



Benefits Advisor

Employee Guide



You want to make a difference. *So do we.*TM



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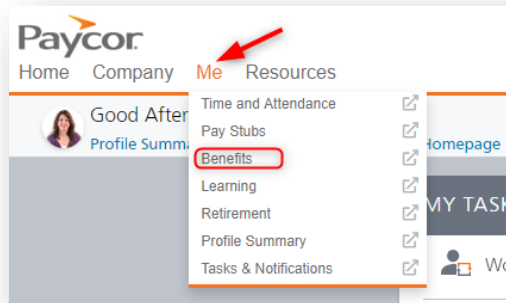
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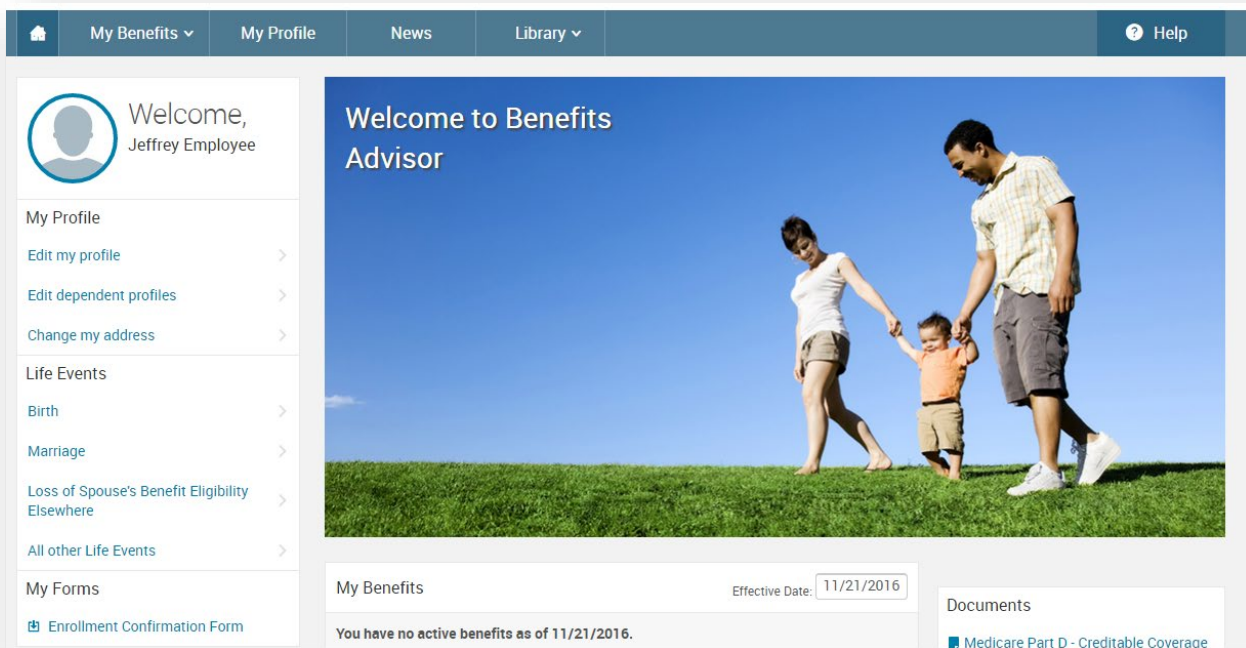
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Accessing Your Online Benefits Portal

1. Login to Paycor. Hover over **Me**, and then click **Benefits**.



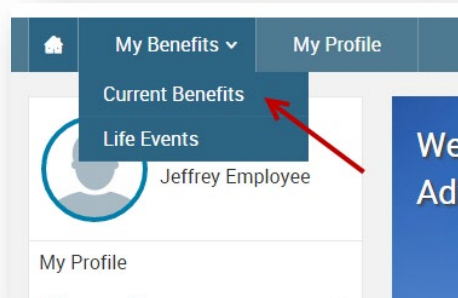
2. You will then be directed to your Benefits Home screen:



3. From this screen, you can:
 - View your benefits
 - Get information on the plans you're enrolled in
 - Find carrier information
 - Process a life event change that allows you to update your benefits, such as:
 - Marriage – add a spouse
 - Birth/Adoption of a child – add a new child
 - Divorce – remove a former spouse
 - Loss of coverage through a spouse's plan – allows you to add benefits

Viewing Current Benefits

1. You can view your current benefit information by selecting **Current Benefits** when hovering over the **My Benefits** menu:



2. This will take you to a summary confirmation screen that will show all benefits you are enrolled in, pending enrollments, as well as who is covered and the cost. The per pay costs reflected on the page depend on whether or not the “Include pending costs” is selected and if there are benefits in a pended state.

A screenshot of the 'Current Benefits, Confirmation Statement for Joe Employee' page. The page shows a summary of benefits as of 2/8/2016. It includes a 'PRINT' button, a note about email confirmation, and cost breakdowns for 'TOTAL COSTS PER YEAR' and 'TOTAL COSTS PER PAY PERIOD'. The 'Medical' section is expanded, showing a pending status for the 'UHC Medical Plan H' and a table of covered individuals. A red arrow points to the 'Include pending costs' checkbox, which is currently unchecked. Another red arrow points to the 'Coverage' column in the table, which shows 'Covered' for all three individuals.

Current Benefits, Confirmation Statement for Joe Employee

Below are your current elections. You may click on the plan name for more information about each plan.

Your Benefits as of 2/8/2016 View your benefits as of another date: 2/8/2016

PRINT If you have an email address on file, you will have the option to email a copy of your benefits confirmation to that address.

TOTAL COSTS PER YEAR		TOTAL COSTS PER PAY PERIOD	
Your Cost	\$0.00	Your Cost	\$0.00
		Employer Cost	\$0.00

(+) Expand All (-) Collapse All

☐ Include pending costs

Medical Your cost per pay period: \$175.39

UHC Medical Plan H
Coverage: Employee + Family
Effective Date: 2/1/2016

This benefit election is pending until approved by HR Department

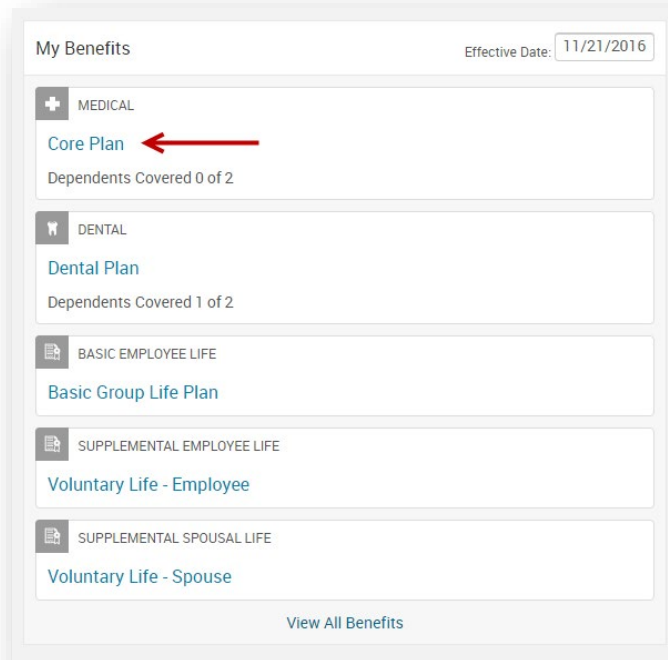
Who will be covered on this plan:

Name	Relationship	Coverage	Effective Date
Joe Employee	Employee	✓ Covered	2/1/2016
Jane Employee	Spouse	✓ Covered	2/1/2016
Jennifer Employee	Child	✓ Covered	2/1/2016

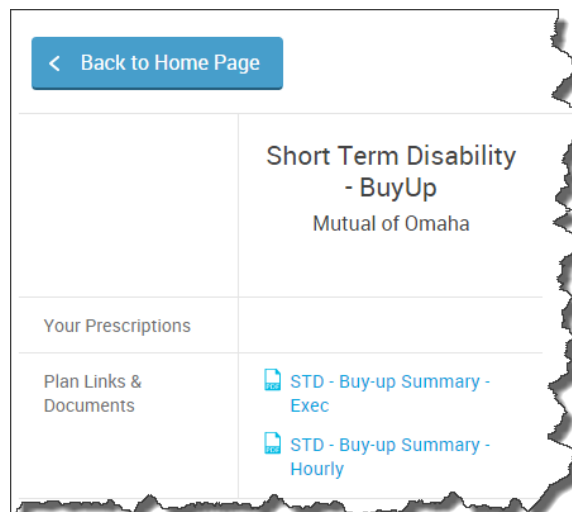
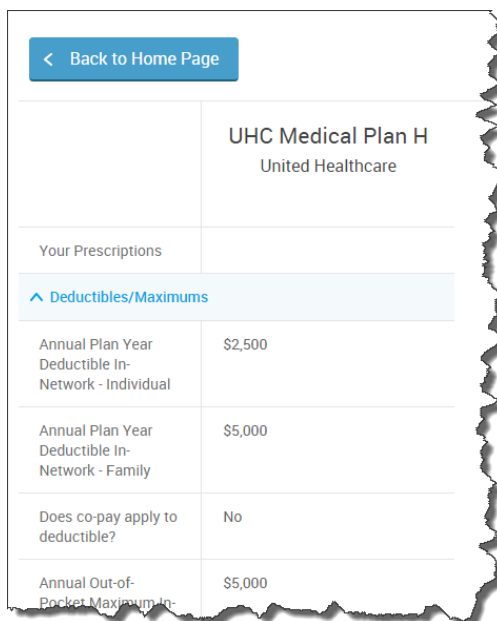
COST DETAILS PER PAY PERIOD	
Total Premium	\$175.39
Employer Cost	\$0.00
Employee Cost	\$175.39

Viewing Plan Information

1. You can view plan detail information and access plan documentation by clicking on the benefit type from the Benefits Quicklook menu on the bottom half of the Home screen.



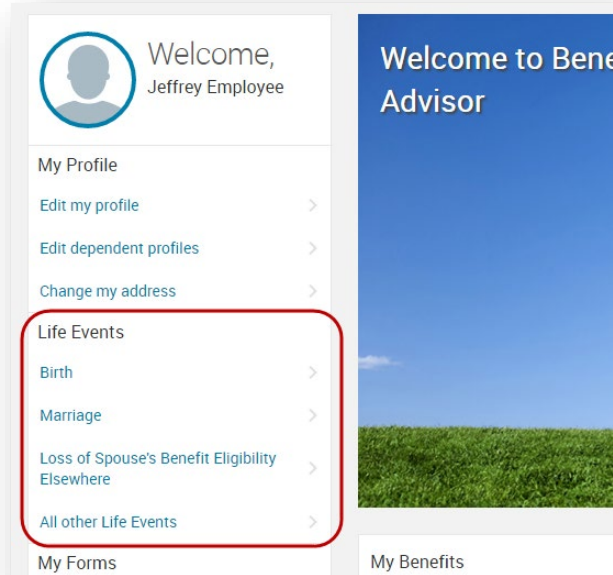
2. Selecting the plan type, for example “Medical”, will take you to a page that will show details of the plan you are enrolled in (if available) as well as any plan documents associated with that plan.



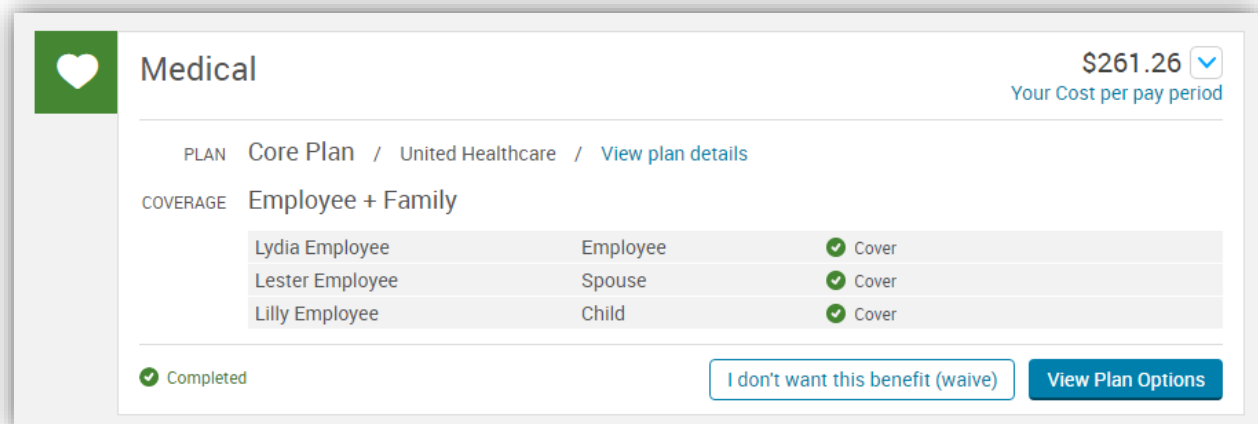
Processing a Life Event Change

From the Benefits Home screen:

1. Click on the **Life Events** link:




2. The system will walk you through providing the appropriate information based on the life event chosen.
3. After a plan is selected or the plan is waived the plan type icon will turn green. The ***Selection Required** text changes to **Completed**. This lets you know the enrollment for that plan type is complete. The plan pod will display the plan's name, vendor, coverage level, and whether dependents are covered, not covered, or ineligible. Anytime during the enrollment process changes can be made by selecting View Plan Options.



4. Clicking the arrow next to the cost opens a flyout menu with more detailed information, which typically includes the total premium and employer contribution.

Core Plan

United Healthcare 

DEDUCTIBLE:

Individual: \$700

Family: \$1,900


OUT-OF-POCKET MAX:

Individual: \$2,100

Family: \$4,200

CO-INSURANCE: 20%

[View plan details](#)

Your Cost per pay period:
\$261.26 

Cost Summary (per pay period)

Total Premium	\$752.92
Spousal Surcharge	\$0.00
Employee Cost	\$261.26

5. The system will walk you through the allowable selection/change of your plans based on enrollment rules per the life event type. Note: These changes will not be complete until you get to the end of the enrollment and you click the Save Enrollment button after selecting “I agree, and I’m finished with my enrollment” box.

Once You've Reviewed All Your Selections:

Participation

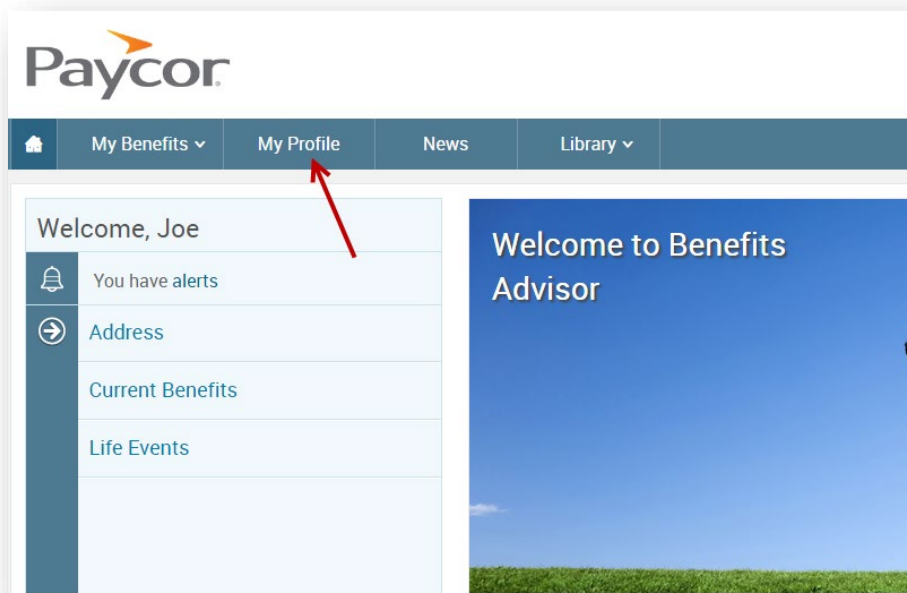
I hereby acknowledge I have read the statements contained herein, or they have been read to me, and the statements are true and complete to the best of my knowledge. I understand any misrepresentation or omission contained herein may be used to reduce or deny claim or void the contract if such misrepresentation or omission affects acceptance of the risk. I hereby enroll for benefits for which I am presently eligible, or for which I may become eligible, under my employer's group contract(s). If any deductions are required for this coverage, I authorize such deductions from my earnings and I understand that any premiums will be automatically deducted from my paycheck on a pre-tax basis (before tax dollars) unless I submit a declination election. I reserve the right to revoke this deduction authorization at any time upon written notice.

☐ I agree, and I'm finished with my enrollment

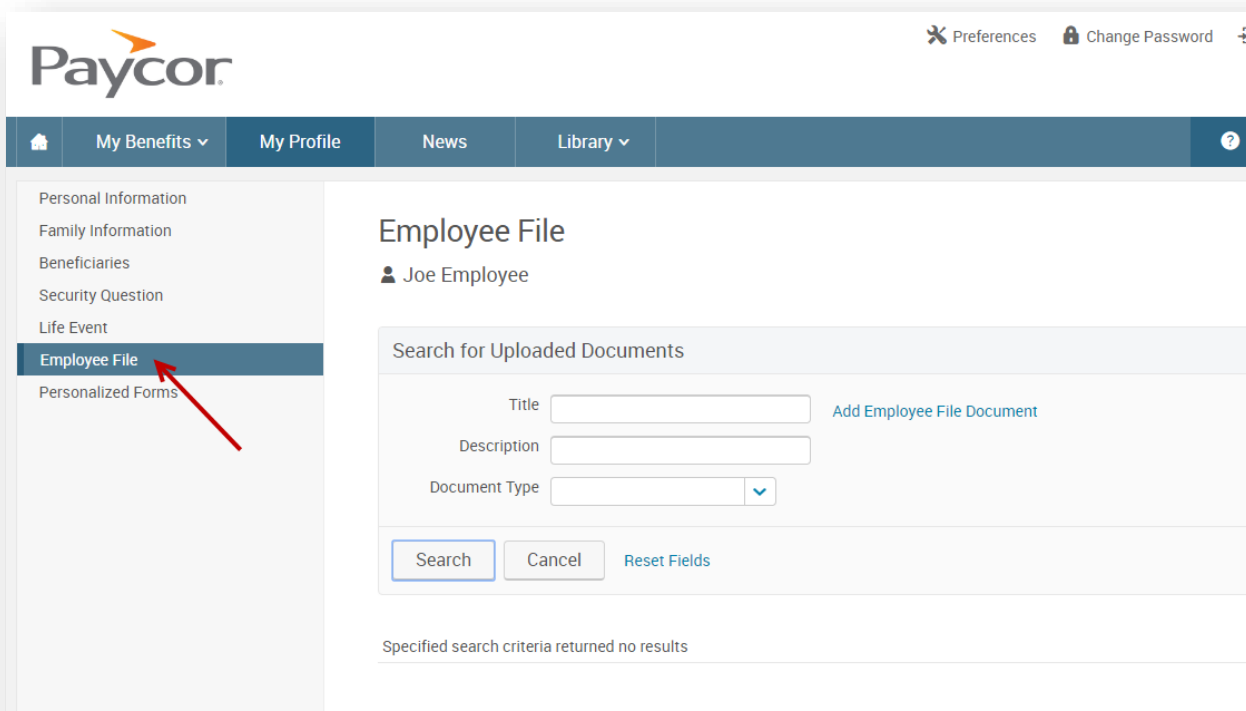
✓ Save My Enrollment!

Uploading Documents to Your Record

1. On the Home page, click on My Profile.



2. Select Employee File on the left menu.



3. Click Add Employee File Document.

The screenshot shows the Paycor web application interface. At the top, there's a header with the Paycor logo and links for Preferences and Change Password. Below this is a navigation bar with tabs: My Benefits, My Profile, News, and Library. A left sidebar contains a list of menu items: Personal Information, Family Information, Beneficiaries, Security Question, Life Event, Employee File (highlighted), and Personalized Forms. The main content area is titled "Employee File" and shows a user profile for "Joe Employee". Below the profile, there's a section "Search for Uploaded Documents" with input fields for Title, Description, and Document Type, and buttons for Search, Cancel, and Reset Fields. A red arrow points to a link labeled "Add Employee File Document". At the bottom of the search section, a message states "Specified search criteria returned no results".

4. Enter a Title, Description and Document Type and then select the document to be uploaded. Please note the acceptable document file types.

The screenshot shows the "Add Employee File Document" form in the Paycor application. The form is titled "Employee File" and is for "Joe Employee". It contains four required fields: Title, Description, Document Type (a dropdown menu currently set to "Unspecified"), and File. A tooltip box next to the File field provides information: "Supported file types include .doc, .docx, .pdf, .xls, .xlsx, and .txt. Files may be up to 6 MB in size." Below the fields, there's a note: "* Fields are required". At the bottom of the form are "Save" and "Cancel" buttons. The left sidebar is the same as in the previous screenshot, with "Employee File" highlighted.

5. Click Save.

The screenshot shows the 'Employee File' form for 'Joe Employee'. A green success message at the top states 'Employee File information was saved successfully.' The form contains fields for Title, Description, Document Type (set to 'Unspecified'), and File (with a 'Choose File' button and 'No file chosen' text). A note indicates that fields with an asterisk are required. 'Save' and 'Cancel' buttons are at the bottom.

Personal Information
Family Information
Beneficiaries
Security Question
Life Event
Employee File
Personalized Forms

Employee File

✓ Employee File information was saved successfully.

Joe Employee

* Title

* Description

* Document Type Unspecified

* File Choose File No file chosen

* Fields are required

Save Cancel

6. You can view the uploaded documents by clicking on the Employee File menu.

The screenshot shows the 'Employee File' menu selected in the sidebar. The main content area displays a 'Search for Uploaded Documents' section with input fields for Title, Description, and Document Type, along with 'Search', 'Cancel', and 'Reset Fields' buttons. Below this is a table of uploaded documents. A red arrow points to the first document, 'Test Document'.

Personal Information
Family Information
Beneficiaries
Security Question
Life Event
Employee File
Personalized Forms

Employee File

Joe Employee

Search for Uploaded Documents

Title [Add Employee File Document](#)

Description

Document Type

Search Cancel [Reset Fields](#)

Title	Description	Type	View
Test Document	Test Document	Unspecified	View