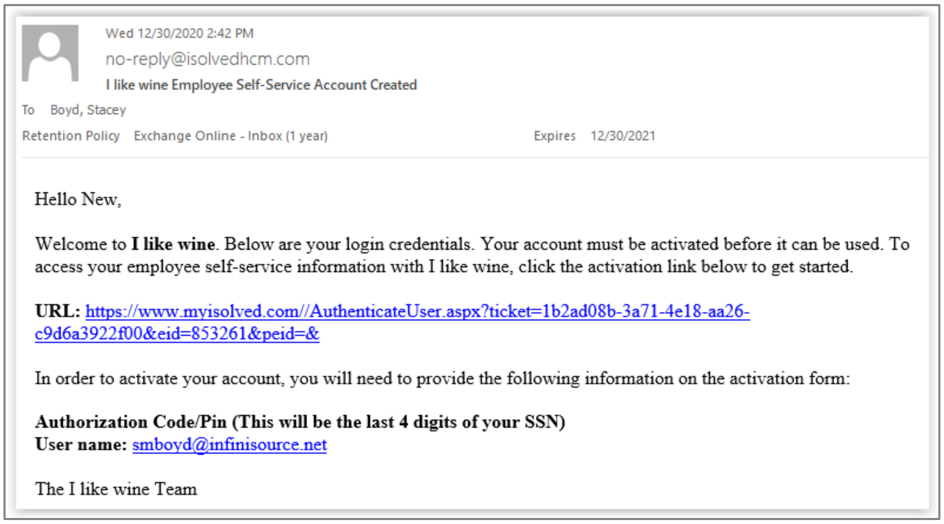
Introduction

This article provides assistance to using the Employee Self-Service for the Benefit items.

Activation

If you do not have an employee self-service account set up currently, you will receive an email from no-reply@isolvedhcm.com to activate your Self-Service account. You must activate this before you can sign up for benefits. Follow the instructions outlined in the email.


Wed 12/30/2020 2:42 PM
no-reply@isolvedhcm.com
I like wine Employee Self-Service Account Created
To Boyd, Stacey
Retention Policy Exchange Online - Inbox (1 year) Expires 12/30/2021

Hello New,

Welcome to **I like wine**. Below are your login credentials. Your account must be activated before it can be used. To access your employee self-service information with I like wine, click the activation link below to get started.

URL: https://www.myisolved.com//AuthenticateUser.aspx?ticket=1b2ad08b-3a71-4e18-aa26-c9d6a3922f00&eid=853261&peid=&

In order to activate your account, you will need to provide the following information on the activation form:

Authorization Code/Pin (This will be the last 4 digits of your SSN)
User name: smboyd@infinisource.net

The I like wine Team

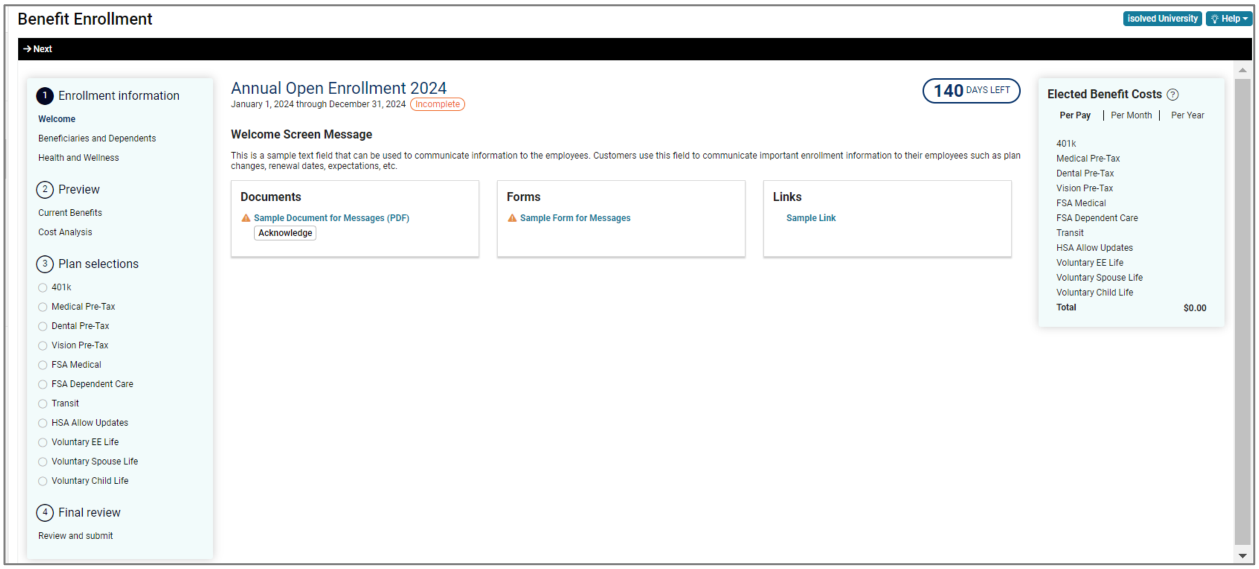
Once you have activated your Employee Self-Service account, you are able to login using the username (your email address) and password.

Benefit Enrollment Wizard Instructions

Navigate to **Employee Self-Service > Benefit Enrollment**.

- **Welcome Screen:** This is the first page of the enrollment and where you will get start to navigate through the benefit enrollment.
    - This screen may be customized with a message, attached document(s) and/or included link(s), be sure to review them thoroughly.
    - The documents may be configured to require your acknowledgement so you would need to open, thoroughly review the document(s) & select to acknowledge before you can complete the enrollment
    - In the upper right corner, you will find the status of your enrollment (incomplete, complete, etc) as well as how many days remain in the current enrollment period
        - Be mindful of this date as you may not be able to enroll if attempting to after the enrollment is closed

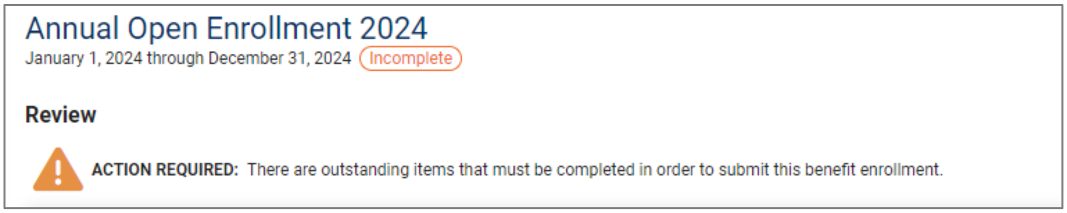
- Use the Next button to move to the next step of the enrollment

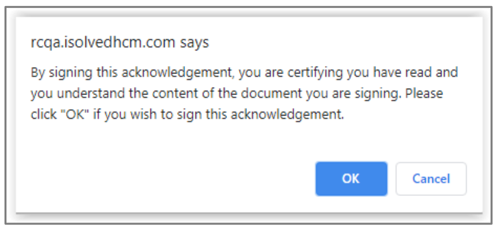


- **Beneficiaries and Dependents:** Add or update Dependents, Beneficiaries and Emergency Contacts here. You must have each contact added here and flagged as a dependent if they will be covered by any of the benefit plans. If you do not add them here, you wont be able to select them to be included in the coverage(s).
  - Select 'add new' or the contact's name to edit, if needed
  - Add in the correct name
  - Select the appropriate contact type
    - If selecting dependent (meaning they may be added to a benefit plan), you will be required to add their birthdate
    - Add in the social security number
  - Select the correct relationship type
  - Select 'use employee's address' if appropriate, if not, uncheck this and add in their address
  - Save & Repeat as needed until all contacts are added
  - Select Next when finished
- **Health and Wellness:** This may/may not be part of your enrollment process as it is unique for each group
  - If this is within your enrollment, check the box(es) for those that are a tobacco user(s), if any
- **Cost Analysis:** This page will show the costs of benefit deductions. Some coverage's (such as life, disability, etc) may not show a deduction amount on this screen because you have to elect the coverage amount first before the system can calculate your deduction.
  - Select to "Display all benefit plan cost details" or select each one individually
    Select Next to move to the next step of the enrollment
- **Current Benefits:** This page will show the plans that you are currently enrolled in. Depending on your company's configuration, you may have the option to "Keep" some plans. Any plan(s) that don't have the keep option, you would need to navigate to that coverage to make your selection.
  - Select Next to move to the next step of the enrollment
  - This will take you through each of the benefits that your employer is making available to you
  - The options you see may be different than what is included in this guide but will function in the same manner

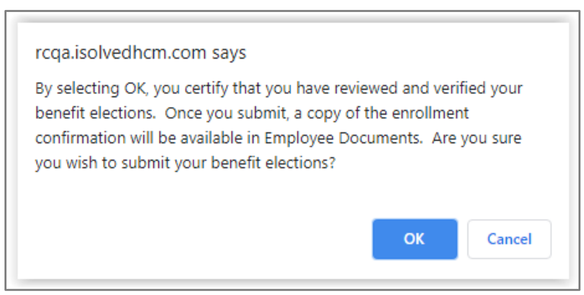
- **Some Basics about Choosing Your Plans**
    - You may find messages on the top of the page, as well as on the right along with any documents &/or links your company administrator has included
        - Review these as they may include information you would find helpful to make a decision on what coverage is best for you
        - The documents may be configured to require your acknowledgement so you would need to open, thoroughly review the document(s) & select to acknowledge before you can complete the enrollment
    - To select a plan, simply click on the radial button
        - If you don't see a dependent or beneficiary in the list, you must navigate back to Beneficiaries and Dependents section (as described above) and add them in or check that the "dependent" box is checked (or beneficiary for plans requiring this)
    - To see the other coverages, you may select "Show All" to go back to the previous screen
    - To waive coverage, select Coverage Waived, you may be required to select a reason for waiving
    - As you navigate through the enrollment, the page will update to have a green check mark. If it isn't green, you may have missed something that requires acknowledgment.
- **Choosing Your Plans for Medical, Dental, Vision & HRA Type Plans:**
    - This will allow you to select the level of coverage and select all that should be included in the coverage from the list of contacts that have been added as a dependent.
- **Choosing Your Plans for Life, STD and LTD Plans:**
    - This will allow you to select the coverage amount
    - The per pay deduction will be calculated and show when the amount is selected
      If Evidence of Insurability (EOI) is required, you will be prompted with a red warning showing what actual coverage amount is until EOI has been approved through your insurance provider
- **Choosing Your Plans for FSA Medical, FSA Limited, FSA Dependent Care, HSA, Transit and Parking Plans:**
    - This will allow you to add an annual target amount (ie the amount you want to contribute for the year)
    - After entering this information in the field, the per-pay deduction amount will be calculated based on what you added for the annual target amount & how may pay periods are left in the plan year.
    - In some cases, the plan may be based on you having or not having a specific plan.
- **Choosing Your Plans for Retirement Plans:**
    - This will allow you to add the amount &/or percent that you want to contribute to your retirement account from each paycheck
    - You may an option to contribute Pre-Tax & to the Roth (Post-Tax)
      Please note that the elected costs are a projected cost & may vary for each payroll based on the percentage elected.
- **Choosing Your Plans for Employer Paid Plans:**
    - If you have any employer paid plans that are included in the enrollment, you may not have an option to waive them, and it will most likely default to have you enrolled
    - You may be required to identify your Beneficiaries.

- **Benefit Confirmation:** The final step of the enrollment wizard is the Benefit Confirmation
  - Any items that you are required to complete but may have missed will be displayed at the top & indicate “Action Required”
    - You must complete all items listed here to complete and submit your enrollment





  - You will find a list of each benefit, the selections you made and those that will be covered under each selection
  - On the lower left, you can print this page
  - If all items have been completed, the top will have a button to submit benefits
    - When selected, you’ll be asked to confirm that is what you intend to do
    - Select OK to acknowledge that your benefit enrollment is correct
    - This will act as an electronic signature



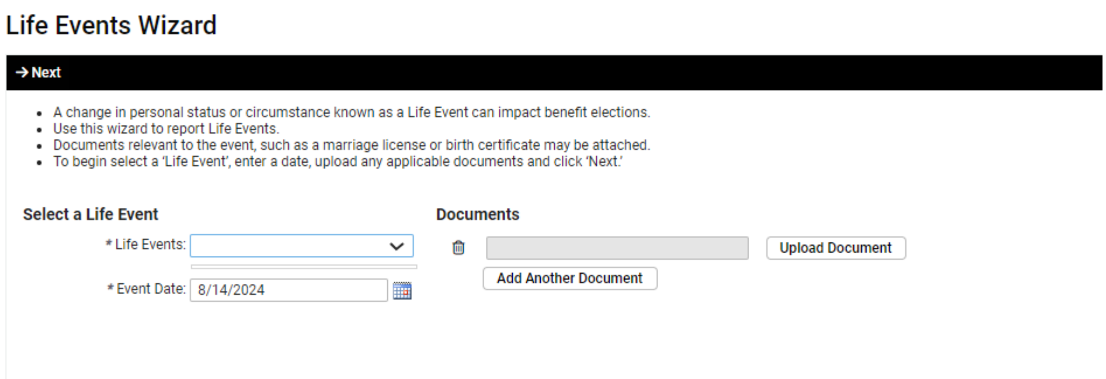
- **You have completed your benefits enrollment!** If you need to make a change while the enrollment period is still open, make your changes and re-submit the enrollment.

Life Event Wizard Instructions

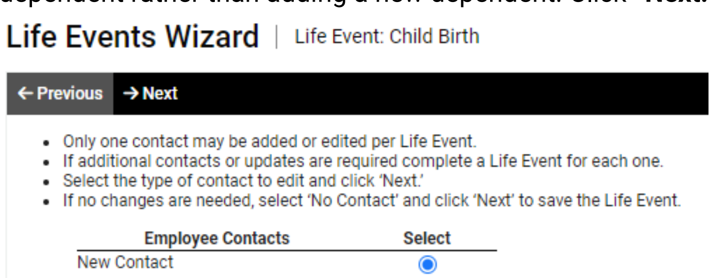
There are many events in life that can qualify you to make a change in current benefit elections. When these events occur, you are able to submit these life event changes through your Employee Self Service account. When you submit a life event via the life event wizard, you may be able to elect benefits. The changes in benefits will be reviewed and approved by your company's administrator.

Navigate to **Employee Self-Service > Life Event Wizard**

- **Life Events:** Choose the applicable life event from the drop down of options.
- **Event Date:** Enter the date of the event
- **Documents**: You can add documentation for your life event here. It is not required at this stage in the process but HR may require evidence of your Life Event change before approving it.
- Click **"Next."**



- The screens that are available depend on the nature life event you choose on the first screen of the Life Event Wizard.
  - For example, if you choose "Birth" as the life event, the system will allow you to add a dependent, and change tax exemptions. If you choose Divorce/Legal Separation, you will be able to edit your current dependent rather than adding a new dependent. Click **"Next."**



  - Add/Edit the dependent information as necessary and click **"Next"**
  - Please note that if you are submitting a Life Event for Divorce/Legal Separation, <u>do not</u> change the relationship status at this time but you do need to uncheck the dependent box. Your company administrator can update the relationship at another time.
  - With certain life events, the wizard may allow you to update the Name/Address. These changes may have to be approved by HR before the change will take effect.
    - Enter any Name/Address changes and click **"Next."**
  - At the end of the wizard, click "Save."

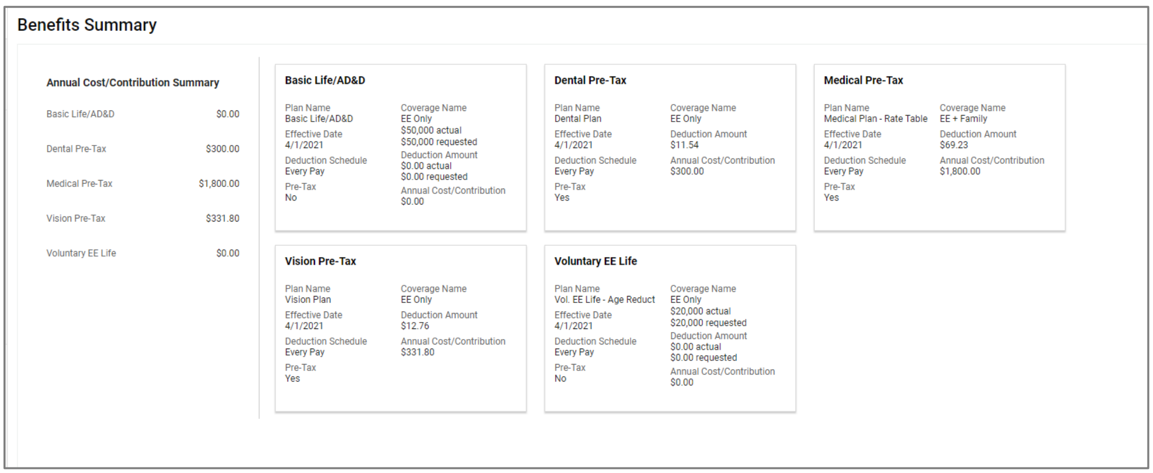
isolved will then provide links to enter another life event (for example, if you had twins, you need to enter a separate Life Event for each child), go to the benefits enrollment to make changes to your benefits, or go to the Tax Updates Wizard to update your taxes, if desired.

After you have completed the Life Event Wizard, click on **"Go to Benefits Enrollment"** to make the benefit election changes for HR approval.

Please refer to the "Benefits Enrollment Wizard Instructions" in this document to make sure you complete the process in its entirety.

Other Employee Self-Service Options

Benefit Summary Screen which provides an overview of your current benefit plans and current deductions.



Benefit Plan Details Screen which provides more detailed information of your current benefit plans, including any documents, messages and links that may be attached.

Benefit Updates which may be available based on your company's configuration. This provides access to make changes to certain benefits you have elected, such as:

- Primary Care Physician
- Deferred Compensation election (ie: retirement contribution amount/percent)
- HSA contribution
- HSA banking
- QTB Parking or Transit contribution

Simply select the radial button for the item you'd like to update & select **Next.** Select 'edit' for the appropriate row. Make the desired changes & click **'Save'.** The changes may go into a pending status until your company administrator approves them.

Please note, you are only able to edit what is already there; you are not able to add new in this area

Documents may include stored documents for things such as:

- Personnel
- Payroll
- I-9
- Confidential PHI: in this tab, you will find the Employee Benefit Enrollment Summary for each enrollment you have previously submitted
- Confidential – Other
- Signed Acknowledgements: in this tab, you may find a copy of the ElectronicSignatureConsent, if your administrator required one & you accepted
- Other
- EE Uploads