

## Enrollment of Employee with Eligibility - Benefits

### 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

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

This work instruction shows how to enroll an employee in benefit plans.

 To enroll an employee in Retirement or Leave, please refer to the following instructions:

Enrollment with Eligibility - Leave Enrollment

Enrollment with Eligibility - Retirement Enrollment

### NIS Policies

The tasks in this documentation provide end users with the tools to enter data and collect data in NIS. It is the responsibility of the agencies to comply with State Statutes, Federal Rules and Regulations, and State policies. For further information concerning State Statutes and policies, please refer to both internal agency resources and the Department of Administrative Services website: <http://www.das.state.ne.us/>.

### Navigation

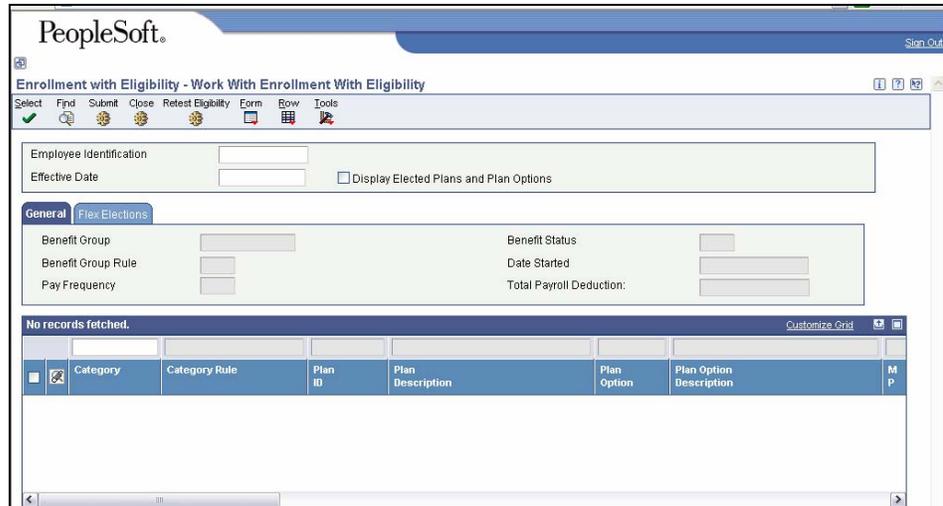
Click Roles, HR\_PR .  
(Citrix users – right click on the menu, choose Apply Roles, choose HR\_PR.)

Human Resources and Payroll - Agencies > Benefits Administration > Enrollment with Eligibility

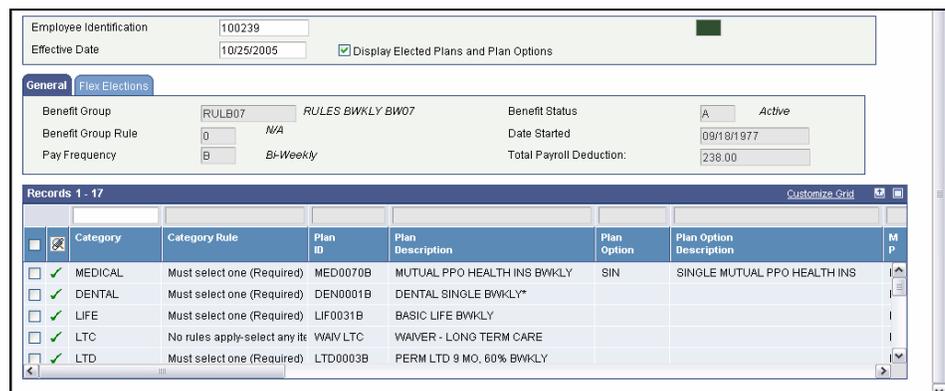
## Steps

### Enroll an Employee in Benefits using Enrollment with Eligibility

Start this instruction from the Enrollment with Eligibility – Work with Enrollment with Eligibility window.



1. Complete the following fields in the header:
  - Employee Identification
  - Effective Date – enter the same date you entered in the Enrollment Effective Date on the Employee Master.
2. Click **Find**.



3. Review the information in the following fields:
  - Benefit Group
  - Benefit Status – The Benefit Status must be Active (A)
  - Last Start Date

- Pay Frequency
4. On the grid, choose each row that contains a benefit plan or plan option in which you want to enroll the employee.
-  Some Categories require an election. You *must* elect one plan.
5. Click **Row, Elect**. The Enrollment with Eligibility - Change Amount or Rate window appears.
-  If any of the plans that you choose requires an amount or rate, the Change Amount or Rate form appears. Follow steps 6 – 9.



PeopleSoft. Sign Out

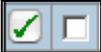
Enrollment with Eligibility - Change Amount or Rate

OK Cancel Tools

Employee No. 100239 MUJELLER, DOWI L  
Plan ID MISC0001 YMCA - LINCOLN

**Override Amounts**

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

6. Type the amount or rate that the employee pays in the Employee Payroll Ded DBA field.
  7. If applicable, complete the following field:
    - Employer Paid Benefit DBA field.
  8. When you have entered the amount(s) or rate(s), click **OK**. The Enrollment with Eligibility – Work with Enrollment with Eligibility window appears with a check mark  on the row of each plan elected.
-  Before you click Submit to save the elections, you can undo an incorrect election. Choose the election on the grid, click **Row, Mistaken Enrollment**.
9. Click **Form, Submit** to save the information.
-  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. Return to step 4 to elect a required benefit plan or plan option. (The required plan will be highlighted.)

Enrollment with Eligibility - Retest Eligibility Complete Message
<p>Retest Eligibility Completed</p> <p>Please review any changes in blue font color, which have been made .</p> <p>These could include the automatic election of default and mandatory plan(s), or stopping of plans or plan options due to change of eligibility status.</p> <p>Make correction(s) if needed, and retest eligibility again.</p> <p><input type="button" value="OK"/></p>

10. Click **Close**.