 displays the Oracle eBenefits Configuration interface. At the top, there's a navigation bar with 'ORACLE' logo, 'Health Benefits' dropdown, a search bar, and links for 'Advanced Search' and 'Last Search Results'. Below this, there are tabs for 'Benefit Program', 'Plan Type and Option' (which is active), and 'Cost'. The main content area shows 'Benefit Program' as 'KU1' and 'Effective Date' as '01/01/2005'. Under the 'Plan Type' section, there are input fields for 'Plan Type' (value: 10), 'DispPinSeq' (value: 10), 'Event Rules ID' (value: KU1X), 'Waive Coverage' (value: Allowed with Proof), and 'Dependent Rules ID' (value: PU1DR). To the right of these fields, there are checkboxes for 'HIPAA Plan' and 'COBRA Plan', and a 'Load Cross Plan Values' button. Below the 'Plan Type' section, there's a 'Self-Service Configuration' section with checkboxes for 'Collect Dependent/Beneficiary', 'Collect Fund Allocations', and 'Show if no choice'. At the bottom, there's a 'Handbook URL ID' field with the value 'KUBENI-HANDBOOK' and a search icon, which is highlighted by a red arrow.



# Text Catalog Changes

Navigation: 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 ▾ HEB Q

Sub ID begins with ▾  Q

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 Template Composer interface. The main window shows a table of templates with columns: \*Template Title, \*Life Event Type, Description, Active, and Action. The 'Marriage Event' row is highlighted. An 'Activity Guide Composer' dialog box is open, showing the 'Introduction' task. 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

**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.

**Left Sidebar:**

- Introduction (Visited)
- Activity Guide Type (Not Started)
- General Information (Not Started)
- Security (Not Started)
- Additional Actions (Not Started)

# 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.

**Define Authorization**

Authorization ID: EDITALL

**Authorization Details**

\*Description: Edit Attachments, Notes, Urls  
Short Description: Edit All  
Comments: Edit Attachments, Notes, Urls

**Authorization Options**

☒ Edit Attachments ☒ View Attachments  
☒ Edit Notes ☒ View Notes  
☒ Edit URLs ☒ View URLs

**Define Authorization Entries**

Entry ID: BN\_MARCERT

**Entry Definitions**

\*Effective Date: 01/01/1900  
\*Description: Marriage Certificate  
Short Description: Marriage C.  
Comments: Marriage Certificate posted here

**Entry Control**

☒ Attachments ☒ Notes ☐ URLs

**Define Authorization**

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





# Updating Videos

Navigation: Favorites ▾ Main Menu ▾ > PeopleTools ▾ > Utilities ▾ > Administration ▾ > URLs

ORACLE® All Search >> Advanced Search Last Search Results Add To ▾

New Window | Personalize Page

### URL Maintenance

URL Identifier: BNE\_OE\_VIDEO

\*Description: Welcome Video

\*URLID: https://www.youtube.com/embed/RrsgG\_GMTdw?rel=0

Comments: Open Enrollment's Welcome step

URL Properties

Search

Up next

AUTOPLAY

Embed Video

```
<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>
```

☐ Start at 3:28

EMBED OPTIONS

☒ Show player controls;

☐ Enable privacy-enhanced mode. ⓘ

COPY

for Employee Onboarding

Watch later Share

## 2. Company Policies

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

hr360

Onboarding

16:57

# 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

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			
OBDSUA1	OnBoarding	OnBoarding for USA	OnBoarding for USA	Yes			
POS_DAT	Manage Positions	Manage Position	Manage Position	Yes			
QST0000	Create Questionnaire	Create Questionnaire	Activity guide for creating questionnaire.	Yes			

# Designing Activity Guide Templates

## Open Enrollment Activity Guide Category Steps

**Activity Guide Composer**

Template: ENROLLM  
Effective Date: 1900-01-01

**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

**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	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

✕ Exit

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 at step.

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

**Activity Guide Composer**

Template: OBDUSA1  
Effective Date: 1900-01-01

**Introduction** (Visited)

**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 OnBoarding and the different steps that can be included for this template are displayed.

Total Steps for Template: 26

**Available Steps**

Add Step	Added Step Count	Step Definition Description	Long Description
Add Step	1	ACA 1095-Consent	The employee will provide consent using Form 1095-C Consent
Add Step	0	Acknowledgement	Employee needs to acknowledge this step before they can review/edit sensitive information.
Add Step	0	Banking	Enter your bank account and payment distribution information.
Add Step	0	Benefits Enrollment	Start benefits enrollment and enroll for available benefits.
Add Step	1	Fluid Benefits Enrollment	Start fluid benefits enrollment and enroll for available benefits.
Add Step	1	Competencies	Manage competencies and accomplishments in your current profile.
Add Step	1	Degrees	Manage degrees in your current profile.
Add Step	1	Dependent/Beneficiary Info	Dependent/Beneficiary Information
Add Step	0	Direct Deposits	Add or update your direct deposit information.
Add Step	1	Fluid Direct Deposits	Add or update your direct deposit information.
Add Step	1	Disability	Add or update disability status.
Add Step	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.

**Organize and Configure Steps** (Not Started)

**Display and Processing** (Not Started)

**Notifications** (Not Started)

**Review and Activate** (Not Started)

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 interface. At the top, the Oracle logo is on the left, and navigation icons (home, search, notifications with a '75' badge, and a settings icon) are on the right. The main content area features a grid of fluid tiles. The 'Open Enrollment' tile, highlighted with a red arrow, is a yellow rectangle containing a calendar icon with a red cross and a clock icon. It displays the text: 'Starts now until 12/31/2019. Your final enrollment must be submitted by 11:59 PM PST, 12/31/2019'. Below this, it shows a 'Countdown to Open Enrollment Deadline:' with a digital clock reading 'Days 230 02:31:39'. Other tiles include 'Company Directory' (organizational chart icon), 'Time' (person and clock icon), 'Payroll' (stack of money icon, 'Last Pay Date 02/28/2019'), 'Personal Details' (employee photo), 'Talent Profile' (person and star icon), 'Benefit Details' (person, cross, and house icon, 'Enrollment Ends 12/31/2019'), 'Performance' (document with bar chart icon, '6 Current Documents'), and 'Total Rewards' (pie chart and coins icon, 'Total Rewards Statement 2018').

ORACLE Employee Self Service

**Open Enrollment**

Starts now until 12/31/2019. Your final enrollment must be submitted by 11:59 PM PST, 12/31/2019

Countdown to Open Enrollment Deadline: Days 230 02:31:39

**Company Directory**

**Time**

**Payroll**

Last Pay Date 02/28/2019

**Personal Details**

**Talent Profile**

**Benefit Details**

Enrollment Ends 12/31/2019

**Performance**

6 Current Documents

**Total Rewards**

Total Rewards Statement 2018

## Video Content

✕ Exit

Benefits Open Enrollment

ORACLE  
PRODUCT

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

ORACLE  
PRODUCT

Benefits Welcome Video


Watch later Share



Grow Your Nest Egg

# Fluid Acknowledgement/Online Agreement

✕ Exit⋮

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

< PreviousNext >

<b>Welcome</b> <input checked="" type="radio"/> Visited	<b>Task: Acknowledgement</b>  <b>By checking Agree you understand the following:</b> <ul style="list-style-type: none"><li>• 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.</li><li>• You understand that you cannot change your benefit elections until the next Open Enrollment period, unless you have a qualified family status change.</li><li>• 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.</li><li>• You are responsible for meeting all program and deadlines for your election.</li></ul> <p>You understand that this serves as a legal and binding agreement</p> <p><a href="#">Terms and Conditions</a></p> <p><input checked="" type="checkbox"/> I Agree</p> <p><span>Save</span></p>
<b>Acknowledgement</b> <input checked="" type="radio"/> Visited	
<b>Personal Information</b> <input type="radio"/> Not Started	
<b>Dependent/Beneficiary Info</b> <input checked="" type="radio"/> Visited	
<b>Benefits Enrollment</b> <input type="radio"/> Not Started	
<b>Benefits Statements</b> <input checked="" type="radio"/> Visited	
<b>Summary</b> <input type="radio"/> Not Started	



## Update Personal Information

✕ Exit

Benefits Open Enrollment

< Previous

Next >

⋮

ORACLE  
TECHNOLOGY

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

Rosanna Channing

Welcome

☐ Visited

Acknowledgement

☒ Complete

Personal Information

☐ Visited

Name

☐ Visited

Home and Mailing Address

☐ Visited

Contact Information

☐ Not Started

Dependent/Beneficiary Info

☐ Visited

Benefits Enrollment

☐ Visited

Summary

☐ 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

>

# Update Dependent/Beneficiary Information


✕ Exit

Benefits Open Enrollment

< Previous

Next >

⋮

 **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	✓	✓	>



## Enrollment Page – Card View

**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

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**

Contact Information

Phone  
646/350-1111

Email  
[HCMGENUser1@ap6023fems.us](mailto:HCMGENUser1@ap6023fems.us)

Address  
Benefits Administrator  
123 Bowery Street  
New York, NY 07666

Resources

[GBI Benefits Handbook](#)

**Benefit Plans**

Wellness Credit	Medical	Dental
Current No Coverage New No Coverage Status Pending Review	Current Enhanced Medical Plan New Enhanced Medical Plan Status Visited 2 Dependents	Current Enhanced Dental Plan New Enhanced Dental Plan Status Pending Review 2 Dependents
Pay Period Cost \$0.00	Pay Period Cost \$245.00	Pay Period Cost \$13.88
Review	Review	Review

Vision	Life	Supplemental Life
Current Enhanced Vision Plan New Enhanced Vision Plan Status Pending Review 2 Dependents	Current Basic Life Plan New Basic Life Plan \$50,000 Status Pending Review 0 Beneficiaries	Current Suppl Group Life 3x New Suppl Group Life 3x \$270,000 Status Pending Review 1 Beneficiaries
Pay Period Cost \$11.50	Pay Period Cost \$0.00	Pay Period Cost \$59.40
Review	Review	Review



# 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

LTD

STD

Medical

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

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invest wisely. deliver more.

# 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
Select	Waive	Proof Required			\$16.00		\$-16.00
Select	Basic Out-of-Network Medical		\$121.00		\$55.00		\$56.00
✓	Enhanced Medical Plan		\$310.00		\$55.00		\$245.00
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

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

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

Add Dependent

▼ Enroll in Your Plan

The Family Cost showing is based on the dependent you select. To see other coverage cost, select the help icon.

Besides any credits listed below, you will receive one of the following choices.

Plan Name	
Select	Waive
Select	Basic Out-of-Network Medical
<input checked="" type="checkbox"/>	Enhanced Medical Plan
Select	Medical HMO Plan 2

Overview of All Plans

▼ Select Primary Care Provider

Overview of Medical Plans

▼ 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

Contact Information

Phone  
646/350-2222

Email  
HCMBENUser1@ap6023fems.i

Resources

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

[Blue Cross/ Blue Shield](#)

[Kaiser Permanente](#)



## Add Dependents and Beneficiaries

CancelAdd 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 Birth05/05/2019

\*GenderFemale

\*Relationship to EmployeeChild

DependentYes

BeneficiaryYes

\*Marital StatusSingle

\*StudentNo

\*DisabledNo

\*SmokerNon Smoker

As of

As of

As of

As of

**Address**

1430 North West Blvd  
Apt B215  
Guttenberg, NJ 07093

Home

Same as mine >

**National ID**

No data exists

Add National ID



# Life Plan Elections

CancelLifeDone

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

Percent

\*Secondary Allocation

Percent

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

Add Beneficiary

Contact Information

Phone

646/350-3333

Email

[HCMBENUser2@ap6023fems](mailto:HCMBENUser2@ap6023fems)

# Plan Election Updates

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

Exit

Benefits Open Enrollment

CHANGELINE REQUEST

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

< PreviousNext >

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

Medical

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

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# Plan Election Updates

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

Exit

Benefits Open Enrollment

ORACLE REPORT

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

Medical

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	Changed	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	2 Beneficiaries	\$0.00	Changed	Review

# Review Enrollment Elections and Print Option

Exit

Benefits Open Enrollment

ORACLE  
PERFORMANT

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

< Previous

Next >

Submit Enrollment

Welcome

Visited

Acknowledgement

Complete

Personal Information

Visited

Dependent/Beneficiary Info

Visited

Benefits Enrollment

Visited

Benefits Statements

Not Started

Summary

Not Started

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 Visited

\*Excess Credit Cash

Review Enrollment

Full Cost \$432.03

General Credits \$-275.00

Plan Credits \$-69.00

LTD STD

Medical

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

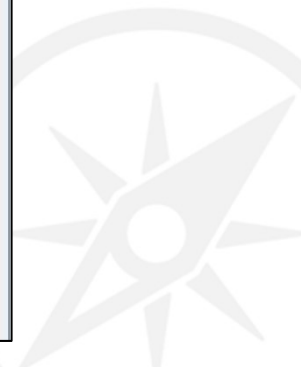
Pay Period Cost \$13.88

Review

Vision

Life

Supplemental Life



# Review Enrollment Elections

**Review 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 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	<b>\$ 88.03</b>
Full Cost	\$ 432.03
General Credits	\$ -275.00
Plan Credits	\$ -69.00
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	<a href="#">2 Dependents</a>	\$ 245.00
Enhanced Dental Plan	Family	<a href="#">2 Dependents</a>	\$ 13.80
Enhanced Vision Plan	Family	<a href="#">2 Dependents</a>	\$ 11.50
Basic Life Plan		<a href="#">2 Beneficiaries</a>	

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

**PERSONAL INFO**

Name: Robert Channing  
 Date of Birth: 01/01/1980  
 Relationship: Spouse  
 Marital Status: Married  
 Dependent: Yes  
 Beneficiary: Yes

**DEPENDENTS ENROLLMENTS**

Enhanced Medical Plan: Robert Channing  
 Enhanced Dental Plan: Robert Channing  
 Enhanced Vision Plan: Robert Channing

**DEPENDENTS DESIGNATIONS**

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

**INVESTMENT ALLOCATIONS**

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

**Global Business Institute**  
 GBI US Fulltime Benefit Page

Robert Channing  
 Senior Accounting

This election preview is for information only. It is not a contract. Please refer to the actual plan documents for complete details.

Robert Channing  
 05/16/2019

Page 2 of 2

5/16/2019 3:16 AM

# Enrollment Statement

Update via BI Publisher Report Definition (BEN\_ER\_STMT01.rtf)

Oracle BI Publisher Report Definition interface showing search results for reports starting with 'BEN'.

**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 Report Name begins with BEN

☐ Include History ☐ Correct History

Search Advanced Search

**Search Results** Show Detail

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

Find an Existing Value | Add a New Value

Oracle BI Publisher Report Definition interface showing the Template configuration for the report BENERSTMTVW.

**Template**

Report Name: BENERSTMTVW

Template ID: BENERSTMTVW\_1  
Description: Review Enrollment online  
\*Language Code: English  
Channel: [Dropdown]  
☒ Default Template

**Template Files**

Effective Date: 01/06/1900  
\*Status: Active  
Template File: BEN\_ER\_STMT01.rtf  
Upload Preview ☐ Use Alt. XML

Buttons: Add, Update/Display, Include History, Correct History

# Benefit Statements

Employees can view current and historical Enrollment Previews and Confirmation Statements

✕ Exit

Benefits Open Enrollment

ORACLE  
PERFECT

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  
Confirmation Statement  
Enrollment Preview

1 row

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

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## 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.

Steps8 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

Exit

Benefits Open Enrollment

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

< PreviousNext >

Welcome

Visited

Acknowledgement

Complete

Personal Information

Visited

Dependent/Beneficiary Info

Visited

Benefits Enrollment

Complete

Benefits Statements

Visited

Summary

Visited

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 Submitted

\*Excess Credit Cash

Review Enrollment

Full Cost \$432.03

General Credits \$-275.00

Plan Credits \$-69.00

LTD

STD

Medical

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

Current Enhanced Vision Plan

New Enhanced Vision Plan

Status Visited

2 Dependents

Life

Current Basic Life Plan

New Basic Life Plan \$50,000

Status Changed

2 Beneficiaries

Supplemental Life

Current Suppl Group Life 3x

New Suppl Group Life 3x \$270,000

Status 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 Cash

Review Enrollment

Full Cost \$432.03

General Credits \$-275.00

Plan Credits \$-69.00

LTD

STD

Medical

Benefit Plans

Plan Type

Current

Pay Period Cost

Status

Actions

Wellness Credit

No Coverage

\$0.00

Pending Review

Review

Medical

Enhanced Medical Plan

Enhanced Medical Plan

2 Dependents

\$245.00

Changed

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

Visited

Review

Life

Basic Life Plan

Basic Life Plan \$50,000

2 Beneficiaries

\$0.00

Changed

Review

Supplemental Life

Suppl Group Life 3x

Suppl Group Life 3x \$270,000

1 Beneficiaries

\$59.40

Visited

Review

AD and D

Flat 25K AD&D

Flat 25K AD&D \$25,000

1 Beneficiaries

\$0.25

Changed

Review

Dependent AD and D

Waive

Waive

\$0.00

Visited

Review

Dependent Life

Waive

Waive

\$0.00

Pending Review

Review

Benefits Alerts

View

Done

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

Contact Information

Phone

646/350-1111

Email

HCMGENUser1@ap6023fems.us

Address

Benefits Administrator

123 Bowery Street

New York, NY 07666

Resources

[GBI Benefits Handbook](#)

# View and Print Submitted Enrollment Elections

Statement Type: Enrollment Preview

Enrollment Effective Date: 01/01/2020

[View Submitted Enrollment](#)

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	<b>\$ 88.03</b>
Full Cost	\$ 432.03
General Credits	\$ -275.00
Plan Credits	\$ -69.00
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	<a href="#">2 Dependents</a>	\$ 245.00

## Creating Fluid Confirmation Statements



# Creating Confirmation Statements

Benefits Administrator role has access to Confirmation Statement process



# Confirm Statement Printing Options

**Workforce Administrator** **Benefits Administrator** [New Window](#) [Personalize](#)

**Benefits Statement Options**

Statement Type: Confirmation Statement  
Schedule ID:

**Statement Control** [1 of 1](#) [View All](#)

\*Effective Date: 01/01/1900 [+](#) [-](#)

\*Report Name for Viewing: BENCFSTMTVW [Q](#) Online Ben Confirmation Stmt  
Report Name for Printing: BENCFSTMT [Q](#) Print Ben Confirmation Stmt  
Employees Per File:

**Self Service Configuration**

☒ Available in Self Service  
☒ Email Notification

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Add](#) [Update/Display](#) [Include History](#) [Correct History](#)

**Left Navigation Menu:**

- Employee/Dependent Information
- Enroll in Benefits
- Review Employee Benefits
- Benefits Management
- Benefits Configuration**
  - Benefit Program
  - Benefit Rates
  - Open Enrollment Definition
  - Benefit Program Table
  - Benefit Plan Table
  - Event Rules
  - Eligibility Rules
  - Life Event Rules
  - Limit Table
  - Schedule Table
  - Benefits Statement Options**
  - Administrative Contacts
  - Enrollment Contact Assignment



# Confirmation Statements

Create Benefit Confirmation Statements for all employees or individual employees

**Workforce Administrator** **Benefits Administrator** New Window Personalize Page

**Online Confirmation Statements**

Run Control ID: WS Report Manager Process Monitor Run

Schedule ID:  (Leave blank for all schedules)

**Statement Process Selection**

☒ Online Only ☐ Online and Print ☐ Print Only  
☐ Draft

**Process Status to Include**

☐ Election Error ☒ Finalized - Enrolled

**Participants Selection**

☐ Include All Employees

	*Empl ID	First Name	Last Name	Ben Record	Event ID		
1	<input type="text" value="KU0046"/>	Rosanna	Channing	<input type="text" value="0"/>	<input type="text" value="0"/>	+	-

Save Return to Search Previous in List Next in List Notify Add Update/Display

# Employees Can Now View Statements

Employees view statements from the Benefit Details tile

Employee Self Service

Benefit Details

Home

Search

Flag

More

Refresh

Benefits Summary

Life Events

Dependent/Beneficiary Info

Benefits Enrollment

Benefit Statements

Affordable Care Act

Rosanna Channing

Senior Accounting Manager

Benefit Statements

Statement Type

Confirmation Statement

Enrollment Preview

2 rows

Filter

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	>

# Online and Printable Confirmation Statements

**Benefits Statement**

Statement Type: Confirmation Statement      Description: Open Enrollment 2019

Enrollment Effective Date: 01/01/2019      Statement Issue Date: 02/28/2019

[Print View](#)

This statement confirms your Open Enrollment 2019 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: Rosanna Channing  
Mailing Address: 1430 North West Blvd Apt B215, Guttenberg, NJ 07093  
Email Address: Rosanna.Channing@oraclesample.com

**Eligibility Information**

Home Address: 1430 North West Blvd Apt B215, Guttenberg, NJ 07093  
Gender: Female  
Marital Status: Married  
Birth Date: 01/04/1967  
Service Date: 08/29/1986

**Cost Summary**

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

Your Cost Per Pay Period	<b>\$ 68.23</b>
Full Cost	\$ 412.23
General Credits	\$ -275.00
Plan Credits	\$ -69.00
Excess Credit Rollover To	Cash

**ACME ROCKET COMPANY**

Global Business Institute      Your 2019 Benefits Confirmation Statement  
GBI US Fulltime Benefit Pgm      Election Type: OPEN ENROLLMENT 2019  
Effective Date: 01/01/2019  
Statement Issue Date: 02/28/2019

**Rosanna Channing**  
Senior Accounting Manager  
Employee ID: KU0046

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: 1430 North West Blvd Apt B215, Guttenberg, NJ 07093  
Mailing Address: 1430 North West Blvd Apt B215, Guttenberg, NJ 07093  
Email Address: Rosanna.Channing@oraclesample.com  
Gender: Female  
Marital Status: Married  
Birthdate: 1967-01-04  
Service Date: 1986-08-29

**Cost Summary**

	Amount
Total Pay Period Deduction from Pay	\$ 68.23
Total Pay Period Cost	\$ 412.23
Total Pay Period Credit	\$ 344.00
Credit Rollover to	Cash

**Election Summary**

Benefit	Coverage	Category Base	Your Cost Per Pay Period
Wellness Credit			
Enhanced Medical Plan	Family		\$ 245.00
Enhanced Dental Plan	Family		\$ 13.88
Enhanced Vision Plan	Family		\$ 11.50
Basic Life Plan		\$ 50,000.00	
Suppl Group Life 2x		\$ 180,000.00	\$ 39.60
Flat 25K AD&D		\$ 25,000.00	\$ 0.25
Dependent AD and D			
Dependent Life			
Supplemental AD and D			
Short Term Disability - 60%		\$ 7,500.00	\$ 3.00
Standard Long-term Disability		\$ 7,500.00	\$ 30.00
GBI Sick Leave Plan			
GBI Vacation Time			
Flex Spending Health - U.S.	No Coverage		
Flex Spending Dependent Care	No Coverage		
Vacation Buy	No Coverage		
Vacation Sell	No Coverage		

Benefit	Pre-Tax	After Tax	Voluntary Amt	Voluntary Pct

# Designing the Confirmation Statement

Update via BI Publisher Report Definition (BEN\_CF\_STMT01.rtf)

**Oracle BI Publisher Interface - Template Configuration**

Report Name: BENCFSTMTVW

Template ID: BENCFSTMTVW\_1  
Description: Benefits statement  
\*Language Code: English  
Channel: [Dropdown]  
☒ Default Template

Template Files

Effective Date: 01/30/2019  
\*Status: Active  
Template File: BEN\_CF\_STMT01\_workstrategy.rtf  
Upload Preview ☐ Use Alt. XML

**Preview of Confirmation Statement:**

**ACME ROCKET COMPANY**

GLOBAL BUSINESS INSTITUTE  
GBI US Fulltime Benefits Program  
Your 2017 Benefits Confirmation Statement  
Election Type: OPEN ENROLLMENT  
Effective Date: 01/01/2017

Antonio Santos  
Administrative Assistant  
Employee ID: KU0010

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**

Field	Value
Home Address	4689 Z Street, Sacramento, CA 94246
Mailing Address	4689 Z Street, Sacramento, CA 94246
Email Address	antonio.santos@oracle.com
Gender	Male
Marital Status	Married
Birthdate	1963-03-09
Service Date	2010-07-15

**Cost Summary**

Category	Amount
Total Cost	\$ 154.90
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	3.00%	\$ 71.54
Enhanced Dental	Family		\$ 4.13
Standard Vision Plan	Family		\$ 2.08
Basic Life		\$ 50,000	\$ 2.46
Supplemental Life 2x Salary		\$ 133,000	\$ 0.06
AD and D 25K		\$ 25,000	\$ 0.06
Flex Spending Health - US		\$ 2,500	\$ 53.19

**Benefit Option**


Benefit Option	Pre-Tax	After Tax	Voluntary Amt	Voluntary Pct
Profit Sharing	\$ 0.00	\$ 0.00		
Employee Stock Purchase	\$ 0.00	\$ 0.00		
Pension Plan 1 - U.S.			\$ 25.00	0.00%

**Dependents and Beneficiaries**

Name	Date of Birth	Relationship	Marital Status	Dependent	Beneficiary
Megan Santos	1965-10-12	Spouse	Married	Yes	Yes
Marguerite Santos	1992-03-18	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>
</BEN_CF_STMT>
```



for each Employee  
COMPANY\_DESCR  
PROGRAMNAME

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  
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

FECOST_TYPE	Amount
	AMOUNTend

Election Summary

Benefit	Coverage	Category Base	COST_LBL
FEPLAN	OPTION	CATEGORY	COST end

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 each BENEFIT_OPTION	DEPENDENT

Beneficiary Designations

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

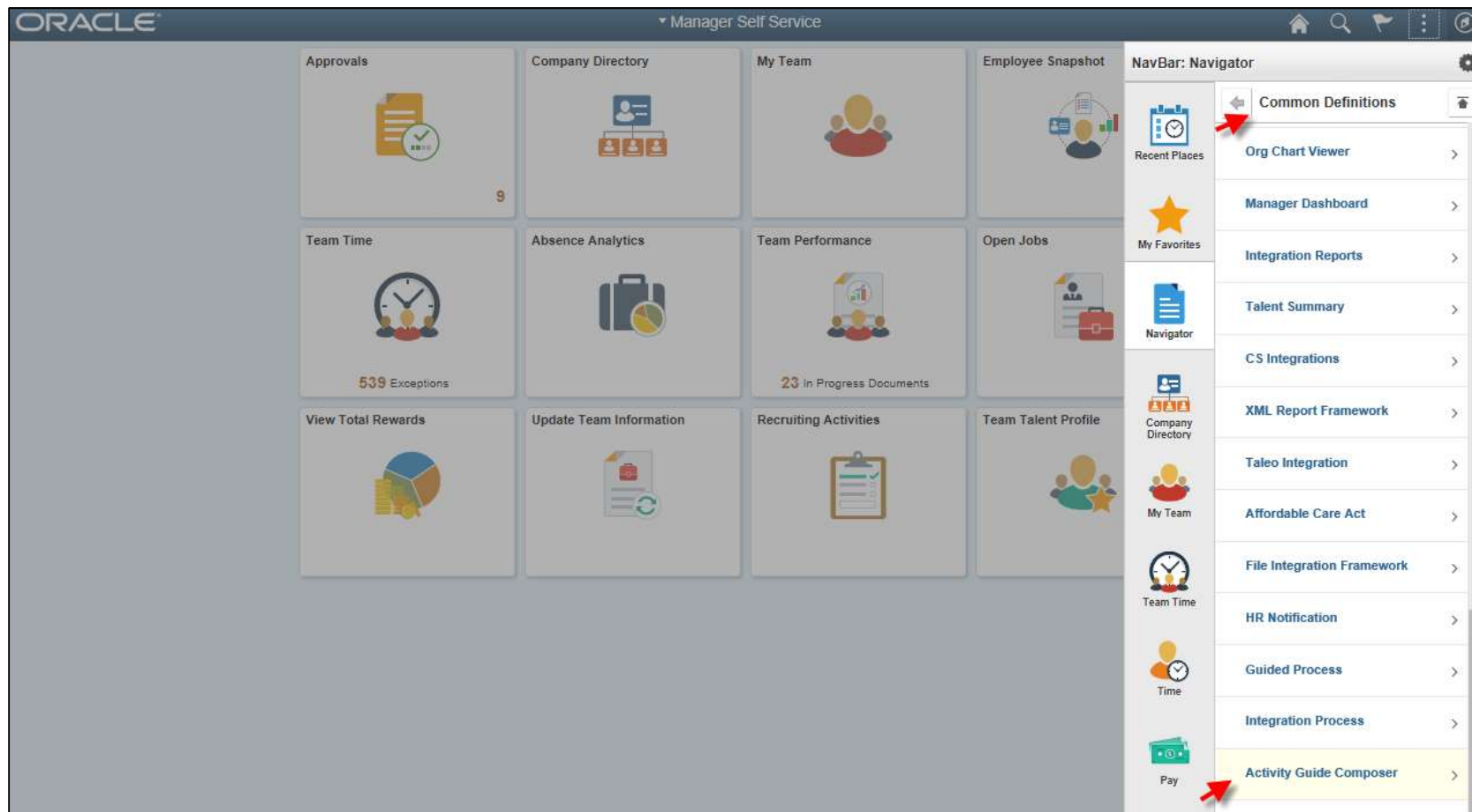
## Activity Guide Composer Open Enrollment





# Fluid Activity Guide Composer

\* PUM 31 – AG Composer moved to Enterprise Components



# AGC Template Category

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Activity Guide Composer ▾ > Categories

ORACLE® All Search Advanced Search

Find an Existing Value Add a New Value

▼ Search Criteria

Search by: Activity Guide Category ▾ begins with

☐ Include History ☐ Correct History

Search Advanced Search

Search Results

View All 1-6 of 6 ▾

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

Favorites ▾ Main Menu ▾ > Enterprise Components ▾ > Activity Guide Composer ▾ > Categories

ORACLE® All Search Advanced Search Last Search Results

Category Security Context Actions Images Assignees Steps Notifications

Activity Guide Category OPENENROLLMENT

Category 1 of 1 ▾ View All






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

Steps 1 of 12 ▾ View All


\*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 !

< Home 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			
OBDKAN1	OnBoarding	OnBoarding for Canada	OnBoarding for Canada	Yes			
OBDGBL1	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	Yes			
OBDSTND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes			
OBDUSA1	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				
OBGGBL1	OnBoarding	Day 1 Onboarding	Day 1 Onboarding	Yes				
OBDESTND	OnBoarding	Standard OnBoarding	Basic OnBoarding steps	Yes				
OBDEUSA1	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
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



# 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		▼	Welcome		⚙	🔗	📄	ℹ	🗑
Group Step	⬆	⬇	Personal Information	⚙	⚙				🗑
Sub Step		▼	Name		⚙	🔗		ℹ	🗑
Sub Step	⬆	▼	Home and Mailing Address		⚙	🔗		ℹ	🗑
Sub Step	⬆		Contact Information		⚙	🔗		ℹ	🗑
Step	⬆	▼	Dependent/Beneficiary Info		⚙	🔗		ℹ	🗑
Step	⬆	▼	Benefits Summary		⚙	🔗		ℹ	🗑
Step	⬆	▼	Benefits Enrollment		⚙	🔗		ℹ	🗑

## Configure Page Message Text

The screenshot displays the 'Activity Guide Composer' application window. A 'Configure Page Text' dialog box is open, showing the 'Page Text' configuration for a step titled 'Welcome'. The 'Available Text Placeholders' field lists several placeholders: %BNE\_OE\_CTX\_VW-FROM\_DT%, %BNE\_OE\_CTX\_VW-TO\_DT%, %BNE\_OE\_CTX\_VW-DESCR120%, %PERSONAL\_DATA-NAME\_DISPLAY%. The 'Page Text' area contains a rich text editor with a toolbar and the text: '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 editor. The background shows a sidebar with a list of steps and a compass icon.

Activity Guide Composer

Template: WSROLL2  
Effective Date: 2019-01-01

**Configure Page Text**

**Page Text**

Step Description: Welcome

Available Text Placeholders: %BNE\_OE\_CTX\_VW-FROM\_DT%, %BNE\_OE\_CTX\_VW-TO\_DT%, %BNE\_OE\_CTX\_VW-DESCR120%, %PERSONAL\_DATA-NAME\_DISPLAY%

Page Text

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.

## Save and Activate

✕ ExitActivity Guide Composer🚩⋮

Template: WSROLL2  
Effective Date: 2019-01-01

⏪ Previous

<b>Introduction</b> ● Visited	<b>Task: Review and Activate</b>  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.  <span>Deactivate Activity Guide</span>
<b>Activity Guide Type</b> ● Visited	
<b>General Information</b> ● Visited	
<b>Security</b> ● Visited	
<b>Additional Actions</b> ● Visited	
<b>Sub Banner</b> ● Visited	
<b>Select Steps</b> ● Visited	
<b>Organize and Configure Steps</b> ● Visited	
<b>Display and Processing</b> ● Visited	
<b>Review and Activate</b> ● Visited	

## 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

Activity Guide Composer

Template: EF\_M4FF  
Effective Date: 1900-01-01

< Previous   Next >

**Introduction**  
● Visited

**Activity Guide Type**  
● Visited

**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

**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 view the options defined for this step.

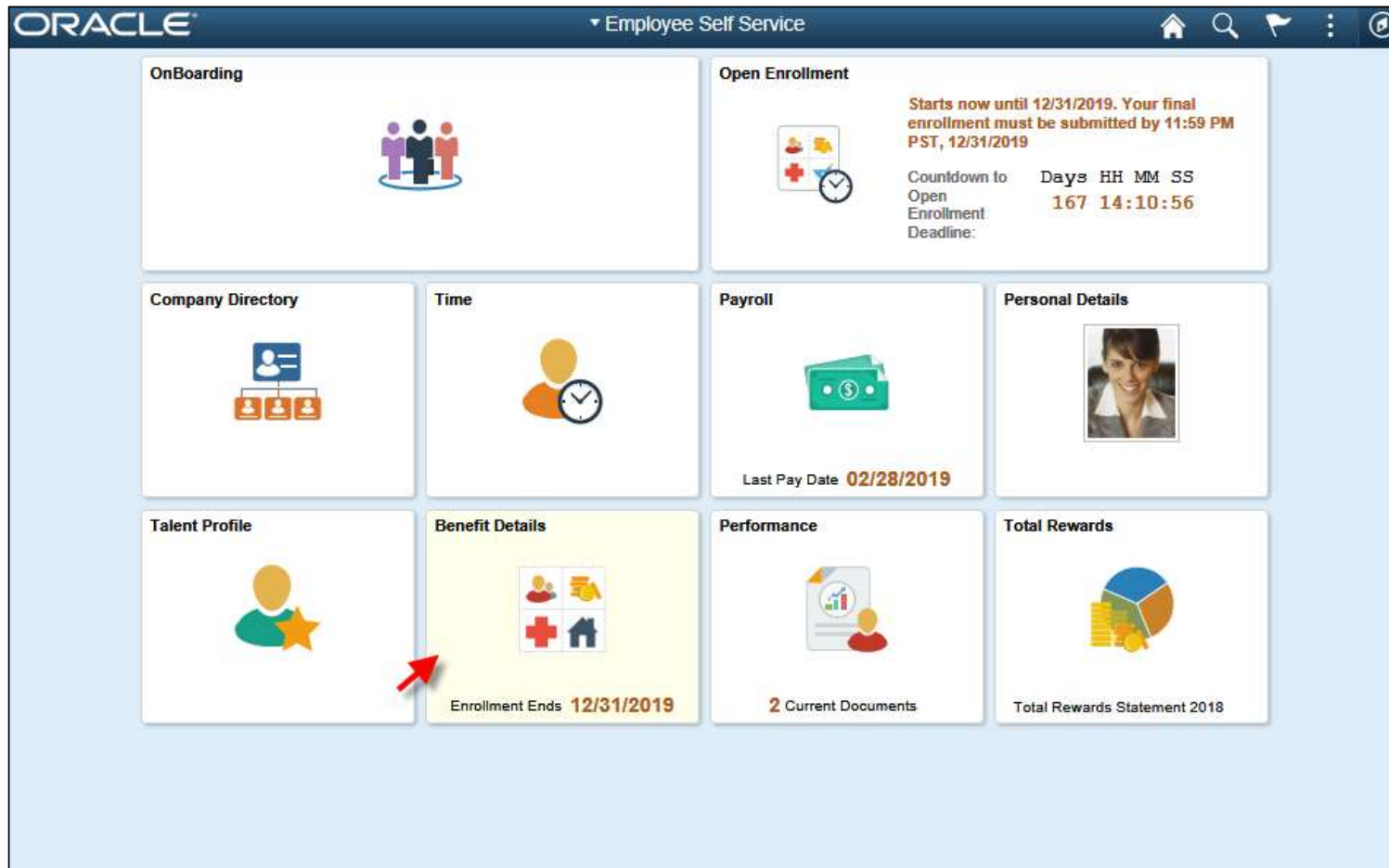
The Category specified for this Activity Guide is Life Event and the different steps that can be included for this template are displayed.

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

## Employee Access via Benefit Details Tile





## 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

**Marriage Event**

Cancel Next >

**Welcome to Marital Event**  
Complete

**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.

**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

## Enter Marriage Information

- Select Marriage Event Type
- Enter Event Date

Marriage

Exit

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

[Exit](#)

Marriage Event

[< Previous](#)

[Next >](#)

[New Window](#) | [Help](#) | [Personalize Page](#)

✖ 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

Summary

☐ Not Started

Document Definition - New Attachment

▼ Instructions

You have chosen to enter a new attachment.

▼ Selection Criteria

Description

Marriage Certificate

\*Subject

Marriage Certificate

Attachment

Add Attachment

Save

Go To

[Life Events - Document Upload](#)

## Add Marriage Certificate

The screenshot shows a web application interface for a 'Marriage Event'. On the left is a 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. The main area is titled 'Document Definition - New Attachment'. It contains instructions: 'You have chosen to enter a new attachment.' and 'Selection Criteria'. Under 'Selection Criteria', there is a 'Description' field with the value 'Marriage Certificate' and a '\*Subject' field with the value 'Marriage Cert'. Below these is an 'Attachment' section with an 'Add Attachment' button. A 'File Attachment' dialog box is open in the foreground, showing a file path 'Z:\Business Development\Marketing - Presentations\la.l' and a 'Browse...' button. The dialog has 'Upload' and 'Cancel' buttons, with a red arrow pointing to the 'Upload' button.

Exit

Marriage Event

< Previous

Next >

New Window | Personalize Page

Document Definition - New Attachment

Instructions

You have chosen to enter a new attachment.

Selection Criteria

Description Marriage Certificate

\*Subject Marriage Cert

Attachment

Add Attachment

Save

Go To

File Attachment

Z:\Business Development\Marketing - Presentations\la.l

Browse...

Upload

Cancel

## Add Marriage Certificate

✕ ExitMarriage Event< PreviousNext >

New Window | Personalize Page

✱ 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

Summary  
🟢 Not Started

### Document Definition - New Attachment

▼ Instructions

You have chosen to enter a new attachment.

▼ Selection Criteria

Description

Marriage Certificate

\* Subject

Marriage Certificate

Attachment

Sample\_Marriage\_Certificate.pdf

View Attachment

Save

Go To

[Life Events - Document Upload](#)



## Document Added

×

Exit

Marriage Event

⋮

Cancel< PreviousNext >

✖ Welcome to Marital Event

✔ Complete

✖ 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

✖

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 AttachmentAdd Note

Attachments

1-1 of

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

Select AllDeselect 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

02/27/2019

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
<a href="#">925.694.8990</a>		Business	>
<a href="#">925.694.7959</a>		Home	>
<a href="#">925.694.7959</a>		Main	✔ >

Email

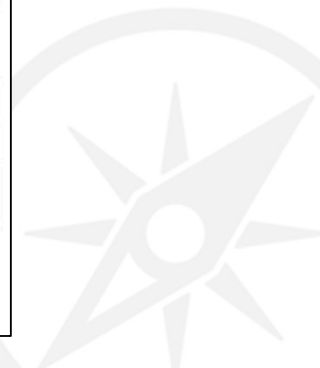
+

Email Address	Type	Preferred
<a href="#">HCMGENUser6@ap6023fems.us.oracle.com</a>	Business	✔ >

Instant Message

+

ID	Protocol	Domain	Preferred
VickiZinn	YAHOO	YAHOO	✔ >



## Review / Update Payroll Info Step

✕ Exit

Marriage Event

< Previous

Next >

★ Welcome to Marital Event

✔ Complete

★ Marital Status

✔ Complete

Document Upload

✔ Complete

Benefit Summary

○ Visited

▶ Personal Information

○ Visited

Dependent/Beneficiary Info

○ Visited

▲ Pay and Compensation

○ Visited

**Tax Withholding**

○ Visited

Direct Deposit

○ Not Started

Benefit Enrollment

○ Not Started

Benefit Election Review

○ Not Started

Pay and Compensation - Tax Withholding

Company Global Business Institute

Status Active

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



## Begin Enrollment Step

✕ Exit

Marriage Event

Cancel< PreviousNext >

★ 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

Summary  
○ Not Started

**Task: Benefit Enrollment**

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.

Start My Enrollment



# 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

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

\$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

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 Pending Review

1 Dependents

Pay Period Cost \$27.23

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

Contact Information

Phone

646/350-1111

Email

HCMGENUser1@ap6023fems.us.o

Address

Benefits Administrator  
500 George Washington Pkwy  
New York, NY 07565

Resources

GBI Benefits Handbook

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## 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="button" value="Select"/>	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"/> <b>Yes</b>
Johnny Mathers	<input type="text" value="HH2321"/>	<input checked="" type="checkbox"/> <b>Yes</b>





# Enrollment Elections Submitted

**Benefit Details** **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](#)

**Benefit Plans**

**Wellness Credit**

Current	No Coverage
New	No Coverage
Status	Pending Review

**Pay Period Cost** **\$0.00** [Review](#)

**Vision**

Current	Waive
New	Waive
Status	Pending Review

**Life**

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

**Supplemental Life**

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

**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

**Benefit Enrollment** [View](#)

**Summary** [View](#)



## Election Preview Statement

Benefit Details

Marriage Event

CancelPreviousNext

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

Task: Benefits Statements

Statement Type

1 row

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



# Online Enrollment Preview

**Benefits Statement**

Statement Type: Enrollment PreviewDescription: US Event MaintenancePrint View

Enrollment Effective Date: 02/23/2019Statement Issue Date: 02/28/2019

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

Cancel

< Previous

Complete

★ 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	Go to Step
Marital Status	Complete	02/28/2019	Yes	Go to Step
Document Upload	Complete	02/28/2019	No	Go to Step
Benefit Summary	Visited		No	Go to Step
Name	Not Started		No	Go to Step
Home and mailing Address	Not Started		No	Go to Step
Contact Information	Not Started		No	Go to Step
Emergency Contact	Not Started		No	Go to Step
Dependent/Beneficiary Info	Not Started		No	Go to Step
Tax Withholding	Not Started		No	Go to Step
Direct Deposit	Not Started		No	Go to Step
Benefit Enrollment	Complete	02/28/2019	No	Go to Step
Benefits Statements	Visited		No	Go to Step

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## 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

The screenshot shows the 'Benefits Open Enrollment' page for Rosanna Channing. The enrollment period is 2/15/2019 - 12/31/2019. The left sidebar contains a navigation menu with the following items: Welcome (Visited), Acknowledgement (Complete), Personal Information (Visited), Dependent/Beneficiary Info (Not Started), Benefits Enrollment (Visited), Benefits Statements (Not Started), and Summary (Not Started). The main content area is titled 'Task: Benefits Enrollment' and includes a 'Submit Enrollment' button. Below this, the 'Enrollment Summary' section displays the following information: Your Pay Period Cost is \$88.03; Status is Pending Review; Full Cost is \$432.03; General Credits are \$-275.00; Plan Credits are \$-69.00; and Excess Credit is set to Cash. A pie chart on the right shows the breakdown of costs, with Medical being the largest portion. At the bottom, the 'Benefit Plans' section shows 'Wellness Credit' with a status of 'Current No Coverage'.

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

Medical

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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