Setting Up ADP Workforce Now Employee Self Service for Benefits Enrollments

Handout Manual

Need support after training?
To exchange tips and best practices with fellow users, get on The Bridge—an online community built exclusively for ADP clients.
ADP Trademarks
The ADP® logo and ADP® are registered trademarks of ADP, LLC. ADP Workforce Now® is a registered trademark of ADP, LLC. The Bridge Sponsored by ADP & Bubble Talk Design® is a registered trademark of ADP, LLC. ADP A more human resource.SM is a service mark of ADP, LLC.

Third-Party Trademarks
Global Crossing® and Ready-Access® are registered trademarks of Global Crossing Holdings, Ltd. in the United States and other countries.
WebEx® is a registered trademark or trademark of Cisco Systems, Inc. and/or its affiliates in the U.S. and certain other countries.
All other trademarks and service marks are the property of their respective owners.
Contents

Course Introduction
Navigating WebEx ................................................................. 1
Course Purpose ........................................................................ 2
Course Agenda ........................................................................ 2
TheBridge.adp.com ................................................................. 3
Implementation Questions ...................................................... 3
Setting Up Employee Self Service for Benefits Enrollments ...... 4

Verifying Employee Self Service Rights
Overview ................................................................................ 5
What Are Employee Access Permissions? .............................. 5
Reviewing Employee Access Permissions Job Aid .................... 6
What Are Workflows? .............................................................. 7
Reviewing Approval Email Notifications for an Activity Job Aid ........................................................................ 8
Enabling Enrollment Email Notifications Job Aid .................... 9
What Are Employee Content Rights? ....................................... 10
Explore: The Employee Content Rights Tab ......................... 10
Updating Content Rights Job Aid ............................................. 11
Defining Waivable Plan Types Job Aid .................................... 12

Customizing Plan Content
Overview ................................................................................. 13
What Is Customized Plan Content? ........................................... 13
Practice: Customizing Plan Content ........................................ 14
Practice Results: Customizing Plan Content ......................... 15

Setting Up Plan Groupings
Overview ................................................................................. 16
What Is a Plan Grouping? ......................................................... 16
Explore: Plan Grouping Tab, Part 1 ........................................... 17
Explore: Plan Grouping Tab, Part 2 ......................................... 18
Practice: Adding and Reordering Plan Groupings ..................... 19
Practice Results: Adding and Reordering Plan Groupings ......... 20
Creating Plan Comparison Groups
Overview ................................................................. 22
What Are Plan Comparison Groups?............................... 22
What Are Plan Comparison Validation Tables?............... 23
Practice: Creating Plan Comparison Groups.................. 24
Practice Results: Creating Plan Comparison Groups....... 25
Practice: Adding Plan Comparison Information to an Existing Benefit Plan........ 26
Practice Results: Adding Plan Comparison Information to an Existing Benefit Plan ............................................. 27

Setting Up Enrollment Profiles
Overview ..................................................................... 29
What Are Enrollment Profiles? ........................................ 29
Explore: Add a New Enrollment Profile, Available Actions Page .................. 30
Using Automatic Enrollment ........................................... 31
Practice: Setting Up an Enrollment Profile ....................... 32
Practice Results: Setting Up an Enrollment Profile .......... 33
What Are Multiple Enrollment Profiles? .......................... 34

Enrolling in Benefits Using Employee Self Service
Overview ..................................................................... 35
Explore: Choose Plans Page .......................................... 35
Practice: Transferring an Employee, Activating the Work Event Enrollment Profile, and Enrolling in Benefits .......... 36
Practice Results: Transferring an Employee, Activating the Work Event Enrollment Profile, and Enrolling in Benefits ..... 38
Knowledge Check .......................................................... 41

Course Closing
How to Access Support Job Aid ........................................ 42
How to Access TheBridge.adp.com Job Aid ...................... 43
Continuing Education Credits ......................................... 43
Training Evaluation .......................................................... 44
Setting Up ADP Workforce Now Employee Self Service for Benefits Enrollments (80879) .............................................. 45

Appendix
Course Introduction

Navigating WebEx

Annotation Tools

Chat

Feedback

Full Screen Mode
Course Purpose
This course prepares you to set up ADP Workforce Now Employee Self Service for benefits enrollments.

Course Agenda
- Verifying Employee Self Service Rights
- Customizing Plan Content
- Setting Up Plan Groupings
- Creating Plan Comparison Groups
- Setting Up Enrollment Profiles
- Enrolling in Benefits Using Employee Self Service
TheBridge.adp.com

TheBridge® is an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics. You can access TheBridge.adp.com to do the following and more:

- Learn how other professionals are getting more from their ADP solutions with time-saving resources and helpful features.
- Join community spaces or topics of interest, including tax, payroll, HR and benefits, and time and labor management.
- Connect with other payroll practitioners, HR professionals, featured industry representatives, and ADP subject matter experts.
- Share your experiences.
- Check the Frequently Asked Questions or ask the community.

Implementation Questions

List any follow-up items that you may need to discuss with your implementation consultant (IC) or implementation specialist (IS):

- ______________________________________________________
- ______________________________________________________
- ______________________________________________________
- ______________________________________________________
- ______________________________________________________
- ______________________________________________________
Setting Up Employee Self Service for Benefits Enrollments

When setting up Employee Self Service for benefits enrollments, you should complete the following tasks in this suggested order:

1. Verifying Employee Self Service rights
2. Customizing plan content
3. Setting up plan groupings
4. Creating plan comparison groups
5. Setting up enrollment profiles
Verifying Employee Self Service Rights

Overview

As part of your preparation for setting up Employee Self Service for benefits enrollments, you need to review employee access permissions, content rights, and waive plans to ensure that employees can view or edit their information and waive plan coverage if applicable.

Depending on your company’s policies, you may want to set up workflows for these types of updates if you require employee changes to benefits-related information to be reviewed and/or approved by a practitioner.

What Are Employee Access Permissions?

Employee access permissions define menu access for employees who are associated with a specific security profile.

Example

In preparation for your annual enrollment period, you review security profiles to ensure that your employees are permitted access to enrollment-related information and can edit beneficiaries in Employee Self Service.
Reviewing Employee Access Permissions Job Aid

Scenario

In preparation for open enrollment, you want to ensure that employees are permitted to access their benefits enrollments and edit beneficiary information in Employee Self Service on the Myself menu.

Instructions

Starting Point: Setup > Security > Access Permissions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Menu Access</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>On the <strong>Access Permissions</strong> page, select <strong>Standard Employee</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>On the <strong>Edit Profile</strong> page, select <strong>Myself</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>Make the appropriate selections.</td>
</tr>
<tr>
<td>5</td>
<td>Click <strong>Save</strong>.</td>
</tr>
</tbody>
</table>
What Are Workflows?

Workflows are repeated patterns of activities. They automate your company’s review, approval, and notification processing. This automation helps ensure that all of the steps in your company's review, approval, and notification processes are completed within the time frames that your company requires.

You can set up workflows for activities that employees complete in Employee Self Service, such as the following:

- Define approval or notification paths for employee activities, such as benefits changes or adding dependents.
- Identify the approvers for activities.
- Provide audit trails for monitoring the approval processes of activities.

Example

Krista Volker used Employee Self Service to change her benefits enrollments to include her husband. Your company requires that practitioners approve benefits changes.

The workflow for this type of request sends an approval task through the Message Center to the practitioner, James Townsend. James can either approve or decline Krista’s request. When James approves the request, Krista’s benefits enrollments are updated, and she receives an approval notification through the Message Center.

1. The employee submits a benefits change request.

2. The practitioner receives the request in the Message Center and responds.

3. The employee receives notification of the approval in the Message Center.
Overview

In ADP Workforce Now, you can apply workflows to activities. You can temporarily or permanently change the approval email notifications that are sent to those designated in the workflow for specific activities.

Scenario

You want to customize an email notification that is sent to employees when practitioners approve employees' requests to add child dependents.

Instructions

Starting Point: Setup > Approval Process > Activity Configuration

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the card for the activity that you want to configure, click (edit).</td>
</tr>
<tr>
<td>2</td>
<td>Click Advanced Options.</td>
</tr>
<tr>
<td>3</td>
<td>In the Activity-Specific Emails section, define and activate the appropriate email notifications.</td>
</tr>
<tr>
<td>4</td>
<td>Click Save.</td>
</tr>
<tr>
<td>5</td>
<td>Click Back to Standard Activities.</td>
</tr>
</tbody>
</table>

Additional Resources

For more information about setting up workflows, including designating approval paths, see the following courses:

- Approval Process Basics for ADP Workforce Now virtual class
- Setting Up Approval Process Email Notifications for ADP Workforce Now web-based training
- Setting Up Approval Process Escalations for ADP Workforce Now web-based training
- Setting Up Approval Process Exceptions for ADP Workforce Now web-based training
Enabling Enrollment Email Notifications Job Aid

Scenario
You want to automatically notify employees by email of their enrollment selections.

Instructions
Starting Point: Setup > Benefits > Benefits Settings > General Settings

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the Enrollment Notification section, select Send Enrollment Email Notification.</td>
</tr>
<tr>
<td>2</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>

Example: Enrollment Email Notification

Tip
Depending on how you configure your activity notifications, you may want to revisit these selections before your open enrollment period. Your Message Center may be inundated with emails given the number of employees making changes to their personal information and benefits selections.
**What Are Employee Content Rights?**

Employee content rights determine which benefits-related fields are displayed to your employees in Employee Self Service.

**Example**

You want employees to view a summary of their current enrollments and access a benefits statement, so you grant the appropriate benefits employee content rights.

**Explore: The Employee Content Rights Tab**

![Benefits Settings](image)

**Options and Descriptions**

The following table describes the options on the Employee Content Rights tab:

<table>
<thead>
<tr>
<th>This Option</th>
<th>Allows Employees to View:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Compensation</td>
<td>Annual compensation information</td>
</tr>
<tr>
<td>Current Enrollments Summary</td>
<td>Benefits Summary</td>
</tr>
<tr>
<td>Compare Plans</td>
<td>A comparison of plans at the time of enrollment</td>
</tr>
<tr>
<td>Benefits Statement</td>
<td>Current and/or future benefits information</td>
</tr>
<tr>
<td>Plan Drop Warning</td>
<td>Warnings that the plan is scheduled to be terminated</td>
</tr>
<tr>
<td>Rate Change Warning</td>
<td>Warnings that the plan's rates are scheduled to change</td>
</tr>
<tr>
<td>Employer Contribution Rule for Retirement and Savings Enrollments</td>
<td>Employer contributions to Retirement and Savings plans</td>
</tr>
<tr>
<td>Employer Contributions for Other Enrollments</td>
<td>Employer contributions to non-retirement plans</td>
</tr>
<tr>
<td>Enrollment Splash Page</td>
<td>A pop-up reminder to enroll in benefits</td>
</tr>
</tbody>
</table>
Updating Content Rights Job Aid

Scenario
You want to make sure that employees have the ability to view a summary of their current enrollments as well as their benefits statements.

Instructions
Starting Point: Setup > Benefits > Benefit Settings > Employee Content Rights

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Make the appropriate selections.</td>
</tr>
<tr>
<td>2</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>

Tip
Before your open enrollment period, you may want to opt to show future changes on the employees’ benefits statements. That way, employees can see and print a record of the changes they made for the upcoming plan year.
Defining Waivable Plan Types Job Aid

Overview

You can define the plan types for which employees can decline coverage when enrolling in benefits. The following is an example of the Waive Plans page:

Scenario

You allow employees to waive coverage in health and welfare plans, such as medical, dental, and vision, because they might be covered under a spouse’s plan.

Instructions

Starting Point: Setup > Benefits > Waive Plans

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the Change Effective On field, enter the date you want these settings to take effect.</td>
</tr>
<tr>
<td>2</td>
<td>Make the appropriate selections.</td>
</tr>
<tr>
<td>3</td>
<td>Click Save.</td>
</tr>
</tbody>
</table>

Setting Up Employee Self Service for Benefits Enrollments

- Verifying Employee Self Service rights
- Customizing plan content
- Setting up plan groupings
- Creating plan comparison groups
- Setting up enrollment profiles
Customizing Plan Content

Overview

ADP Workforce Now provides you with a tool called the Plan Custom Content Editor to customize plan content for each benefit plan that you offer to be displayed in Employee Self Service.

What Is Customized Plan Content?

Customized plan content is plan-specific content that you can add, using the Plan Custom Content Editor, to communicate important messages about each benefit plan that you offer. You can add graphics, logos, pictures, and links to websites and important documents. Employees can access this custom content when they enroll in the particular benefit plan in Employee Self Service.

Example

You want to provide employees with a link to the PPO Health Plan website so that they can research the plan before enrolling in it. When employees access the Enrollments page in Employee Self Service, they can click (information) to view the message that provides a link to the plan's website.
Practice: Customizing Plan Content

Scenario

You want to customize plan content for PPO Health Plan. You need to add a message that alerts employees to visit the PPO Health Plan website to learn more about the plan so that they can make well-informed choices about their health care. You want to add a link to the website so that your employees can easily access it.

Hint: Filter the plan types by Health & Welfare to reduce the number of plans that you see on the Plan Setup page.

Instructions

Starting Point: Setup > Benefits > Plan Setup

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Customize plan content for <strong>PPO Health Plan</strong> using the information in the scenario.</td>
</tr>
</tbody>
</table>
| 2    | Add a link to the plan content so that employees can review the new plan’s details.  
      **Note:** Use any URL that you have available to you. |
| 3    | Use the editing tools to format the text. |
Practice Results: Customizing Plan Content

Note: Your results may differ from this example.

Setting Up Employee Self Service for Benefits Enrollments

- Verifying Employee Self Service rights
- Customizing plan content
- Setting up plan groupings
- Creating plan comparison groups
- Setting up enrollment profiles
Setting Up Plan Groupings

Overview
You can create plan groupings to display related benefit plans on the same page in Employee Self Service.

What Is a Plan Grouping?
A plan grouping is a benefit plan or collection of benefit plans that you can set up to allow multiple enrollments or to restrict to only one enrollment.

When you set up a plan grouping, you ensure that each benefit plan in the grouping is displayed on the same page in Employee Self Service. You can also define the order in which the plans are displayed on that page.

Example
For ease of enrollment, you have a default plan grouping called Health and Welfare – Medical that includes your company’s medical plans.
Explore: Plan Grouping Tab, Part 1

The Plan Grouping tab lists benefit plan groupings in the order in which they will be displayed to employees in Employee Self Service. You can reorder the plans using the Move Up and Move Down buttons.

Elements and Descriptions

The following table describes the elements of the Plan groupings tab.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add and Delete buttons</td>
<td>Adds or deletes plan groupings</td>
</tr>
<tr>
<td>Move Up and Move Down buttons</td>
<td>Reorders the plan groupings as they will be displayed in Employee Self Service</td>
</tr>
<tr>
<td>Create Group link</td>
<td>Creates groups of benefit plans that will have the same enrollment rules</td>
</tr>
</tbody>
</table>
Explore: Plan Grouping Tab, Part 2

On this page, you can create your own custom plan groupings.

Elements and Descriptions

The following table describes the elements of this page, where you can add plan groupings.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter the name of the plan grouping.</td>
</tr>
<tr>
<td>Display Available Benefit Plans From</td>
<td>Select the ADP-supplied plan grouping assigned during plan setup.</td>
</tr>
<tr>
<td>Show Terminated Plans</td>
<td>Click this if you want to display terminated plans as well as active plans.</td>
</tr>
<tr>
<td>Available Benefit Plans</td>
<td>View the list of benefit plans available based on the plan groupings that you selected.</td>
</tr>
<tr>
<td>Selected Benefit Plans</td>
<td>Move the plans that you want to include in the plan groupings from the Available Benefit Plans list to this list.</td>
</tr>
<tr>
<td>Allow Multiple Enrollments in More Than One Benefit Plan</td>
<td>Select this option if you are including benefit plans from different plan groupings, such as medical and dental, so that employees can select one from each offering.</td>
</tr>
<tr>
<td>Restrict Enrollments to Only One Benefit Plan</td>
<td>Select this option if you are including similar plans in the plan groupings so that employees can select only one plan. For example, if you are including only medical plans in the offering, you do not want employees to be able to select more than one medical plan.</td>
</tr>
<tr>
<td>Allow Practitioners to Override This Setting</td>
<td>Select this option if you want practitioners to be able to override the restriction.</td>
</tr>
</tbody>
</table>
**Practice: Adding, Renaming, and Reordering Plan Groupings**

**Scenario**
You want to add a plan grouping that includes your insurance plans to facilitate employees’ enrollments.

**Instructions, Part 1: Add a Plan Grouping**
Starting Point: Setup > Benefits > Plan Groupings

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Add a plan grouping called <strong>Insurance Plans</strong> that includes all of the employee life, long-term disability, and spouse life plans.</td>
</tr>
<tr>
<td>2</td>
<td>Delete the <strong>Insurance - Employee Life</strong>, <strong>Insurance - Long-Term Disability</strong>, and <strong>Insurance - Spouse Life</strong> plan groupings to reduce the number of available groupings.</td>
</tr>
</tbody>
</table>

**Instructions, Part 2: Rename and Reorder Plan Groupings**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Rename the Consumer Health and Savings Accounts - FSA Health Care plan grouping to <strong>FSA Health Care</strong>.</td>
</tr>
</tbody>
</table>
| 2    | On the **Plan Groupings** page, select the check box for the desired grouping and, using the **Move Up** and **Move Down** buttons, list the plan groupings in the following order:  
  1. Health and Welfare – Medical  
  2. Health and Welfare – Dental  
  3. FSA Health Care  
  4. Insurance Plans |
Practice Results: Adding and Reordering Plan Groupings

Part 1: Add a Plan Grouping

Part 2: Rename and Reorder Plan Groupings
Setting Up Employee Self Service for Benefits Enrollments

- Verifying Employee Self Service rights
- Customizing plan content
- Setting up plan groupings
- Creating plan comparison groups
- Setting up enrollment profiles
Creating Plan Comparison Groups

Overview

You can create plan comparison groups so that employees can compare the plan attributes of similar plans.

To make the plan comparison information available in Employee Self Service, you need to take the following steps:

- Set up the appropriate plan comparison group validation tables.
- Create the plan comparison groups.
- Add plan comparison group information to existing benefit plans, if necessary. This information is generally included during plan setup.

What Are Plan Comparison Groups?

Plan comparison groups are groups of information about each plan that employees can use to compare plan attributes.

Example

You used the ADP Workforce Now plan comparison groups called Overview and Prescription Drug Benefits for your medical plans so that employees can compare plan attributes, such as overall plan information and prescription information.
What Are Plan Comparison Validation Tables?

ADP Workforce Now provides a validation table called Comparison Fields that you can populate with the names of the fields that you want to make available in Employee Self Service for benefit plan comparisons.

ADP Workforce Now supplies approximately 50 default values from the Summary of Benefits Coverage. You can add validation table values the same way you add other validation table values by either manually entering them into ADP Workforce Now or importing them.

The Comparison Fields validation table supplies values for selecting fields to include when comparing benefit plans.

Example

You want to include a comparison field value for requiring a referral to see a specialist. This value is included in the ADP Workforce Now supplied values.
Practice: Creating Plan Comparison Groups

Overview

ADP Workforce Now supplies two plan comparison groups—Overview and Services You May Need. You can choose to keep those plan comparison group names or change them, as you see fit. You can create additional plan comparison groups to suit your needs.

Scenario

So that employees can compare the attributes of the prescription plans that you offer, you want to create a plan comparison group for prescription drug benefits.

Instructions

Starting Point: Setup > Benefits > Plan Groupings > Plan Comparison Groups

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Create a plan comparison group called **Prescription Drug Benefits** that includes the following comparison fields:  
* Generic drugs  
* Preferred brand drugs  
* Non-preferred brand drugs  
* Specialty drugs  
**Tip:** Hold the Ctrl key while selecting each field name so you can move the fields to the Selected column at the same time. |
| 2    | Click **Done**. |
Practice Results: Creating Plan Comparison Groups
Practice: Adding Plan Comparison Information to an Existing Benefit Plan

Overview
You must add plan comparison information to your benefit plans in order for the content to be displayed in Employee Self Service.

You can add plan comparison information to benefit plans during setup or after setup by editing the eligibility group information.

Scenario
In preparation for your company’s annual enrollment period, you need to update your existing high deductible health plan with plan comparison information so that the prescription drug plan attributes are displayed in Employee Self Service.

Instructions
Starting Point: Setup > Benefits > Plan Setup

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Edit the High Ded Health Plan, effective 01/01/20XX (where XX is the current plan year).</td>
</tr>
<tr>
<td>2</td>
<td>In the Comparison Groups section, in the Select an Option field, select Prescription Drug Benefits.</td>
</tr>
</tbody>
</table>
| 3    | In the Comparison Fields section, expand the Prescription Drug Benefit comparison group. For each Prescription Drug Benefit comparison field, click Edit Comparison Field Text and enter the following information:  
  - For Generic drugs, enter: retail: 25% coins with $10 min  
  - For Preferred brand drugs, enter: retail: 25% coins with $30 min  
  - For Non-preferred brand drugs, enter: retail: 50% coins with $75 min  
  - For Specialty drugs, enter: retail: 50% coins with $75 min |
Practice Results: Adding Plan Comparison Information to an Existing Benefit Plan

Plan Setup

Plan Comparison Information

Comparison Groups
Select the comparison groups to include in plan comparison

Comparison Fields

- Prescription Drug Benefits
  - Generic drugs: retail 25% coins with $10 min
  - Preferred brand drugs: retail 25% coins with $30 min
  - Non-preferred brand drugs: retail 50% coins with $75 min
  - Specialty drugs: retail 50% coins with $75 min
Setting Up Employee Self Service for Benefits Enrollments

- Verifying Employee Self Service rights
- Customizing plan content
- Setting up plan groupings
- Creating plan comparison groups
- Setting up enrollment profiles
Setting Up Enrollment Profiles

Overview
You can define up to six types of enrollment profiles to guide employees through the steps of benefits enrollment. Once defined, all of the enrollment profiles, with exception of the open enrollment profile, are available year-round.

What Are Enrollment Profiles?
Enrollment profiles consist of a series of screens, like a wizard, that takes employees through the steps of enrolling in benefit plans. Different events trigger the activity of these profiles. The types of enrollment profiles include the following:

- ACA benefit status change
- Life events
- New hire
- Work events
- Open enrollment
- Year round

Example
You want to add a life events enrollment profile for employees who marry and want to add their spouse to their benefit plans. When employees update their dependent status because of marriage, the application directs them to the life events enrollment profile.

Best Practices
- If you add new benefit plans for your new plan year, update all of your enrollment profiles to include the new plans.
- If you define your enrollment profile before adding a new plan grouping or customizing your plan content, edit the enrollment profile to account for the changes.
Explore: Add a New Enrollment Profile, Available Actions Page

The Add a New Enrollment Profile, Available Actions page allows you to specify rules for adding, changing, and unenrolling in coverage during your enrollment event.

Actions and Descriptions

The following table describes the options that you can select on the Add a New Enrollment Profile, Available Actions page to specify actions that employees can take during the enrollment period.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Enrollments, Add</td>
<td>Add the applicable plans as part of a new enrollment.</td>
</tr>
<tr>
<td>Existing Enrollments, Change Coverage</td>
<td>Change coverage levels, for example, switch from Employee coverage to Employee + Spouse coverage.</td>
</tr>
<tr>
<td>Existing Enrollments, Change Plans</td>
<td>Switch into other eligible plans in a particular plan category.</td>
</tr>
<tr>
<td>Existing Enrollments, Unenroll</td>
<td>Unenroll from the current plan.</td>
</tr>
</tbody>
</table>
Using Automatic Enrollment

To prevent employees from making changes to plans that are employer-paid or available through Automatic Enrollment, do not include such plans in the enrollment profile.

If you allow employees to make changes to an Automatic Enrollment or employer-paid plan through tasks such as adding beneficiaries, configure the available actions to allow changes to existing coverage, but do not allow other options.

Example

In this example of setting up Automatic Enrollment life insurance plans, the employee can change the amount of coverage elected but cannot unenroll from the employee life insurance plan.
Practice: Setting Up an Enrollment Profile

Scenario
You want to set up an enrollment profile so that when employees who change jobs within the company need to re-elect benefits due to changes in benefits eligibility, they can do so. The enrollment profile is available to all employees, regardless of eligibility class, and includes all plan classes for the current plan year. Benefits changes take effect on the date of the transfer.

Instructions
Starting Point: Setup > Benefits > Enrollment Profiles

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Create a work event profile using the following information:  
  - Effective On: **Today**  
  - Profile Name: **Job Transfer**  
  - Profile Type: **Work Event**  
  Once you set up an enrollment profile in the Add Enrollment Profile window, you cannot change the information unless you delete the enrollment profile and add a new one. |
| 2    | In the **Choose Eligibility** step, accept the defaults. |
| 3    | In the **Choose Eligibility Groups** step, select the following plan eligibility groups:  
  - Dental - ALL  
  - Geneva Medical - ALL  
  - Healthcare FSA-2017 - ALL  
  - High Ded Health Plan - ALL  
  - Limited Purpose FSA - 2017 - ALL  
  - PPO Health Plan - ALL |
| 4    | In the **Enrollment Window** step, select the second option and indicate that the employee may enroll for 30 days, starting 10 days before the event date. |
| 5    | Complete the **Available Actions** step using the following information:  
  - Select **New Enrollments: Add** and **Existing Enrollments: Change Coverage, Change Plans**, and **Unenroll** for the following plan groupings:  
    - Health and Welfare - Medical  
    - Health and Welfare - Dental  
  - Select **New Enrollments: Add** and **Existing Enrollments: Change Coverage** for the FSA Health Care plan grouping. |
| 6    | In the **Enrollment Note** step, replace **Month DD, YYYY**, with **on the date of your transfer**. |
Practice Results: Setting Up an Enrollment Profile

Note: The results shown here may differ from what you see in your training environment.

Eligibility

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Location</th>
<th>Eligibility Class</th>
<th>ACA Benefit Status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Eligibility is not restricted</td>
<td>Eligibility is not restricted</td>
</tr>
</tbody>
</table>

Eligibility Groups

- Dental - ALL
- Genera Medical - ALL
- Healthcare FSA - 2017 - ALL
- High Ded Health Plan - ALL
- Limited Purpose FSA - 2017 - ALL
- PPO Health Plan - ALL

Enrollment Window

Employee may enroll starting 30 days before the event date for 30 days.

Available Actions

<table>
<thead>
<tr>
<th>PLAN GROUPING</th>
<th>NEW ENROLLMENTS</th>
<th>EXISTING ENROLLMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and Welfare - Medical</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Health and Welfare - Dental</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>FSA Health Care</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

Employees will not be required to make selections during this enrollment.

Enrollment Note

Welcome to the benefits enrollment period. Enrollment is your opportunity to make changes to certain benefits, effective on the date of your transfer.

- During enrollment you can:
  - Add or opt out of health plan coverage
  - Choose your new plan option
  - Enroll eligible family members in your plans
  - Add, drop or change the level of your insurance coverage
  - Enroll or re-enroll in a consumer health and savings account to pay for day care or health expenses with pre-tax dollars

- Please review your options and costs carefully. You can make any changes you like at home or at work until the end of the enrollment period.
- Once the enrollment period has ended, your choices will be final until the next enrollment period or until you have a qualifying life event.
- Contact your administrator if you have questions.

Confirmation Note

You have successfully completed your enrollment. Contact your administrator if you have questions.
What Are Multiple Enrollment Profiles?

When you set up an open enrollment profile, you define a period of time during which it is active. As a result, employees may simultaneously experience multiple enrollment events. After employees complete the first set of enrollment options, Employee Self Service gives them the option of continuing to the next set of options.

For employees who are eligible to participate in multiple enrollment profiles, the enrollments are offered in the following order of precedence:

1. Life events
2. ACA benefit status change
3. New hire
4. Work events
5. Open enrollment
6. Year round

Example

A new employee is hired during your company’s open enrollment period. The employee is prompted to complete the new hire enrollment profile first for current benefits and then the open enrollment profile for next year’s benefits.

Types and Descriptions

The following table describes when employees can enroll in benefits through each type of enrollment profile.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life events</td>
<td>As a result of an event such as marriage, birth, adoption, or divorce</td>
</tr>
<tr>
<td>ACA benefit status change</td>
<td>As a result of a benefit status change, as dictated by the Affordable Care Act (ACA)</td>
</tr>
<tr>
<td>New hire</td>
<td>When the employee is hired</td>
</tr>
<tr>
<td>Work events</td>
<td>As a result of a change in eligibility due to work events such as a promotion or a change in location</td>
</tr>
<tr>
<td>Open enrollment</td>
<td>During your company’s open enrollment period. Employees can also unenroll at this time.</td>
</tr>
<tr>
<td>Year round</td>
<td>At any time of the year</td>
</tr>
</tbody>
</table>

Setting Up Employee Self Service for Benefits Enrollments

- Verifying Employee Self Service rights
- Customizing plan content
- Setting up plan groupings
- Creating plan comparison groups
- Setting up enrollment profiles
Enrolling in Benefits Using Employee Self Service

Overview

Once you set up Employee Self Service, your employees can begin using it to enroll in benefits.

Explore: Choose Plans Page

Elements and Descriptions
Practice: Transferring an Employee, Activating the Work Event Enrollment Profile, and Enrolling in Benefits

Scenario
Donald East is transferring to the Western business unit, San Francisco location, effective today. This transfer changes his benefits eligibility. Donald is in the Executive benefits eligibility class. You activate the Job Transfer work event enrollment profile so that Donald can enroll in benefits using Employee Self Service.

Instructions, Part 1: Transfer the Employee and Activate the Work Enrollment Profile
Starting Point: People > Employment > Employment Profile

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Change Donald East's corporate groups—business unit, location, and benefits eligibility class—according to the scenario.  
Hint: Point to Corporate Groups and click (edit). |
| 2    | On the View/Edit information page, click Save & Continue. |
| 3    | Activate the work event enrollment profile called Job Transfer. |
| 4    | In the Summary of Changes window, click Close. |

Important Information
You must activate work event enrollment profiles for employees individually so that they can use Employee Self Service to enroll in benefits.
Instructions, Part 2: Enroll in Benefits

Acting as Donald and using the work event enrollment profile, do the following.

Starting Point: Myself > Benefits > Enrollments

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 1    | Enroll Donald, his wife, Lacy, and his daughter, Tally, in the **Geneva Medical** plan and choose **Employee + Family**.  
**Note:** Donald's son, Tim, already has coverage under his employer's medical plan. |
| 2    | Enroll Donald in the **Dental** plan and choose **Employee** as the coverage level. |
| 3    | Enroll in the **Healthcare FSA** plan with a contribution amount of **$100** per year. |
| 4    | Click **Review & Complete**. |

Answer the following questions while completing the practice:

1. What is the difference between these two options: Walk Me through My Benefit Options and I Know What I Want to Change?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

2. Which medical plan has the custom plan content and how do you access it?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

3. What are the names of the plan comparison groups?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________

4. How can you change the plan cost view to plan year or pay period?

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
Practice Results: Transferring an Employee, Activating the Work Event Enrollment Profile, and Enrolling in Benefits

Part 1: Transfer the Employee and Activate the Work Event Enrollment Profile

Note: Your results may differ from this example.
Part 1: Transfer the Employee and Activate the Work Event Enrollment Profile (cont.)

Note: Your results may differ from this example.
### Part 2: Enroll in Benefits

**Note:** Your results may differ from this example.

#### Enrollments

**Job Transfer**

1. **Review Your Benefits Elections**
   
   Please review your benefits elections below. Your choices will not be processed until you click Complete Enrollment.

<table>
<thead>
<tr>
<th>PLAN</th>
<th>COVERAGE LEVEL</th>
<th>YOUR COST</th>
<th>EMPLOYER PAYS</th>
<th>EFFECTIVE DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health and Welfare - Medical</td>
<td>EMPLOYEE + FAMILY</td>
<td>$577.50/month</td>
<td>$1,732.50/month</td>
<td>10/16/2017</td>
</tr>
<tr>
<td>Health and Welfare - Dental</td>
<td>EMPLOYEE</td>
<td>$10.20/month</td>
<td>$40.80/month</td>
<td>10/16/2017</td>
</tr>
<tr>
<td>FSA Health Care</td>
<td>$100.00/YEAR</td>
<td>$36.11/month</td>
<td>$0.00/month</td>
<td>10/16/2017</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td><strong>$623.85/month</strong></td>
<td><strong>$1,773.30/month</strong></td>
<td></td>
</tr>
</tbody>
</table>

2. **Complete Your Enrollment**

   You can complete this enrollment, finish it by saving your progress, or return to your plan choices.
**Knowledge Check**

1. Which of the following tasks do you perform when setting up Employee Self Service for enrollments? (Select all that apply.)
   a. Set up benefit plans.
   b. Review and update employees’ content rights.
   c. Set up enrollment profiles.
   d. Customize plan content.

2. Which of the following employee content rights would you enable to alert employees of plans that are terminating?
   a. Current enrollments summary
   b. Compare plans
   c. Plan drop warning
   d. Rate change warning

3. When customizing plan content, you can do which of the following? (Select all that apply.)
   a. Change the name of the plan.
   b. Add an enrollment note.
   c. Add, modify, or delete text on Employee Self Service pages.
   d. Provide links to websites and important documents.

4. You have multiple enrollment profiles that you use for employee enrollments. What is the order in which employees see enrollments if they are eligible for more than one type?
   a. Life events, new hire, open enrollment, work events, ACA benefit status change, year round
   b. Open enrollment, ACA benefit status change, new hire, life events, work events, year round
   c. Year round, new hire, open enrollment, life events, work events, ACA benefit status change
   d. Life events, ACA benefit status change, new hire, work events, open enrollment, year round

5. Creating plan comparison groups does which of the following?
   a. Organizes how benefit plans are displayed in Employee Self Service
   b. Presents plan attributes for different benefit plans
   c. Presents the plans for employees to view and enroll
   d. Ensures employees can access their enrollments
Course Closing

How to Access Support Job Aid

ADP provides various resources to help you perform your tasks after class.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>At the top of any page, click 🎨 (support).</td>
</tr>
</tbody>
</table>
| 2    | In the Search field, enter a topic and then click 🌐 (search).  
**Result:** The available online Help and training are displayed. |
| 3    | Review the available resources.  
**If You Want To** | **Then** |
|      | Read online Help | Click the Documentation tab and select a topic. |
|      | Access a learning byte | In the Learning Resources section, click Just-in-Time Learning. |
| 4    | To close the Support page, click Back. |

Accessing Learning Bytes

The following graphic illustrates the Benefits learning bytes menu from which you can access learning bytes to support you in completing the tasks you learned in this class.
How to Access TheBridge.adp.com Job Aid

Join TheBridge.adp.com, an online community for payroll and HR professionals where you can ask questions, share knowledge, make connections, and learn from industry experts and peers about a broad range of human capital management topics.

Instructions

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If You Are</td>
</tr>
<tr>
<td></td>
<td>Logged on to ADP Workforce Now</td>
</tr>
</tbody>
</table>
|      | Not logged on to ADP Workforce Now | 1. Access thebridge.adp.com/welcome.  
2. Log on using your ADP Workforce Now user name and password. |

Additional Training

- Setting Up Health & Welfare Plans in ADP Workforce Now virtual class
- Setting Up Non-Health & Welfare Plans in ADP Workforce Now Web-based training
- Maintaining Benefit Plans in ADP Workforce Now Web-based training

Next Steps

What will you do in the next week to apply this training?

Continuing Education Credits

ADP is an approved provider of recertification credit hours (RCHs) by the American Payroll Association (APA) and continuing professional education (CPE) credits by the National Association of State Boards of Accountancy (NASBA). Most ADP courses are eligible for RCHs and CPE credits.

RCHs and CPE credits provide recognition for updating or broadening professional competencies and may be used to maintain certifications such as the Certified Payroll Professional (CPP) and Certified Public Accountant (CPA). Professional organizations establish their own certification procedures, which are subject to change.

Professional organizations often require documentation of class objectives, agenda, and duration, along with a certificate of completion. This information is provided at the end of your handout manual. At your request, your instructor will provide you with a certificate of completion at the end of this class.
Training Evaluation

Please take a moment to complete the evaluation.
US - Setting Up ADP Workforce Now Employee Self Service for Benefits Enrollments (80879)

Program Content

Benefits practitioners managing US data only: This course prepares participants to set up ADP Workforce Now® Employee Self Service for benefits enrollments in US-based benefit plans. Topics include verifying Employee Self Service, reviewing and updating employee access permissions and content rights, customizing plan content, setting up plan groupings, and setting up enrollment profiles.

Objectives

Upon completing this course, participants will be prepared to do the following:

- Verify Employee Self Service rights.
- Customize plan content.
- Set up plan groupings.
- Create plan comparison groups.
- Set up enrollment profiles.

Audience

This course is intended for practitioners who need to set up ADP Workforce Now Employee Self Service for benefits enrollments in US-based benefit plans.

Prerequisites

Before beginning this course, participants should complete the US - Benefits Overview and US - Getting Started with Benefit Plan Setup web-based training courses, and either the US - Setting Up Health and Welfare Plans virtual class or the US - Setting Up Non-Health and Welfare Plans web-based training class.

Advance Preparation

None

Participant Materials

Participants need to download or print the US - Setting Up ADP Workforce Now Employee Self Service for Benefits Enrollments handout manual before attending class.

Method of Presentation

Virtual class (VC), Group Internet Based

Duration

2 hours
Continuing Education Credits

This course may be eligible for the following recertification credit hours (RCHs) and continuing professional education (CPE) credits (U.S.-based practitioners only):

RCH: 2.0  
CPE: 2.0

Note: ADP is unable to grant formal RCH and CPE credits to a participant logged on to class through a mobile device.

In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted on a 50-minute hour.

ADP, LLC is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org

In accordance with the American Payroll Association (APA), recertification credit hours (RCHs) apply to Certified Payroll Professional (CPP) and Fundamental Payroll Certification (FPC) credentials.

Recommended Field of Study (NASBA)
Specialized Knowledge and Applications

Privacy Policy

View ADP's Privacy Policy.
Appendix

Contents

Adding a Quick Link to the Employee Self Service Home Page ........................................... 1
Adding a Quick Link to the Employee ADP Workforce Now Home Page Job Aid............ 2
Setting Up an Open Enrollment Profile Job Aid ................................................................. 3
Sending an Open Enrollment Notification Message to Employees Job Aid ................. 4
Setting Up ADP Workforce Now Employee Self Service for Benefits Enrollments

Adding a Quick Link to the Employee Self Service Home Page

Overview
Adding quick links to the ADP Workforce Now Employee Self Service Home page alerts your employees to activities that you want them to complete. This may be especially helpful during your open enrollment period.

What Are Quick Links?
Quick links are shortcuts to pages or websites that you can add to your ADP Workforce Now Employee Self Service Home page as a way of customizing Employee Self Service.

Example
You are preparing for your open enrollment period and want to add a quick link to the ADP Workforce Now Employee Self Service Home page so that employees can easily access their Enrollments page.
Adding a Quick Link to the Employee ADP Workforce Now Home Page Job Aid

Scenario
You want to add a quick link so that employees can easily access a particular page.

Instructions
Starting Point: ADP Workforce Now Home page

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>At the top of the page, click your user name and select <strong>Configuration</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>In the <strong>Select Page</strong> field, select <strong>Quick Links</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>In the <strong>Content</strong> column, click <strong>Quick Links</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>In the <strong>Available Profiles</strong> list, select <strong>Standard Employee</strong> and then click ![add selected].</td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>Text</strong> field, enter the text that you want to be displayed on the ADP Workforce Now Home page.</td>
</tr>
<tr>
<td>6</td>
<td>Select the words that you want to act as the link and click the <strong>Create</strong> icon.</td>
</tr>
</tbody>
</table>
| 7    | Make the following selections in the window:  
|      | • In the **Link Type** field, select **Page Link**.  
|      | • In the **Page** field, select the page to which you want employees to link. |
| 8    | Click **Set** and then click **Done**. |
| 9    | Click **Save** and then click **Back** to return to the prior page. |
## Setting Up an Open Enrollment Profile Job Aid

### Scenario
You have completed the tasks to prepare Employee Self Service for open enrollment. Now, you want to create an open enrollment profile for the new plan year.

### Instructions

**Starting Point:** Setup > Benefits > Enrollment Profiles

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click (add).&lt;br&gt;<strong>Result:</strong> The Add Enrollment Profile window opens.</td>
</tr>
<tr>
<td>2</td>
<td>Complete the Add Enrollment Profile window.&lt;br&gt;• In the <strong>Profile Type</strong> field, select <strong>Open Enrollment</strong>.&lt;br&gt;• In the <strong>Coverage Effective Date</strong> field, enter the date on which benefits coverage will be effective.&lt;br&gt;• In the <strong>Status</strong> field, select <strong>Test</strong> so that you can test the enrollment profile before making it active for employees.&lt;br&gt;• In the <strong>Effective On</strong> field, enter the date on which you are creating the profile.&lt;br&gt;• In the <strong>Profile Name</strong> field, enter a name for the enrollment profile.&lt;br&gt;• Click <strong>Continue</strong>.</td>
</tr>
<tr>
<td>3</td>
<td>In the <strong>Choose Eligibility</strong> step, indicate which employees are eligible for this enrollment profile, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>In the <strong>Choose Eligibility Groups</strong> step, select the applicable plan classes, click (add selected), and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>5</td>
<td>In the <strong>Enrollment Window</strong> step, enter the enrollment period start and end dates, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>6</td>
<td>In the <strong>Available Actions</strong> step, select the actions that employees can take when they complete the enrollment profile, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>7</td>
<td>In the <strong>Enrollment Note</strong> step, enter any enrollment instructions, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>8</td>
<td>In the <strong>Confirmation Note</strong> step, accept the default text or enter your own confirmation note, and then click <strong>Next</strong>.</td>
</tr>
<tr>
<td>9</td>
<td>In the <strong>Summary</strong> step, review your entries, and then click <strong>Done</strong>.</td>
</tr>
</tbody>
</table>

You can opt to walk through the open enrollment profile, testing it as an employee before making it active.

### Additional Resources
Refer to the learning byte called *Creating a Test Open Enrollment Profile* to see a short demonstration of this procedure.
Sending an Open Enrollment Notification Message to Employees

Job Aid

Overview

You can easily send notification messages to all employees who qualify for an OE enrollment profile. These messages display in the Notifications section of the employee's Message Center page.

The following is an example of an Open Enrollment notification message:

![Example Notification Message]

Scenario

You are ready to roll out your open enrollment and want to notify employees that they can begin reviewing their benefits and enrolling in them for the upcoming plan year.

Instructions

Starting Point: Setup > Benefits > Enrollment Profiles

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>In the row for Open Enrollment 20XX (where XX is the upcoming plan year), click (action) and select Send Notification Message to Employees. Result: A message is displayed in Employee Self Service that notifies employees of open enrollment.</td>
</tr>
</tbody>
</table>