Core Benefits Administration

Manager Self Service
Reference Guide

2025

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Chapter 1: Overview of Manager Self Service (MSS)

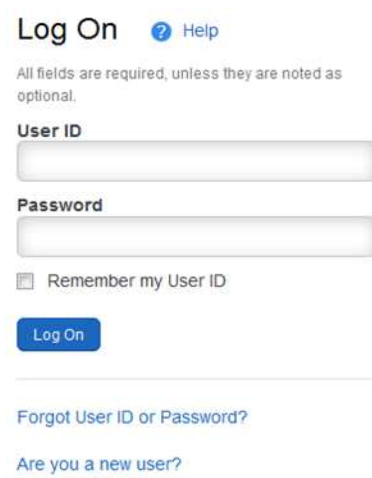
Manager Self Service is the tool/system which allows users to:

- View information regarding an employee's benefits selections.
- Manage an employee's life events and benefit changes.
- Track updates/changes to an employee's benefits.
- Review various reports including enrollment statistics, new hires, etc.

Accessing the System

To access the Manager Self Service system:

- Click on the website address or URL that is provided by the Benefits Service Team.
- Enter your Username and Password. If this is your first visit to the site, click 'Are you a new user?' to register.
- Select Manager Self Service from the drop down box.
- Click Go.
- **Note:** Selecting Your Benefits Portal will allow you to view your personal benefit information.



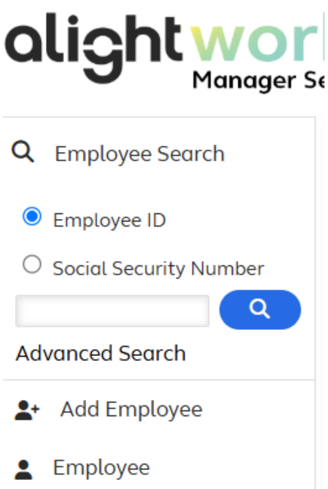
Navigating the System

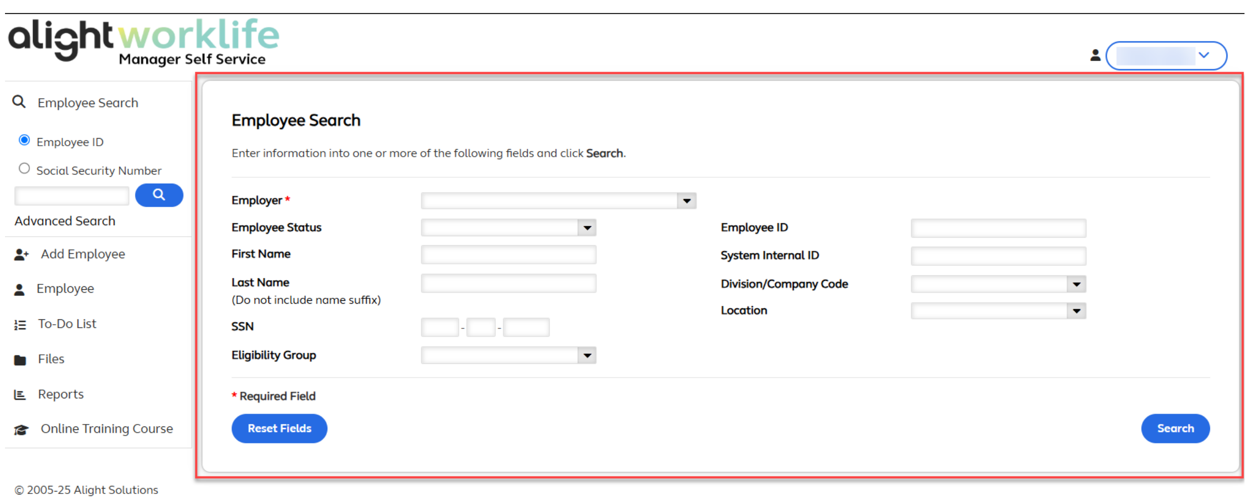
The **Navigation Bar** is located in the left navigation under the Employee Search on the MSS home page. Additional details on how to use each of these menu items is detailed later in this document.

- **Employee Add**– allows users to manually add an employee to the CBA system.
- **To Do List** – allows users to access records requiring attention
- **Files** – used by the Benefit Service Team to ensure that files are processing correctly.
- **Reports** – allows access to the reporting tool where users can create, modify, save, & print reports.
- **Online Training Course** – provides users with access to training schedules and documentation

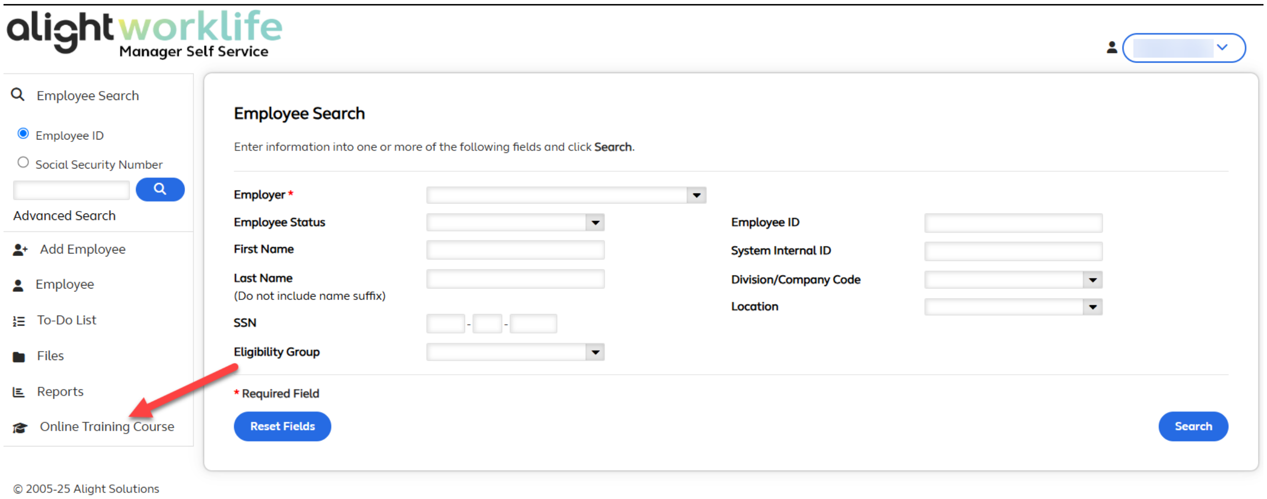
The **Search Options** are located on the left side of the MSS home page. There are two options for searching.

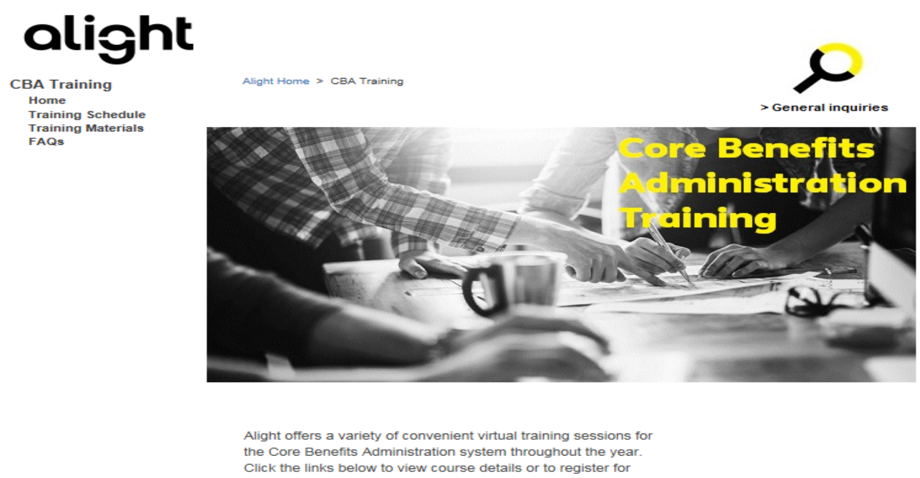
- **Quick Search –** allows users to search for employee records by entering the employee's complete Social Security Number or complete Employee ID or the first few digits of either one. **Note:** the system is not set up to search by the last 4 digits of the SSN.
- **Advanced Search -** allows users to search for an employee using a wide range of options such as: Employee Name, Employee SSN, Eligibility Group, City, State, Division, and/or Location.





The **Online Training Course** section is located at the bottom of the left navigation on the MSS home page. By clicking on the link users can access the CBA training website where they can view the yearly training schedule, sign up for three different types of training classes, and access reference materials.





Access Levels

There are four access levels in the MSS system. Depending on what access level a user has will determine what functions they are able to perform in the system. The following chart outlines each of the access levels and the functions they can perform based on their level.

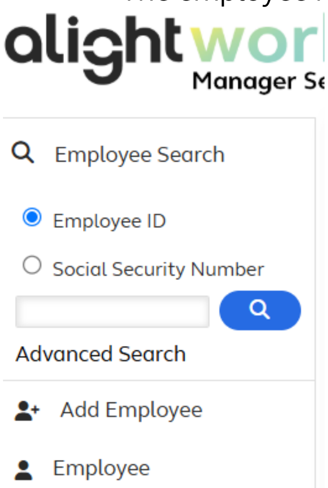
Function	Administrator	High	Medium **	Low **
Search & Retrieve Employee Records	X	X	X	X
View All Employee Data / Add Employees	X	X		
View All Employee Data except Salary/ Bonus & Commissions			X	X
View Dependent Info	X	X	X	X
Add/Modify Dependent Info	X	X	X	
Deactivate/Reactivate Dependents	X	X		
Enroll or make Changes to Coverage on Behalf of Employee via Link to Enrollment in Portal during Open Window for event	X	X	X	
View Beneficiary Designations	X	X	X	X
Make Changes to Beneficiary Designations	X	X	X	
View Benefits Summary Screen	X	X	X	X
Enter Life Events that are not data-driven	X	X		
Retrieve / View Employee Notes	X	X	X	X
Enter / Update Employee Notes (Including Tracking Capability)	X	X	X	
Report View	X	X		
Access to Employer / Employee To-Do List	X	X	X	
View & Approve Pended Employees	X	X		
View, Unpend & Close Pended Coverage Records (i.e. Life Plans)	X	X		
Untrack Notes Entered by Another User	X	X	X	
Search & View Transaction Log Entries	X	X	X	X
Search & View Transaction Log Entry Details	X	X		
Reactivate / Reinstate Employee	X	X		
HR Override Functions (Change coverage and effective dates outside the enrollment window)	X			
Limit Manager Self Service Users Access rights to employee data by Pay site, Location, Division, Department, Job Class*	X			
Modify Username / Password	X			

Chapter 2: Employee Search

The **Search Options** are located on the left side of the MSS home page. There are two options for searching: Quick Search and Advanced Search.

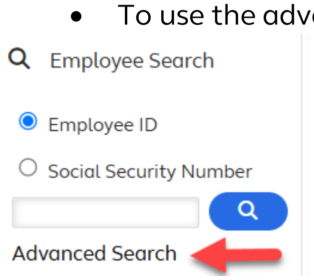
Quick Search

- **Quick Search –** allows users to search for employee records by entering the employee's complete Social Security Number or complete Employee ID or the first few digits of either one. **Note:** the system is not set up to search by the last 4 digits of the SSN.
- To use the quick search function simply enter the SSN or EE ID or first few digits and click Go.
- The employee record will then appear.

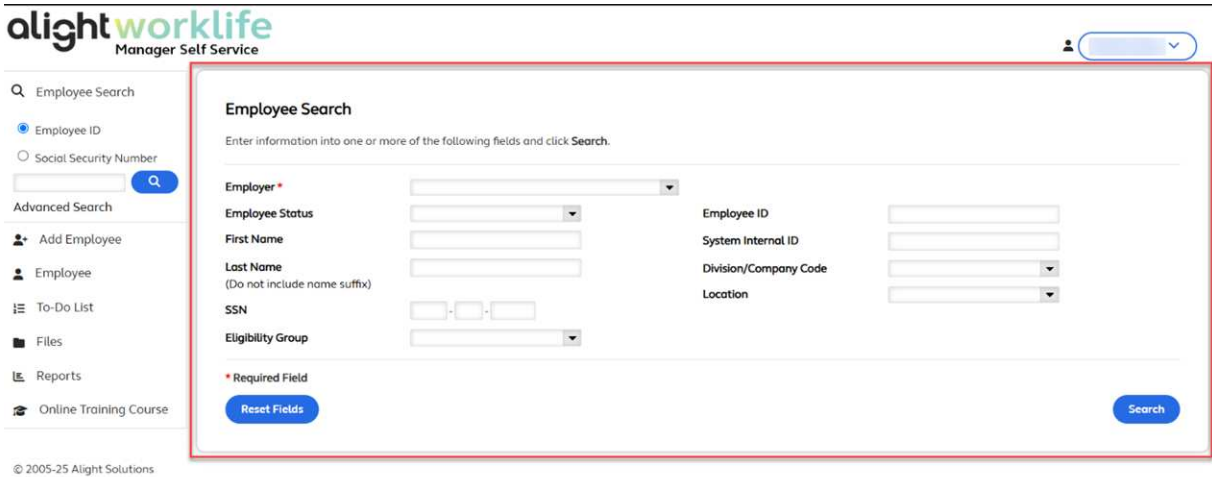


Advanced Search

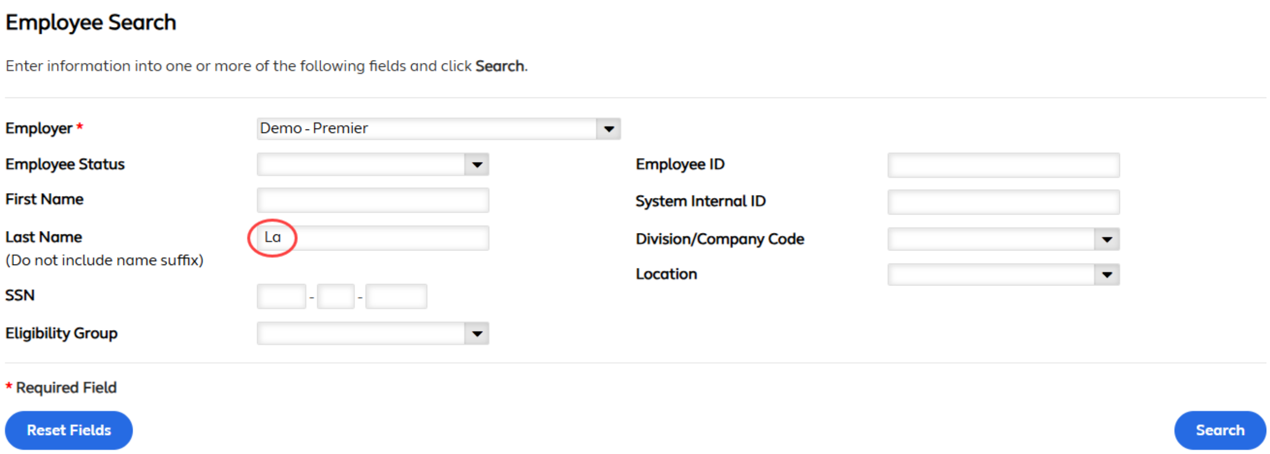
- **Advanced Search -** allows users to search for an employee using a wide range of options such as: Employee Name, Employee SSN, Eligibility Group, City, State, Division, and/or Location.
- To use the advanced search function click on the link for Advanced Search.



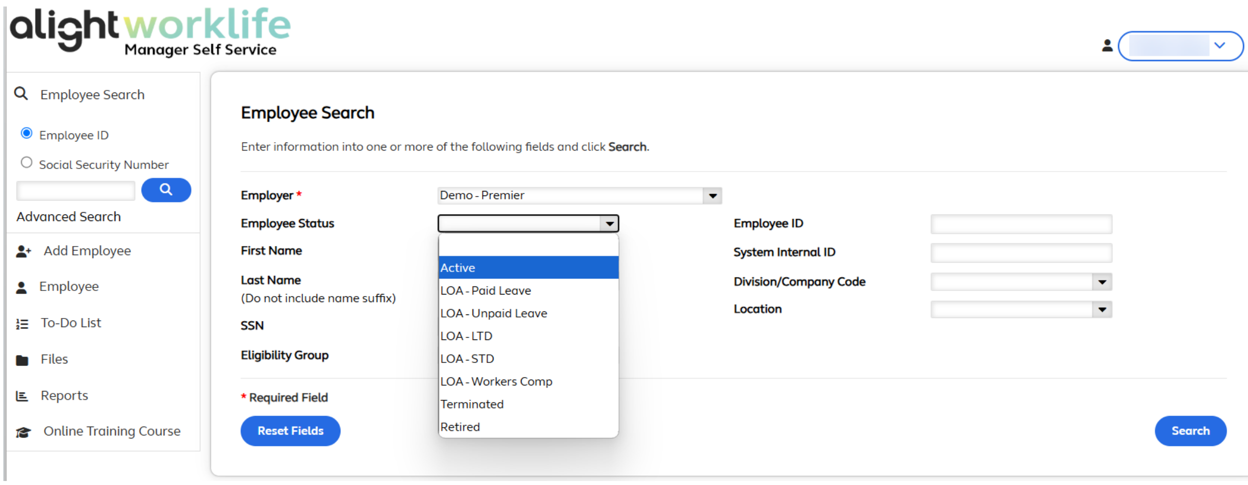
- The Employee Search screen will appear.
- Complete one or more of the fields, then click **Search** to view the results.
- Note there are two types of fields on this screen: Entry and Drop Down.



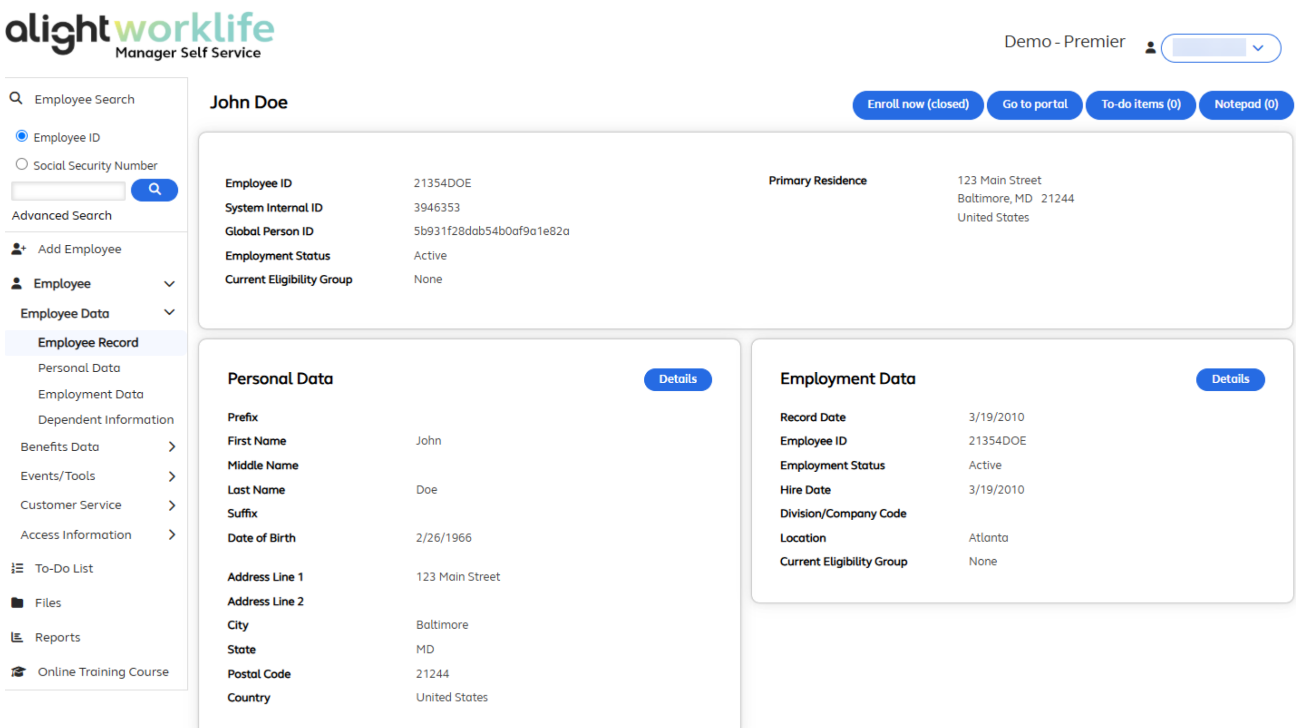
- **Entry Fields** - users can enter complete or partial information in an entry field. Entry fields include First Name, Last Name, SSN, and Employee ID.
    - For example, if a user is not certain of the spelling of an employee's last name, the first few letters can be entered.



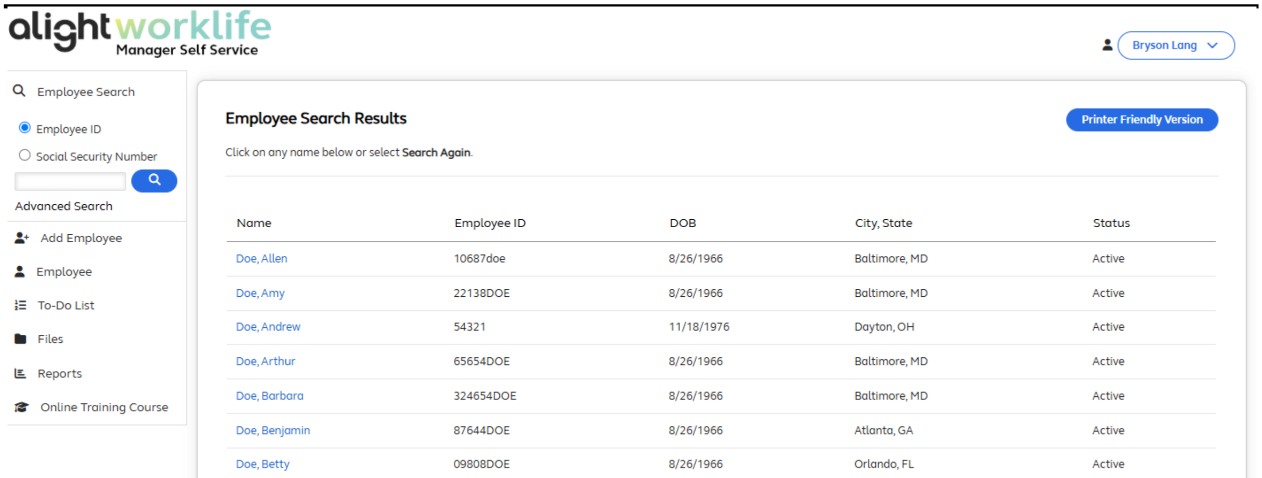
- **Drop-Down Fields** - users can click on the arrow beside any of the drop-down fields to view a list of available options. To select a specific option the user will move the cursor over the option to highlight it and then click the option to select.
    - For example, to view a list of employees who are on active status, click the drop down arrow beside **Employee Status** and select the **Active** option from the list.



- If the system finds just one employee matching the criteria the user entered, the **Employee Record** Screen will display for that employee.



- If the system finds more than one employee that matches the criteria the user entered, the list of matching employees will display.



- If the user sees the employee they are looking for they simply click on their name to display the

Employee Record screen. To print click **Printer Friendly Version** at the bottom of the screen.

- If the user does not see the employee they are looking for, they should click **Search Again** to being a new search.

Chapter 3: Employee Specific Information

When the user locates an employee using the advanced or quick search options, the system automatically displays the Employee Record. The user can then view the employee's information including demographic data, employment data, dependent and beneficiary information, benefits summary, pending transactions, notes, etc. Users can also view the employee's Portal and Enrollment screens just as the employee sees them.

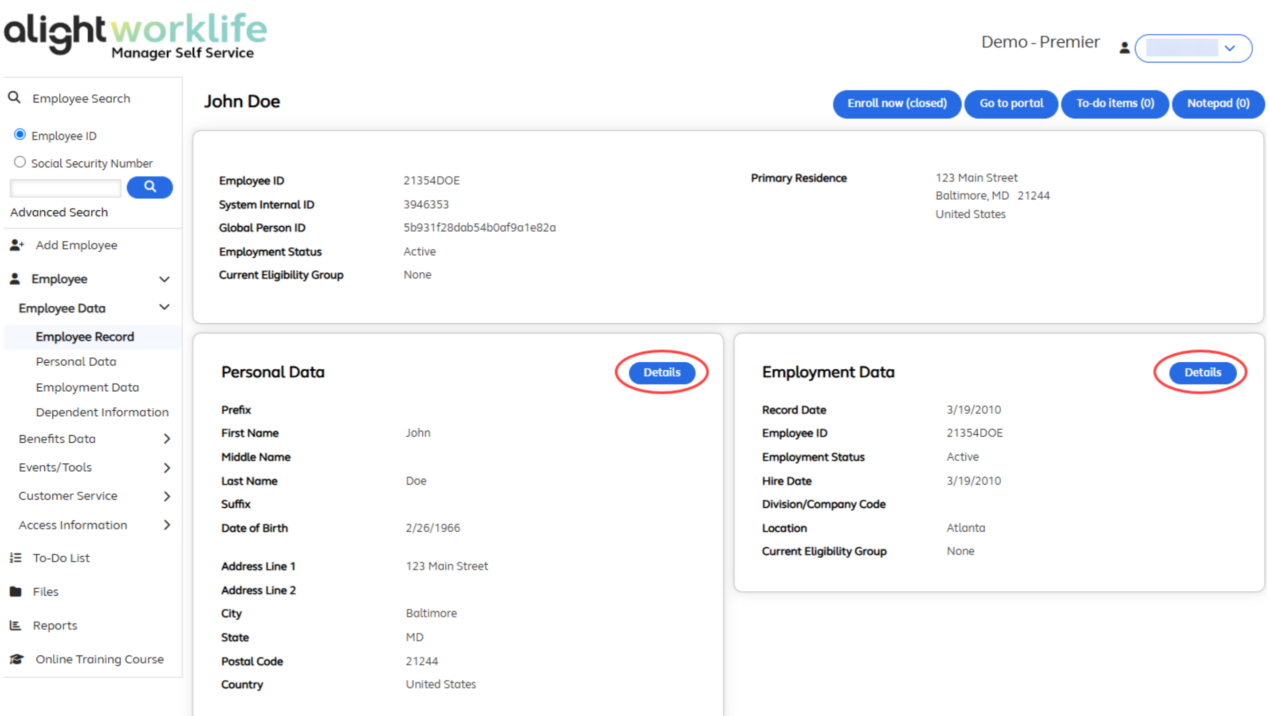
Navigating the Employee Record

The **Top Navigation** menu is located at the top of the Employee Record and contains the following items:

- **Enroll Now** – displays the enrollment dates for the employee if the enrollment window is open. Allows users to view the employee's enrollment information as well as enroll on behalf of the employee (known as surrogate enrollment).
  - If the enroll now link is active but there are no enrollment dates displayed that means the employee is eligible for year round benefits such as Parking or an HSA. The link stays active so the employee can make changes to the year round benefits but they are unable to make updates to any other benefits.

- **Go To Portal** – allows the user to view the employee's portal (benefits website) just as the employee sees it. Users are then able to help the employee with navigation issues or help answer employee questions.
- **To-Do Items** – allows the user to view, approve, or deny pending life events as well as view issues that have been submitted through issue tracker.
- **Notepad** – users can view, print, and add notes to an employee's record.
- **Note** – additional details on how to use each of these menu items is detailed later in this document.

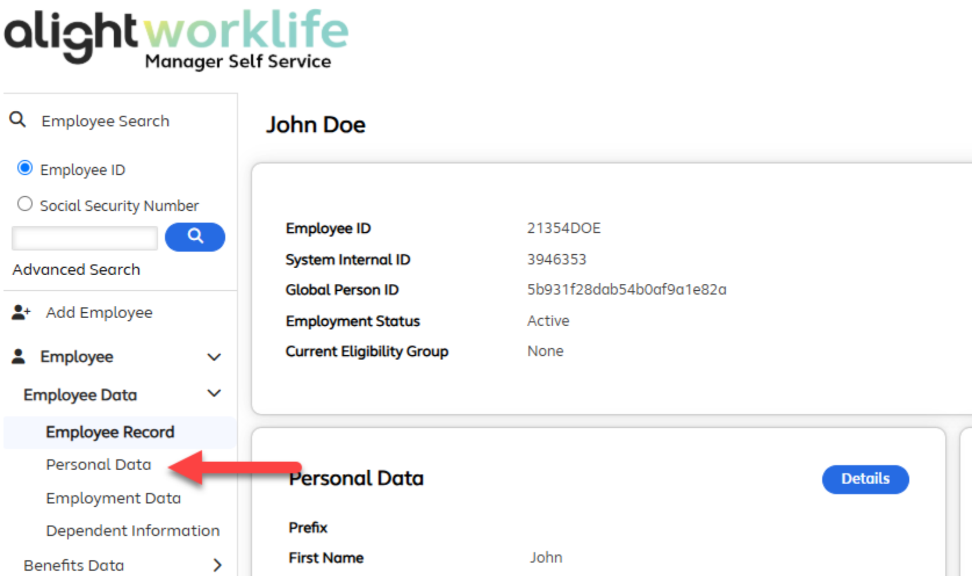
The center of the employee record screen contains a small portion of the employee's Personal Data and Employment Data. To view additional information the user can click on the Details link located beneath each section.



Personal Data

There are two ways a user can view an employee's personal data.

- From the Employee Record a user can click on the Details link located underneath the Personal Data header (as shown above).
- The user can click on Employee Data from the navigation menu on the left. This will expand the menu where the user can click on Personal Data.



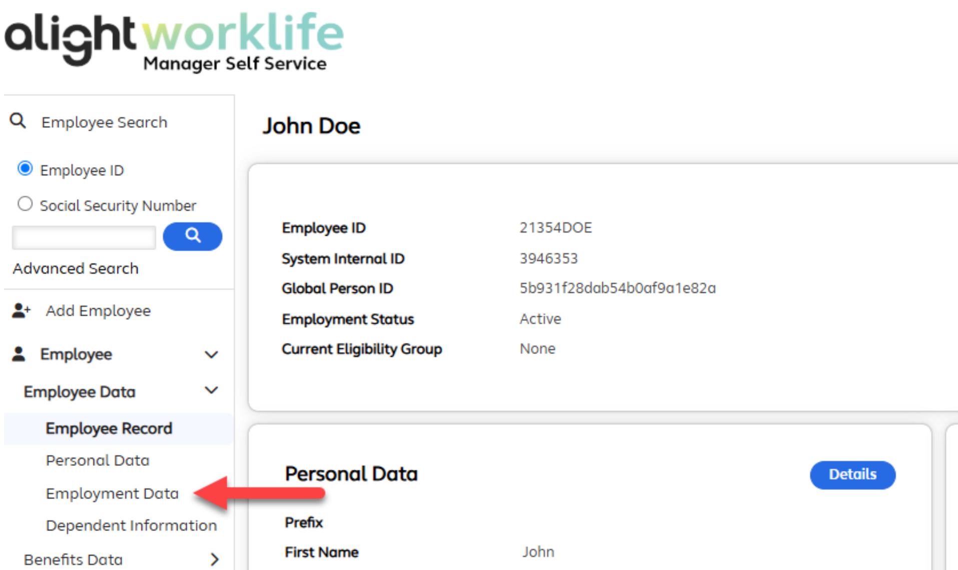
The personal data screen contains information such as the employee's name, address, phone number, date of birth, marital status, gender, etc. The fields are open and can be updated in the MSS system but the best practice is to allow the information to be updated via the eligibility file that is transmitted via the HRIS system on a regular basis (usually once a week).

Employment Data

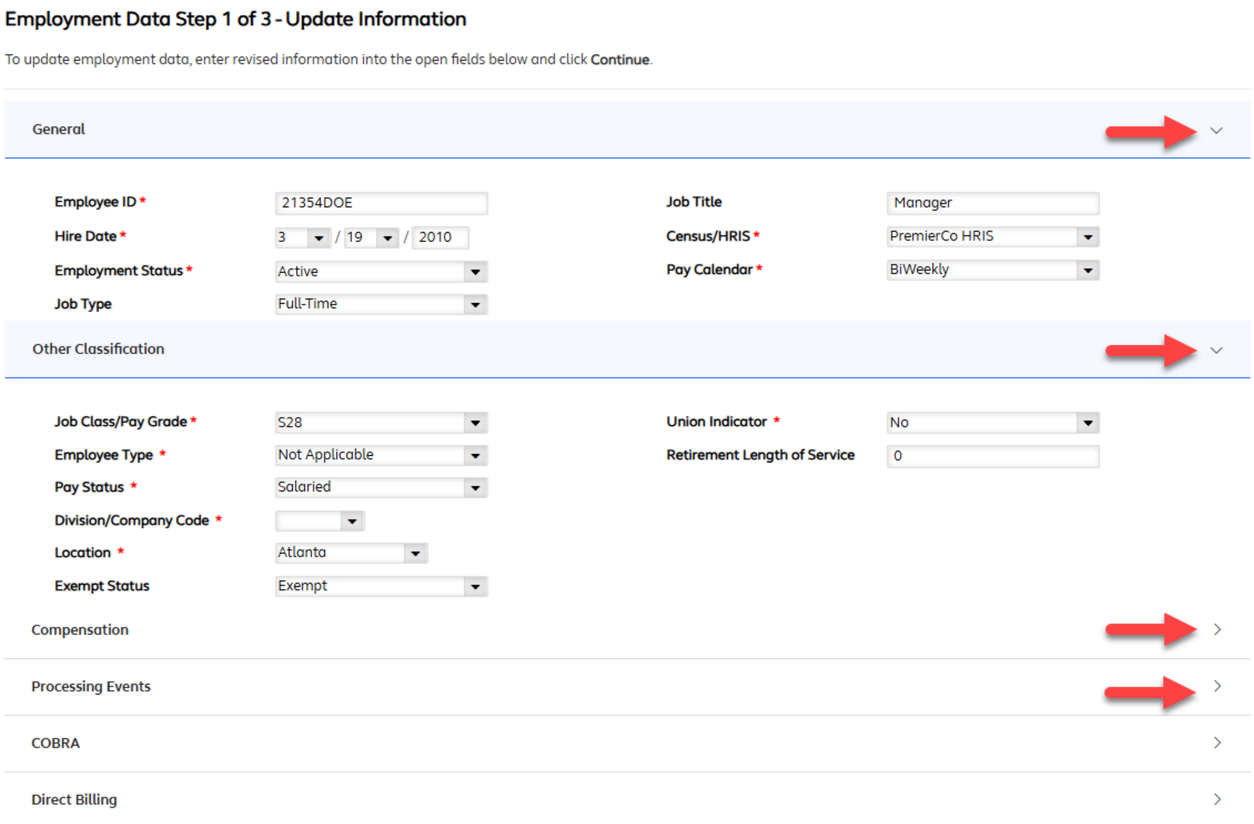
There are two ways a user can view Employment Data for an employee.

- From the Employee Record a user can click on the Details link located underneath the Employment Data header (as shown above).
- The user can click on Employee Data from the navigation menu on the left. This will expand the menu where the user can click on Employment Data.

The Employment Data screen displays data such as an employee's Hire Date, Employment Status, Employee ID, Pay Status, Pay Site, etc.



Additional Employment Data such as Compensation information, HIPAA information, and user defined information can be viewed by clicking on various options from the accordion menu located at the bottom of the Employment Screen.



Just like the Personal Data section, the fields in the Employment Data section are open and can be updated in the MSS system but the best practice is to allow the information to be updated via the eligibility file that is transmitted via the HRIS system on a regular basis (usually once a week).

When Alight is the Direct Billings and Payments (DBP) and/ or COBRA Administrator (Optional Services), additional Employment Data can be viewed by clicking on the **COBRA** and **Direct Billing** options from the accordion menu located at the bottom of the Employment Screen.

COBRA

- **COBRA Subsidy Indicator:** Client defined value to identify a unique COBRA Subsidy rule

- **COBRA Subsidy Calculated End Date:** System calculated COBRA Subsidy End Date based on COBRA Subsidy Indicator/rule
- **COBRA Subsidy End Date Override:** COBRA Subsidy End Date Override to be used instead of the system calculated end date.
- **COBRA Disability Indicator:** Indicator to identify qualified beneficiary who is eligible for COBRA Disability extension. See the COBRA Education document for additional details about this process.
- **COBRA Disability Indicator Effective Date:** Effective date when the 19th month of COBRA Disability extension begins. This is also the date when COBRA cost switches to the COBRA Disabled rate.
- **TAA Indicator:** Indicator to identify qualified beneficiary who is eligible for Trade Adjustment Act (TAA) special second COBRA election period and/or special extension of COBRA period. See the COBRA Education document for additional details about this process.

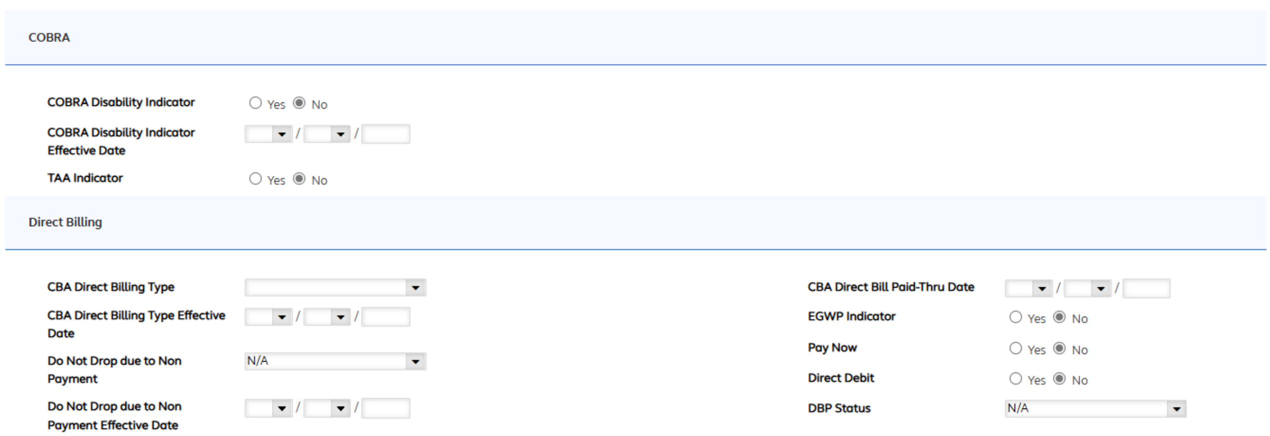
Direct Billing

- **CBA Direct Billing Type:** Indicator identifies participants who are eligible to be direct billed. Valid values:
    - **COBRA only:** Only COBRA benefits are direct billed
    - **Direct Bill All:** All benefits are direct billed
- **CBA Direct Billing Type Effective Date:** Effective date when participant becomes eligible to be direct billed
- **Do Not Drop due to Non Payment:** Indicator identifies participants who should not be dropped due to non-payment. This indicator is set in the DBP TBA system and passed back to CBA for display only in MSS.
- **Do Not Drop due to Non Payment Effective Date:** Effective Date associated with Do No Drop due to Non Payment indicator. This indicator is set in the DBP TBA system and passed back to CBA for display only in MSS.
- **CBA Direct Bill Paid-Thru Date:** Date through which the DBP TPA system is calculating the participant's premium as having been paid. This date is updated immediately upon receipt of a payment that has been entered onto the TBA System. If a participant has paid a portion of his or her monthly rate, the paid through date will not advance until the full month's premium is paid. DBP cannot change the paid through date that is displayed. This date is passed back to CBA for display only in MSS.
- **EGWP Indicator:** Indicator identifies participants enrolled in an Employer Group Waiver Plan (EGWP). This indicator is set in the DBP TBA system and is passed back

to CBA for display only in MSS. It is also included on the DBP drop report to identify participants who should have prospective drop of the medical and retroactive drop any other coverage (e.g., dental).

- **Pay Now:** Indicator identifies participants who are eligible to make a payment through Pay Now (which is a one-time direct debit payment). This indicator is set in the DBP TBA system and is passed back to CBA for display only in MSS and to drive Alight Worklife DBP tile messages.
- **Direct Debit:** Indicator identifies participants who are enrolled in Direct Debit. This indicator is set in the DBP TBA system and is passed back to CBA for display only in MSS and to drive CBA Portal DBP Promo, Alight Worklife DBP tile, and Notification messages.
- **DBP Status:** A participant will have one of the following billing statuses:
  - ACTV (Active)—The participant has current rates and is still receiving bills.
  - PINACT (Pending Inactive)—The participant no longer has current rates but still owes an outstanding amount and is still receiving bills.
  - INACT (Inactive)—The person no longer has current rates or an outstanding amount owed, and is no longer receiving bills.

This indicator is set in the DBP TBA system and is passed back to CBA for display only in MSS and to drive CBA Portal DBP Promo, Alight Worklife DBP tile, and Notification messages.

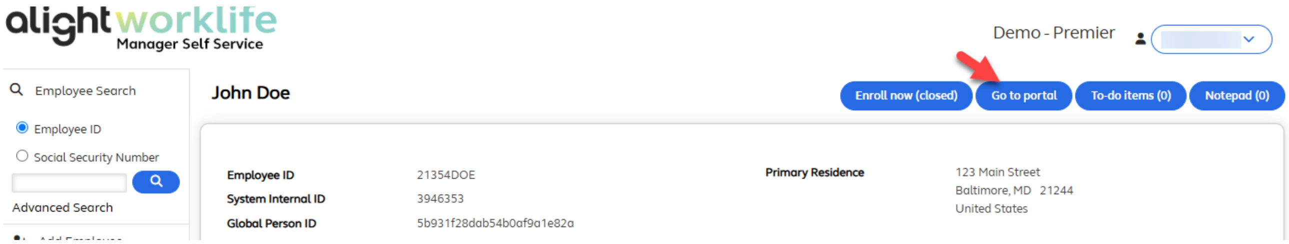

COBRA

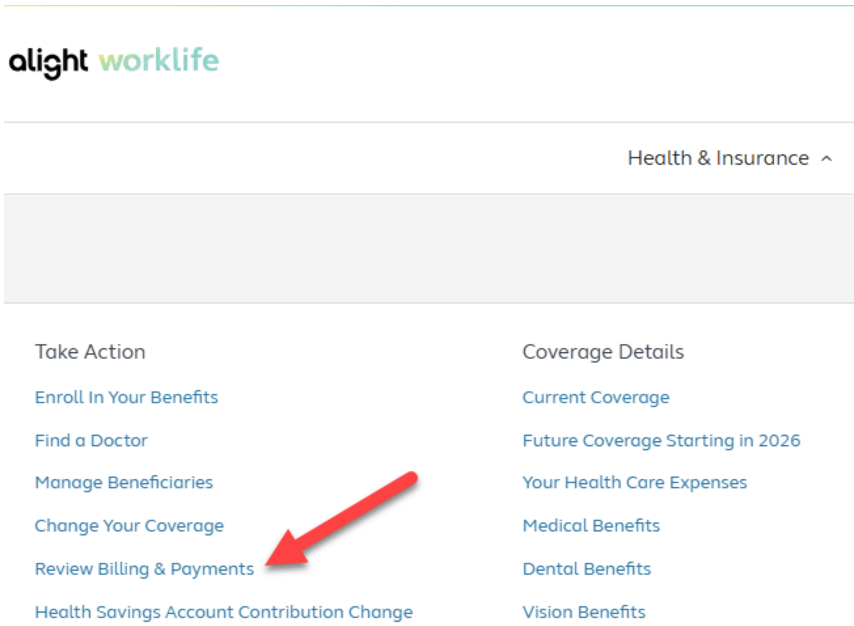
COBRA Disability Indicator: Yes / No
COBRA Disability Indicator Effective Date
TAA Indicator: Yes / No

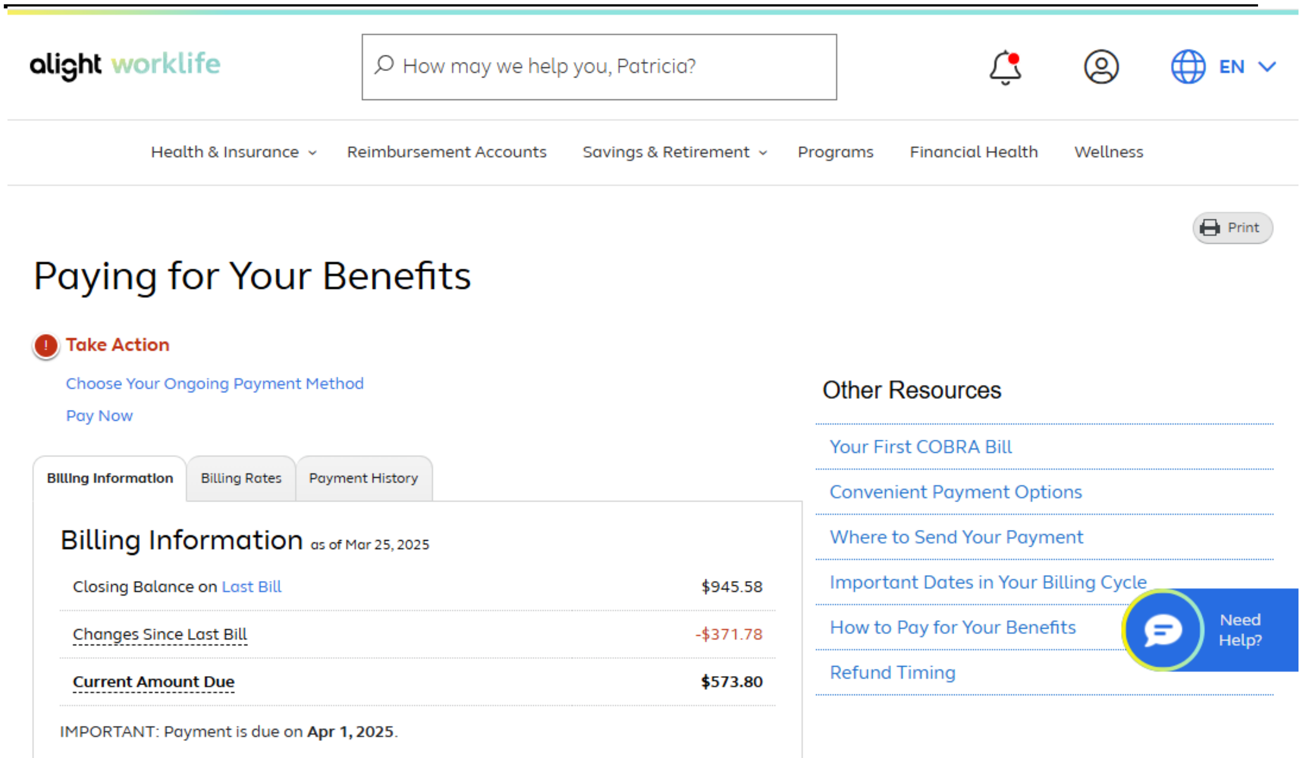
Direct Billing

CBA Direct Billing Type
CBA Direct Billing Type Effective Date
Do Not Drop due to Non Payment: N/A
Do Not Drop due to Non Payment Effective Date
CBA Direct Bill Paid-Thru Date
EGWP Indicator: Yes / No
Pay Now: Yes / No
Direct Debit: Yes / No
DBP Status: N/A

Through Go to site, users can access the employee's view of the DBP details through the Alight Worklife Health & Insurance drop down and select Review Billing Payments







alight worklife

How may we help you, Patricia?

EN

Health & Insurance | Reimbursement Accounts | Savings & Retirement | Programs | Financial Health | Wellness

Print

Paying for Your Benefits

Take Action

Choose Your Ongoing Payment Method

Pay Now

Billing Information | Billing Rates | Payment History

Billing Information as of Mar 25, 2025

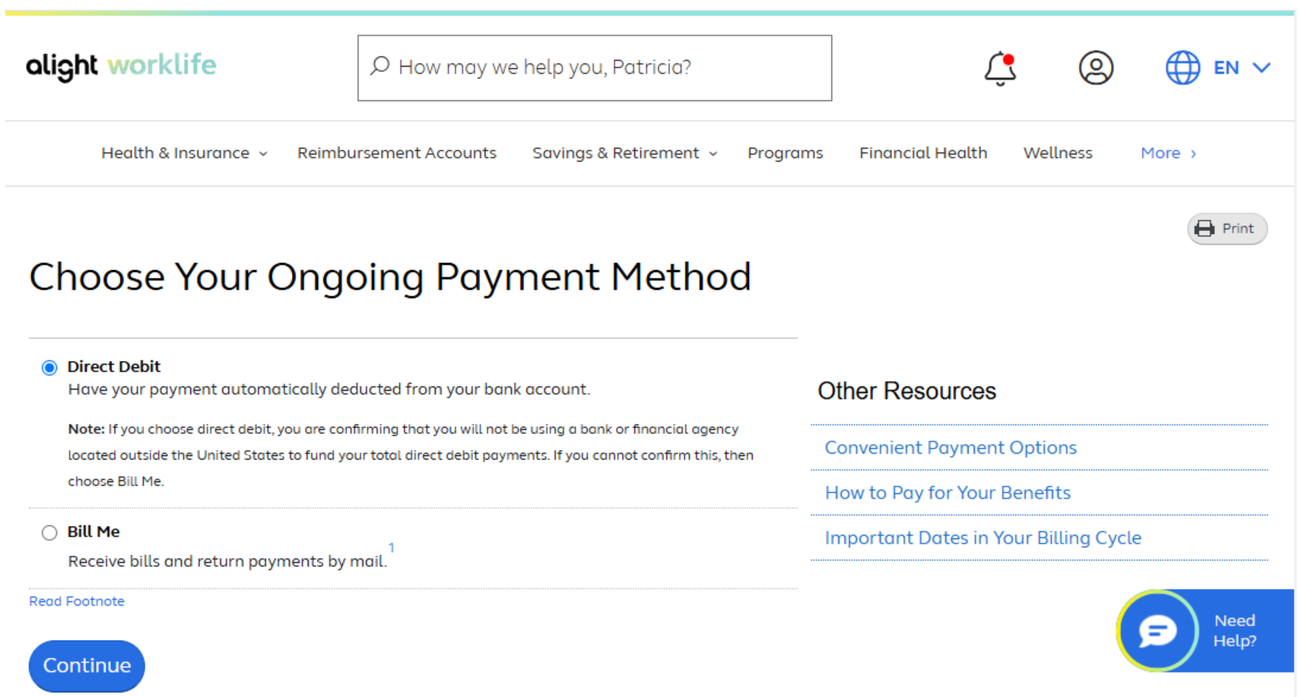
Closing Balance on Last Bill	$945.58
Changes Since Last Bill	-$371.78
Current Amount Due	**$573.80**

IMPORTANT: Payment is due on **Apr 1, 2025**.

Other Resources

- Your First COBRA Bill
- Convenient Payment Options
- Where to Send Your Payment
- Important Dates in Your Billing Cycle
- How to Pay for Your Benefits
- Refund Timing

Need Help?



alight worklife

How may we help you, Patricia?

EN

Health & Insurance | Reimbursement Accounts | Savings & Retirement | Programs | Financial Health | Wellness | More

Print

Choose Your Ongoing Payment Method

Direct Debit
Have your payment automatically deducted from your bank account.

Note: If you choose direct debit, you are confirming that you will not be using a bank or financial agency located outside the United States to fund your total direct debit payments. If you cannot confirm this, then choose Bill Me.

Bill Me
Receive bills and return payments by mail.[1]

Read Footnote

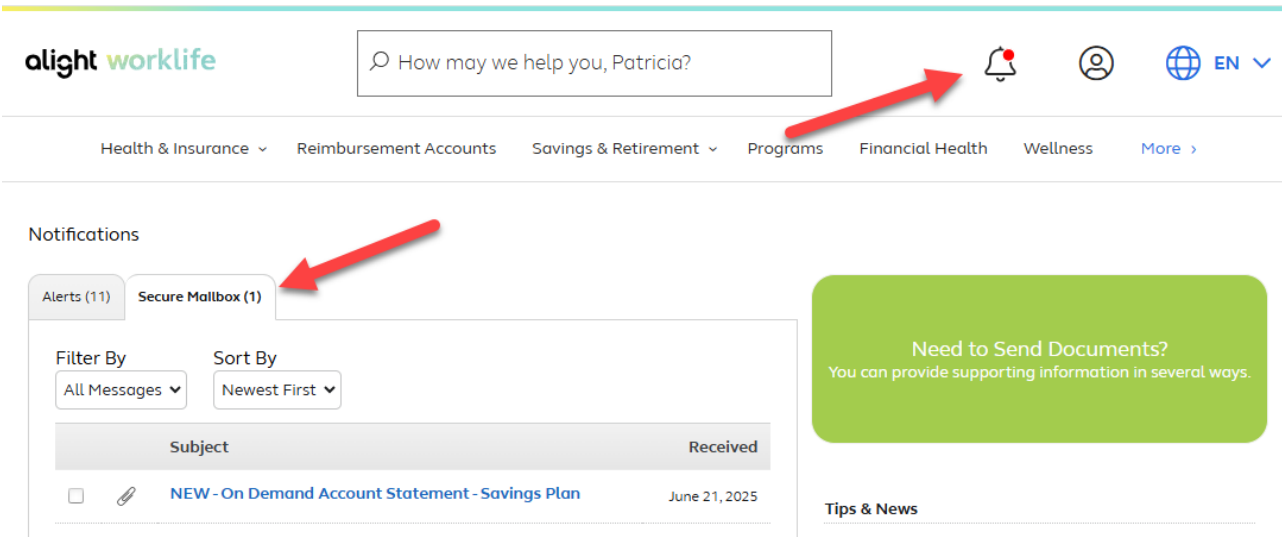
Continue

Other Resources

- Convenient Payment Options
- How to Pay for Your Benefits
- Important Dates in Your Billing Cycle

Need Help?

Through Go to site, users can also view a copy of participant DBP notices and billing statements in the online Secure Participant Mailbox (SPM).

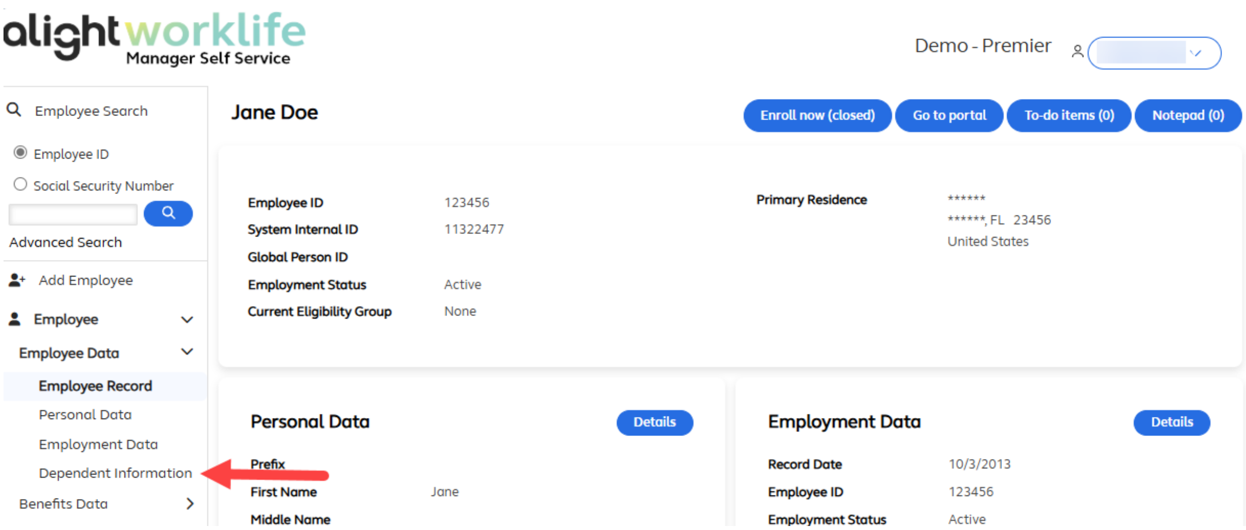


The DBP TBA system passes data back to CBA daily Monday through Saturday. For fields (e.g., Paid-Thru Date, DBP status) that are dependent upon the daily payment processing and twice per week DBP rate fetch processing, which run on Wednesdays and Sundays, will be sent to CBA the following day.

Dependent Information

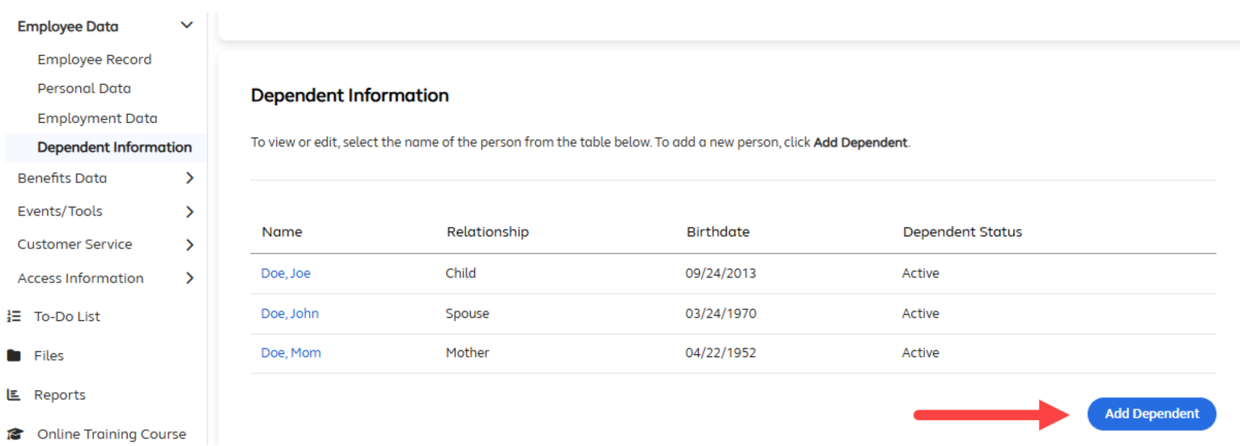
The Dependent Information screen allows users to add, view, edit, deactivate, and verify or deny dependents.

To access the dependent information screen click on the Employee Data menu under the search box to expand the menu options. Click Dependent Information link.



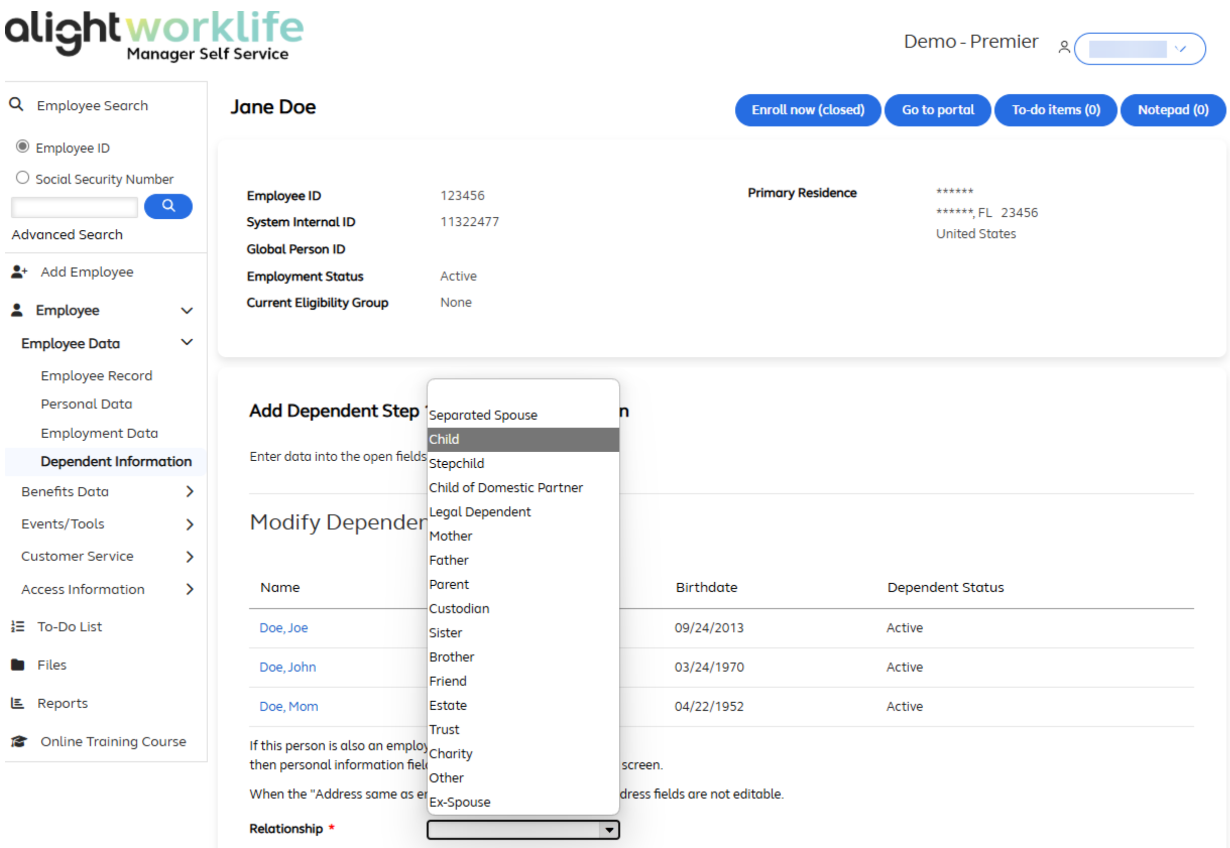
Adding a Dependent

To add a dependent to an employee's record, click the Add Dependent button at the bottom of the screen.

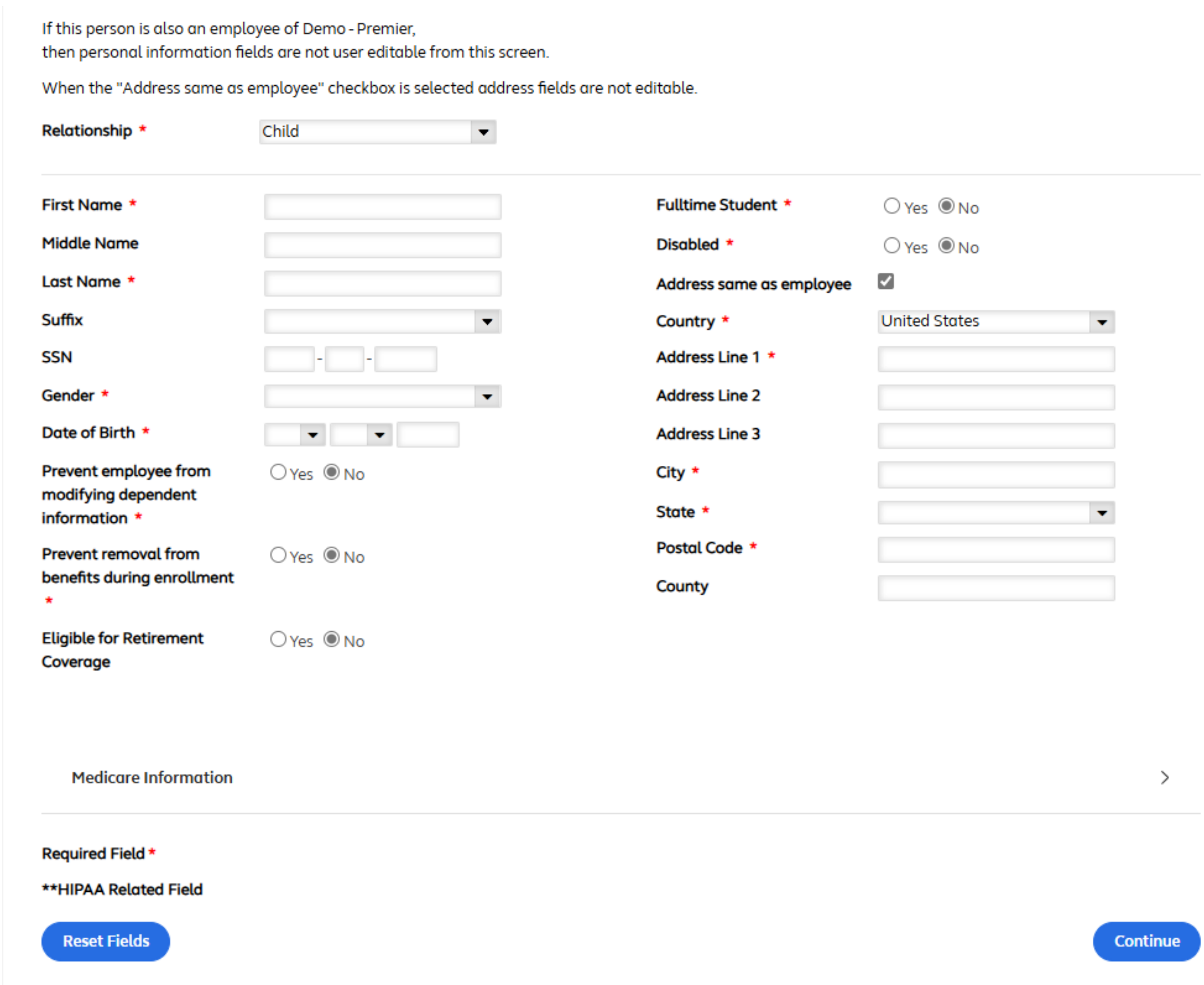


Step 1 of 4:

- Click the drop down arrow to select the appropriate relationship of the dependent.
- **Note:** the relationship options that display are based on the client's requirements. These are established during the system setup.
- Click Continue.



- The fields that need to be completed for the dependent will appear. They will vary based on the relationship that was selected.
- Complete the required fields, then click continue.


If this person is also an employee of Demo - Premier,
then personal information fields are not user editable from this screen.

When the "Address same as employee" checkbox is selected address fields are not editable.

Relationship * Child

First Name *

Middle Name

Last Name *

Suffix

SSN

Gender *

Date of Birth *

Prevent employee from modifying dependent information * Yes No

Prevent removal from benefits during enrollment * Yes No

Eligible for Retirement Coverage Yes No

Fulltime Student * Yes No

Disabled * Yes No

Address same as employee

Country * United States

Address Line 1 *

Address Line 2

Address Line 3

City *

State *

Postal Code *

County

Medicare Information

Required Field *

**HIPAA Related Field

Reset Fields

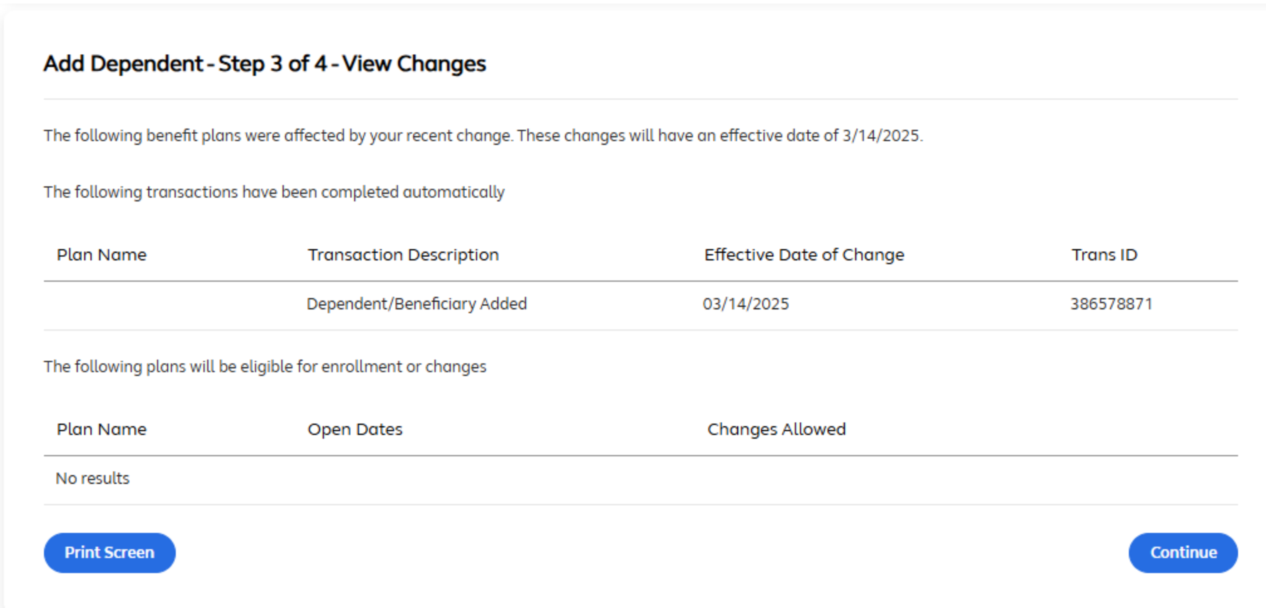
Continue

Step 2 of 4:

- Verify the information, then click continue.

Step 3 of 4:

- The next step includes viewing the changes that were made. The system will display the addition of the dependent to the system, any automatic changes that may have occurred to coverage, as well as any benefits that are now open for changes.
- For example, if a child is added and the client automatically enrolls every dependent in life insurance that will display on this screen. Click continue.



Add Dependent - Step 3 of 4 - View Changes

The following benefit plans were affected by your recent change. These changes will have an effective date of 3/14/2025.

The following transactions have been completed automatically

Plan Name	Transaction Description	Effective Date of Change	Trans ID
	Dependent/Beneficiary Added	03/14/2025	386578871

The following plans will be eligible for enrollment or changes

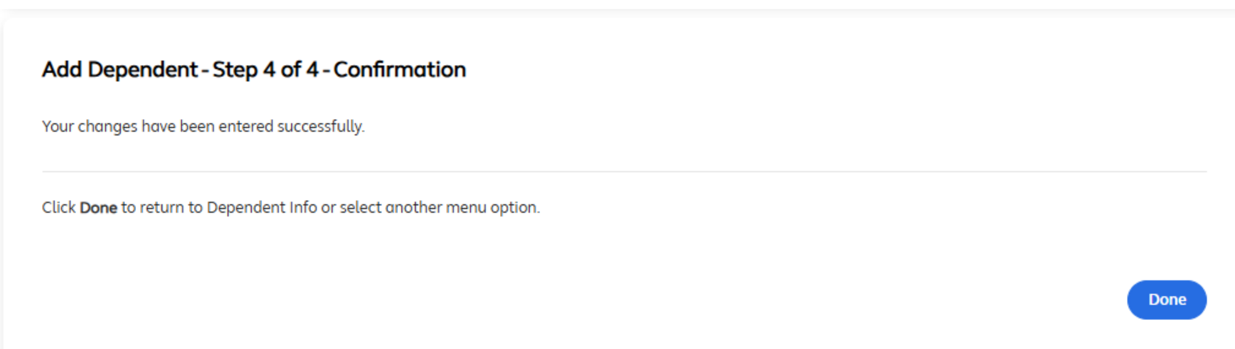
Plan Name	Open Dates	Changes Allowed
No results		

Print Screen

Continue

Step 4 of 4:

- A confirmation page will display.
- Click **Done** to complete the process.



Add Dependent - Step 4 of 4 - Confirmation

Your changes have been entered successfully.

Click **Done** to return to Dependent Info or select another menu option.

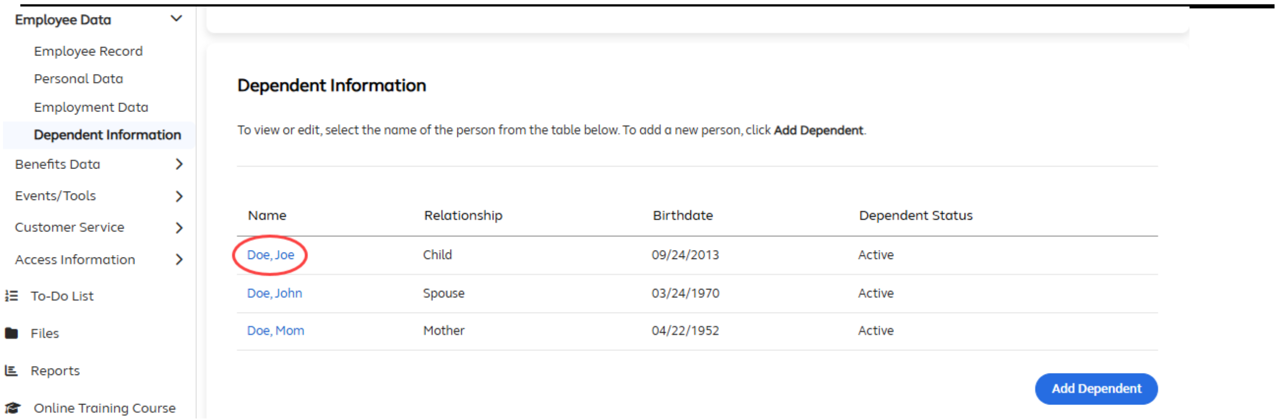
Done

Editing/Updating a Dependent Record

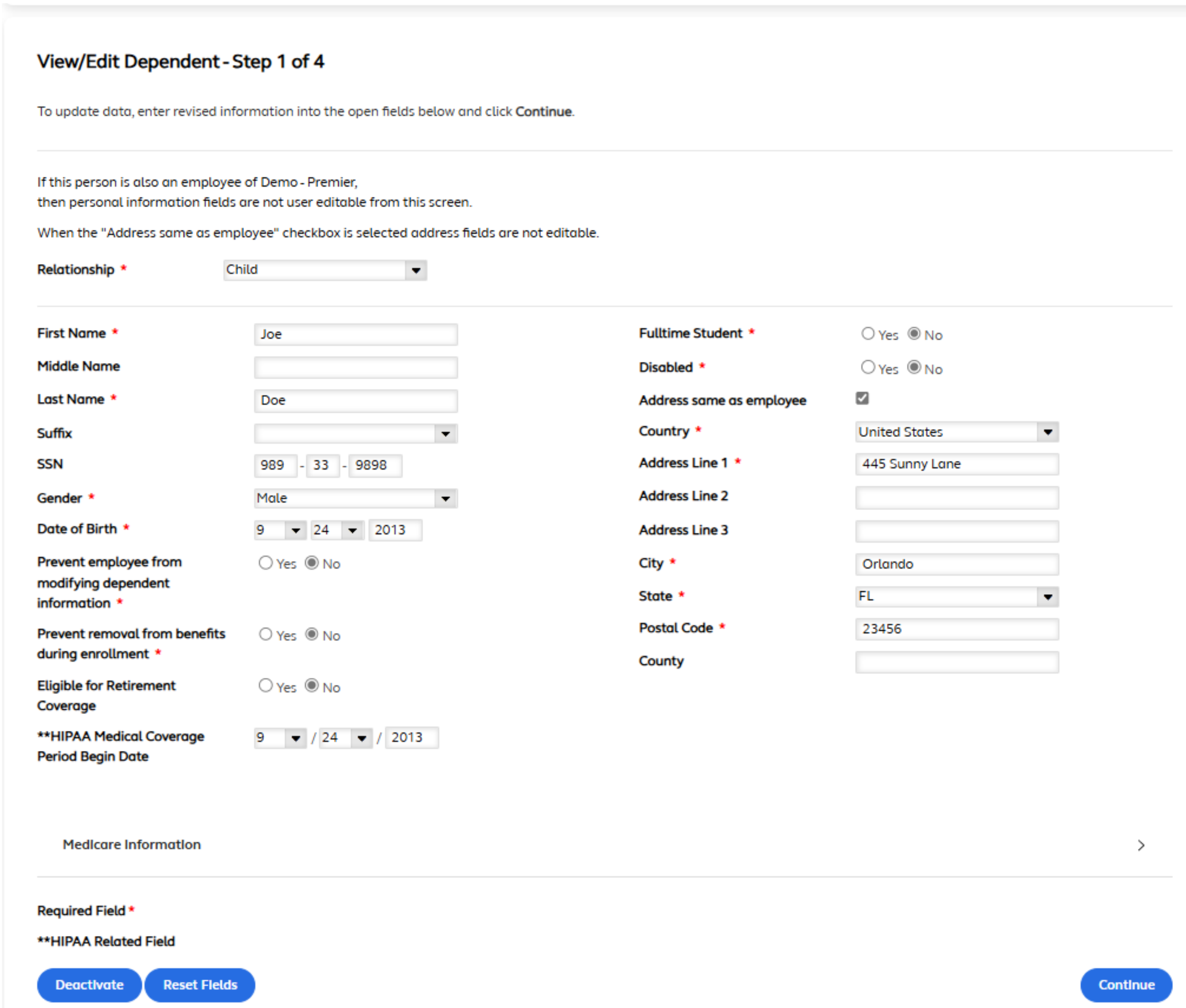
There may be times when a user needs to edit/update a dependent record on behalf of the employee. To access the dependent information screen click on the Employee Data menu under the search box to expand the menu options. Click Dependent Information link.

Step 1 of 4:

- Click on the name of the dependent that needs to be edited/updated.



- The dependent record will display.
- Enter the updated information, then click continue.



View/Edit Dependent - Step 1 of 4

To update data, enter revised information into the open fields below and click **Continue**.

If this person is also an employee of Demo - Premier,
then personal information fields are not user editable from this screen.

When the "Address same as employee" checkbox is selected address fields are not editable.

Relationship * Child

First Name *	Joe	**Fulltime Student** *	Yes / No (No selected)
Middle Name		**Disabled** *	Yes / No (No selected)
Last Name *	Doe	**Address same as employee**	☑
Suffix		**Country** *	United States
SSN	989 - 33 - 9898	**Address Line 1** *	445 Sunny Lane
Gender *	Male	**Address Line 2**	
Date of Birth *	9 / 24 / 2013	**Address Line 3**	
Prevent employee from modifying dependent information *	Yes / No (No selected)	**City** *	Orlando
		State *	FL
Prevent removal from benefits during enrollment *	Yes / No (No selected)	**Postal Code** *	23456
		County	
Eligible for Retirement Coverage	Yes / No (No selected)		
****HIPAA Medical Coverage Period Begin Date**	9 / 24 / 2013		

Medicare Information >

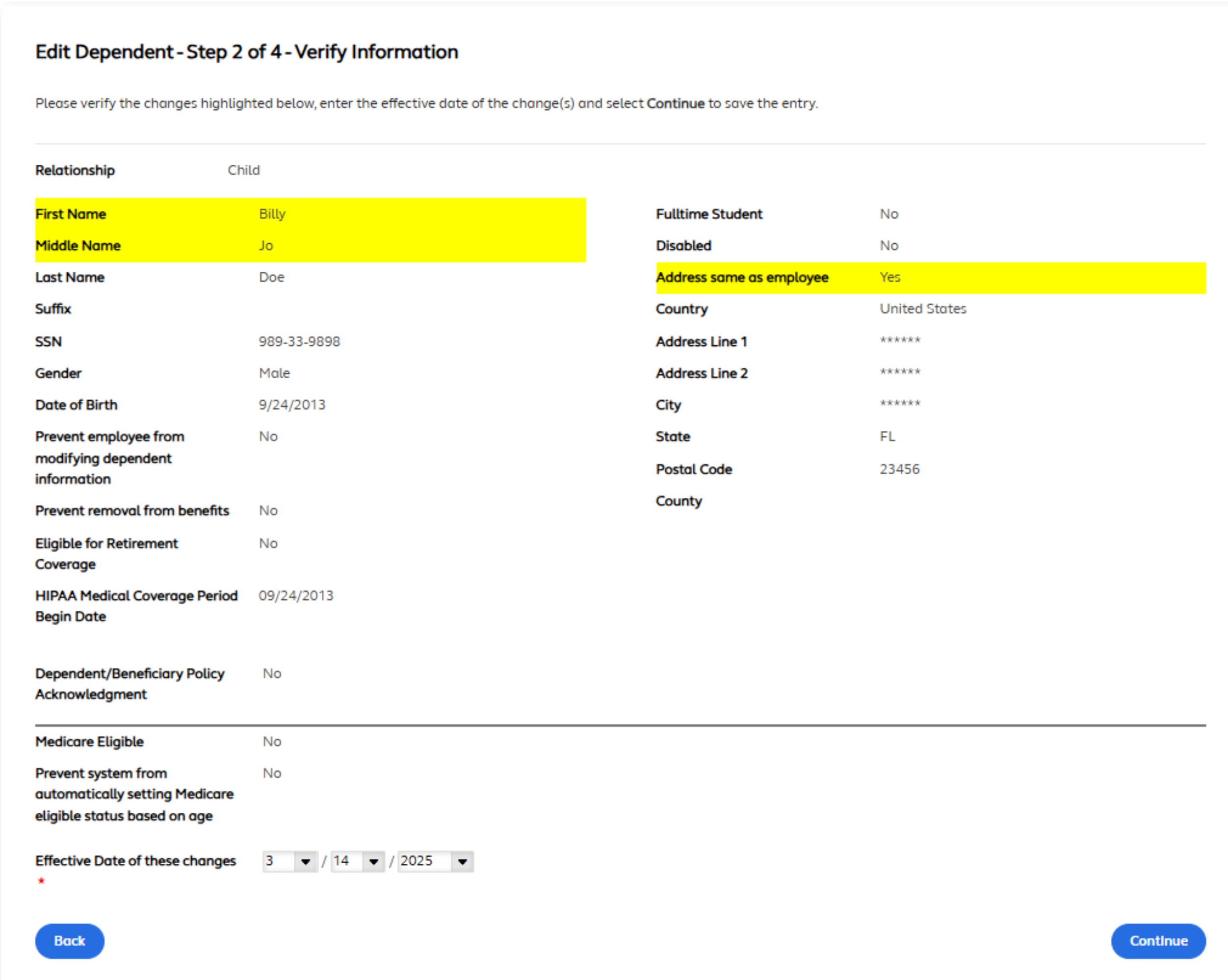
Required Field *

****HIPAA Related Field**

Deactivate | Reset Fields | Continue

Step 2 of 4:

- The information that was updated will be highlighted. Verify the information.
- Enter the effective date of the change.
- Click continue.



Edit Dependent - Step 2 of 4 - Verify Information

Please verify the changes highlighted below, enter the effective date of the change(s) and select **Continue** to save the entry.

Relationship	Child		
First Name	Billy	**Fulltime Student**	No
Middle Name	Jo	**Disabled**	No
Last Name	Doe	**Address same as employee**	Yes
Suffix		**Country**	United States
SSN	989-33-9898	**Address Line 1**	******
Gender	Male	**Address Line 2**	******
Date of Birth	9/24/2013	**City**	******
Prevent employee from modifying dependent information	No	**State**	FL
		Postal Code	23456
		County	
Prevent removal from benefits	No		
Eligible for Retirement Coverage	No		
HIPAA Medical Coverage Period Begin Date	09/24/2013		
Dependent/Beneficiary Policy Acknowledgment	No		
Medicare Eligible	No		
Prevent system from automatically setting Medicare eligible status based on age	No		
Effective Date of these changes *	3 / 14 / 2025		

Back   Continue

Step 3 of 4:

- The next step includes viewing the changes that were made.
- The system will display the modification under the Transaction Description along with the effective date. This will be defaulted to today's date.
- Click continue.

Edit Dependent - Step 3 of 4 - View Changes

The following benefit plans were affected by your recent change. These changes will have an effective date of 3/14/2025.

The following transactions have been completed automatically

Plan Name	Transaction Description	Effective Date of Change	Trans ID
	Dependent/Beneficiary Modified	03/14/2025	386578877

The following plans will be eligible for enrollment or changes

Plan Name	Open Dates	Changes Allowed
No results		

Print Screen

Continue

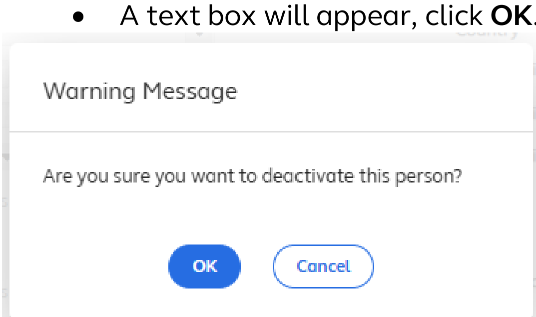
Deactivating/Reactivating a Dependent

A dependent may need to be deactivated from the system for various reasons. For example, maybe a dependent was accidentally added to the system twice or the employee needs to be removed from coverage. If needed, the dependent can always be "reactivated" at a later point in time.

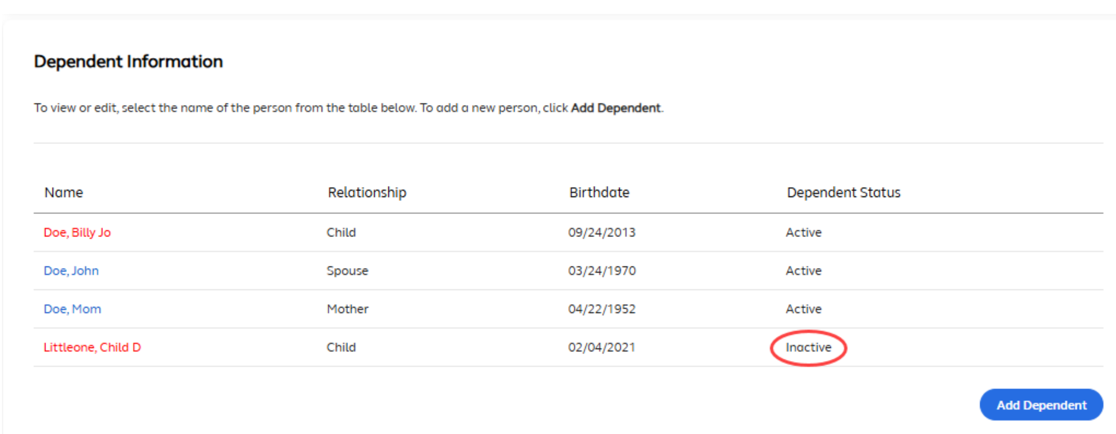
Step 1 of 4:

- Click on the name of the dependent that needs to be deactivated.
- Once the dependent's information displays, click **Deactivate** at the bottom of the screen.

- A text box will appear, click **OK**.



- The dependent's record will now reflect the **Inactive** status.

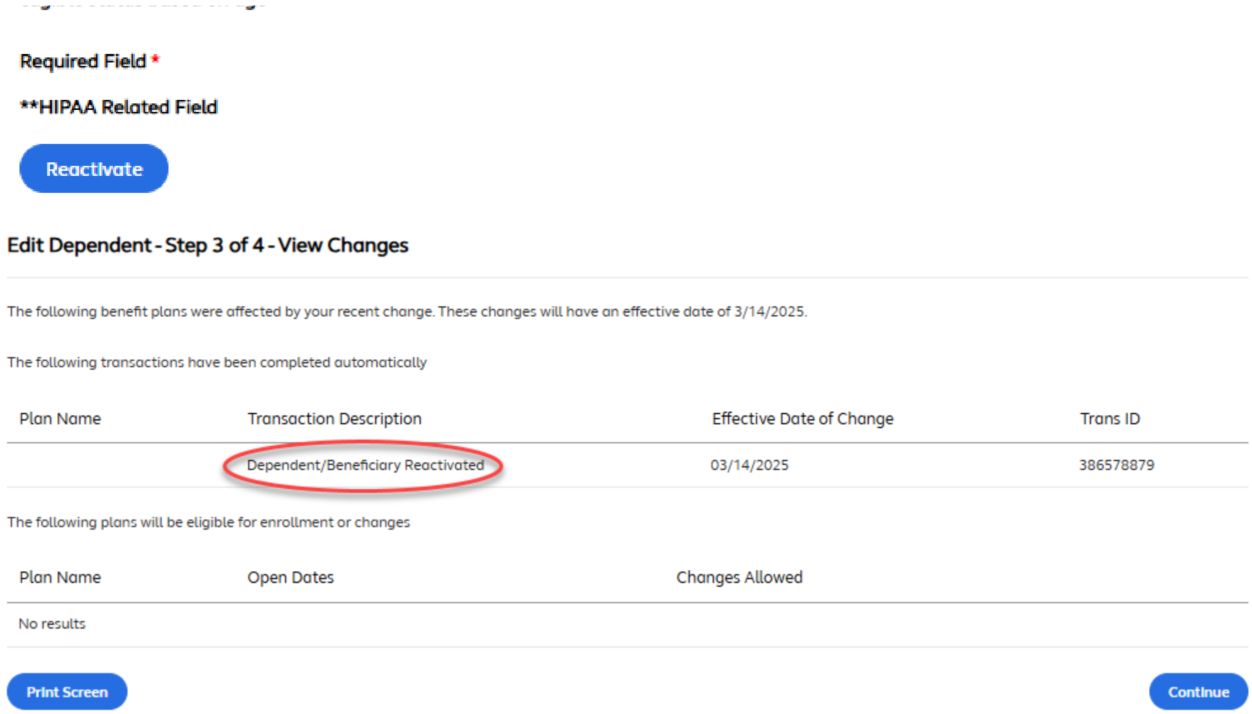

Dependent Information

To view or edit, select the name of the person from the table below. To add a new person, click **Add Dependent**.

Name	Relationship	Birthdate	Dependent Status
Doe, Billy Jo	Child	09/24/2013	Active
Doe, John	Spouse	03/24/1970	Active
Doe, Mom	Mother	04/22/1952	Active
Littleone, Child D	Child	02/04/2021	Inactive

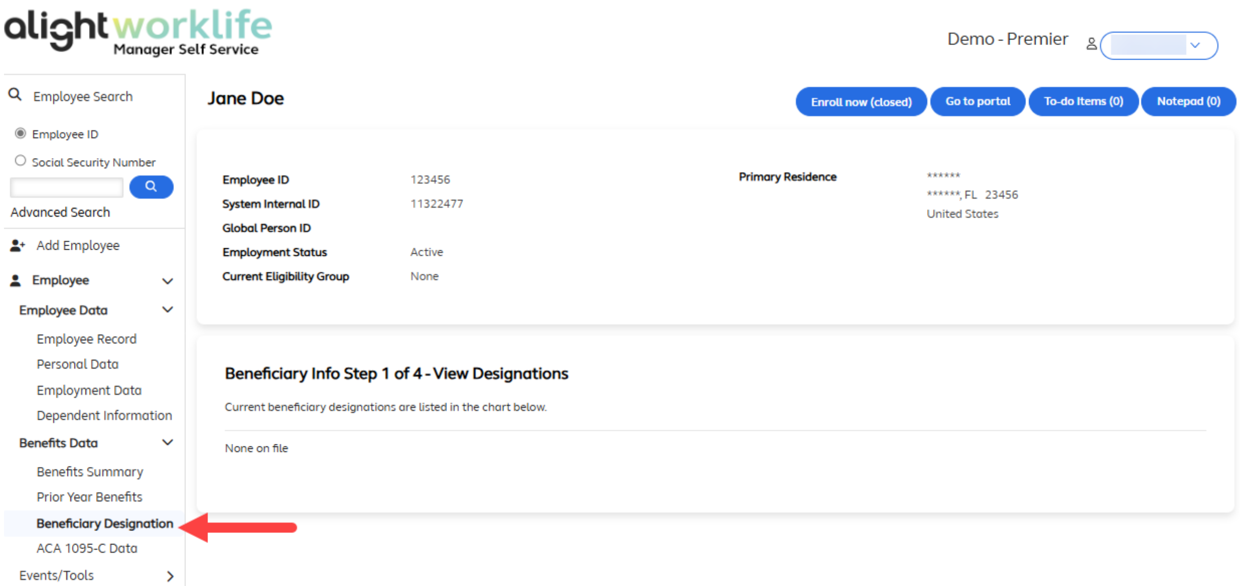
Add Dependent

- To reactivate the dependent, click on the dependent's name to pull up their record and click
  Reactivate at the bottom of the screen.



Beneficiary Designations

The Beneficiary Designation screen allows users to view and edit beneficiary designations on behalf of the employee.



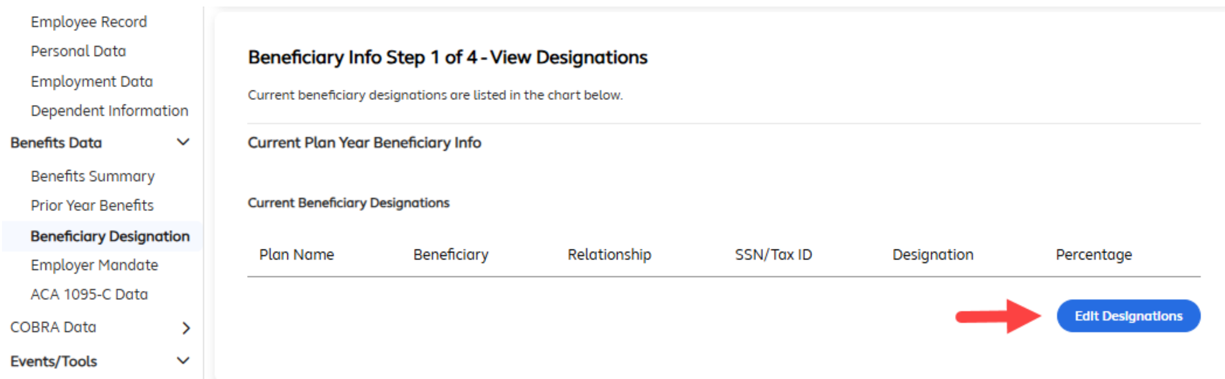
Note that the system will automatically verify that the primary and contingent designations add up to 100% for employees who split their beneficiary for a specific benefit between two or more individuals.

If both current and future plan years are open (as during the Annual Enrollment period) beneficiary information will display for each plan year.

Updating a Beneficiary Designation

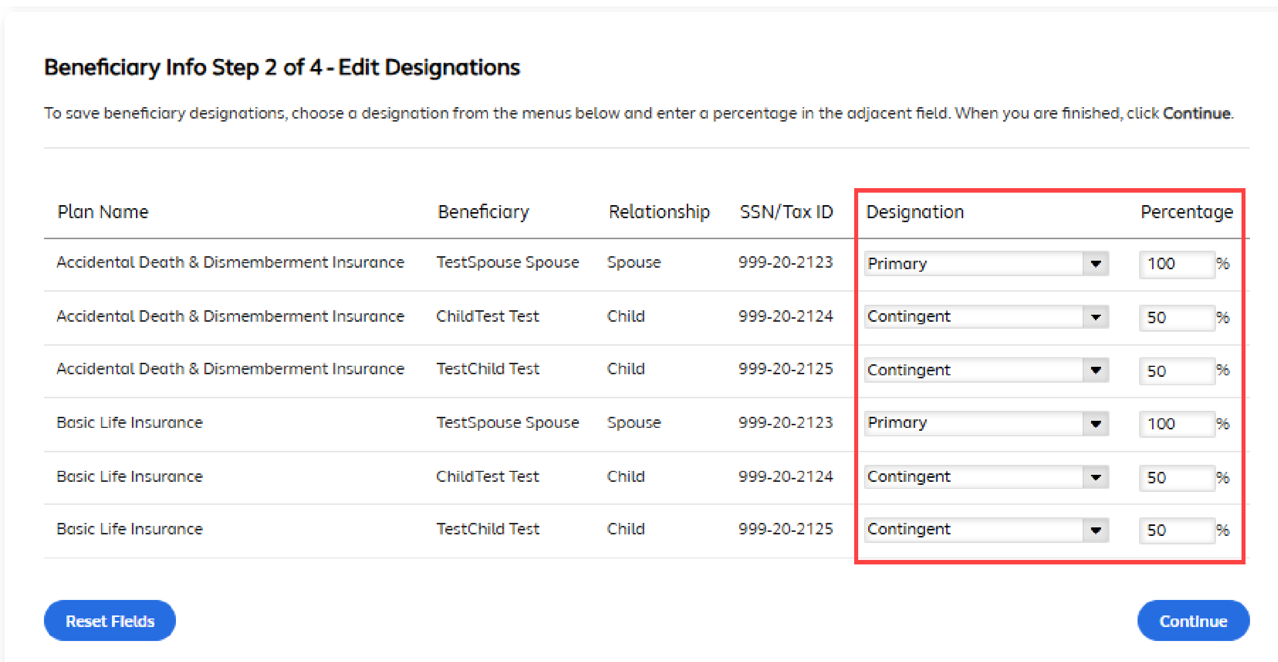
Step 1 of 4:

- Click Edit Designations at the bottom of the screen.



Step 2 of 4:

- Make updates to the **Designation** fields (primary or contingent) and **Percentages** as needed.
- The Reset Fields button can be used to clear all fields in order to make updates/corrections.
- When designations are accurate, click **Continue**.



Beneficiary Info Step 2 of 4 - Edit Designations

To save beneficiary designations, choose a designation from the menus below and enter a percentage in the adjacent field. When you are finished, click **Continue**.

Plan Name	Beneficiary	Relationship	SSN/Tax ID	Designation	Percentage
Accidental Death & Dismemberment Insurance	TestSpouse Spouse	Spouse	999-20-2123	Primary	100 %
Accidental Death & Dismemberment Insurance	ChildTest Test	Child	999-20-2124	Contingent	50 %
Accidental Death & Dismemberment Insurance	TestChild Test	Child	999-20-2125	Contingent	50 %
Basic Life Insurance	TestSpouse Spouse	Spouse	999-20-2123	Primary	100 %
Basic Life Insurance	ChildTest Test	Child	999-20-2124	Contingent	50 %
Basic Life Insurance	TestChild Test	Child	999-20-2125	Contingent	50 %

Reset Fields

Continue

Step 3 of 4:

- Verify the designation information for accuracy.
- If corrections are still required, click the back button to make the necessary changes and then click continue.

- If no changes are necessary, click Continue.

Beneficiary Info Step 3 of 4 - Verify Designations

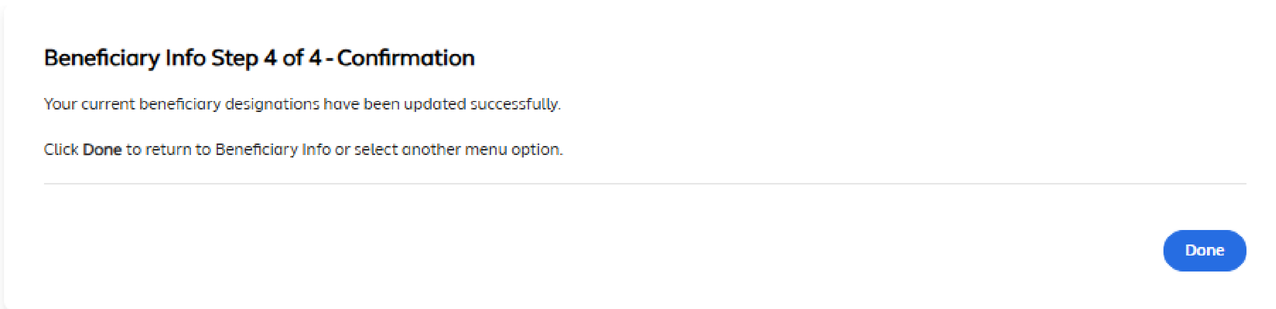
The following designations have been made. To save these changes now, select **Continue**.

Plan Name	Beneficiary	Relationship	SSN/Tax ID	Designation	Percentage
Accidental Death & Dismemberment Insurance	TestSpouse Spouse	Spouse	999-20-2123	Primary	100%
Accidental Death & Dismemberment Insurance	ChildTest Test	Child	999-20-2124	Contingent	50%
Accidental Death & Dismemberment Insurance	TestChild Test	Child	999-20-2125	Contingent	50%
Basic Life Insurance	TestSpouse Spouse	Spouse	999-20-2123	Primary	100%
Basic Life Insurance	ChildTest Test	Child	999-20-2124	Contingent	50%
Basic Life Insurance	TestChild Test	Child	999-20-2125	Contingent	50%

Back Continue

Step 4 of 4:

- A confirmation page displays.
- Click **Done** to return to the beneficiary designation screen.

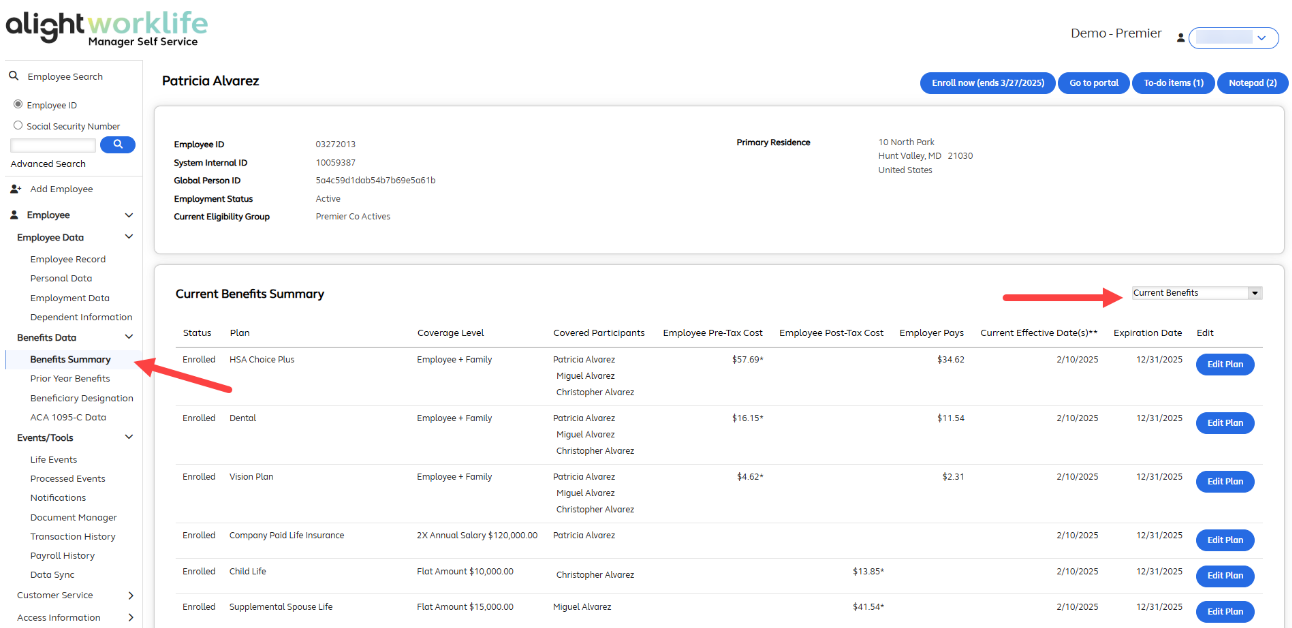


Benefits Summary

The Benefits Summary screen displays details about an employee's benefit selections. Details include:

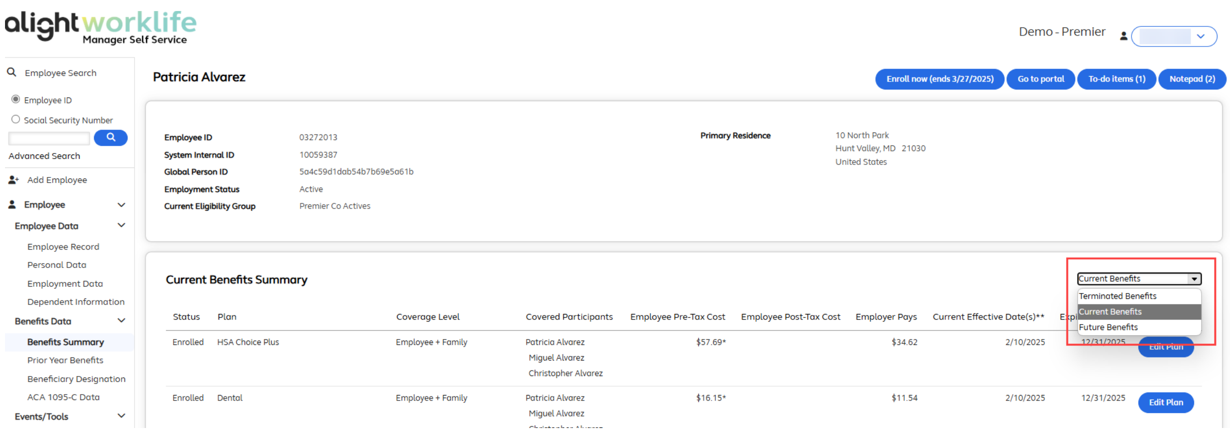
- Enrollment status and coverage level for each plan
- Dependents covered under each plan
- Employee cost per day (pre and post-tax)
- Employer cost per pay (if the client has chosen to display their contribution)
- Current effective date and expiration date

For each benefit available, a View or Edit column displays. The View column displays for all non-Admin level users. It contains a "View Plan" link that allows the user to see more detailed information about each benefit selection. The Edit column displays for Admin-level users only, and contains an "Edit Plan" link that allows users to both view and modify benefit information. Note that the "Edit Plan" link functionality is described in Chapter 10, "HR Override."



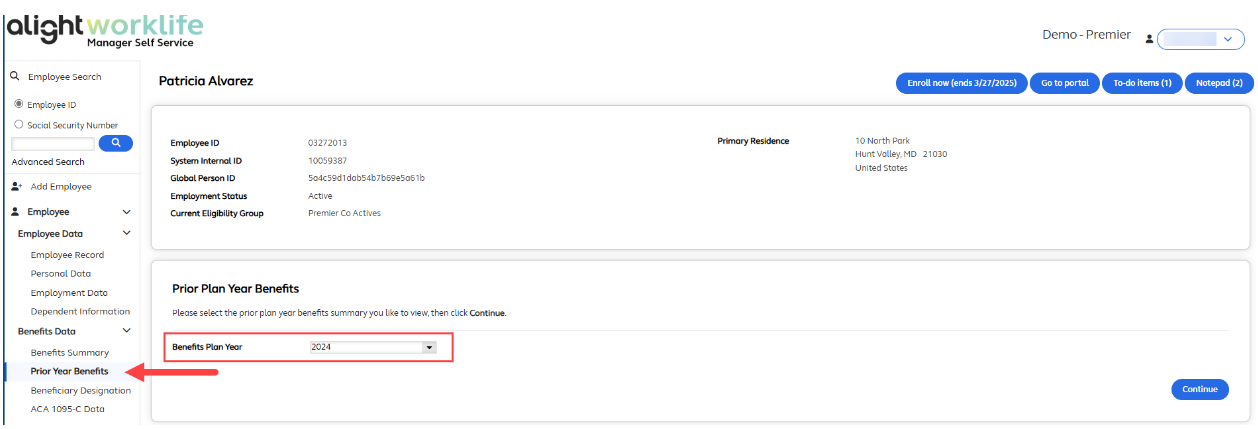
The Benefits Summary also contains three different options of benefits information for each employee available via the drop down box.

- **Current Benefits** – Displays every benefit an employee is eligible to enroll in for the current plan year along with enrollment status and current effective and expiration dates.
- **Terminated Benefits** – Displays any benefits for the current plan year that have been terminated. For example, an employee who gets married and adds a spouse to medical coverage will have a terminated record showing for employee only medical coverage.
- **Future Benefits** – Displays any benefits the employee has selected which have a future effective date such as those elected during the open enrollment period for the upcoming plan year.



Prior Year Benefits

The Prior Year Benefits screen displays the same information as the Benefits Summary Screen but for the previous plan year(s) – for as many years as the employee has been in the benefits administration system.



- To view benefits for a previous plan year the user will select the year they wish to view from the drop-down list and then click Continue.
- The benefits summary screen displays for the selected plan year.

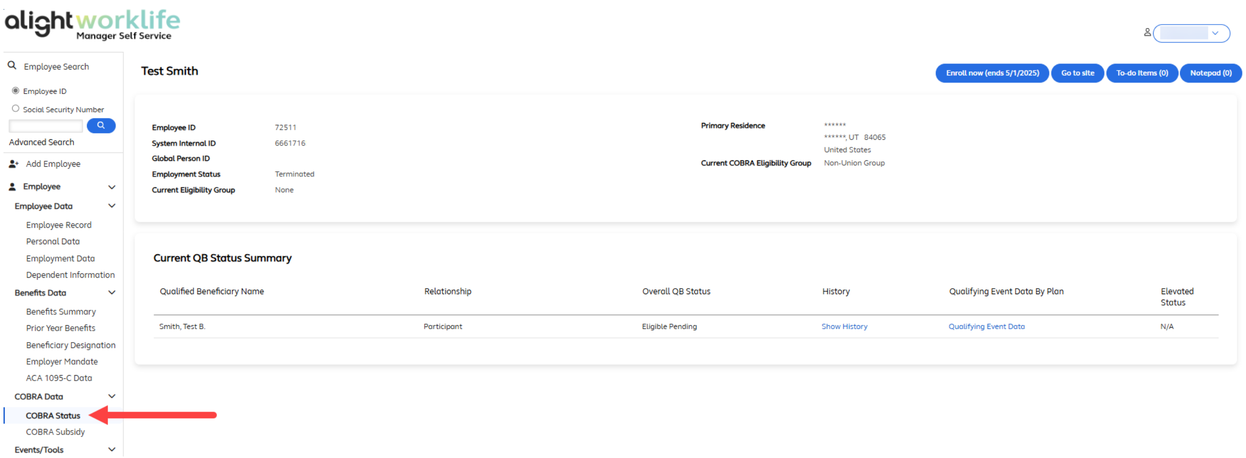
- **Note:** If the employee was not hired until the current plan year, or the client was not using the CBA system until the current plan year, this screen will not contain any information for the employee.

COBRA

When Alight is the COBRA Administrator (Optional Service), the **COBRA Status** screen displays a summary of the participant and dependent COBRA Qualified Beneficiary (QB) and Qualifying Event (QE) data.

- **Qualified Beneficiary Name:** Name of the individual
- **Relationship:** Relationship of the individual to the record keeper (Participant, Spouse Types, Child (includes Step Children), Domestic Partner, Child of a Domestic Partner, etc.)
- **Overall QB Status:**
  - **None:** Not a Qualified Beneficiary
  - **Eligible Pending:** Considered a Qualified Beneficiary and is eligible to enroll in at least one COBRA plan, but has not yet elected and is still within their election period
  - **Participating:** Participant has enrolled in at least 1 COBRA plan
  - **Eligible Covered:** Dependent has been covered under at least 1 COBRA plan
  - **Eligible Waived:** Participant actively waived all COBRA coverage but has not reached the end of their election period
  - **Failed to Elect:** Participant did not enroll in COBRA OR actively waived all COBRA coverage and is at the end of their election period
  - **Terminated:** Participant was covered under COBRA, but COBRA coverage is terminated (e.g., due to reaching COBRA coverage end or choosing to terminate coverage)
- **History:** Link to historical QE data for the QB
- **Qualified Event Data By Plan:** Link to current QE data for the QB
- **Elevated Status:** Can this person be elevated to their own record keeping account? Any Qualified Beneficiary that is not the originating record keeper can call the Customer Service Center to independently elect COBRA.
  - **N/A:** Participant
  - **Not Eligible**: Individual does not have QE data to allow for elevated COBRA coverage.
  - **Eligible:** Individual does have QE data to allow for elevated COBRA coverage.

  - **Elevated:** Individual has been moved to their own record or moved with another person that was elevated.



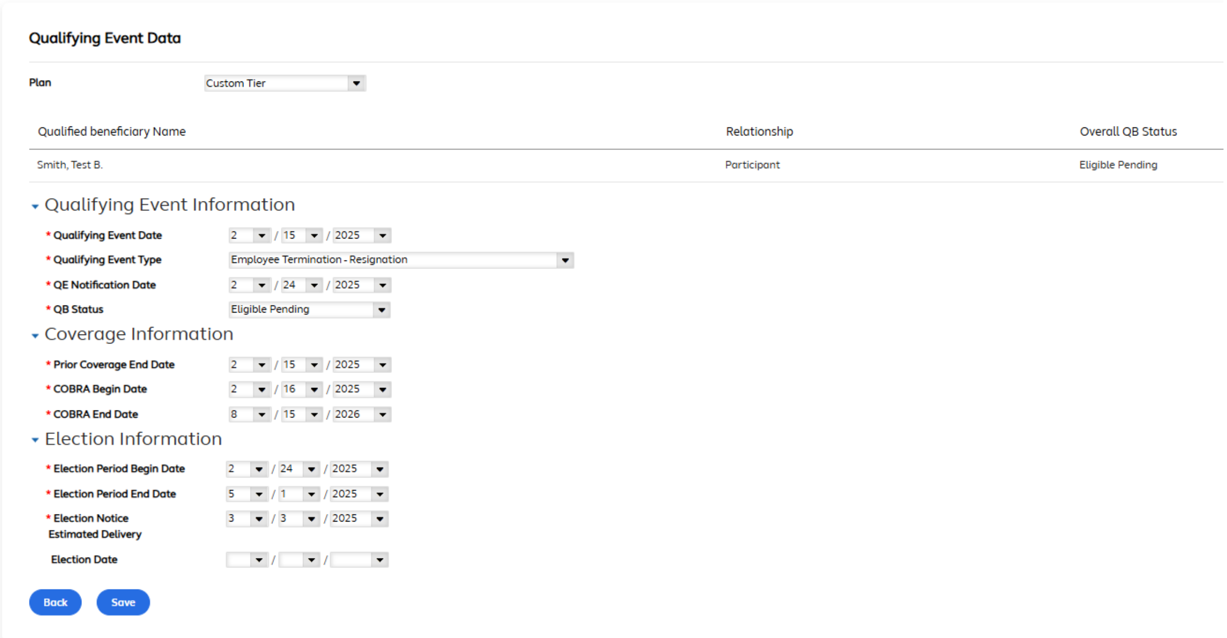
Clicking on the **Qualifying Event Data** link for an individual QB displays the detailed QE data by plan.

- **Qualified Event Date:** The date the event occurred that caused the loss of COBRA eligible coverage
- **Qualified Event Type:** Type of event that caused the loss in COBRA eligible coverage
  - Termination
  - Reduction in hours
  - Loss of dependent eligibility
  - Divorce or legal separation
  - Retirement
  - Severance
  - Leave of absence
  - Entitlement to Medicare
  - Military service
  - Layoff
  - Bankruptcy
  - Death
- **QE Notification Date:** The date the qualifying event was processed in the system
- **QB Status:** Status of Plan Election
  - **None:** Not a Qualified Beneficiary
  - **Eligible Pending:** Considered a Qualified Beneficiary and is eligible to enroll

in COBRA plan, but has not yet elected and is still within their election period

  - **Participating:** Participant has enrolled in COBRA plan
  - **Eligible Covered:** Dependent has been covered under COBRA plan
  - **Eligible Waived:** Participant actively waived COBRA plan but has not reached the end of their election period
  - **Failed to Elect:** Participant did not enroll in COBRA OR actively waived all COBRA coverage and is at the end of their election period
  - **Terminated:** Participant was covered under COBRA, but COBRA coverage is terminated (e.g., due to reaching COBRA coverage end or choosing to terminate coverage)

- **Prior Coverage End Date:** Last day of Active Coverage
- **COBRA Begin Date:** First day of COBRA coverage
- **COBRA End Date:** Last day of COBRA coverage
- **Election Period Begin Date:** First day of enrollment period (When the Event is triggered in the system – e.g., the transaction date)
- **Election Period End Date:** Last day of enrollment period (Prior Coverage End Date plus one day OR Election Notice Estimated Delivery date, whichever is later + 60 days)
- **Election Notice Estimated Delivery:** Date COBRA Enrollment notice is estimated for delivery (QE Notification Date + 7 days)
- **Election Date:** The date the election was actively elected



Qualifying Event Data

Plan: Custom Tier

Qualified beneficiary Name	Relationship	Overall QB Status
Smith, Test B.	Participant	Eligible Pending

Qualifying Event Information

- * Qualifying Event Date: 2 / 15 / 2025
- * Qualifying Event Type: Employee Termination - Resignation
- * QE Notification Date: 2 / 24 / 2025
- * QB Status: Eligible Pending

Coverage Information

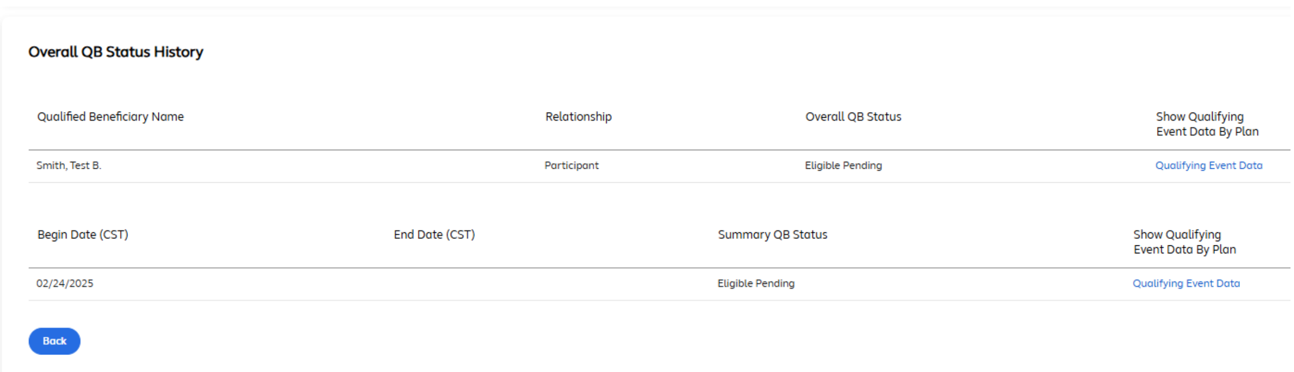
- * Prior Coverage End Date: 2 / 15 / 2025
- * COBRA Begin Date: 2 / 16 / 2025
- * COBRA End Date: 8 / 15 / 2026

Election Information

- * Election Period Begin Date: 2 / 24 / 2025
- * Election Period End Date: 5 / 1 / 2025
- * Election Notice Estimated Delivery: 3 / 3 / 2025
- Election Date: / /

Back Save

- Clicking on the **History** link displays the historical QE data for the QB



Overall QB Status History

Qualified Beneficiary Name	Relationship	Overall QB Status	Show Qualifying Event Data By Plan
Smith, Test B.	Participant	Eligible Pending	Qualifying Event Data

Begin Date (CST)	End Date (CST)	Summary QB Status	Show Qualifying Event Data By Plan
02/24/2025		Eligible Pending	Qualifying Event Data

Back

Life Events

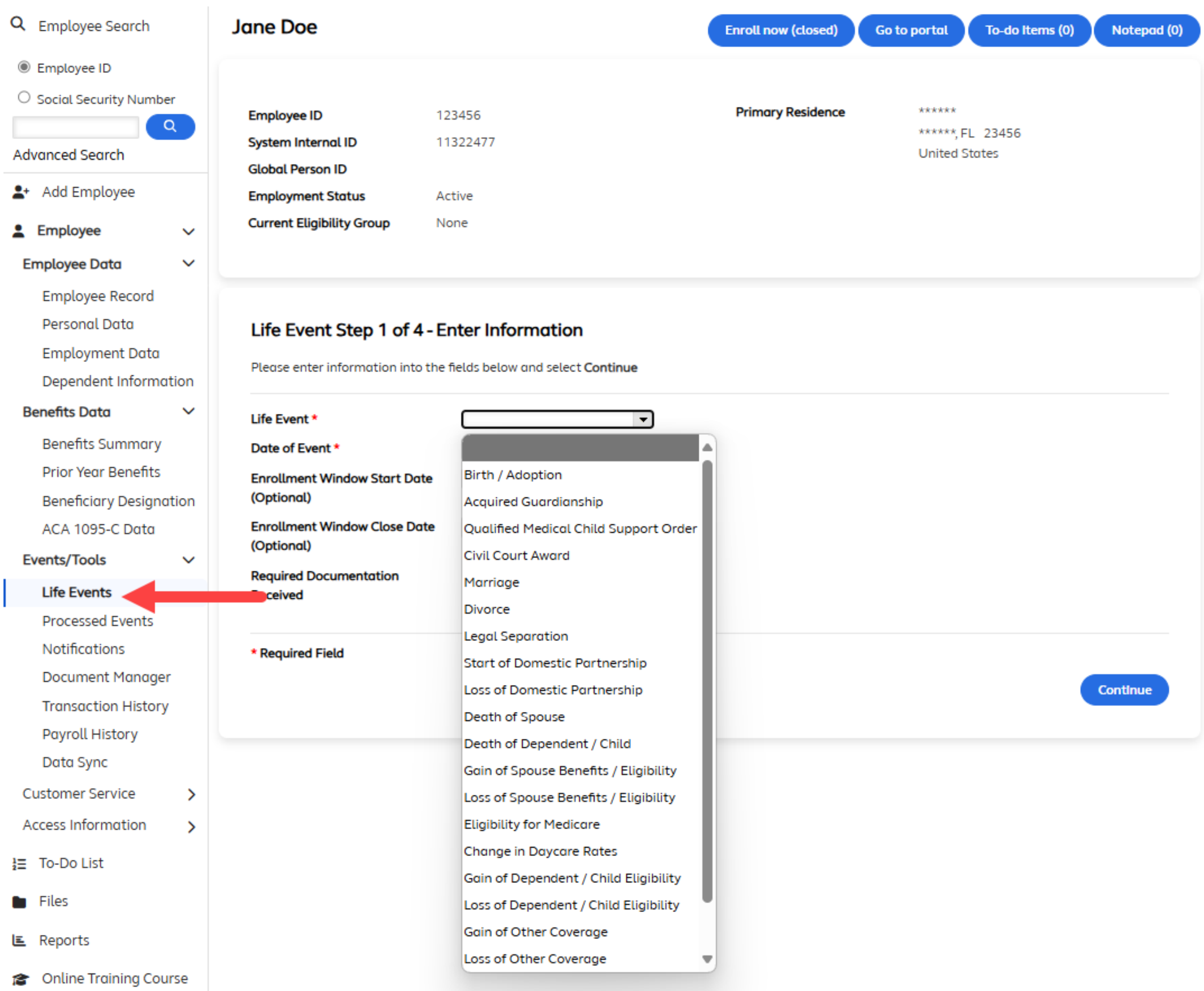
There may be times when users need to log/enter Life Events on behalf of an employee. This is handled via the Life Events screen.

Note that some clients use Self-Service Life Events, where employees are expected to enter their own life events via the employee portal. (These events may be automatically approved, or may require approval via the Core Benefits Administration system, depending on how the client requested each event be set up.) Even if employees can submit Life Events via the portal, users can still use the Life Events screen to enter a life event on behalf of an employee.

Important Note: Life Events vary and some may require the addition of dependents. For example, entering a birth or marriage does not automatically add the new dependent to the employee's record nor does it automatically add this dependent to coverage.

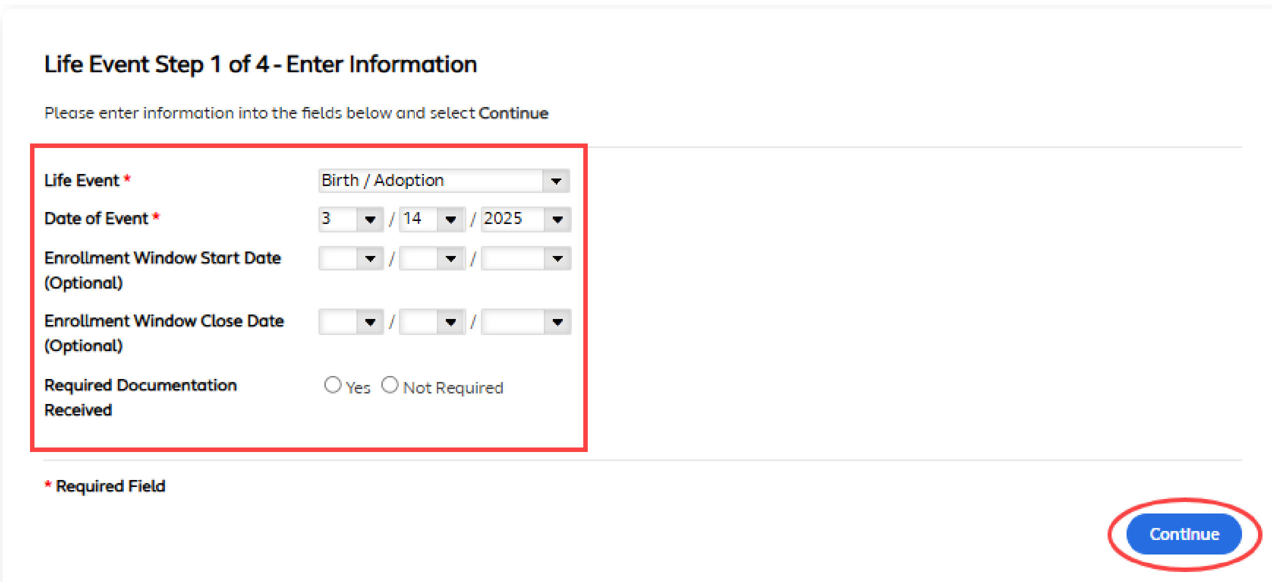
Entering a Life Event

- The user can click on Events/Tools from the navigation menu on the left. This will expand the menu where the user can click on **Life Events**.
- The user will then select the appropriate life event from the drop-down menu.



Step 1 of 4:

- The **Date of Event** field must be completed by using the drop-down arrows.
- If there is a specific date the user wants the enrollment window to open that date should be entered in the **Enrollment Window Start Date** field. If a date is not entered they system will default to today's date.
- The user has the ability to override the system rules and choose how long they would like the enrollment window to remain open. The user can opt to have the window close earlier than usual or allow the employee to have a longer period of time by extending the enrollment window in the **Enrollment Window Close Date** field.
- Next click the appropriate radio button to indicate whether any required documentation, such as a copy of a birth certificate, has been received.
  - o If documentation is not required no selection is needed.
- Click **Continue**.


Life Event Step 1 of 4 - Enter Information

Please enter information into the fields below and select **Continue**

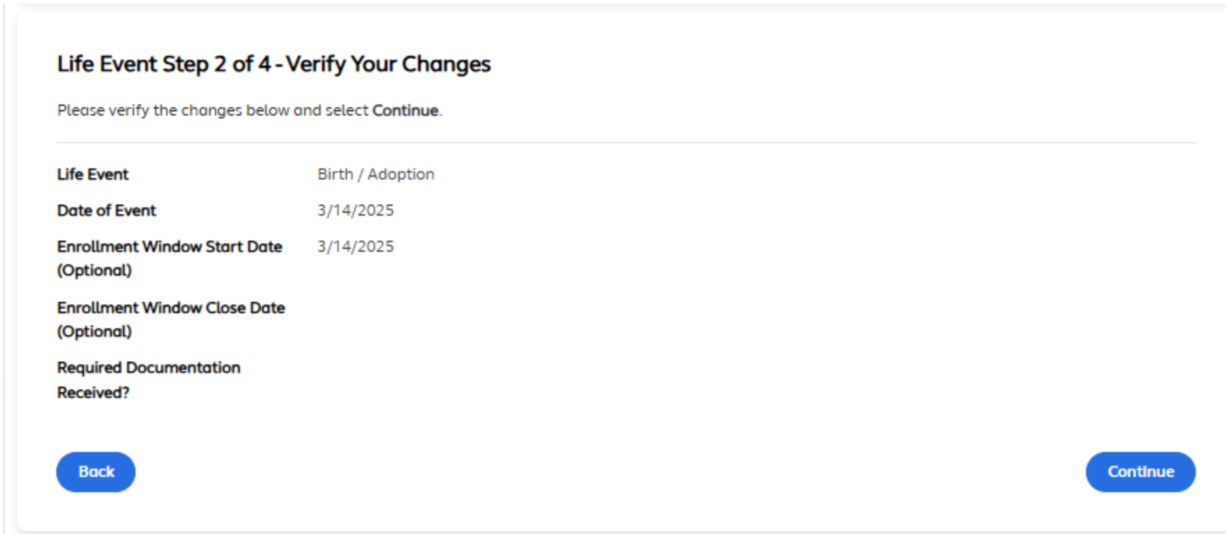
Life Event *	Birth / Adoption
Date of Event *	3 / 14 / 2025
Enrollment Window Start Date (Optional)	/ /
Enrollment Window Close Date (Optional)	/ /
Required Documentation Received	Yes Not Required

* Required Field

Continue

Step 2 of 4:

- Verify the information is correct and click **Continue**.



Step 3 of 4:

- The next screen displays the event that was just entered and lists the plans the employee is now eligible to enroll in. Note the dates of enrollment will now display next to the Enroll Now link on the employee's portal.
- Click **Continue**.

Life Event Step 3 of 4 - View Changes

Print Screen

The following benefit plans were affected by your recent change. These changes will have an effective date of 3/14/2025.

The following transactions have been completed automatically

Plan Name	Transaction Description	Effective Date of Change	Trans ID
	Birth/Adoption	03/14/2025	387419123

The following plans will be eligible for enrollment or changes

Plan Name	Open Dates	Changes Allowed
Delaware North - Cigna - Dental	2/10/2025 - 4/12/2025	Change Plan
HSA Choice Plus	2/10/2025 - 4/12/2025	Change Plan
Vision Plan	2/10/2025 - 4/12/2025	Change Plan
Basic AD&D Insurance	2/10/2025 - 4/12/2025	Change Plan
Company Paid Life Insurance	2/10/2025 - 4/12/2025	Change Plan
Supplemental AD&D Insurance	2/10/2025 - 4/12/2025	Change Plan
Child Life	2/10/2025 - 4/12/2025	Change Plan
Supplemental Spouse Life	2/10/2025 - 4/12/2025	Change Plan
Aaron's Inc. - Dependent Care Flexible Spending Account	2/10/2025 - 4/12/2025	Change Plan
HSA - Medical	2/10/2025 - 4/12/2025	Change Plan

Continue

Step 4 of 4:

- A confirmation page will display. Click **Done** to return to the main Life Events screen.

Life Event Step 4 of 4 - Change Confirmation

Your changes have been entered successfully.

Click **Done** to return to Life Event or select another menu option.

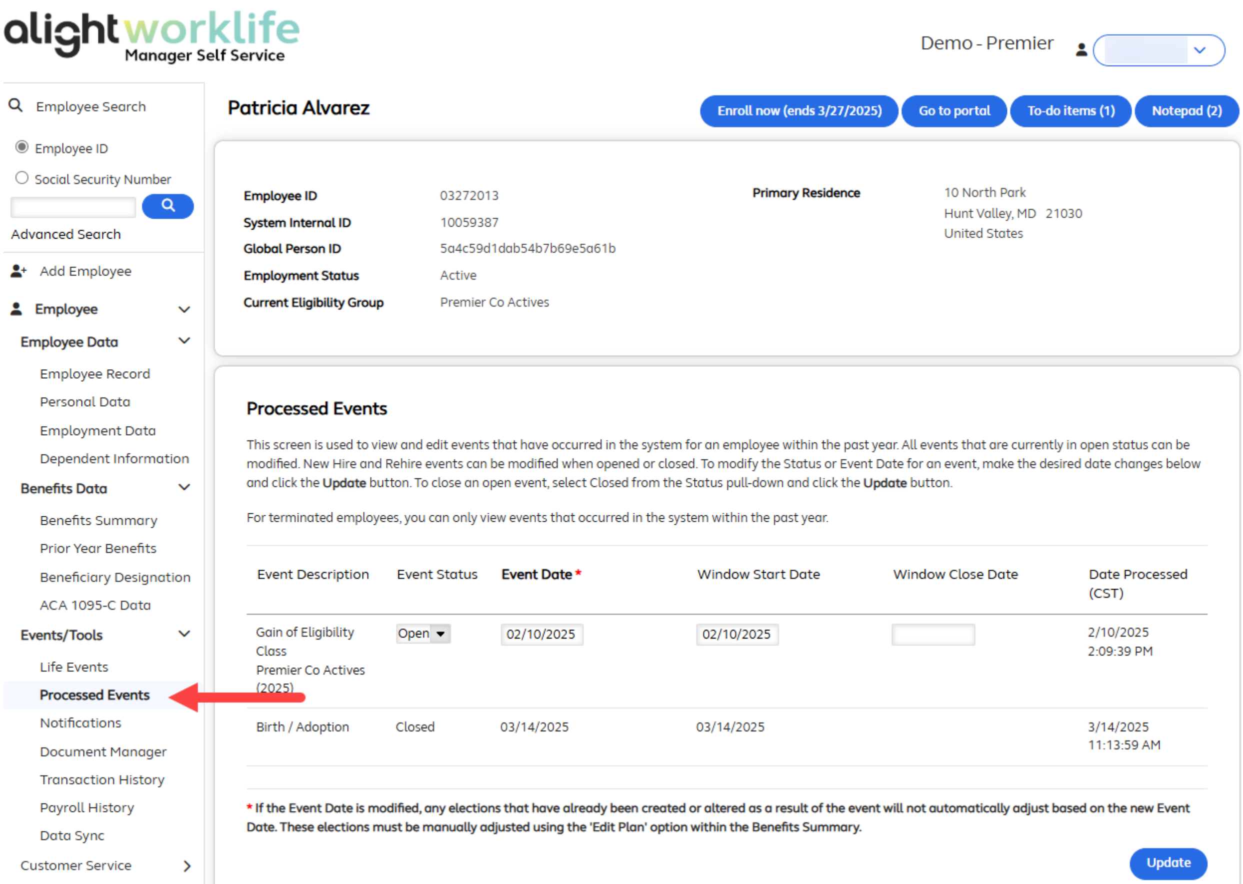
Done

Chapter 4: Processed Events

The Processed Events section is used to view and edit events that have occurred in the system for an employee within the past year. All events that are currently in open status can be modified. New Hire and Rehire events can be modified when opened or closed.

To view processed events:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Events/Tools** from the navigation menu on the left. This will expand the menu where the user can click on **Processed Events**.

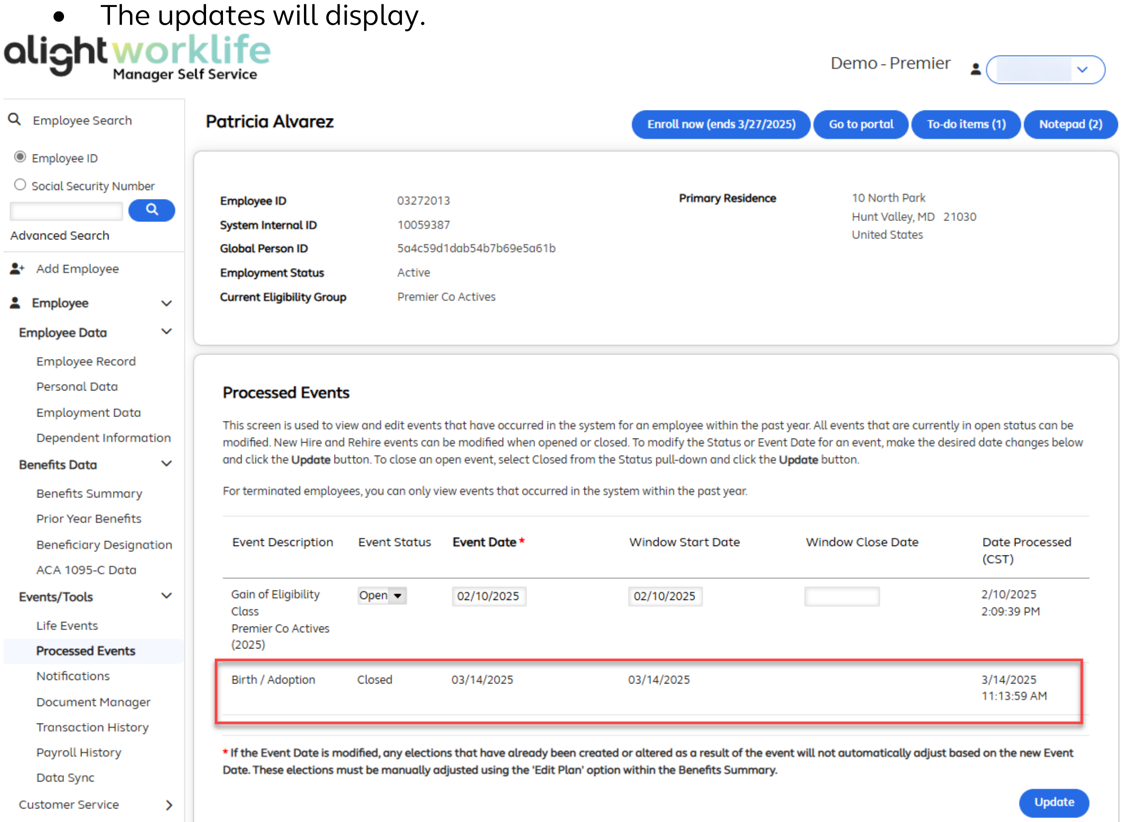


Editing an Event

Any event that is in an "Open" status can be modified. For example, if a user has entered an administrative event for an employee, they may want to use the Event Manager to close that event as soon as the employee has made any necessary benefit adjustments. Or, the user may need to modify the Event Date of a transaction if it was entered in error.

To edit an event:

- If necessary for this modification, click the gray down arrow to change the status under the **Event Status** column.
- If necessary, click the gray down arrows to change the month, day, and/or year of the **Event Date.**
- **Important Note:** If the Event Date is modified, any elections that have already been created or altered as a result of the event will not automatically adjust based on the new Event Date. These elections must be manually adjusted using HR Override (which is covered in Chapter 12.
- The enrollment window can be shortened or extended as needed by entering a date in the **Window Close Date** field.
- Once the necessary modifications are completed, click **Update**.
- The updates will display.



Chapter 5: Transaction Log

The transaction log displays all transactions that have been processed for an employee in the Manager Self Service System since the employee was first added to the system. Examples of the types of transactions included in the log include:

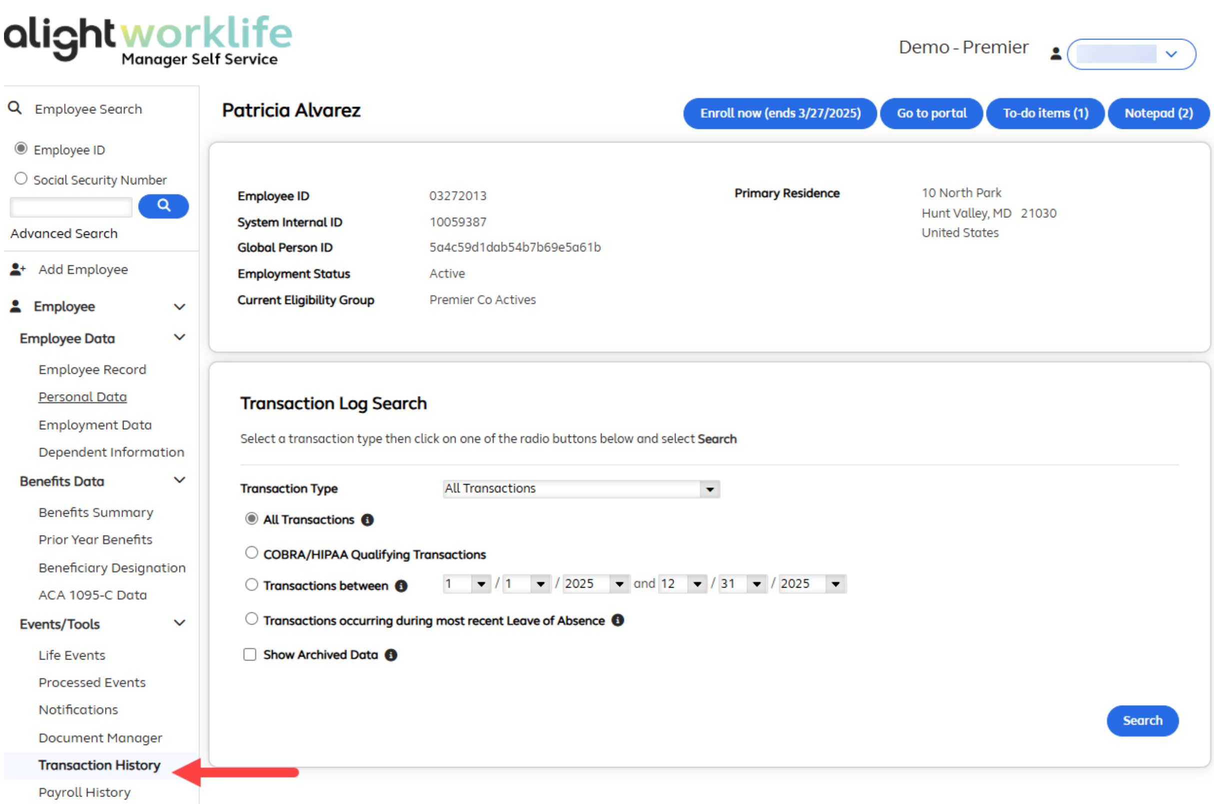
- Initial load into the system from the eligibility file
- Any automatic enrollments in employer-sponsored benefits such as basic life insurance
- Enrollments and waives made by the employee from the employee portal
- Enrollments and waives made on behalf of an employee by an administrator
- Life and employment events or any administrative events entered on behalf of the employee

Viewing the Transaction Log

The transaction log includes details about when the transaction was made, who make the transaction, what benefit is affected, and when the transaction is effective.

To view an employee's transactions:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Events/Tools** from the navigation menu on the left. This will expand the menu where the user can click on **Transaction History**.

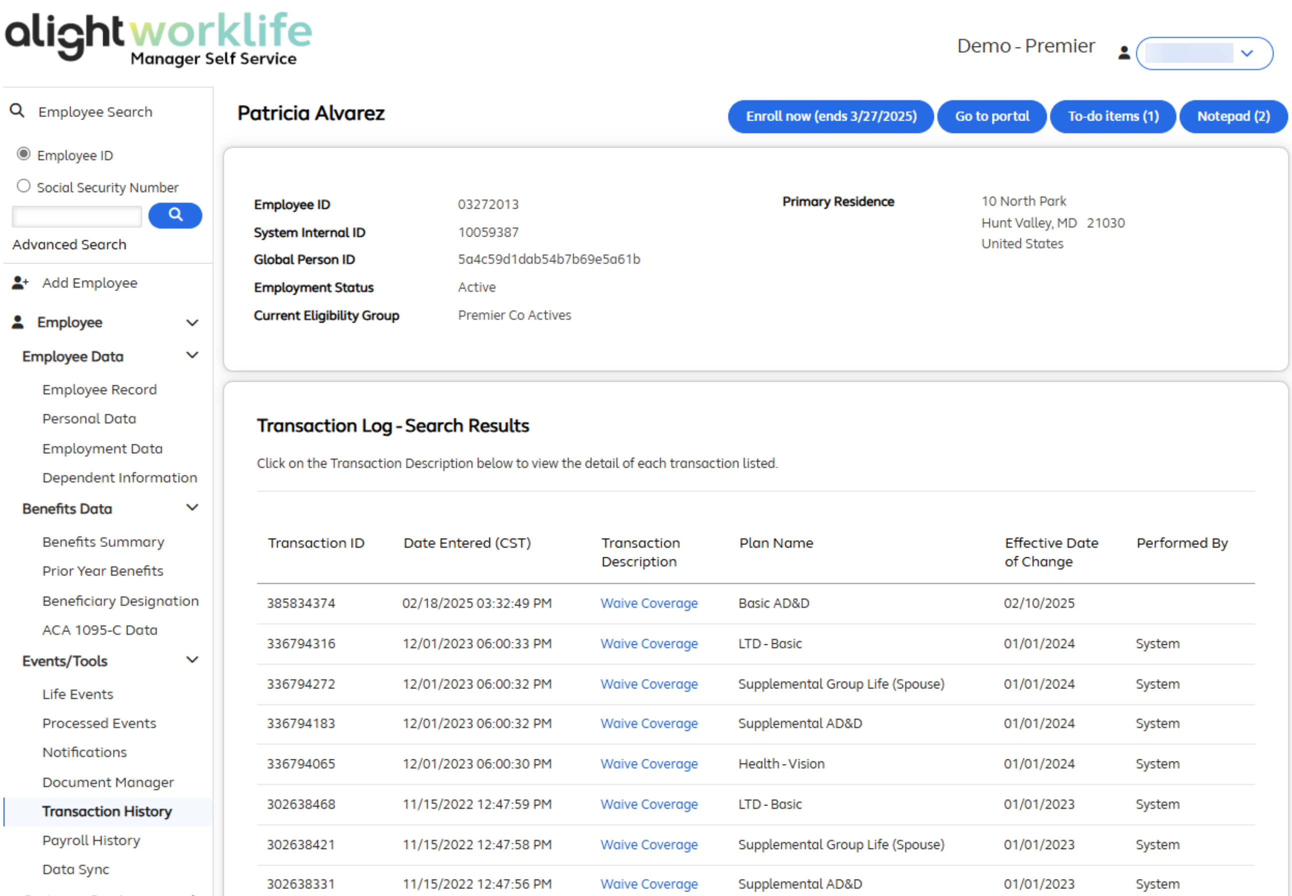


- Click the down-arrow to select Transaction Type from the drop-down list.
- The user should click the appropriate radio button to indicate whether they want

to see all transactions of this type, just COBRA/HIPAA Qualifying transactions, or transactions within a specific date range.

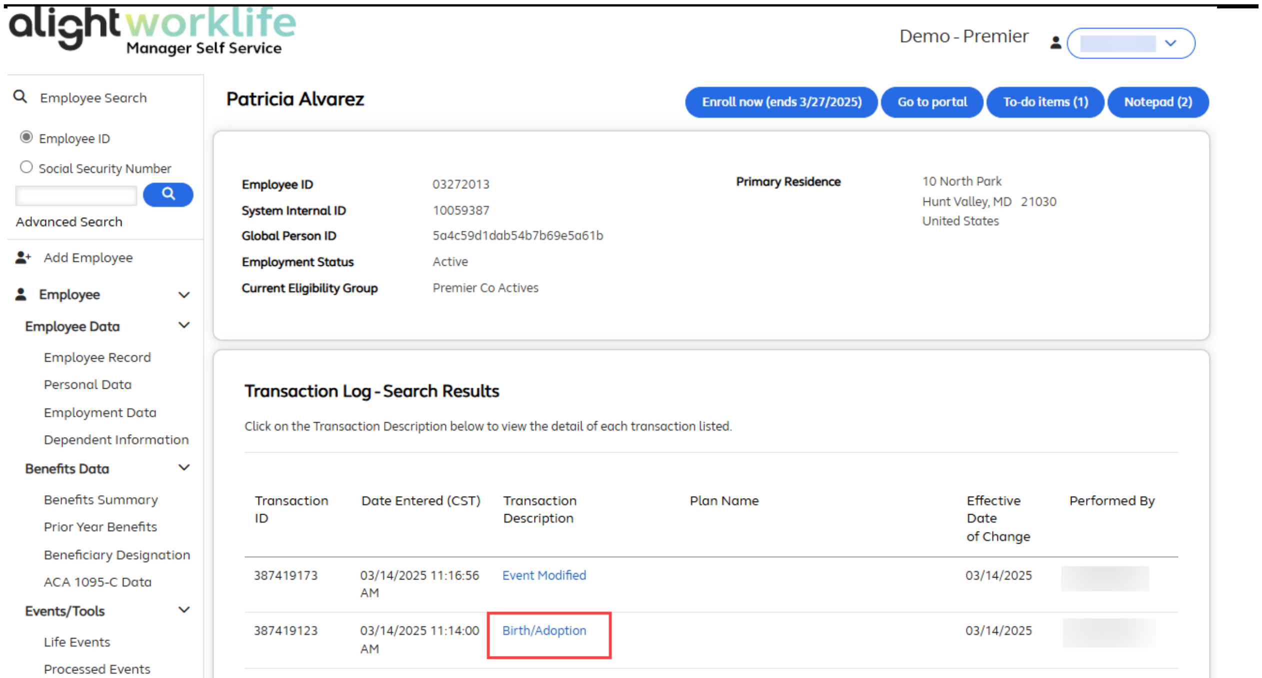
- Click **Search** to view the selected transactions.

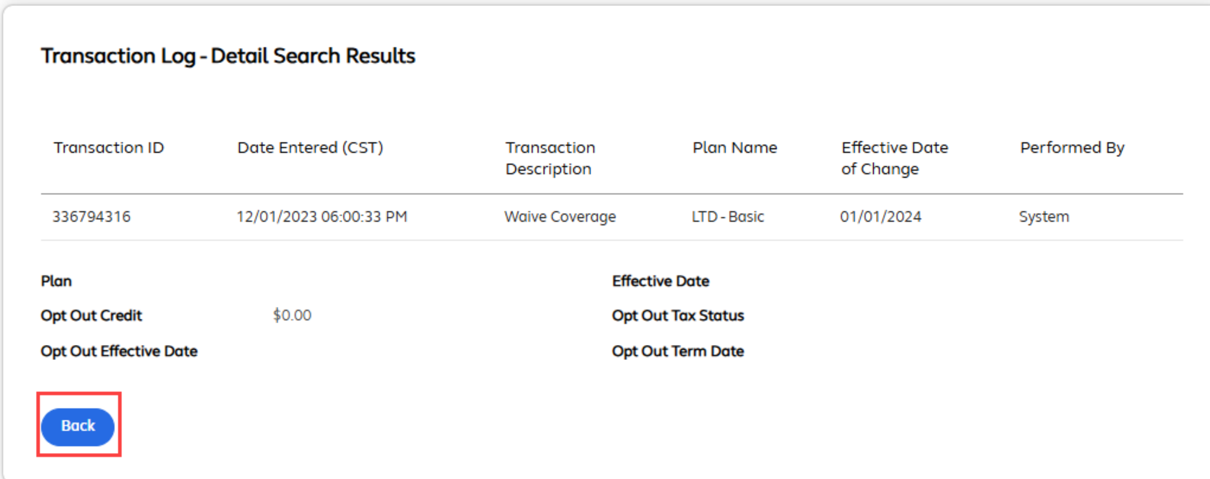
- Note that transactions display in descending order by Transaction ID. The order can be changed by clicking on any of the column headers. For example, to see all transactions affecting the HSA click on the Plan Name column. Repeated clicks on the same column header will toggle between ascending and descending order.



Viewing a Specific Transaction

To see details of any listed transaction, click the desired link in the Transaction Description column. A new screen displays providing additional detail about that transaction. When done reviewing the details, click **Back** to return to the Transaction Log.


alight worklife
Manager Self Service
Demo - Premier
Employee Search
Employee ID
Social Security Number
Advanced Search
Add Employee
Employee
Employee Data
Employee Record
Personal Data
Employment Data
Dependent Information
Benefits Data
Benefits Summary
Prior Year Benefits
Beneficiary Designation
ACA 1095-C Data
Events/Tools
Life Events
Processed Events
Patricia Alvarez
Enroll now (ends 3/27/2025)
Go to portal
To-do items (1)
Notepad (2)
Employee ID 03272013
System Internal ID 10059387
Global Person ID 5a4c59d1dab54b7b69e5a61b
Employment Status Active
Current Eligibility Group Premier Co Actives
Primary Residence
10 North Park
Hunt Valley, MD 21030
United States
Transaction Log - Search Results
Click on the Transaction Description below to view the detail of each transaction listed.
Transaction ID
Date Entered (CST)
Transaction Description
Plan Name
Effective Date of Change
Performed By
387419173
03/14/2025 11:16:56 AM
Event Modified
03/14/2025
387419123
03/14/2025 11:14:00 AM
Birth/Adoption
03/14/2025



Chapter 6: Notification Manager

If Notifications have been enabled, the Notification Manager tool can be used to generate notifications to an employee as well as view notifications that have already been scheduled or delivered.

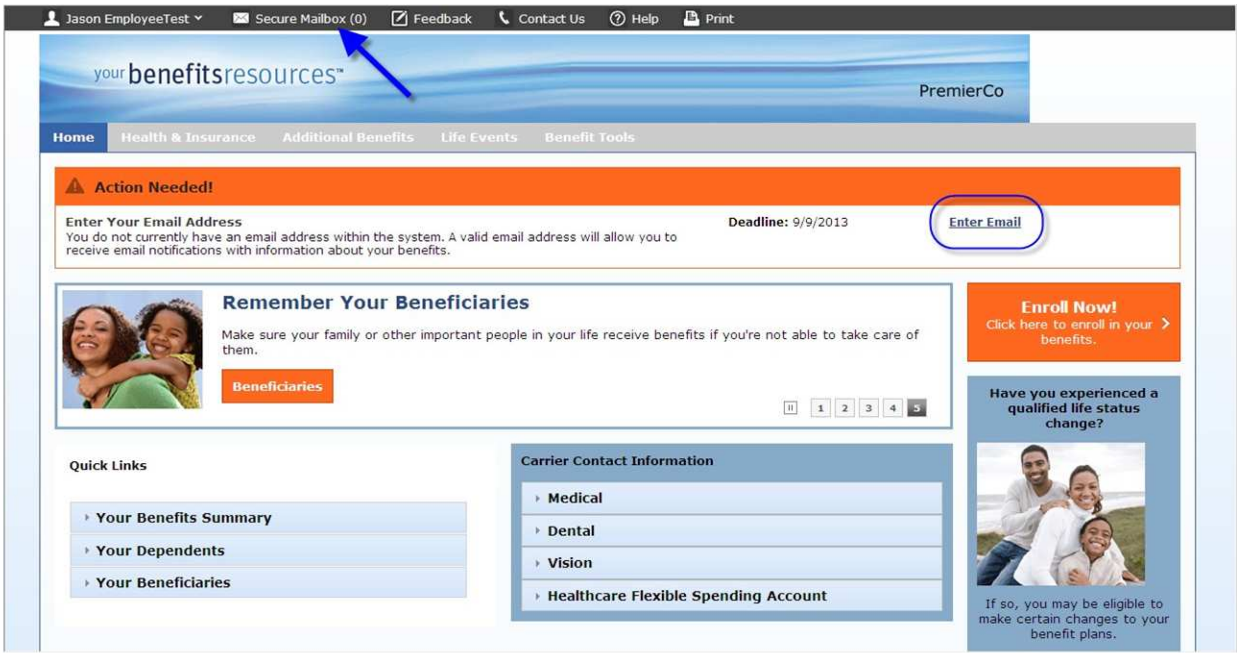
Notifications can be set up for various types of employment and life events. For example, emails may be set up to be delivered to new hires providing instructions on how to access the employee portal so they can enroll in their benefits. Notification emails can be delivered to the employee's personal email address on file within the Manager Self Service system or to the employee's secure email box within the employee portal.

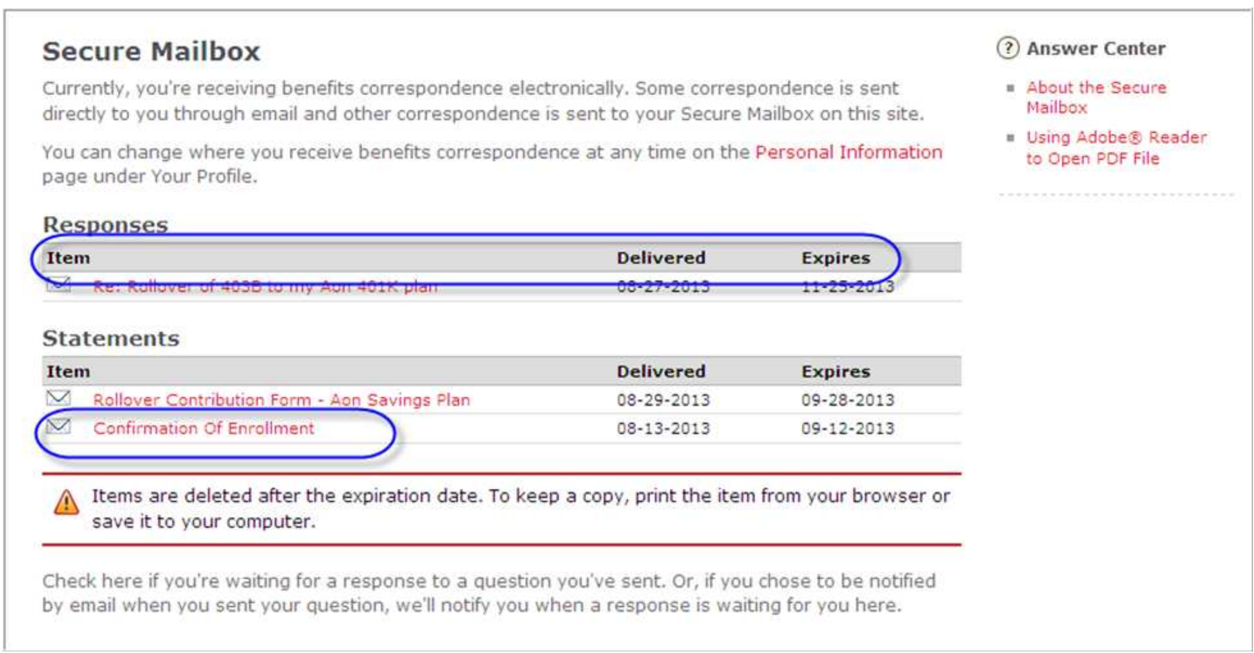
When the employee logs into the portal for the first time the system will prompt them to enter their personal email address if it's not on file so they will be able to receive email notifications.

Viewing a Notification from the Secure Mailbox

To view notifications via the Secure Mailbox:

- The employee clicks on the link for the Secure Mailbox at the top of the employee portal.
- Note there is a number located beside the Secure Mailbox link that will indicate the number of notifications waiting on the employee.
- The employee's Secure Mailbox is displayed where they will see a list of all of the messages, the date of delivery, and the expiration date for each item.
- To open a message the employee simply clicks on the link.





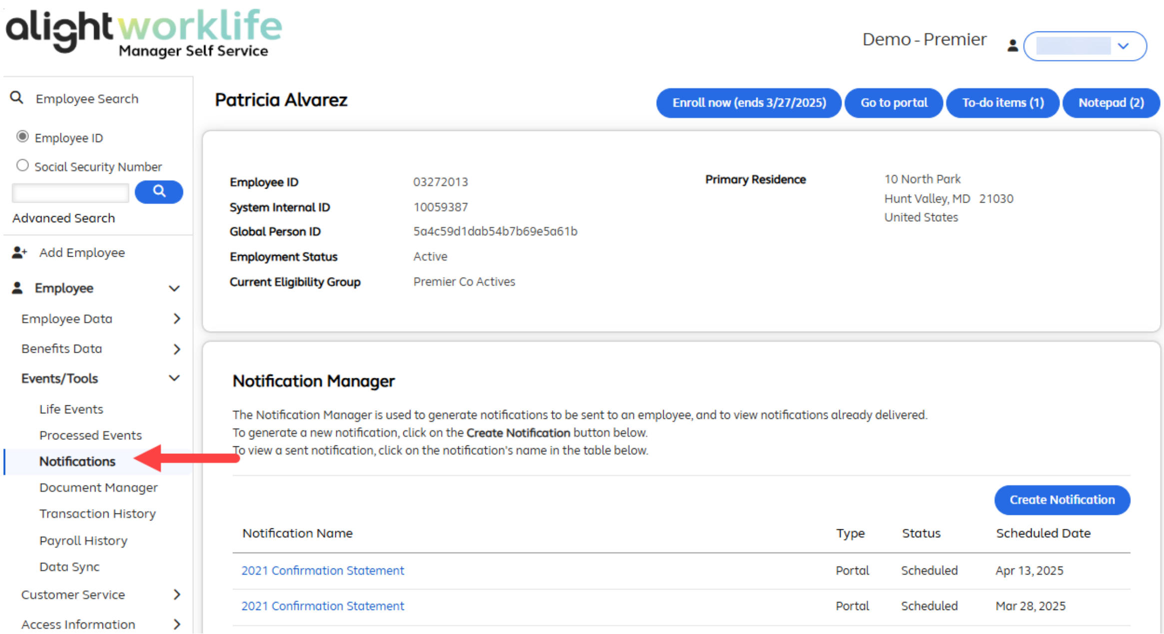
- Messages will be automatically deleted from the Mailbox on the expiration date.

Viewing Notifications from Manager Self Service

There are times when administrators may need to view the notifications that are scheduled for delivery or have already been delivered to an employee.

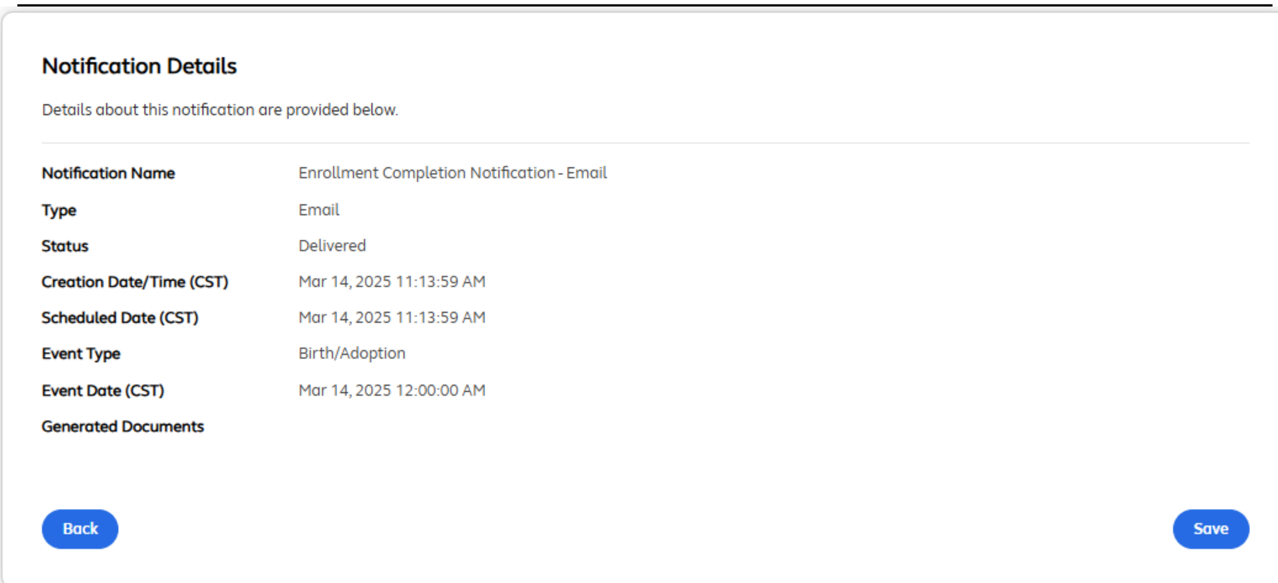
To view notifications:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Events/Tools** from the navigation menu on the left. This will expand the menu where the user can click on **Notifications**.

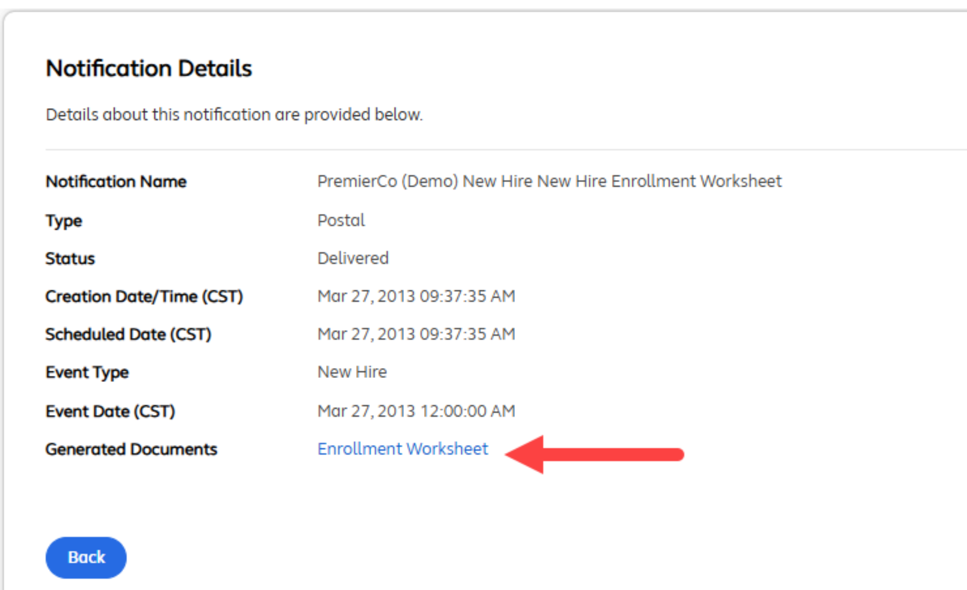


A list of all of the notifications for the employee will display. The administrator can see the notification name, the type, the status and the scheduled date.

- **Type:** there are three types of notifications:
  - o **Postal** – sent via standard mail
  - o **Portal** – emailed to the secure mailbox in the employee's portal
  - o **Email** – emailed to the employee's personal email address
- **Status Column:** the user can view the status column to see if the notification was delivered or if it failed. For example, if the notification is set up as an email notification and the employee does not have a personal email address on file then the notification will fail.
- **Notification Name:** the user can click on the Notification Name to view the details of that specific notification. If the notification was delivered successfully the system will display the date and time the notification was viewed by the employee.



- If there were any documents attached to the notification there will be a link the administrator can click on to view the attachment.



Creating Notifications

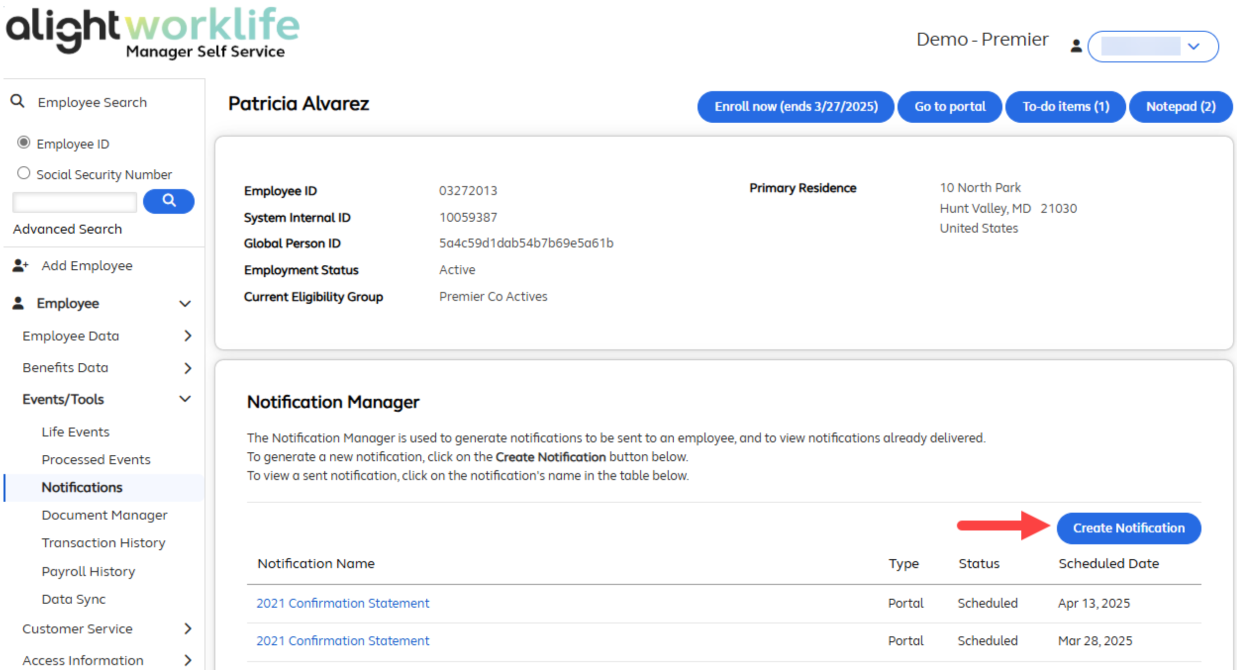
In addition to viewing notifications that are scheduled or have already been sent to an employee the Notification Manager can be used to generate notifications for employees.

To create a notification:

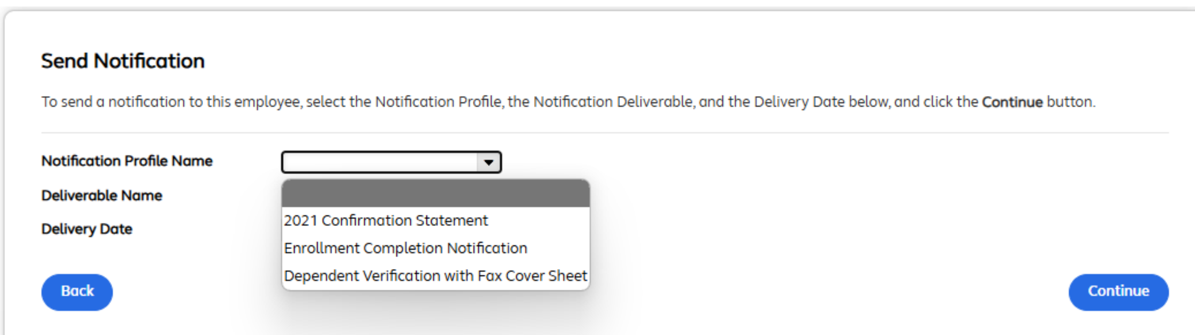
- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Events/Tools** from the navigation

menu on the left. This will expand the menu where the user can click on **Notifications**.

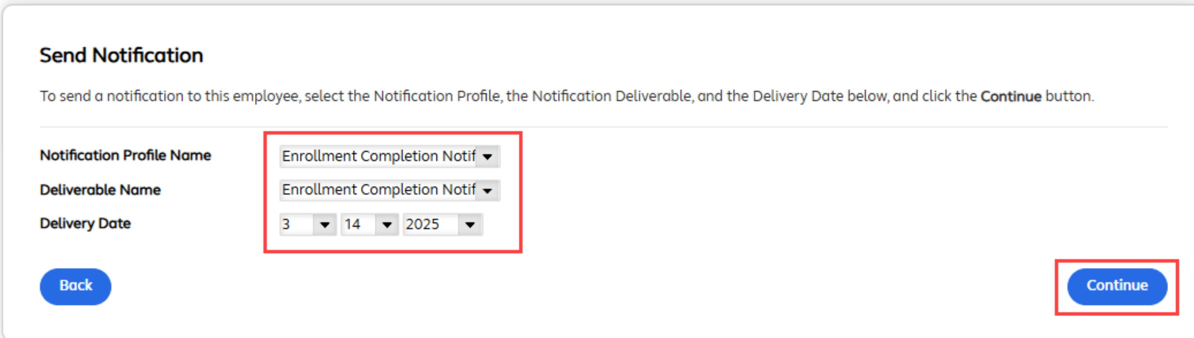
- Click Create Notification in the middle of the screen.



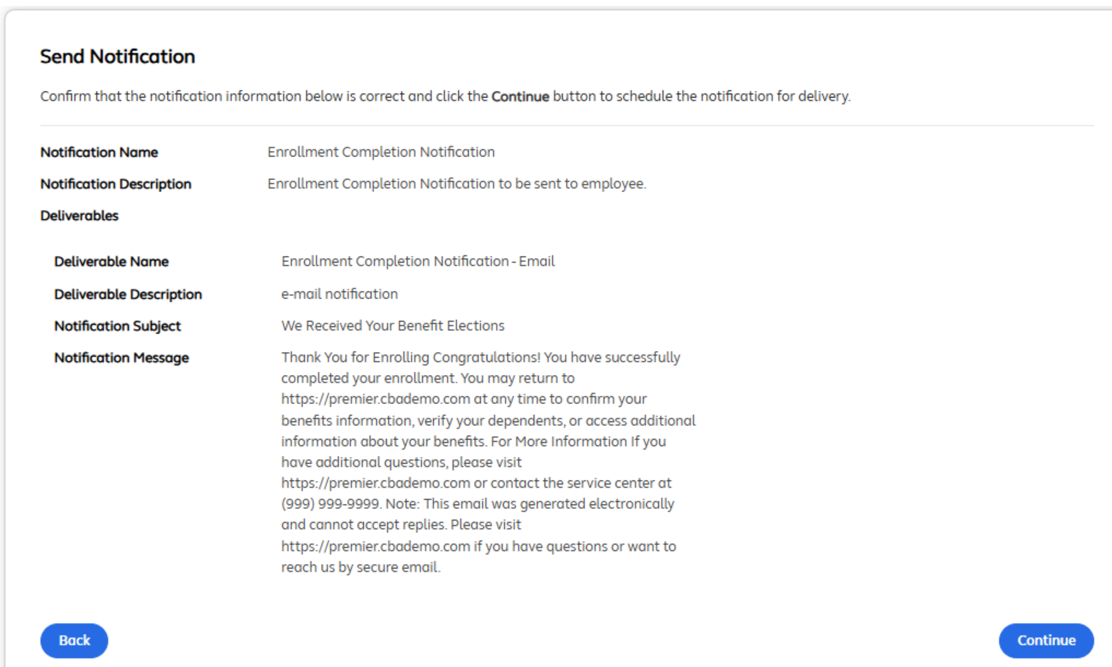
- Click the down arrow beside **Notification Profile Name** to display the available notifications and click on the name of the notification desired.

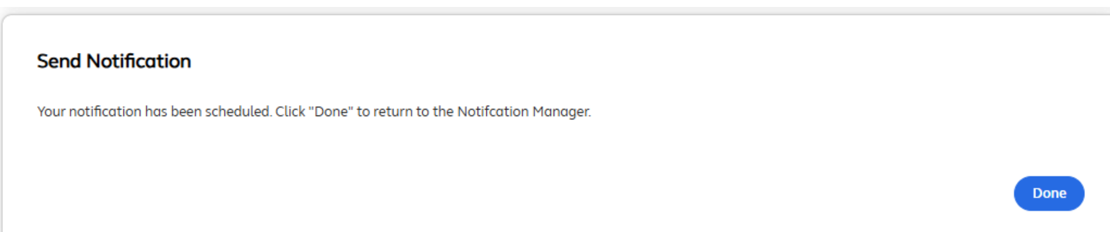


- Click the down arrow next to **Deliverable Name** to select the type of notification: email, portal, or postal.
- Select the month, day, and year for the **Delivery Date**.
- Click **Continue**.

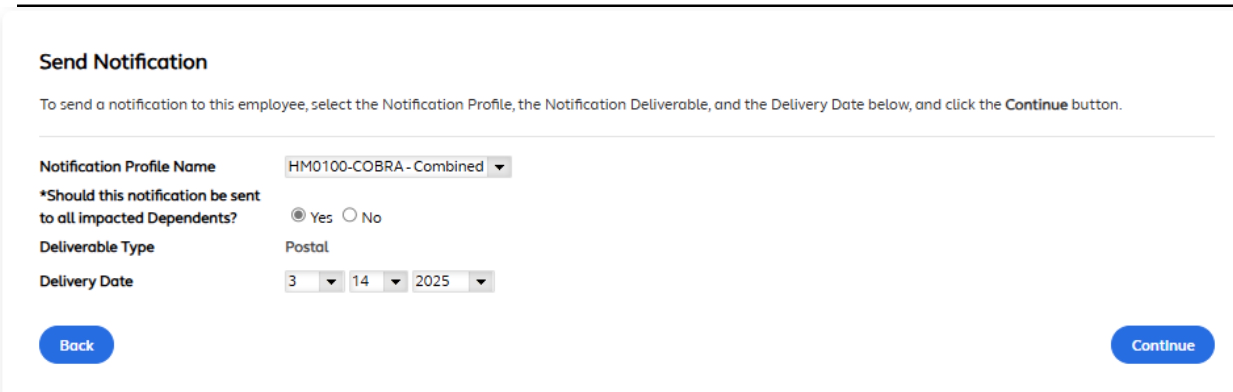


- Verify the information and click **Continue**. Then click **Done** to go back to the main Notifications screen. The scheduled notification will display in the list.



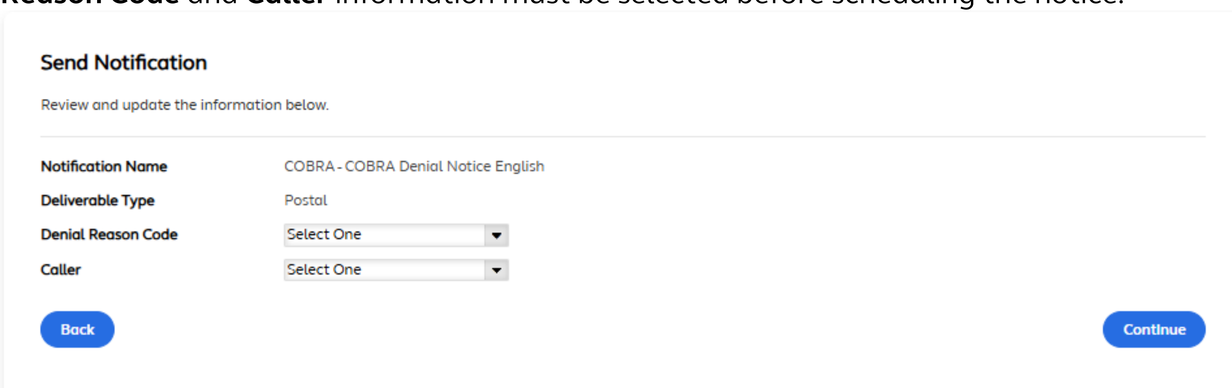


When Alight is the COBRA Administrator, if a COBRA notice (except for the COBRA Denial Notice) is selected, addition questions will display to select the recipients for the notice (e.g., spouse, QMCSO dependents, etc.).



After scheduling the notification, the system will check the overall QB status of the selected recipients and generate the notices accordingly. If the overall QB status of the recipient is None or Failed to Elect, a notice will not be generated. For the COBRA Rights notice and HIPAA Privacy Notice, the system will not check the overall QB status of the selected recipients and will generate the notices for these selected recipients.

For the COBRA Denial notice, additional options will be shown on next screen where the **Denial Reason Code** and **Caller** information must be selected before scheduling the notice.



See the COBRA Education document for additional details about COBRA Notifications and when they are generated.

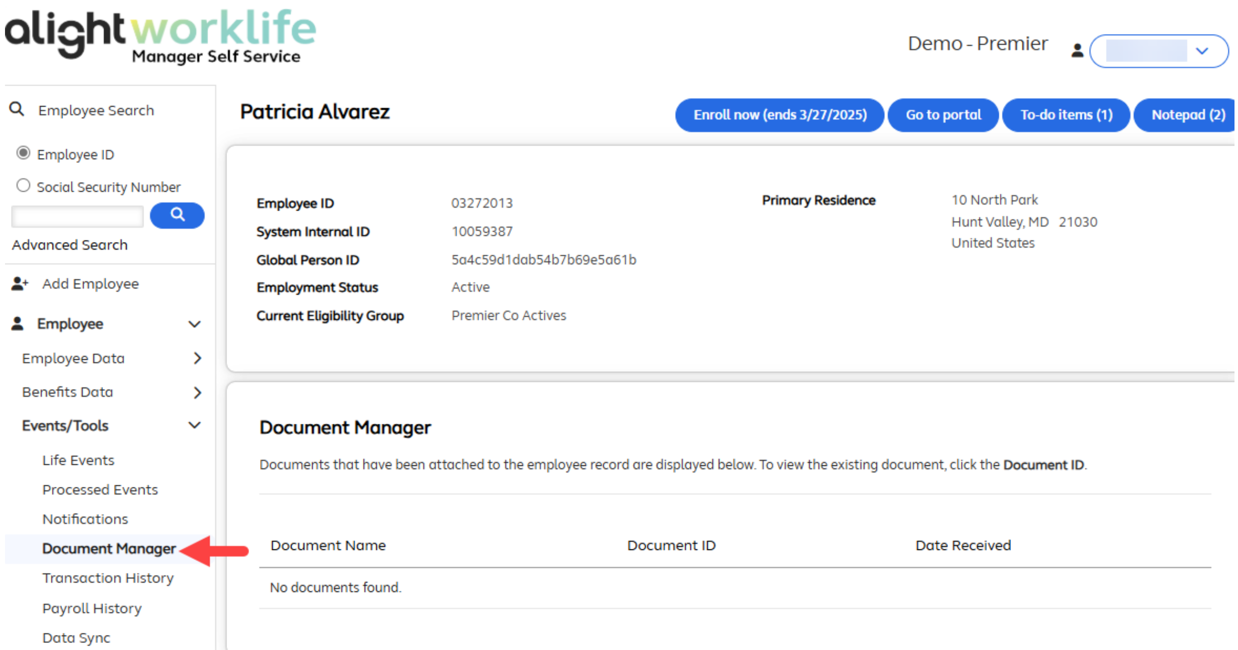
Chapter 7: Document Manager

The document manager tool allows administrators to view any documents that have been attached to an employee record. For example, if an employee sends in documents as part of the dependent verification process, such as a birth certificate or marriage certificate, the documents will be scanned in and attached to the employee's record.

Important note: As long as the correct process is followed to submit the document it should take about 2-3 days for the document to be visible in Manager Self Service. If the correct process is not followed it may take longer for the document to be attached to the employee's record.

To view documents:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Events/Tools** from the navigation menu on the left. This will expand the menu where the user can click on **Document Manager**.
- A list of all of the documents attached to the employee record will display. The administrator can see the document name, document ID, and the date received.
- The administrator can click on the link for the document to open and view the document.



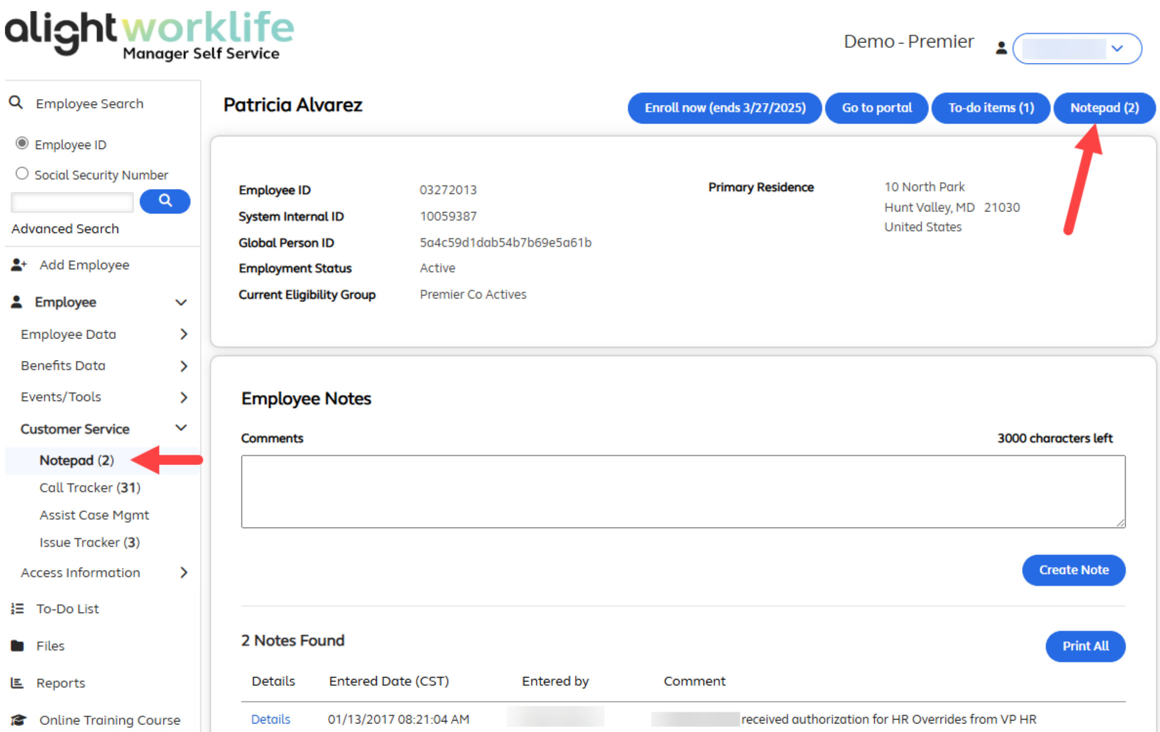
Chapter 8: Employee Notepad

The employee notepad is used to document and track all notes and comments for an individual employee. These notes help users understand all interactions with employees and include detailed explanations for updates that have been made to the employee's record.

Viewing Employee Notes

To view notes attached to an employee's record:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Customer Service** from the the navigation menu on the left. This will expand the menu where the user can click on **Notepad**.

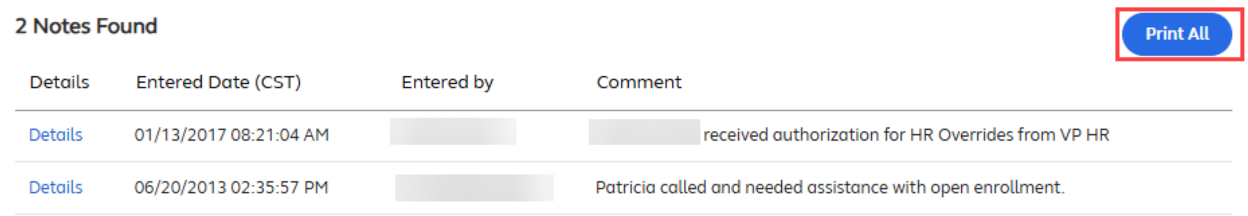


- There will be a number beside the Notepad link on the left navigation bar as well as beside the Employee Notepad link at the top of the screen (above the employee's personal information) indicating the number of notes that have been entered for that employee.
- Existing notes will be displayed at the bottom of the screen.

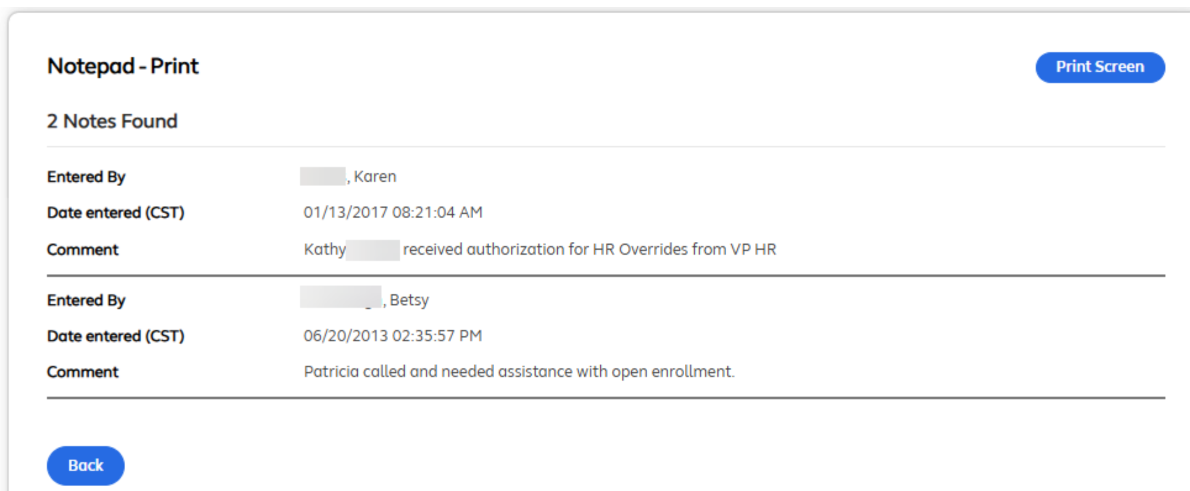
2 Notes Found — Print All

Details	Entered Date (CST)	Entered by	Comment
Details	01/13/2017 08:21:04 AM		received authorization for HR Overrides from VP HR
Details	06/20/2013 02:35:57 PM		Patricia called and needed assistance with open enrollment.

- Each note includes the date and time the note was entered, who the note was entered by, and the first 150 characters of the comments.
- To review the entire note click the Details link and a pop up window will appear displaying the entire note.
- Users are able to print all of the notes by using the Print All button on the right side of the screen just above the notes section.



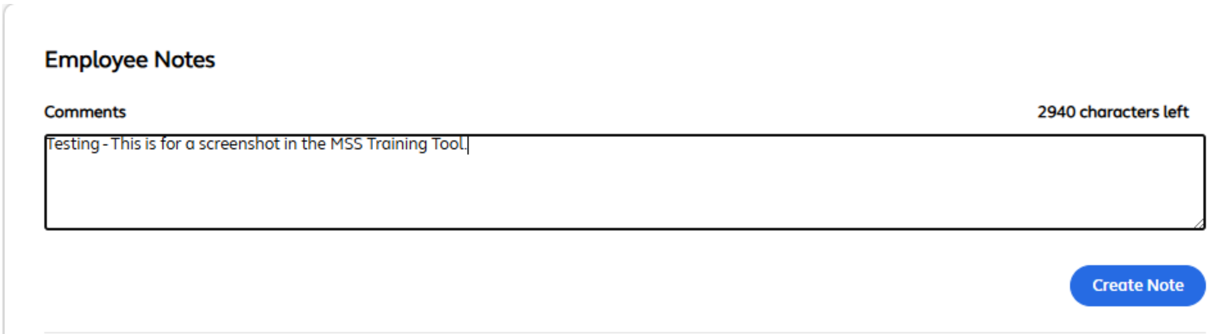
- A new window will appear displaying all of the notes. Click the Print Screen within the window to print all of the notes.



Entering Employee Notes

To enter a note in an employee's record:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Customer Service** from the navigation menu on the left. This will expand the menu where the user can click on **Notepad**.
- Click in the comments box and type the note.
- There is a limit of 3000 characters per note. At the bottom of the note the system will display the number of characters remaining as the note is being entered.
- Once the note is complete click **Create Note**.
- **Important Note:** Once a note has been created it cannot be edited or deleted.



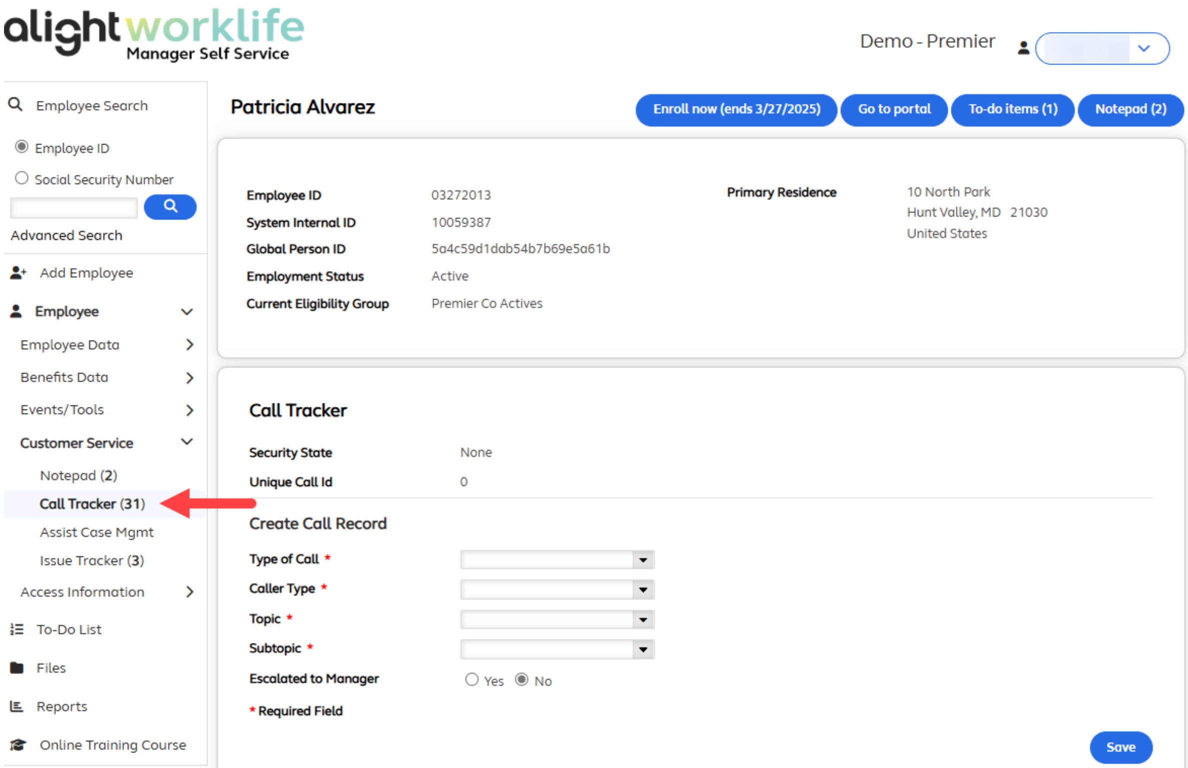
Chapter 9: Call Tracker

Call Tracker is a tool that our Customer Service Representatives use to log all phone calls and interactions with employees. It is required that every single interaction is documented in the Call Tracker tool. Reports are generated from the information that is entered which allows trends and issues to be identified and overall service improved.

Creating a Call Record

To create a call record:

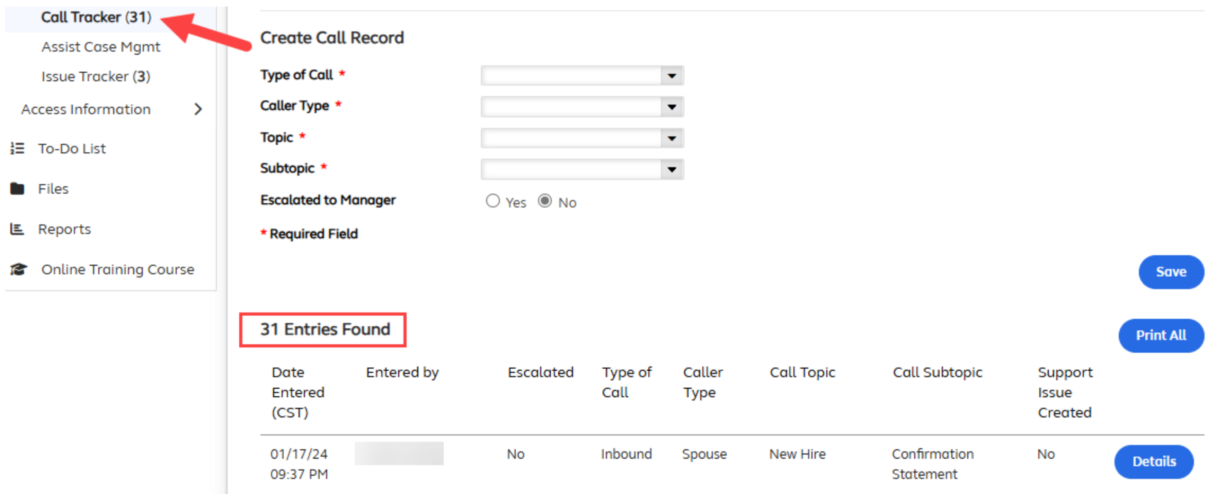
- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Customer Service** from the navigation menu on the left. This will expand the menu where the user can click on **Call Tracker**.
- When a Customer Service Representative interacts with an employee, they first open up the Call Tracker tool then select the **Type of Call, Caller Type, Topic, and Subtopic.**
- The Type of Call and Caller Type are required fields for every interaction.
- If the interaction results in an issue that needs further research, the **Yes** radio button next to
  Create Support Issue should be selected.
    - The Issue Tracker screen will then display (information on Issue Tracker is contained in Chapter 9).
- Once the fields have been completed, click **Save**.



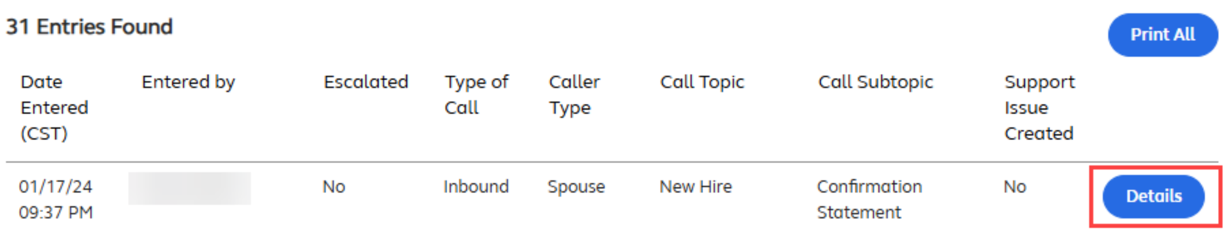
Viewing Call Details

Every interaction the call center has with the employee is entered into the Call Tracker tool. The entire list of interactions can be seen at the bottom of the Call Tracker Screen.

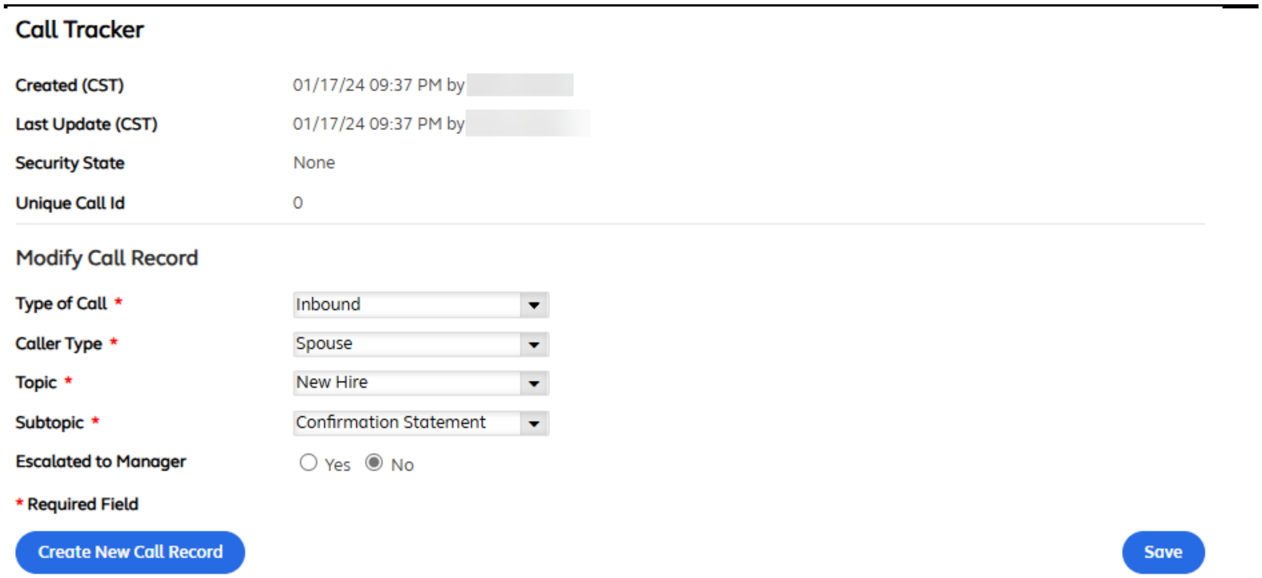
- There will be a number beside the Call Tracker link on the left navigation bar indicating the number of interactions that have been logged for that employee.



- To view the details regarding a specific interaction click the **Details** button for that interaction.



- If information in the call tracker is incorrect it can be edited by simply selecting the correct information and then clicking **Save**.



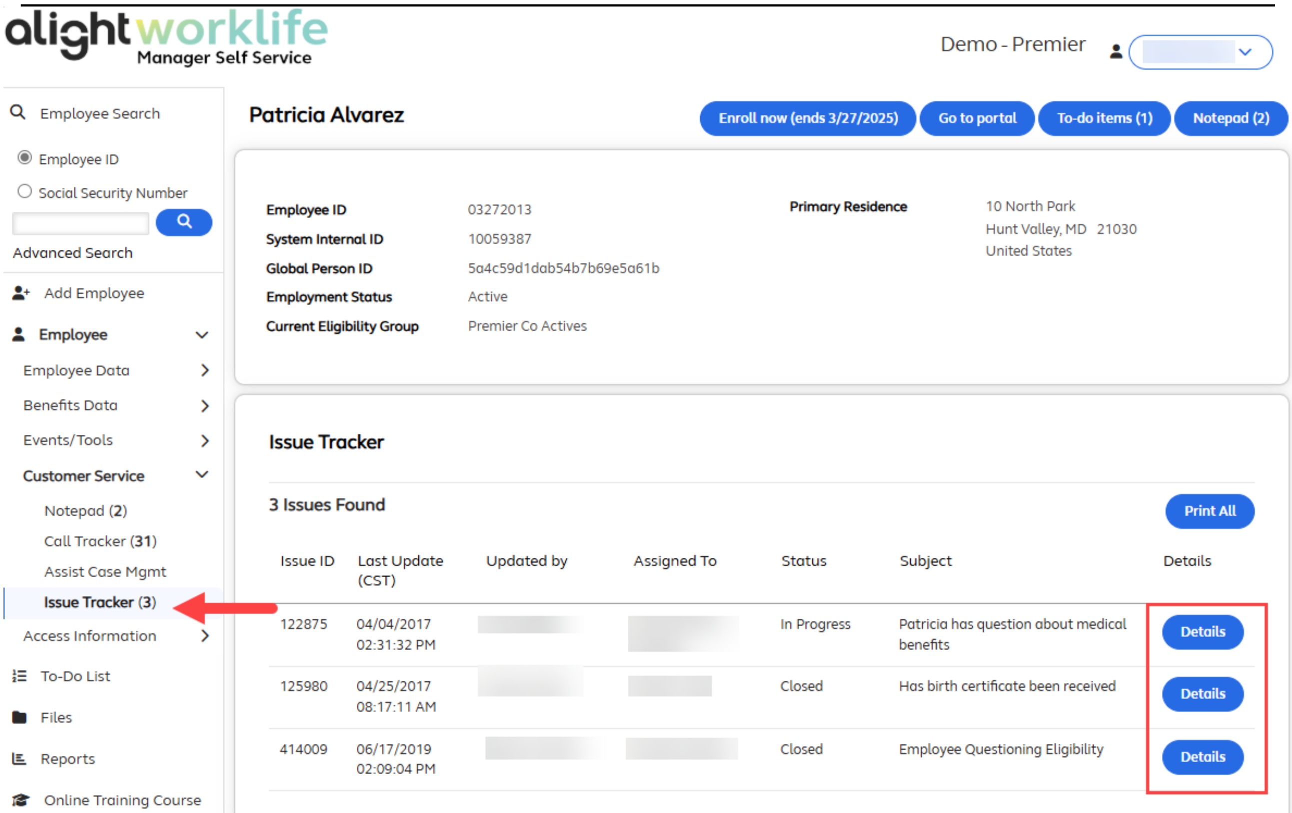
Chapter 10: Issue Tracker

Issue Tracker is the historical system primarily used by Customer Service Representatives in the call center to submit and track employee specific issues needing additional research to the Benefit Service team.

Viewing Previously Logged Issues

To view details of logged issues:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Customer Service** from the navigation menu on the left. This will expand the menu where the user can click on **Issue Tracker**.
- Click on the **Details** button next to the desired issue to view the details.



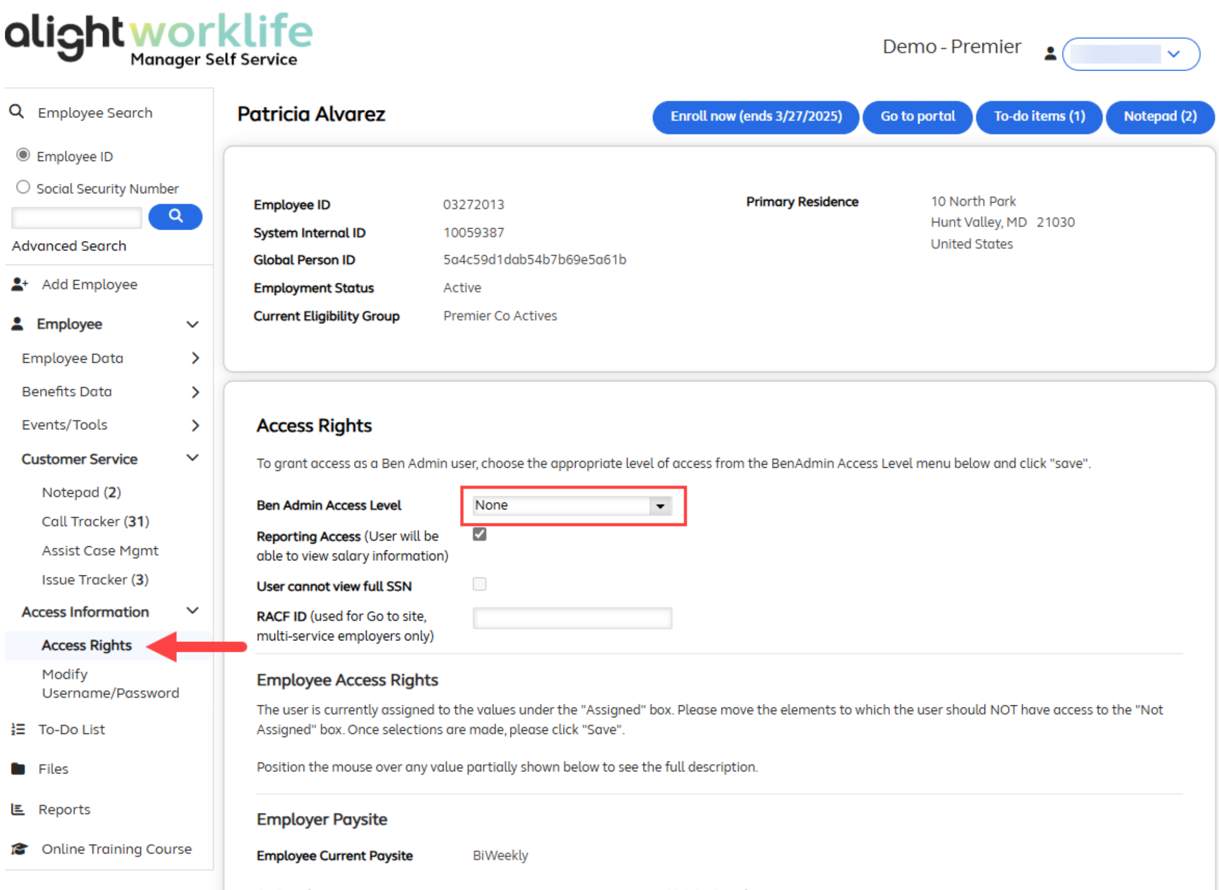
- Once the record is displayed check the Status field and review any notes to understand what is going on with the issue.

Chapter 11: Access Rights

If desired, an HR Administrator can grant access rights to another employee. For example, if a new employee joins the HR Department and will be responsible for viewing and managing employee benefits information in the Manager Self Service System, the HR Administrator has the ability to grant the new employee access to the Manager Self Service system. The HR Administrator would be responsible for determining what access level to grant that new employee.

To view or modify access rights:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Access Information** from the navigation menu on the left. This will expand the menu where the user can click on **Access Rights**.
- Click the drop down arrow next to **Ben Admin Access Level** and select the appropriate access level from the options.
- There are 4 access levels available: Admin, High, Medium, and Low. The chart on Page 4 outlines each of the access levels and the functions they can perform based on their level.



- Based on the system setup HR Administrators may be able to limit access rights based on additional criteria such as Paysite, Location or Job Class. To limit access, move the items to the appropriate boxes (Assigned or Not Assigned) by highlighting the items and using the right and left arrows and then click **Save**.
- For example, in the screen shot below this employee has access to the 2014 paysite only and can only view employees with a Job Class of 2015 Acquisition.

alight

Access Rights

To grant access as a Ben Admin user, choose the appropriate level of access from the BenAdmin Access Level menu below and click "save".

Ben Admin Access Level BenefitsAdmin-Admin

Reporting Access (User will be able to view salary information) ☑

User cannot view full SSN ☑

RACF ID (used for Go to site, multi-service employers only)

Employee Access Rights

The user is currently assigned to the values under the "Assigned" box. Please move the elements to which the user should NOT have access to the "Not Assigned" box. Once selections are made, please click "Save".

Position the mouse over any value partially shown below to see the full description.

Employer Paysite

Employee Current Paysite BiWeekly

Assigned		Not Assigned
2013 2014 2018 Bi-Weekly 2011 BiWeekly- Old	> <	BiWeekly

Employer Location

Employee Current Location Atlanta

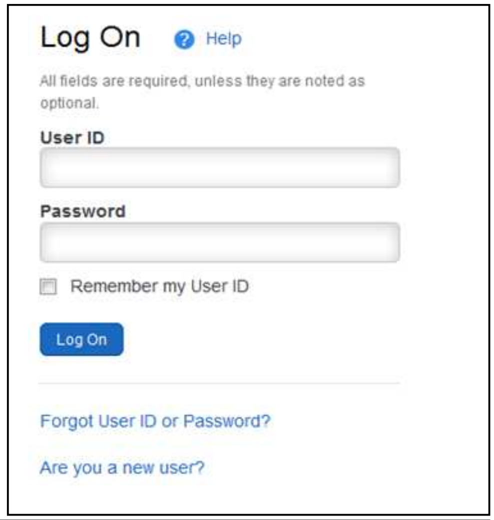
Assigned		Not Assigned
Boca Raton Detroit Evanston IL Florham Park OE Location	> <	Atlanta

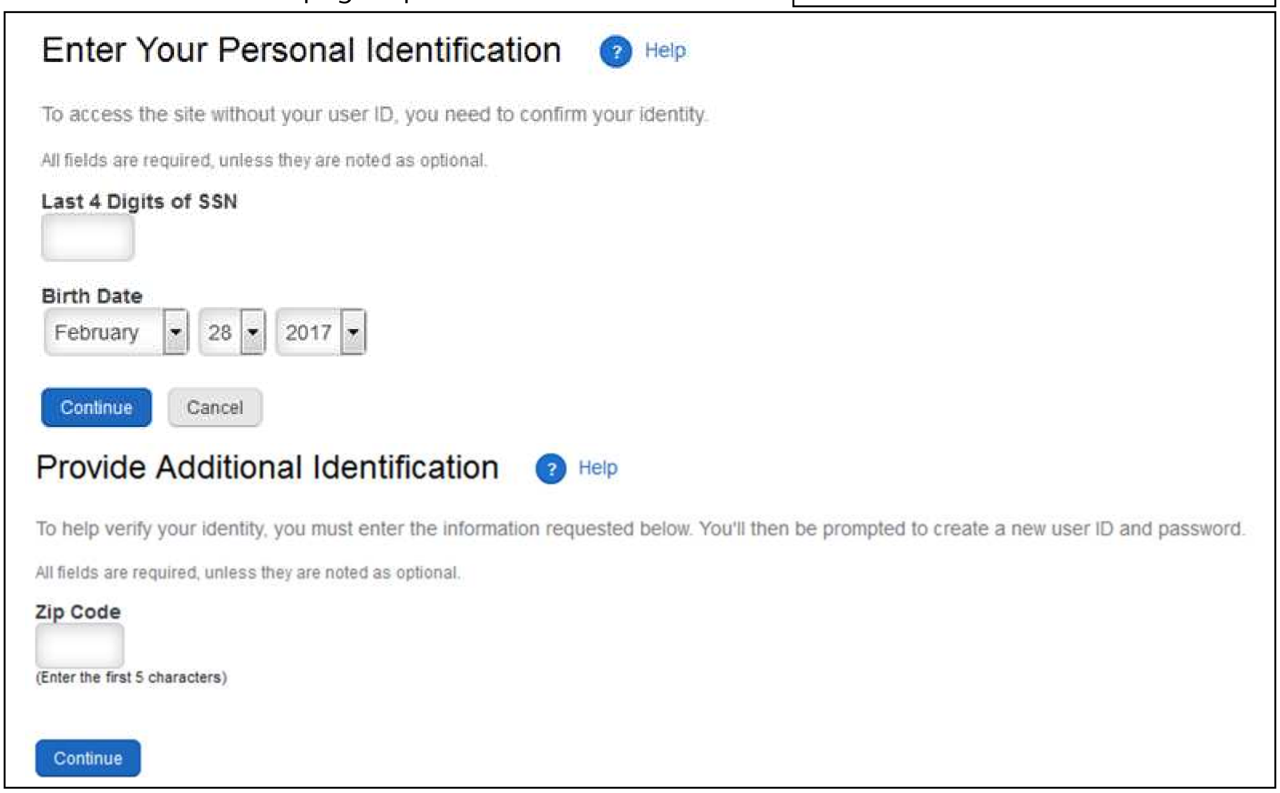
Chapter 12: Updating Usernames and Passwords

Sometimes users will forget their usernames and passwords. If this happens, all users have the ability to reset their own usernames and passwords from the logon screen.

To recall a username or change a password:

- Click **Forgot User ID or Password?** from the logon screen.
- Complete the prompts on the next two screens (last four digits of SSN, date of birth, zip code) and click **Continue**.
- If the system finds an existing username, the user will have the option to enter or update the password. If the user has not registered, the Create Username and Password page is presented.





Chapter 13: HR Override

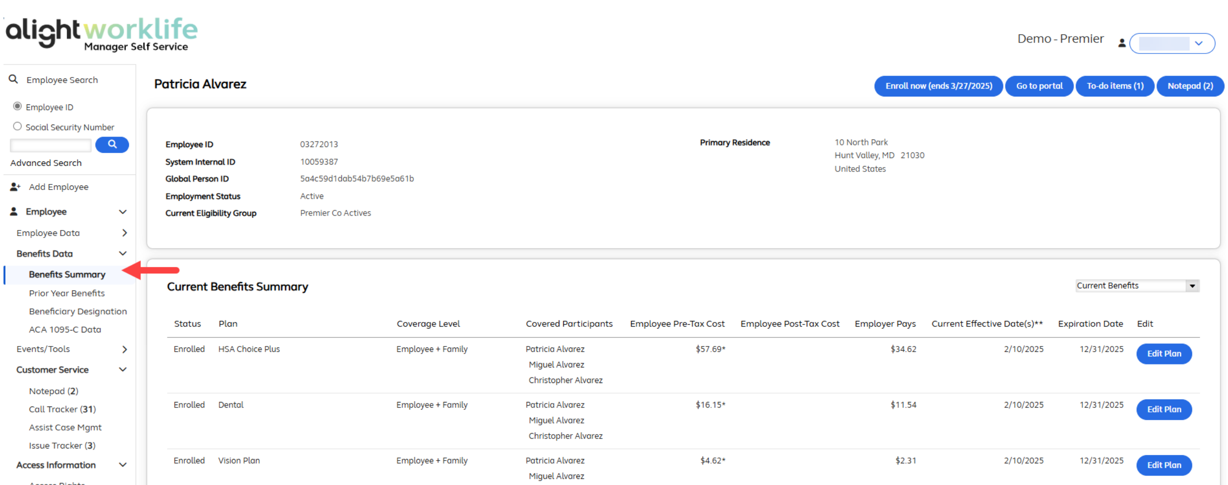
HR Override is a function that allows Admin-level users to make corrections and/or adjustments to an employee's or their dependents benefit selections and effective dates of coverage. For example, an HR Override can be used to make changes to the following:

- Current Effective Date
- Effective Date of the Elected Plan
- Plan Expiration Date
- Date the elected plan is set to expire
- Original Effective Date
- Date the enrolled plan was first in effect for the employee
- Plan Coverage Amount /Tier
- Tier level currently in effect
- Covered Dependent
- Dependents that are currently covered under the plan.
- Dependent's Coverage Effective Date
- Date the dependent's coverage began for the plan year being reviewed

Accessing HR Override Function

To access the HR Override function:

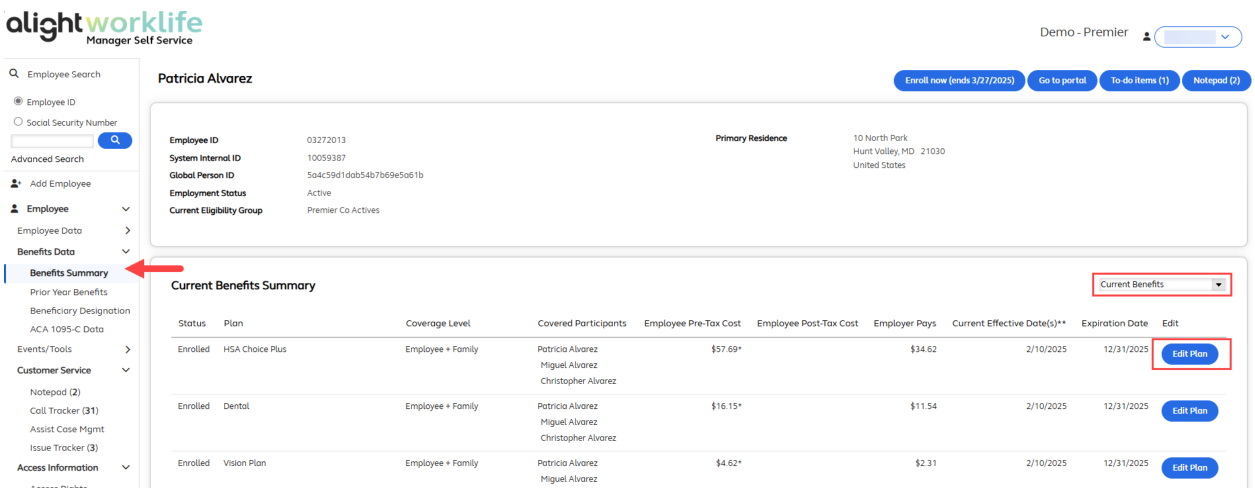
- Pull up an employee's record using the search functions outlined in Chapter 2.
- Once the employee's record is displayed click on **Benefits Data** from the navigation menu on the left. This will expand the menu where the user can click on **Benefits Summary**.



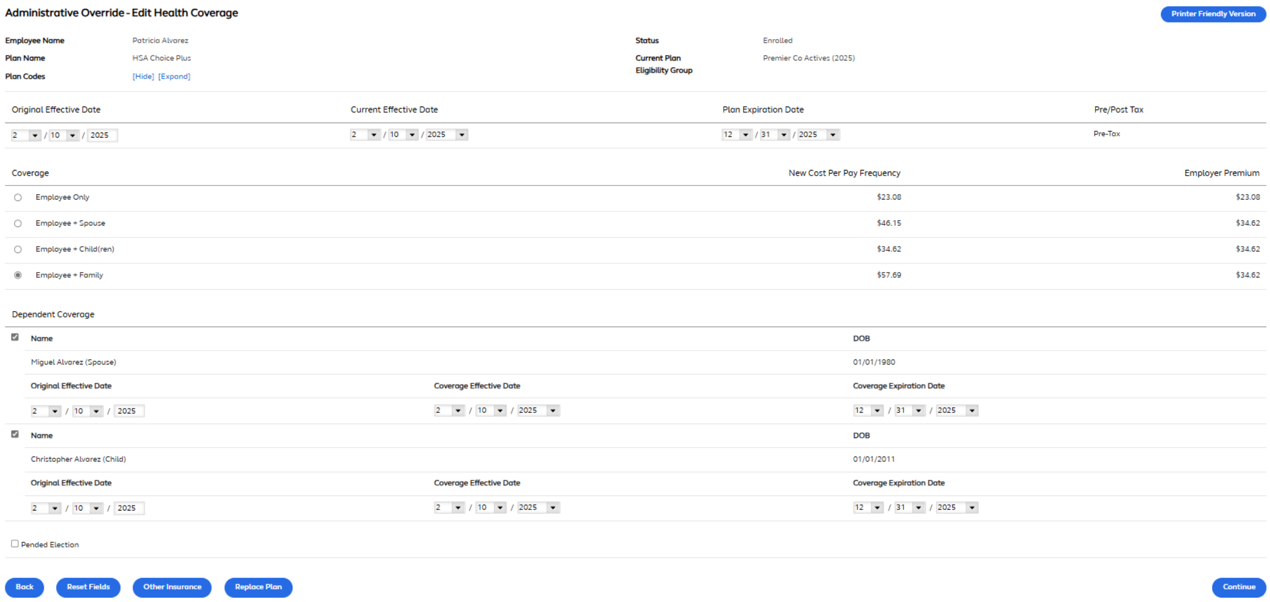
- Click on the appropriate tab to access the benefits that need to be adjusted:

Terminated, Current, or Future. Note the system will default to the Current tab.

- Locate the benefit plan that needs to be adjusted and click **Edit Plan**.



- Make the appropriate adjustments to the employee's coverage or the dependents coverage. Note that the entire plan can also be replaced by clicking on the **Replace Plan** button at the bottom of the page.
- Once the changes have been made click **Continue**.


Administrative Override - Edit Health Coverage

Printer Friendly Version

Employee Name	Patricia Alvarez	Status	Enrolled
Plan Name	HSA Choice Plus	Current Plan Eligibility Group	Premier Co Actives (2025)
Plan Codes	[Hide] [Expand]		

Original Effective Date	Current Effective Date	Plan Expiration Date	Pre/Post Tax
2 / 10 / 2025	2 / 10 / 2025	12 / 31 / 2025	Pre-Tax

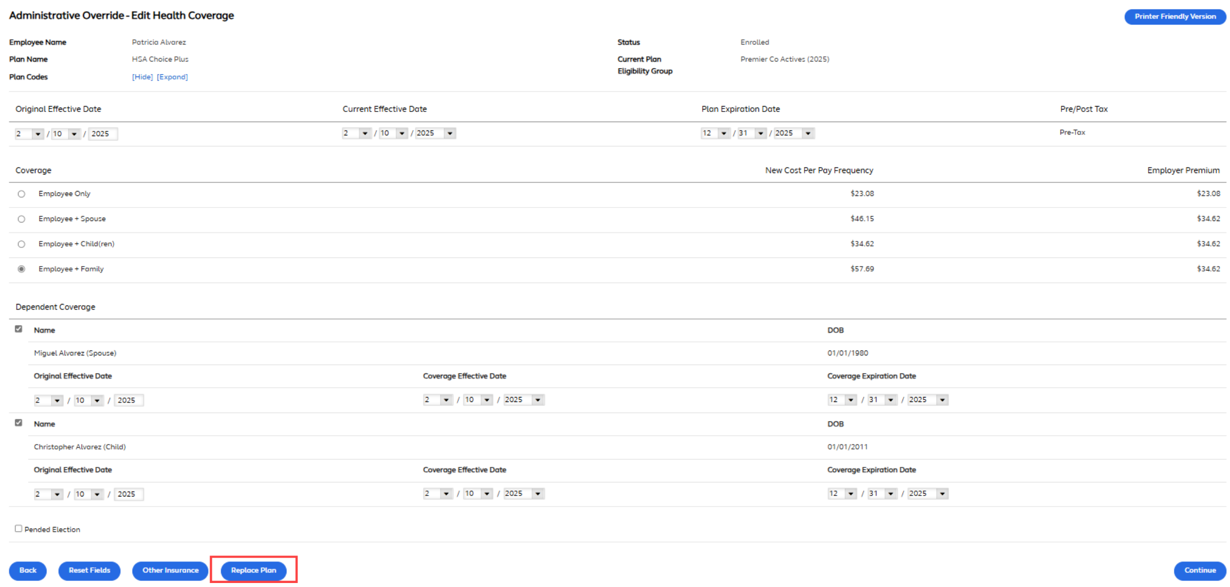
Coverage	New Cost Per Pay Frequency	Employer Premium
Employee Only	$23.08	$23.08
Employee + Spouse	$46.15	$34.62
Employee + Child(ren)	$34.62	$34.62
Employee + Family	$57.69	$34.62

Dependent Coverage

Name		DOB
Miguel Alvarez (Spouse)		01/01/1980
Original Effective Date	**Coverage Effective Date**	**Coverage Expiration Date**
2 / 10 / 2025	2 / 10 / 2025	12 / 31 / 2025
Name		**DOB**
Christopher Alvarez (Child)		01/01/2011
Original Effective Date	**Coverage Effective Date**	**Coverage Expiration Date**
2 / 10 / 2025	2 / 10 / 2025	12 / 31 / 2025

Pended Election

Back | Reset Fields | Other Insurance | Replace Plan | Continue



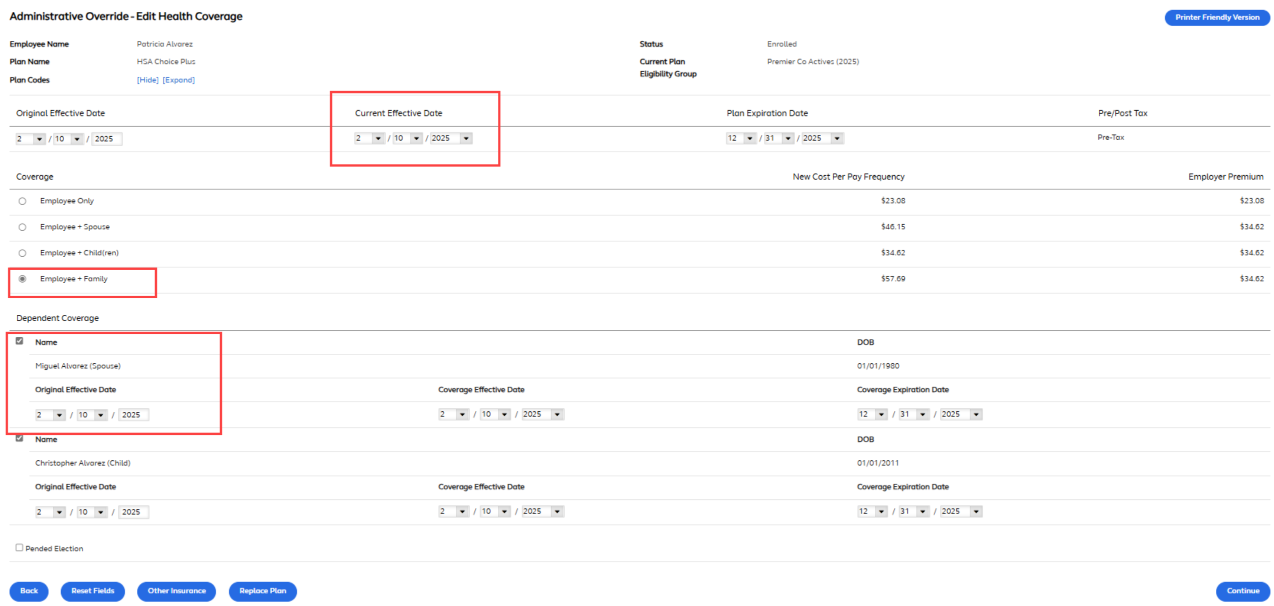
Example 1 – HR Override

Change Employee Only Medical Coverage to Employee + Spouse

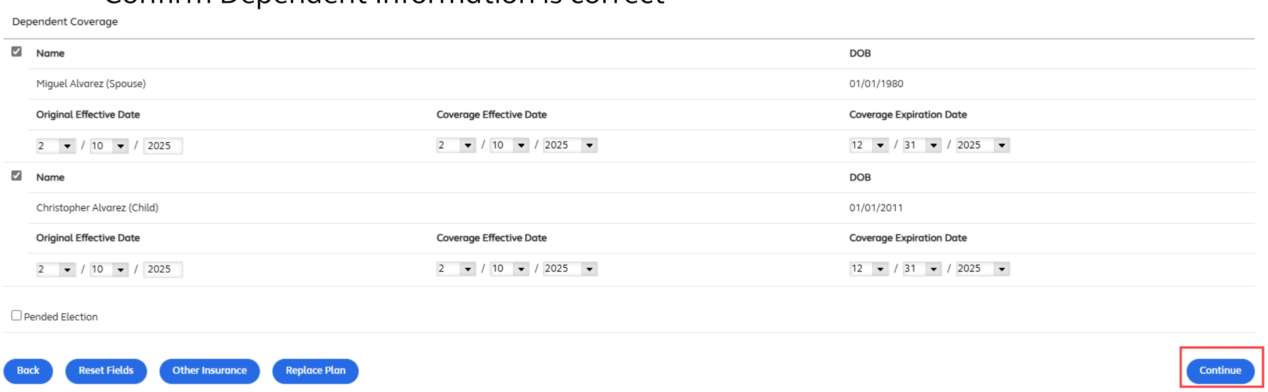
Suppose it's October 27th and an employee wants to switch from Employee only to employee + spouse because his spouse losing their job November 1st. Since life events cannot be future dated, an HR Override can be used to enter the desired change for the employee now.

To complete the HR Override:

- Update the new Current Effective Date because employee only coverage will be terminating and employee + spouse coverage will become effective.
- Click the **Employee + Spouse** radio button for his new coverage level.
- Check the boxes next to each dependent's name (spouse).
- Click **Continue**.



- Confirm Dependent Information is correct



- Click **Continue**.

- The system highlights the changes that were entered in yellow for verification. If any corrections need to be made, click **Back**. If all of the information entered is correct click **Continue.**
- The benefits summary displays and the status of the family level coverage now displays as "Termination Pending". This is because the termination date is in the future (according to our example, today is October 27th and the termination is not effective until 10/31/17).
- The new Employee + Spouse level coverage appears on the Future Benefits tab until it becomes effective on November 1st. Then it will appear on the Current Benefits tab.
- After October 31st, the status of the employee only level coverage displays as Terminated under the Terminated Benefits tab.

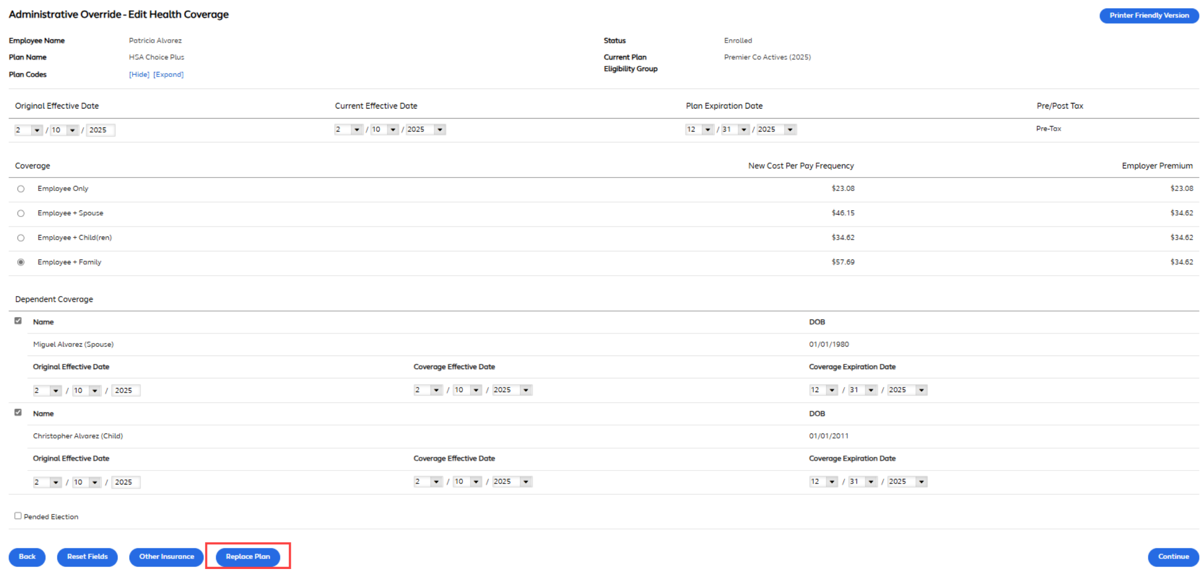
Example 2 – HR Override

Replace Plan

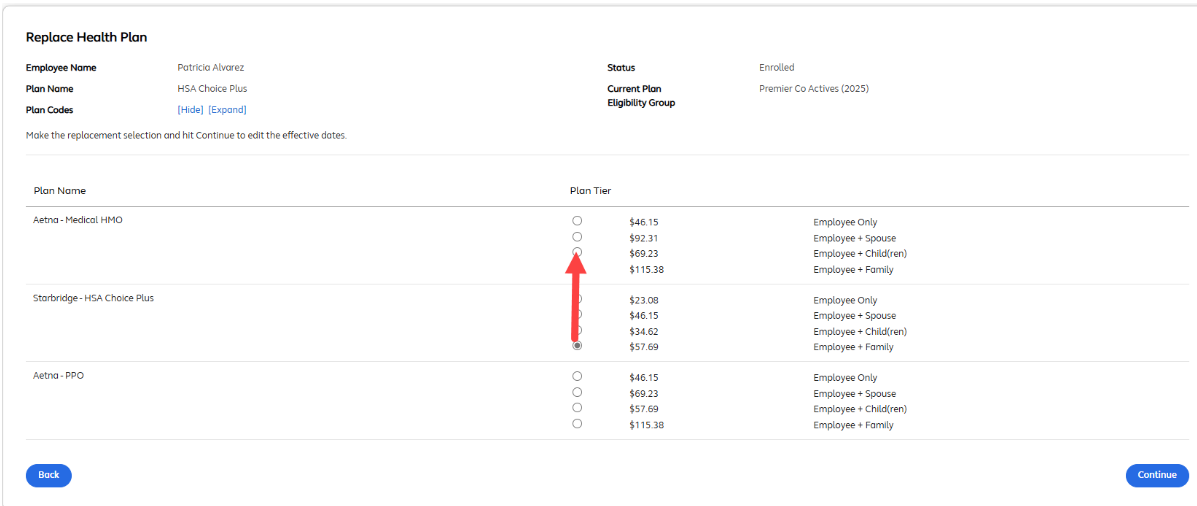
Suppose there is any employee who enrolled in one medical plan by mistake and now wants to select a different plan, or the employee waived coverage by mistake and now wants to choose a medical plan, or has a tier level change due to a Life Event/Status Change. To make any of these changes the **Replace Plan** function would be used.

To complete this HR Override:

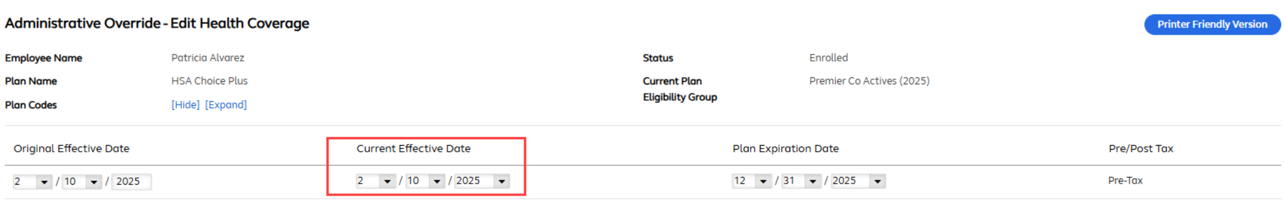
- Click Replace Plan to display all plans available to this employee (based on his or her eligibility group) for the type of coverage being adjusted – Medical, Dental, etc.



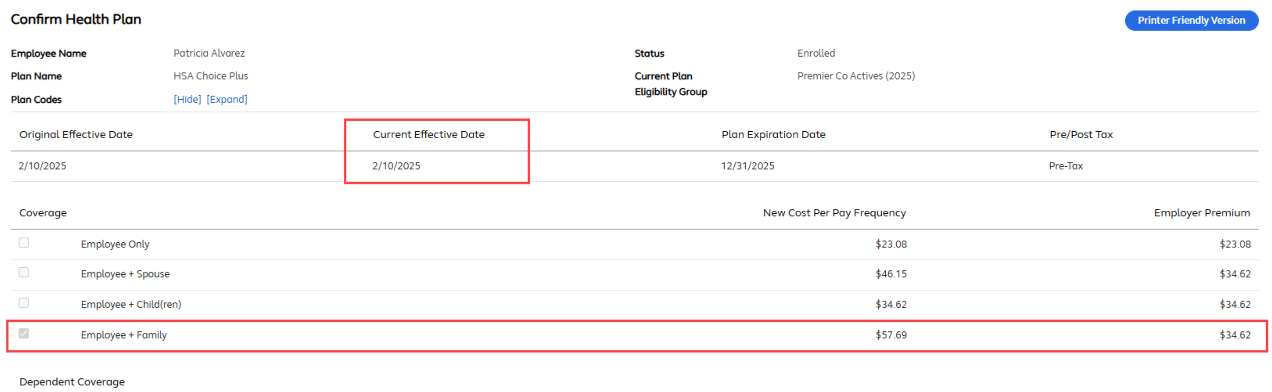
- Click the radio button for the appropriate replacement plan and plan tier.
- Click **Continue**.



- Enter the Current Effective Date for the new coverage.
- Click the appropriate radio button to indicate selected **Coverage Level**.
- Click the check box next to each Dependent Name to be covered under this plan.
- Click **Continue**.



- Added and terminated dependent information will display. If the information is correct, click
  Continue. Otherwise click **Back** and make corrections.
- The system highlights the new/changed information in yellow for verification. If the information is correct click **Continue**. Otherwise, click **Back** and make corrections.
- The benefits summary displays.


Confirm Health Plan

Printer Friendly Version

Employee Name	Patricia Alvarez	**Status**	Enrolled
Plan Name	HSA Choice Plus	**Current Plan Eligibility Group**	Premier Co Actives (2025)
Plan Codes	[Hide] [Expand]		

Original Effective Date	Current Effective Date	Plan Expiration Date	Pre/Post Tax
2/10/2025	2/10/2025	12/31/2025	Pre-Tax

Coverage	New Cost Per Pay Frequency	Employer Premium
Employee Only	$23.08	$23.08
Employee + Spouse	$46.15	$34.62
Employee + Child(ren)	$34.62	$34.62
Employee + Family	$57.69	$34.62

Dependent Coverage

Chapter 14: Add Employee

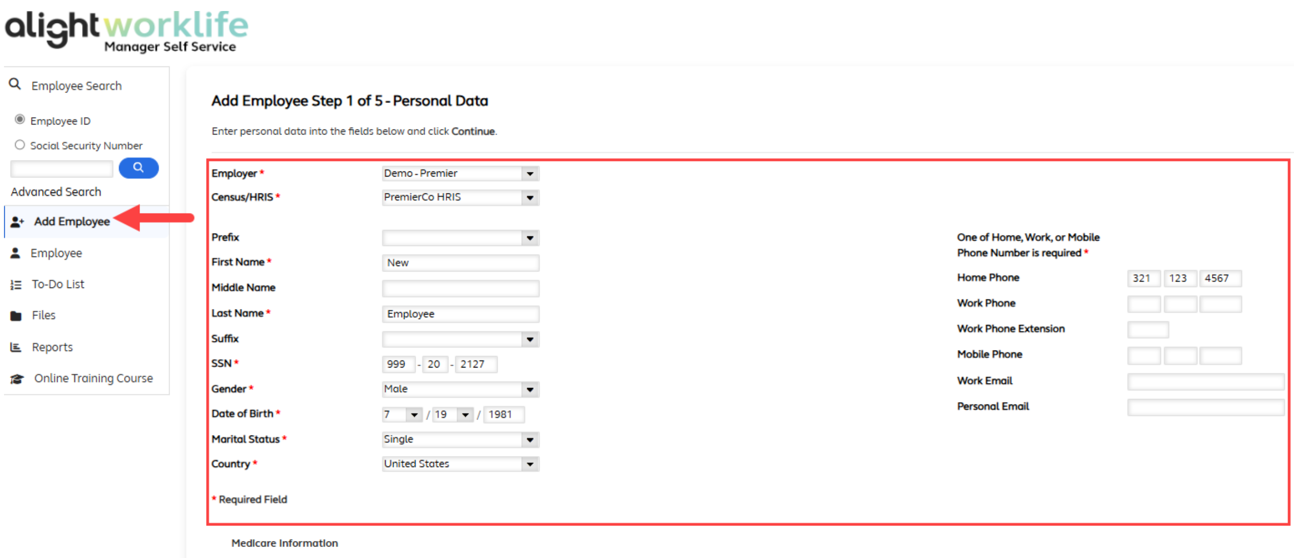
Typically new employees are added via the eligibility file that is transmitted on a regular basis (usually once a week). However, there may be times when an employee must be added to the system manually. For example, suppose a new employee was not entered into the HRIS system in time to be included with this week's file. If the employee needs to enroll right away, they may need to be added manually to the system by using the Add Employee function.

Important Note: If an employee is added manually it is important to ensure the employee's data is sent on the next eligibility file. If the employee is not included on the next file, their status will change to terminated and any benefits they have enrolled in will be terminated as well.

To manually add an employee to the system:

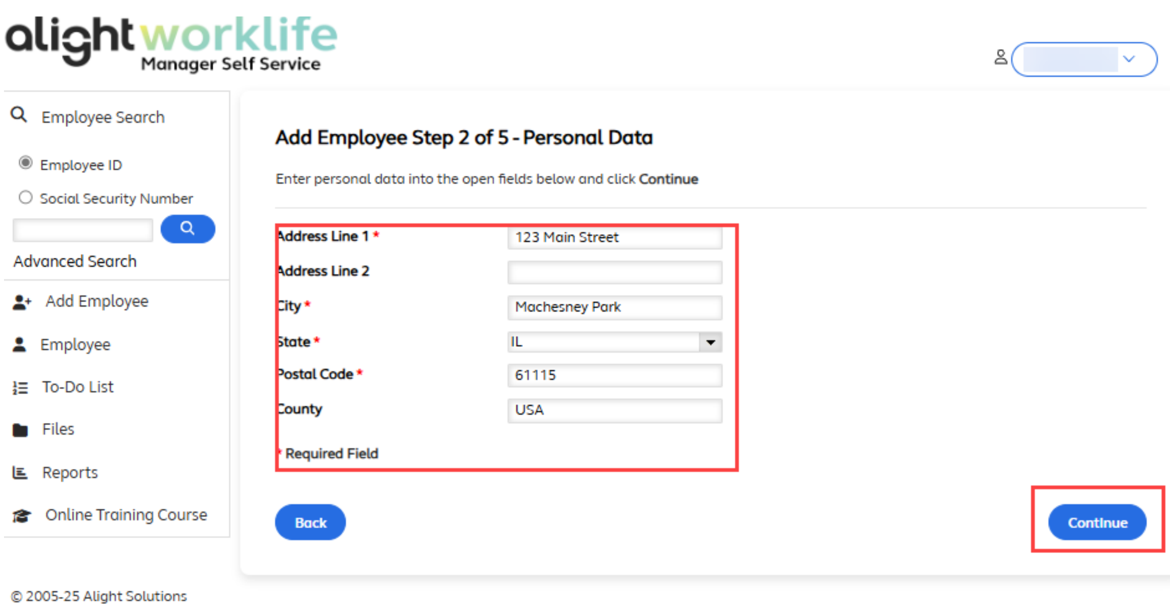
Step 1 of 5:

- Click the Add Employee link on the top navigation bar.
- Complete the required fields (marked with an asterisk) and click **Continue**.



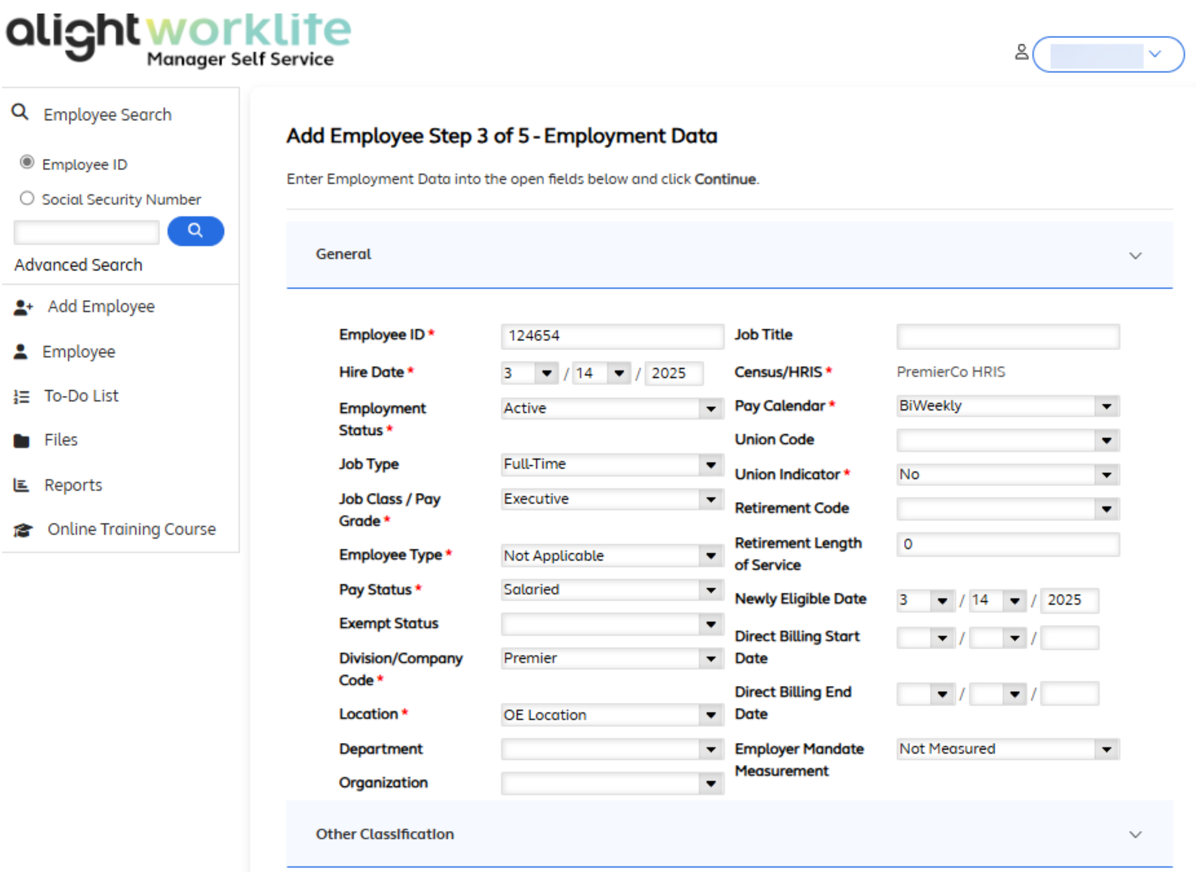
Step 2 of 5:

- Enter the employee's address: City, State, and Postal Code.
- Click **Continue**.



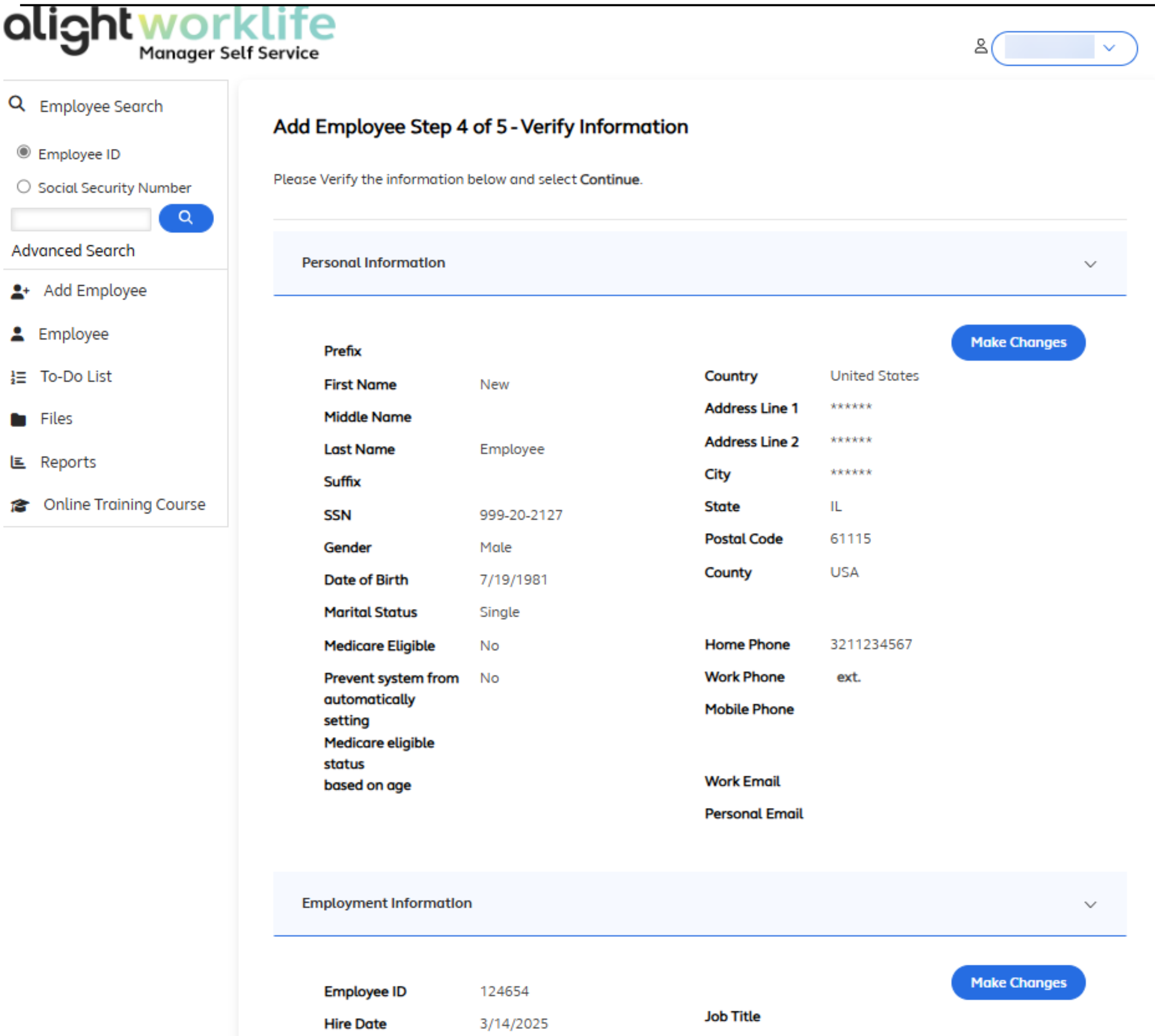
Step 3 of 5:

- Enter the employment information.
- Required Fields are marked with an asterisk.
- Click **Continue**.



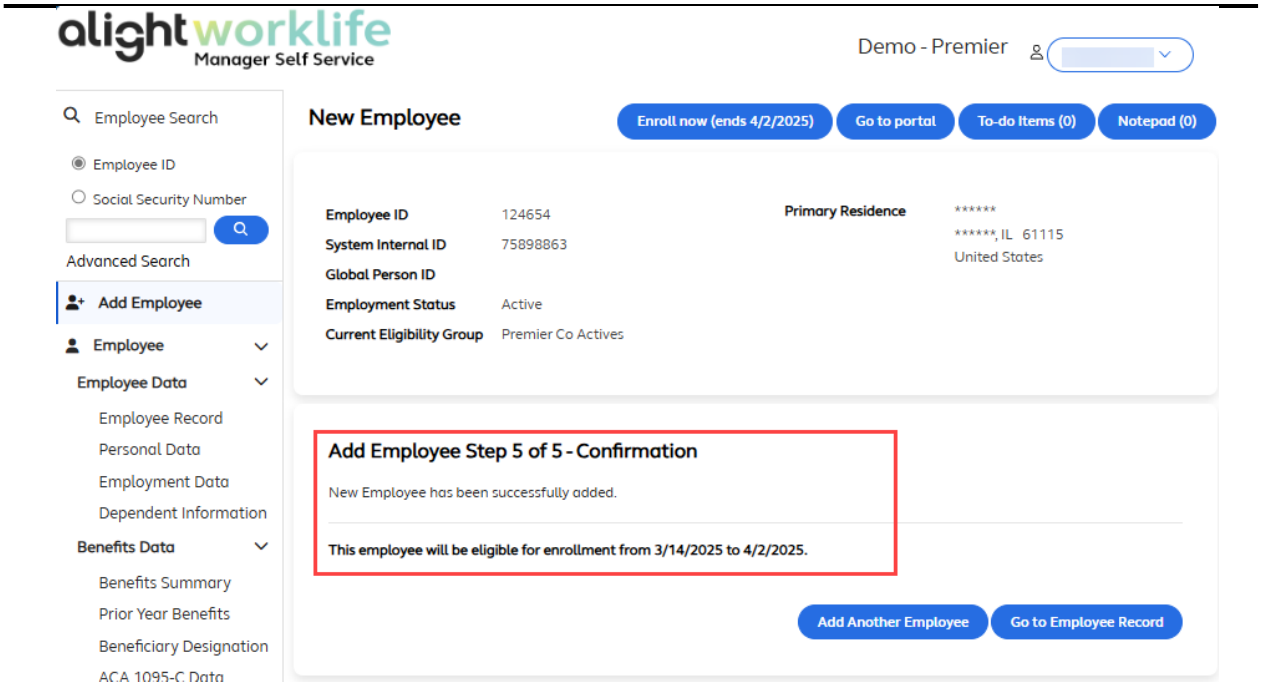
Step 4 of 5:

- Verify the information that was entered.
- If the information is correct click **Continue**. If any changes are needed click **Make Changes** and update the information.



Step 5 of 5:

- A confirmation page will display noting the employee has been added successfully.
- Remember that if an employee is added manually, their information must be transmitted on the next eligibility file or their status will change to terminated and any benefits they are enrolled in will be terminated as well.



Chapter 15: To-Do List

The purpose of the To-Do List is to allow users to view and track employees that have pending events, pending coverage, or may need additional follow up or action taken on their record. The To-Do List can be viewed for an individual employee or for all employees.

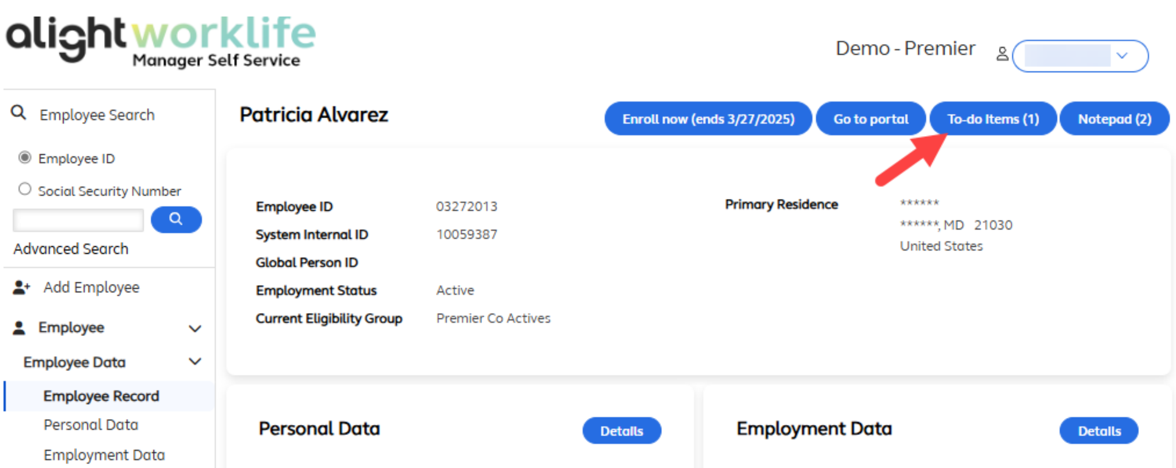
Here are a few examples of how an item may be added to the To-Do list:

- The employee elects coverage greater than the guaranteed issue (GI) amount (for example, supplemental life insurance). The amount requested over the GI is pended until the carrier either approves or denies coverage.
- If self-service life events are allowed but HR approval is required before the coverage is allowed then once the employee entered the life event it would appear on the To-Do List pending approval.
- If self-service life events are not allowed but HR requires documentation before approving the life event. For example, an employee calls to notify HR of a birth but they have not submitted the required documentation, the HR Administrator can enter the life event in a pending status until the required documentation is received. This event will be added to the To-Do List
- An employee calls into the Service Center and the Customer Service Representative is not able to resolve the employee's issue. The CSR creates an Issue using Issue Tracker and it appears on the To-Do List until the issue is researched and resolved.

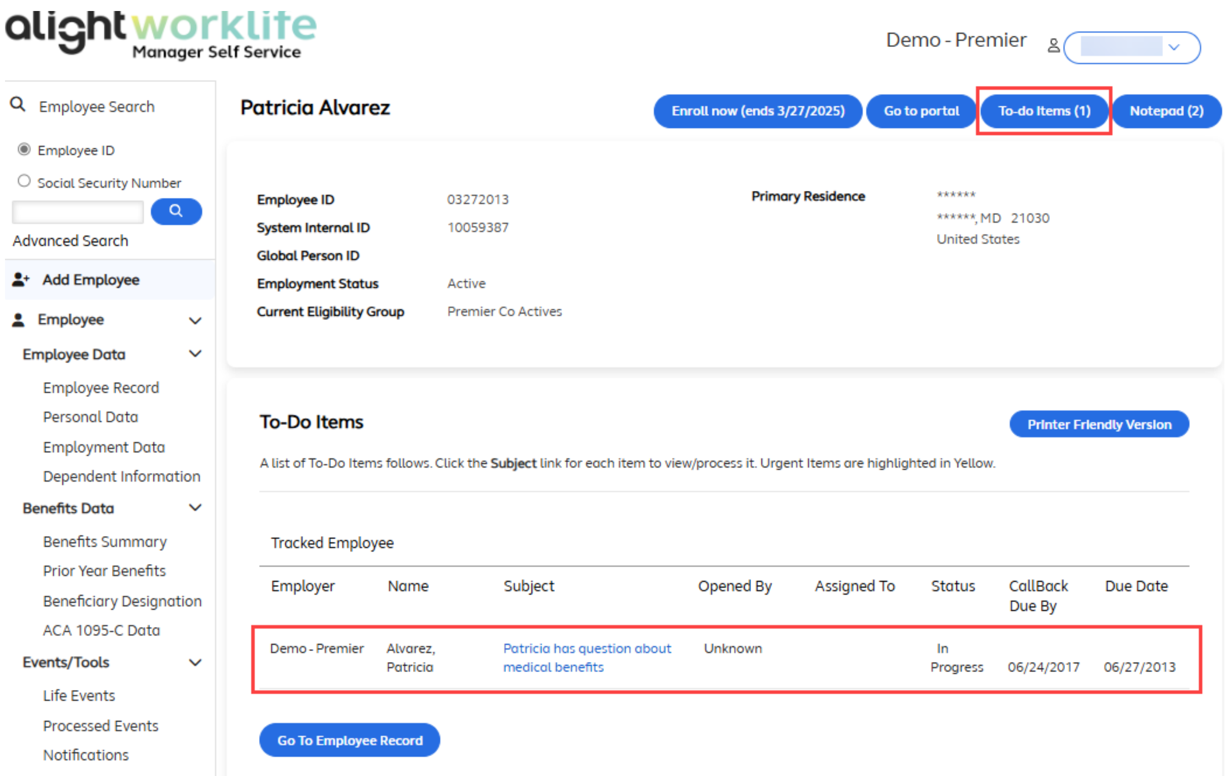
Viewing the To-Do List for a Specific Employee

To view the To-Do List for a specific employee:

- Pull up an employee's record using the search functions outlined in Chapter 2.
- Click on the link for To-Do Items from the middle navigation bar just above the employee's record.



- In the sample screen shot below the employee has one Tracked Issue and one item for pended coverage.
- To view the tracked issue, click on the link in the **Subject** field.
- To view the pended coverage click on the **Details** link.

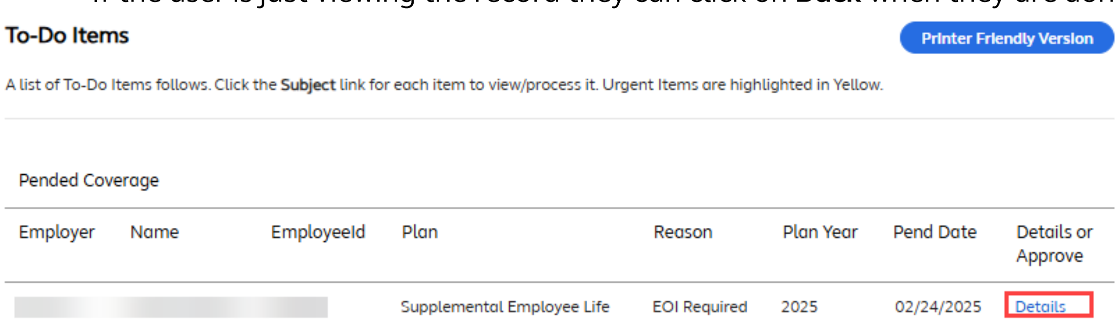


- When viewing a tracked issue, the issue tracker will open and the user can view the details.
- If the user is responsible for researching/resolving the issue, once they have a resolution they will open the issue tracker and make the appropriate updates to the **Status**, **Comments**, and **Resolution Code** fields. See Chapter 9 for additional details on Tracked Issues.

Viewing, Approving, or Denying Pended Coverage

To view pending coverage:

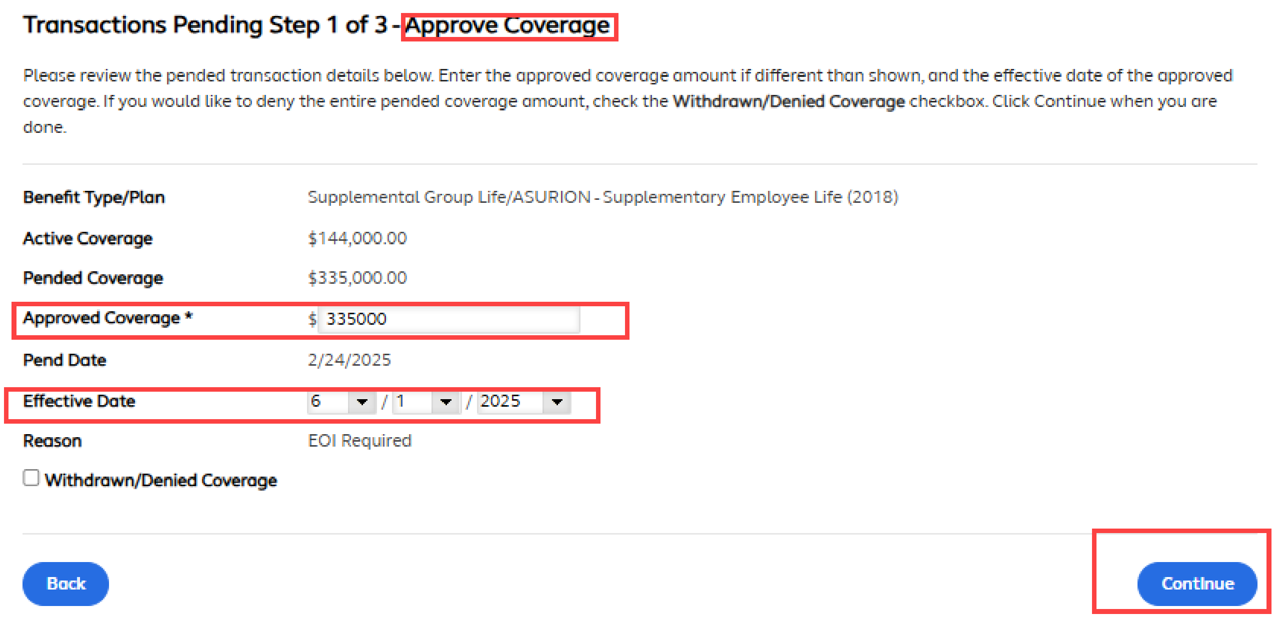
- Click on the **Details** link to open up the Pending Transactions screen.
- If the user is just viewing the record they can click on **Back** when they are done.



To approve or deny coverage:

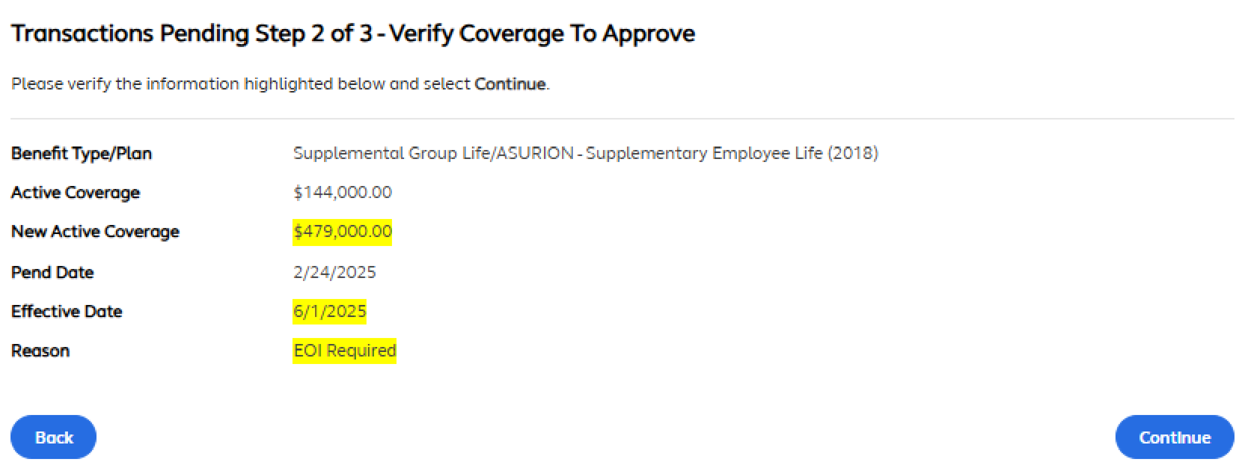
Step 1 of 3:

- If the carrier has denied coverage, or the employee has chosen to withdraw his application (or not submit the EOI at all), click the **Withdrawn/Denied Coverage** checkbox at the bottom of the screen then click **Continue**.
- If the carrier has provided full or partial approval of the pended amount, complete the **Approved Coverage** field with the portion of pended coverage that is approved and then enter the moth, day, and year of the **Effective Date**.
- Click **Continue**.



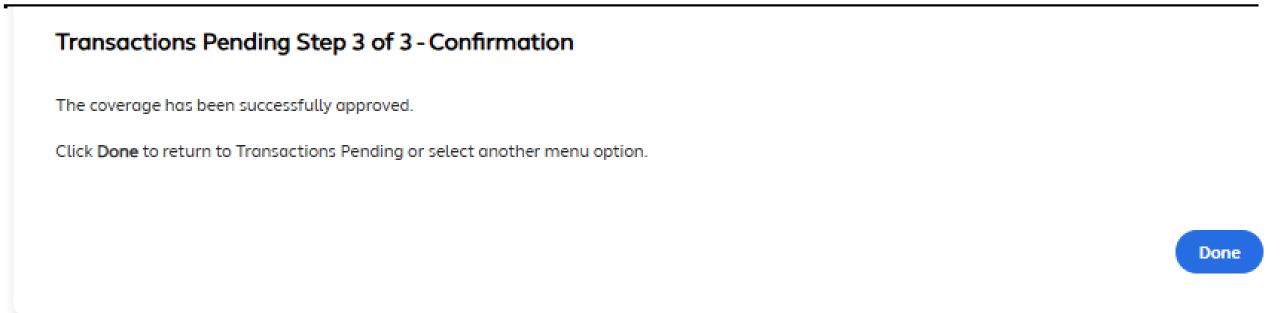
Step 2 of 3:

- Verify the information. Click **Continue.**



Step 3 of 3:

- View the confirmation and click **Done.**

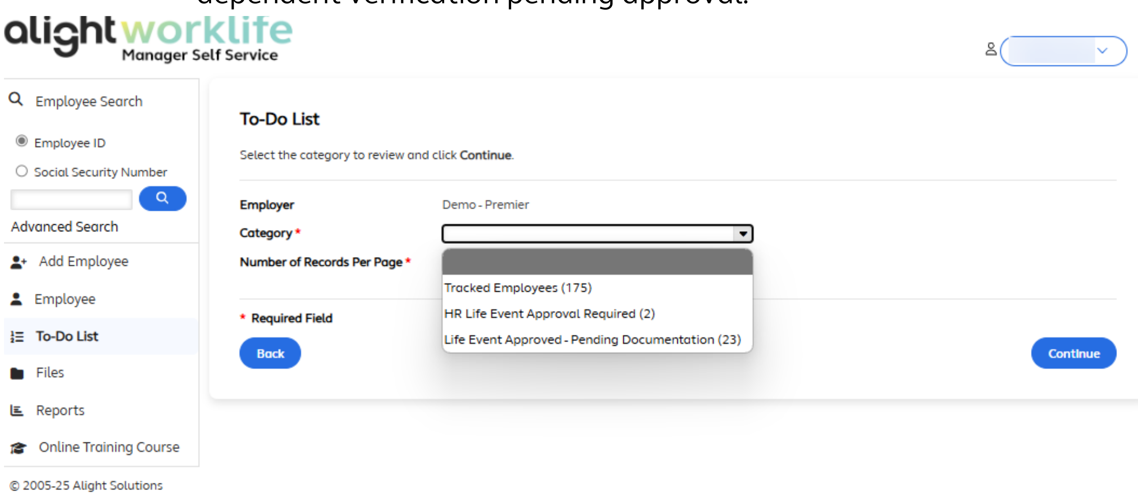


Viewing the To-Do List for All Employees

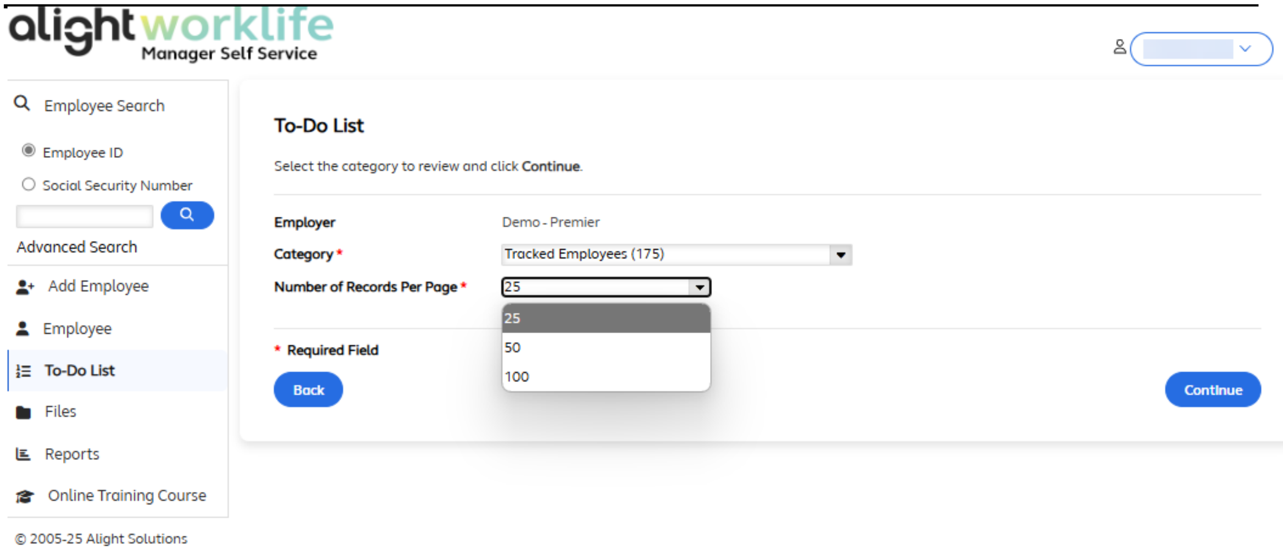
To view the To-Do List for all employees:

- Click on the **To-Do List** link from the Top Navigation bar.
- Click the drop down arrow to select the **Category**. There are six categories to choose from:

- **My Assigned Employees** – displays employees for whom an issue was created through Issue Tracker and assigned to you to be researched/resolved.
- **Tracked Employees** – displays all employees for whom an issue was created in Issue Tracker.
- **EOI Required** – displays all employees whose life or AD&D coverage is pended for Evidence of Insurability (EOI).
- **Life Event Approval Required** – displays all employees that have life events pending approval.
- **Life Event Approved-Pending Documentation** – displays employees that have live events that have been approved but there is required documentation they need to submit before coverage is allowed.
- **Dependent Verification Required** – displays employees that have dependent verification pending approval.



- Users can change the number of records that are visible per page by clicking on the drop down arrow and changing the number.
- Click **Continue**.



To approve or deny coverage for pending EOIs:

- Select the EOI required category.

- If the carrier has denied coverage, or the employee has chosen to withdraw his application (or not submitted the EOI at all) click the **Withdrawn/Denied Coverage** checkbox.
- If the carrier has provided full or partial approval of the pended coverage, click on the **Details** link and complete the **Approved Coverage** field with the portion of approved coverage and complete the month, day, and year of the **Effective Date.**
- Click **Continue.**

Pended Coverage (18 records)

Export

To withdraw pended coverage that has not been approved, click the **Withdrawn or Denied** check box for that item(s). Then click **Continue**.
To view details for the pended coverage or to approve coverage, click the **Details** link for that item.

Employer	Name	Employee ID	Plan	Reason	Plan Year	Pend Date	Withdrawn or Denied	Details or Approve
			Supplemental Employee Life	EOI Required	2025	11/19/2024	☐	Details
			Spouse Life Insurance	EOI Required	2025	11/19/2024	☐	Details
			Supplemental Employee Life	EOI Required	2025	02/15/2025	☐	Details
			Spouse Life Insurance	EOI Required	2025	02/15/2025	☐	Details
			Supplemental Employee Life	EOI Required	2025	02/07/2025	☐	Details
			Spouse Life Insurance	EOI Required	2025	11/17/2024	☐	Details

To approve or deny pending life events:

- Select either one of the Life Event Approval Required Categories.
- Select Accept or Deny.

- Click **Continue**.

Tracked Life Events (23 records)

Export

To accept a tracked event, click the **Accept** check box for that item(s), or click the **Deny** checkbox to deny a tracked event. Then click **Continue**.

Employer	Name	Employee ID	Pend Date	Event Name / Event Date	# Days from Event Start	Accept	Deny
Demo - Premier	Doe, Lindsey	098DOE	10/16/2012	Birth / Adoption 10/10/2012	4538	☐	☐
Demo - Premier	Doe, Tisha	2153DOE	09/26/2012	Birth / Adoption 09/12/2012	4566	☐	☐
Demo - Premier	Doe, Wendy	5465DOE	02/15/2012	Birth / Adoption 02/10/2012	4781	☐	☐
Demo - Premier	Estimator, Johnny	123	02/28/2010	Birth / Adoption 02/28/2010	5493	☐	☐
Demo - Premier	Estimator, Johnny	123	02/28/2010	Birth / Adoption 02/28/2010	5493	☐	☐

- Verify the information and click **Continue**.

Accept/Deny Self Service Life Event Step 2 of 3 - Verification

Please verify the information highlighted below and click **Continue**.

Name	SSN	Event Name/Event Date	Reason	Action
Doe, Lindsey	000-33-2200	Birth / Adoption 10/10/2012		Accepted

Back Continue

- The confirmation will display.
- Click **Done**.

To approve or deny Dependent Verification:

- The MSS Dependent Verification approval screen displays upon clicking the **Details** link.
- The user will save the updated dependent verification status which will be added to the Dependent Verification History section.

The **Document Manager Image** column will display 'Exist' if the verification document is uploaded via the employee portal and it exists in Document Manager. In this case, you will be able to click on the word **Exist** which will automatically take you to the MSS Document Manager screen. If the verification document is uploaded via the employee portal but it is not yet displayed in Document Manager or if the document was never uploaded, it will display as 'Does not Exist'.
Note: Clicking on the **Document Manager Image** column title will sort the records that have been rendered before you applied the sort. For example, if there are 3 pages of employee records requiring dependent verification and you are still on page one with first 100 records, then only the first 100 records will sort. If you go to the last page and then apply the sort, all records will sort on this column.

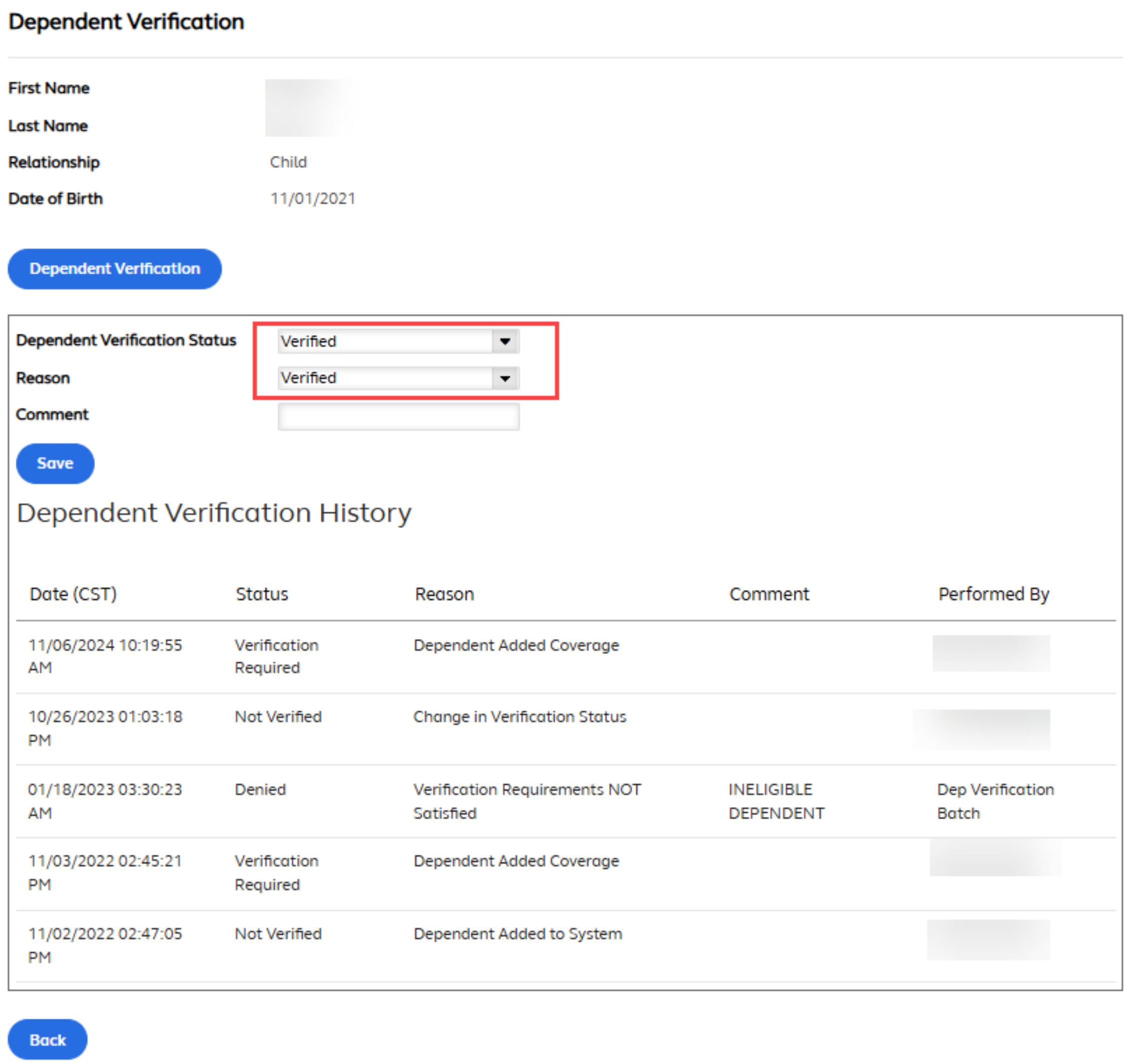
The **Portal Doc Upload** column indicates with a 'Y' or 'N' whether a document has been uploaded via portal by the employee or not. There can be up to a 4-hour delay from when a document is uploaded via the CBA employee portal and when the document is visible under Document Manager in MSS, so you may see a combination of data displayed for some employees where the **Portal Doc Upload** value is 'Yes' but the **Document Manager Image** value is still displaying as 'Does not Exist'.

Note: Document Manager does not currently accept Dependent ID in the bar code scan for image uploads preventing the ability for CBA to identify which document is uploaded, faxed or emailed for which dependents under an employee record. Therefore, if an employee has more than one dependent who needs verification but the document has been uploaded for only one of the dependents, MSS will display 'Exist' and 'Y' for both dependent records even if the document was only uploaded for one dependent.

Dependent Verification Required (132) Export

Below is a list of dependents whose Dependent Verification Status requires action.

Employer	Employee Name	Employee ID	Dependent Name	Relationship	Verification Status	Status Date	Details	Document Manager Image	Portal Doc Upload
[illegible]	[illegible]	[illegible]	[illegible]	Child	Verification Required	11/06/2024	Details	Does Not Exist	No
[illegible]	[illegible]	[illegible]	[illegible]	Spouse	Verification Required	11/06/2024	Details	Does Not Exist	No



Dependent Verification

First Name	
Last Name	
Relationship	Child
Date of Birth	11/01/2021

Dependent Verification

Dependent Verification Status	Verified
Reason	Verified
Comment	

Save

Dependent Verification History

Date (CST)	Status	Reason	Comment	Performed By
11/06/2024 10:19:55 AM	Verification Required	Dependent Added Coverage		
10/26/2023 01:03:18 PM	Not Verified	Change in Verification Status		
01/18/2023 03:30:23 AM	Denied	Verification Requirements NOT Satisfied	INELIGIBLE DEPENDENT	Dep Verification Batch
11/03/2022 02:45:21 PM	Verification Required	Dependent Added Coverage		
11/02/2022 02:47:05 PM	Not Verified	Dependent Added to System		

Back

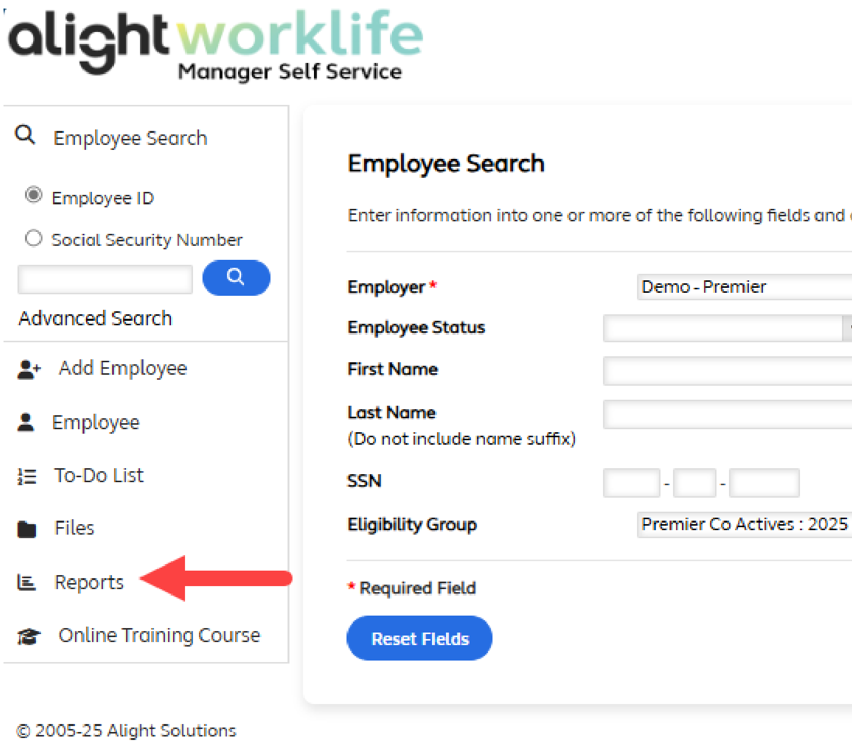
Chapter 16: Reports

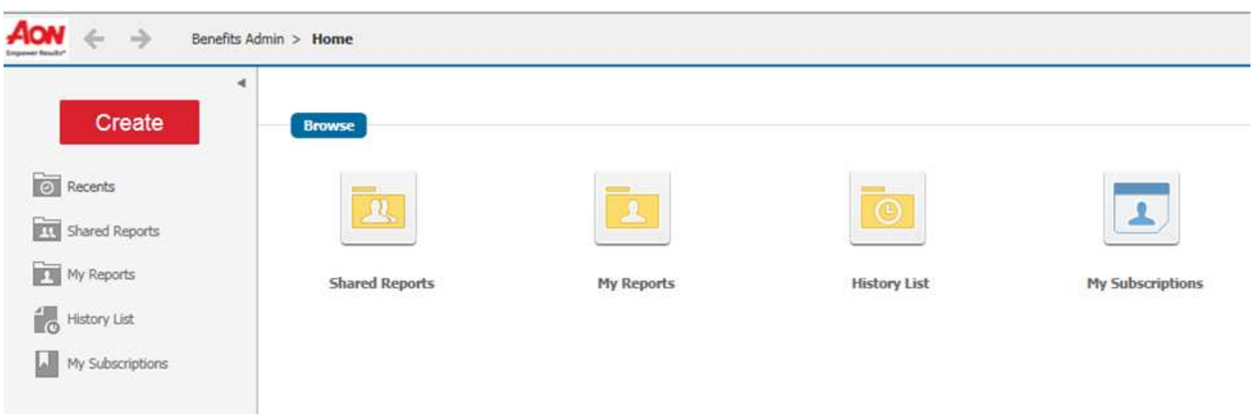
The Manager Self Service system includes a reporting tool that contains standard reports that users can access and run. The reporting tool allows users to customize the reports by entering specific selection criteria, sorting data, applying filters and formatting.

For reports that users need to run on a regular basis they can save the customized report so it can be easily run as needed or the users can schedule the report to automatically run.

To view available reports:

- Click on the Reports link from the Left Navigation bar.
- A new window will pop up (the window will need to be maximized for easy viewing).





- Reports are grouped in folders by categories such as: Census, Elections Data, Premium Statement, etc. To view the available reports in each category click on the **Folder Icon** to display the report options.
- Detailed information on running, customizing, saving, and scheduling reports can be found in the ***Reports Reference guide*** located on the training website. Users may also sign up for instructor-led webinars by clicking on **Home** on the top navigation bar then clicking on the **Need Training** icon.

Chapter 17: Files

For users that have Admin level access to Manager Self Service there will be a Files link in the left navigation bar. However, this function is mainly utilized by the Benefits Service team to ensure that files are transmitting and processing correctly.

If files have been set to be “suspended” this function allows the Benefits Service team to review and correct any potential errors in the files, such as missing addresses, before the file is allowed to be loaded into Manager Self Service.