

Enrolling an Employee with Eligibility
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Enrolling an Employee with Eligibility

Enrolling an Employee with Eligibility Overview

To enroll an employee in benefit plans that have eligibility requirements, you use the enrollment with eligibility feature. For you to use this feature, the employee must be assigned to a Benefit Group. When you enroll an employee, the system displays only the Plans assigned to the Benefit Group that has been assigned to the Employee Master record. The enrollment process tests for eligibility and assigns the applicable enrollment status and date to the employee's record, depending on which eligibility requirements are met.

When an employee is enrolled in benefits, the instructions for any employee-paid deductions and any State-paid benefit amounts are automatically created in the Employee Instructions, in the Payroll system. This integration increases data integrity and reduces errors.

The system displays the selected employee's Benefit Group information:

- Benefit Group Rule
- Pay Frequency
- Benefit Status
- Date Started

Warning: You must have completed the Enrollment Effective Date field on the Employee Master prior to Enrolling an Employee in Benefits using Enrollment with Eligibility.

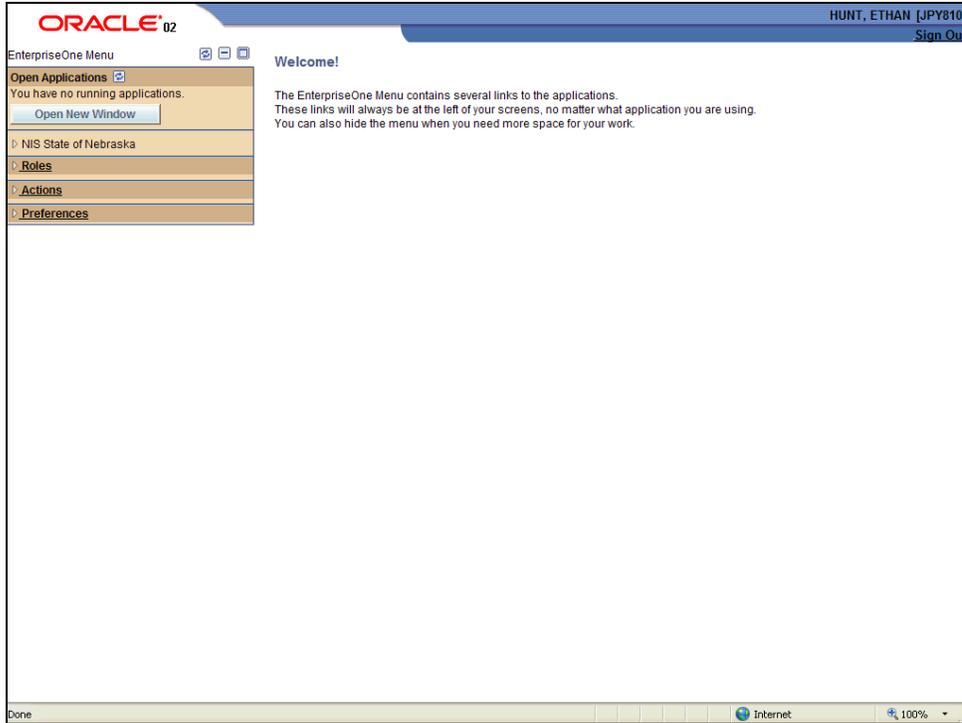
Enrolling an Employee with Eligibility Lesson

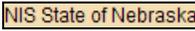
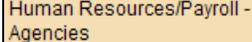
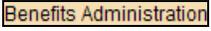
Procedure

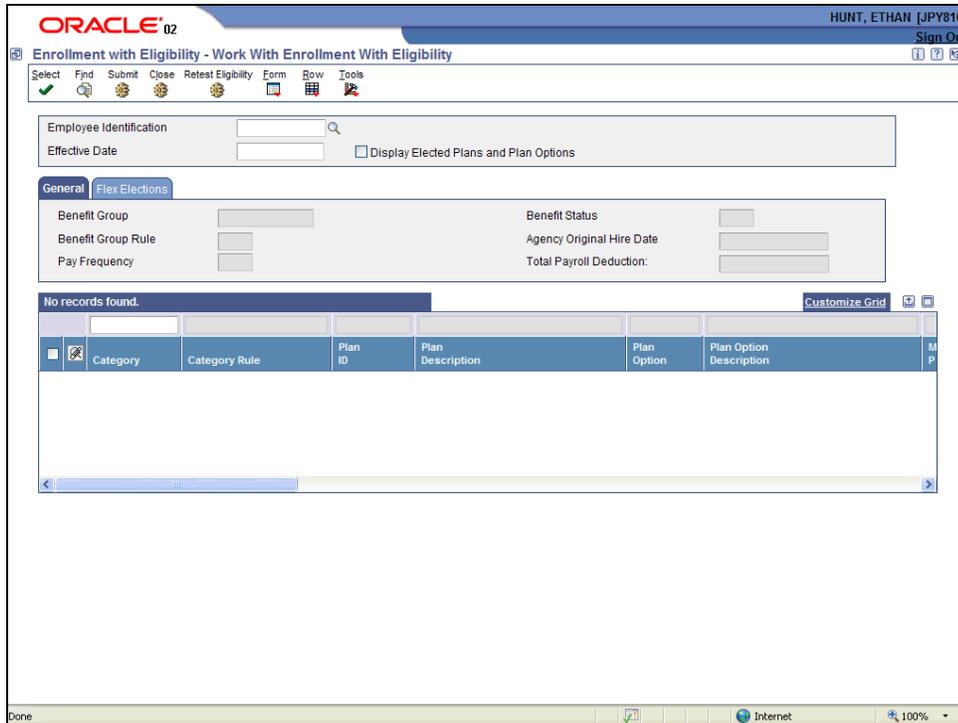
In this lesson you will learn how to enroll an employee with eligibility.

Training Guide

Enrolling an Employee with Eligibility



Step	Action
1.	Click the NIS State of Nebraska link. 
2.	Click the Human Resources/Payroll - Agencies link. 
3.	Click the Benefits Administration link. 
4.	Click the Enrollment with Eligibility link. 



Step	Action
5.	Enter the employee's address book number in the Employee Identification field.
6.	In the Effective Date field enter the same date you entered in the Enrollment Effective Date on the Employee Master.
7.	Click the Find button. 
8.	Review the following fields in the Header: Benefit Group Benefit Status - This field must be ACTIVE (A) Agency Original Hire Date Pay Frequency
9.	On the grid, choose each row that contains a benefit plan or plan option in which you want to enroll the employee by clicking the check box for that row. Note: Some Categories require an election where you must elect or waiver one plan.
10.	After selecting the rows click the Row button. 
11.	Click the Elect menu. 

Training Guide

Enrolling an Employee with Eligibility

Step	Action
12.	If any of the plans that you choose requires an amount or rate, the Change Amount or Rate form appears.

ORACLE 02 HUNT, ETHAN [JPY810] Sign Out

Enrollment with Eligibility - Change Amount or Rate

OK Cancel Tools

Employee No. 4874666 KENT, CLARK S
Plan ID MISC0001 YMCA - LINCOLN

Override Amounts

Employee Payroll Ded DBA	6110	YMCA LINCOLN		\$
Employer Paid Benefit DBA				
Flex Cost DBA				
Flex Credit DBA				

Done Internet 100%

Step	Action
13.	Type the amount or rate that the employee pays in the Employee Payroll Ded DBA field. If applicable, complete the Employer Paid Benefit DBA field as well.
14.	Click the OK button. 
15.	A check mark appears on the row of each plan elected. You can undo an incorrect election if necessary. To do so choose the election on the grid, click Row, Mistaken Enrollment.

ORACLE 02 HUNT, ETHAN [JPY810] Sign Out

Enrollment with Eligibility - Work With Enrollment With Eligibility

Select Find Submit Close Retest Eligibility Form Row Tools

Employee Identification: 4874666 KENT, CLARK S
 Effective Date: 06/15/2009 Display Elected Plans and Plan Options

General Flex Elections

Benefit Group: NAPE-B NAPE/AFSCME-BI-WEEKLY Benefit Status: A ACTIVE
 Benefit Group Rule: 0 N/A Agency Original Hire Date: 06/15/2009
 Pay Frequency: B BI-WEEKLY Total Payroll Deduction: 246.76

Records 1 - 199 Customize Grid

<input type="checkbox"/>	Category	Category Rule	Plan ID	Plan Description	Plan Option	Plan Option Description
<input type="checkbox"/>			LIF0048B	OPTIONAL 10,000 LIFE INS BWKLY		
<input type="checkbox"/>			LIF0049B	OPT 1X'S ANNUAL SALARY LIFE BW		
<input type="checkbox"/>			LIF0050B	OPT 2X'S ANNUAL SALARY LIFE BW		
<input type="checkbox"/>			LIF0051B	OPT 3X'S ANNUAL SALARY LIFE BW		
<input type="checkbox"/>			LIF0052B	OPT 4X'S ANNUAL SALARY LIFE BW		
<input type="checkbox"/>			LIF0053B	OPT 5X'S ANNUAL SALARY LIFE BW		
<input checked="" type="checkbox"/>			WAIVOLIF	WAIVE OPTIONAL LIFE		
<input type="checkbox"/>	COLLSAV	NO RULES APPLY-SELE...	COLLSAV1	COLLEGE SAVINGS DEPENDENT 1		
<input type="checkbox"/>			COLLSAV2	COLLEGE SAVINGS DEPENDENT 2		
<input type="checkbox"/>			COLLSAV3	COLLEGE SAVINGS DEPENDENT 3		
<input type="checkbox"/>			COLLSAV4	COLLEGE SAVINGS DEPENDENT4		
<input type="checkbox"/>			COLLSAV5	COLLEGE SAVINGS DEPENDENT 5		
<input type="checkbox"/>			COLLSAV6	COLLEGE SAVINGS DEPENDENT 6		

Step	Action
16.	Click the Form button. 
17.	Click the Submit menu. <input type="button" value="Submit"/>
18.	Note: If a plan was not selected in a category that requires an election (ex. Medical), the Retest Eligibility window appears. Read the directions and click OK to return to the Work with Enrollment with Eligibility screen. Elect a required benefit plan or plan option. (The required plan will be highlighted.)
19.	Click the Close button. 
20.	You have successfully completed this lesson. End of Procedure.