CLARK COUNTY SCHOOL DISTRICT

BUSINESS AND FINANCE DIVISION

TECHNOLOGY & INFORMATION SYSTEMS SERVICES DIVISION

USER SUPPORT SERVICES

EMPLOYEE BUSINESS TRAINING DEPARTMENT

PeopleSoft-HCM:

ESS–Open Enrollment

Revised: June 2020

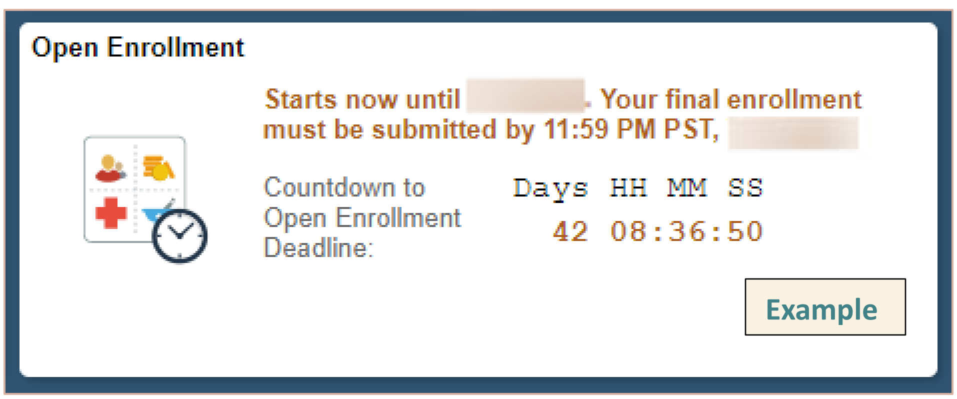
CCSD
CLARK COUNTY
SCHOOL DISTRICT

Open Enrollment

Open Enrollment permits employees to initiate changes to benefits which involve themselves and their dependents. There are different Open Enrollment periods for the various employee groups (i.e. - Support Professional, School Police, Police Administrators, Licensed Employees, Unified/Administrators)

Why is open enrollment so important? Because it's the one time during the year that benefit changes can be made (i.e.: changing from one medical plan to another, adding/removing a dependent, etc.). If no changes are needed, the current enrollment information will roll over and there is no need to do anything.

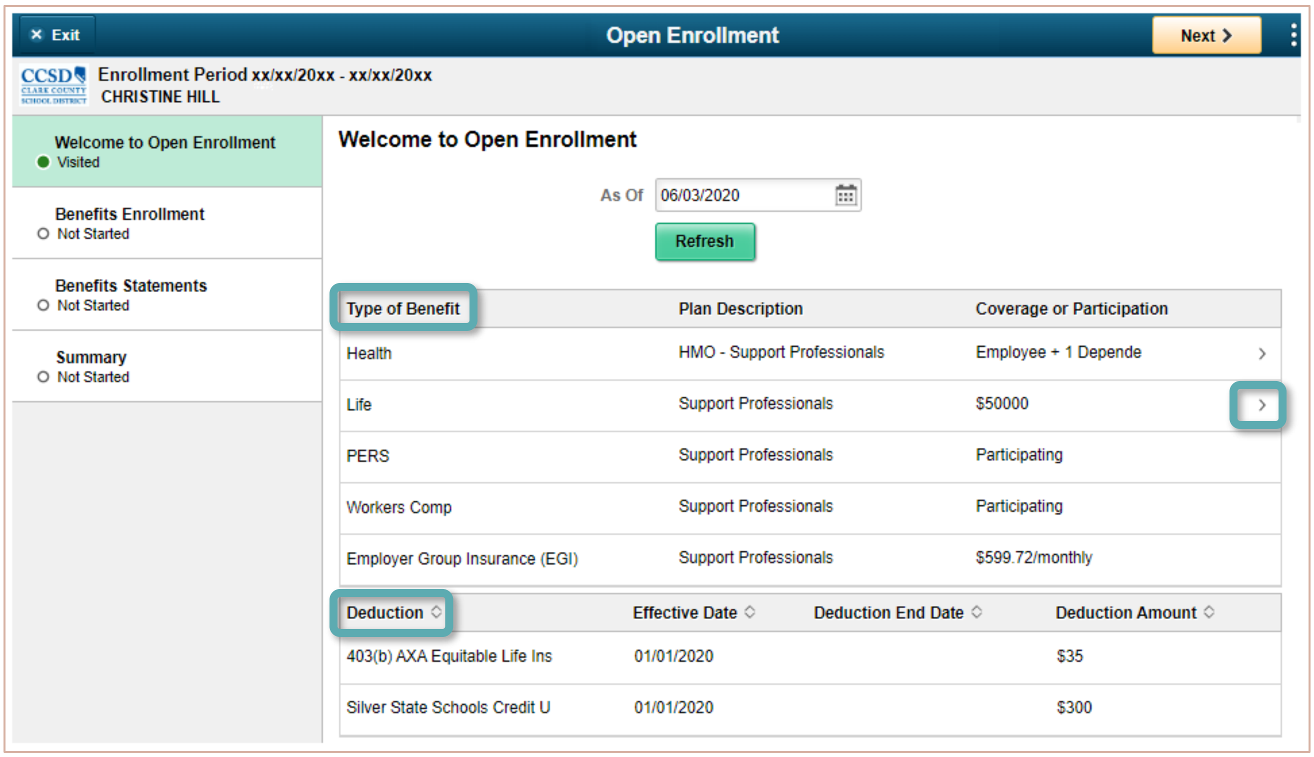
All changes **must** be done through the HCM Employee Self-Service System (ESS) > Open Enrollment tile during the Open Enrollment period. (Paper forms will NOT be accepted.) Each Plan Year, all changes and/or new enrollments ***must*** be made by the designated deadline as determined by the Benefits Department. Any changes made during the Open Enrollment process take effect ***after*** this deadline. Open Enrollment dates and deadlines vary depending on the Plan Year/Employee group. (During Open Enrollment periods, a counter will appear on the tile indicating how much time remains before the deadline.)



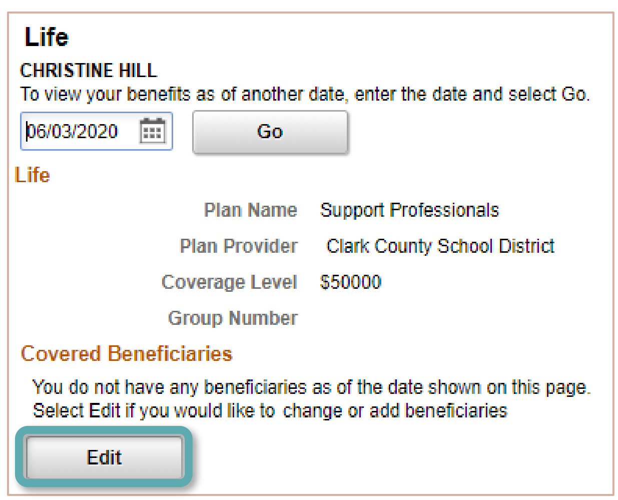
> ***Note***: CCSD employees can make important benefits changes after Open Enrollment as long as they have experienced a **Qualifying Life Event (or QLE)**. Common QLEs include marriage, divorce, a new baby, or a child reaching the age of 27.
>
> **IMPORTANT:** An employee **must** make changes within **30 days** of the life event date. Life Events are also initiated in the HCM System. Detailed instructions on how to complete a Life Event in ESS, can be accessed on the CCSD Employee Business Training website (training.ccsd.net) > Resources > HCM > Benefits > **ESS – Life Events Guide**.

1. After selecting the **Open Enrollment** tile from the **Employee Self Service** dashboard, the **Welcome** page appears and displays the employee's current benefits information (benefit type, plan description, and coverage/participation) as well as any deductions, their effective dates, and their amounts.

   The steps of the process appear in a panel on the left, as well as the statuses (such as "Not Started," "Visited," and "Complete"). There is a **Next** button in the upper right corner that can be used to navigate between steps. During the process, a **Previous** button also becomes available to return to a prior step if needed. The **Exit** button in the upper left corner can be clicked at any time, and the employee can return to the **Open Enrollment** tile to complete the process provided it's before the current Plan Year's deadline.

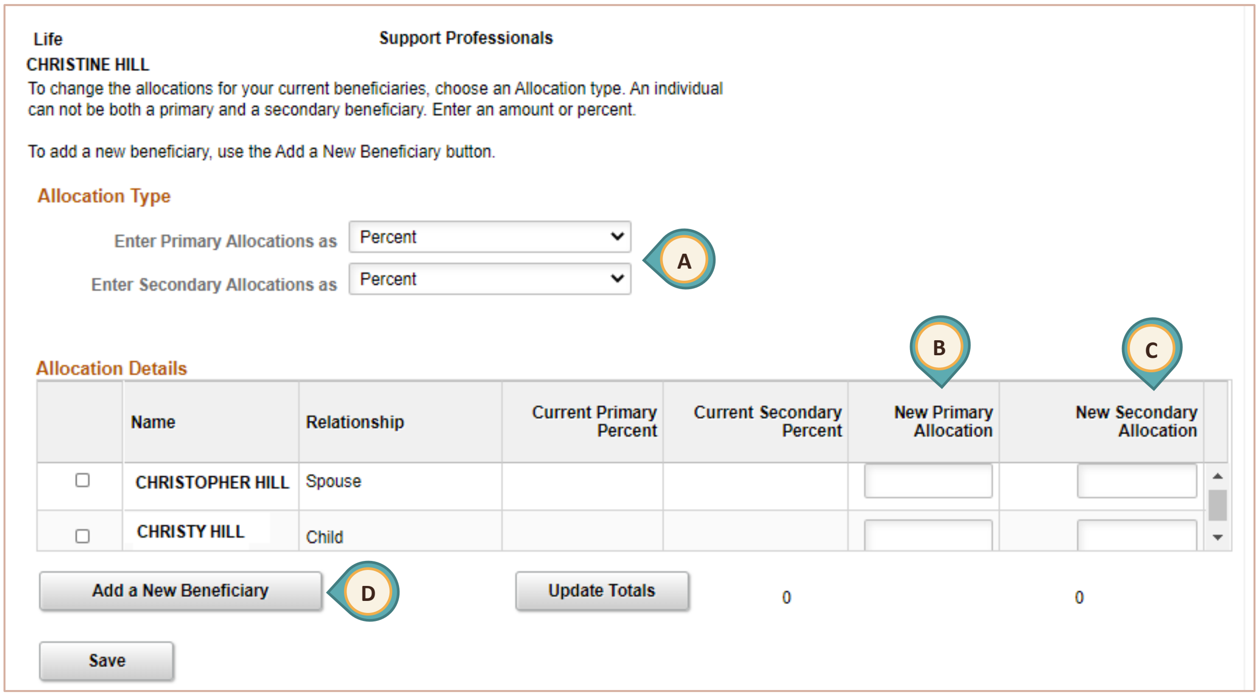


To verify or add a Life Insurance beneficiary, click the **>** symbol on the right side **Life** row. A new window will appear displaying the current information. Select the **Edit** button to change or add beneficiaries.



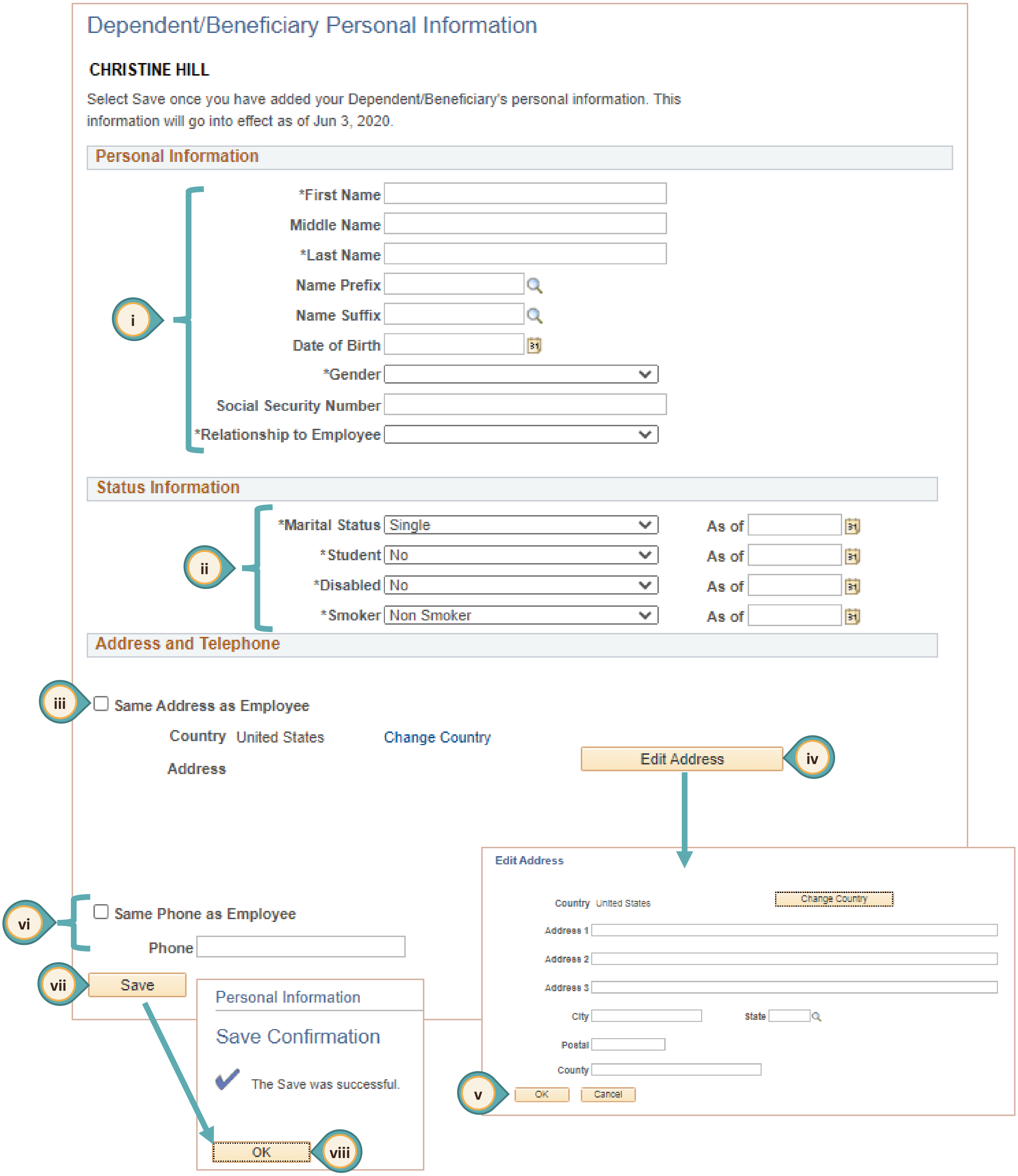
To edit/add the beneficiary information:

A. Select either percent or flat amount for both the **Primary Allocation** and the **Secondary Allocation**. (The **Primary Allocation** is an allocation for the primary beneficiary. The **Secondary Allocation** is an allocation for the contingent beneficiary.)
B. Enter the **Percentage** allocated to the primary beneficiary. The total allocated to the primary beneficiaries should equal 100%.
C. Enter the **Percentage** allocated to the secondary beneficiary. The total allocated to the secondary beneficiaries should equal 100%. Click the **Update Totals** button to confirm the primary allocation and secondary allocation total 100%.



D. To add a new beneficiary, click the **Add a New Beneficiary** button.

   i. Enter the beneficiary's personal information in the space provided.
   ii. Select the marital status of the beneficiary from the drop-down list.
   iii. Click the checkbox **Same Address as Employee** if the beneficiary has the same address. The system will populate the fields with the employee's address.
   iv. Click the **Edit** checkbox if the beneficiary's address is different from the employee's address. A new window will open to enter the address for the beneficiary.
   v. Click **OK** to save the entry.
   vi. Click the checkbox **Same Phone as Employee** or enter a different phone number in the space provided.
   vii. After entering the required information on the page, click the **Save** button.
   viii. The Save Confirmation window appears. Click the **OK** button.

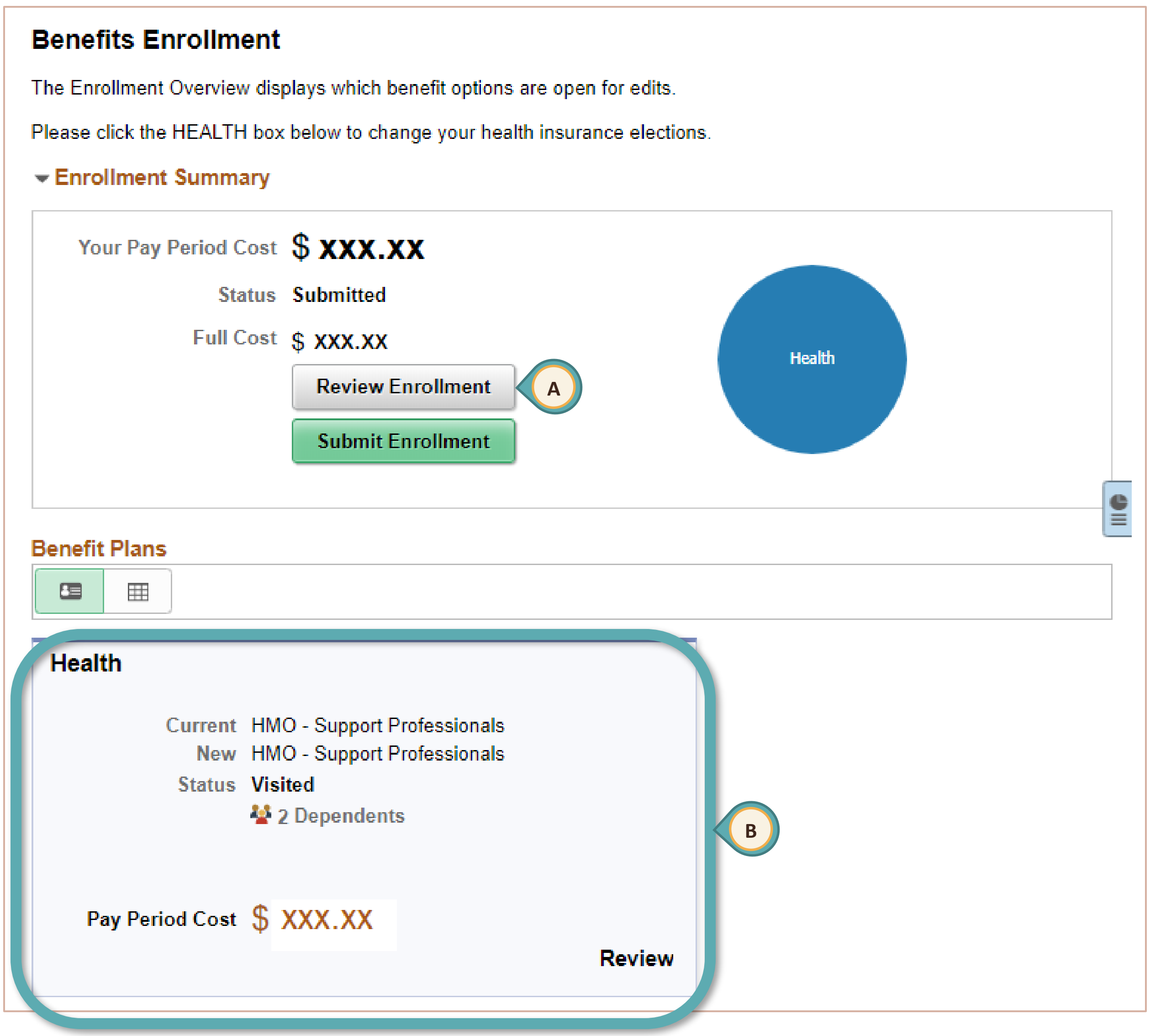


E. Select the **Next** button (upper right corner) to proceed to the **Benefits Enrollment** page.

2. The **Benefits Enrollment** page displays the current health benefits. (An automatic **Resources** menu may pop out from the right side of the page. To collapse this, click the blue tab attached to the Resources panel. The menu will then be hidden from view.)

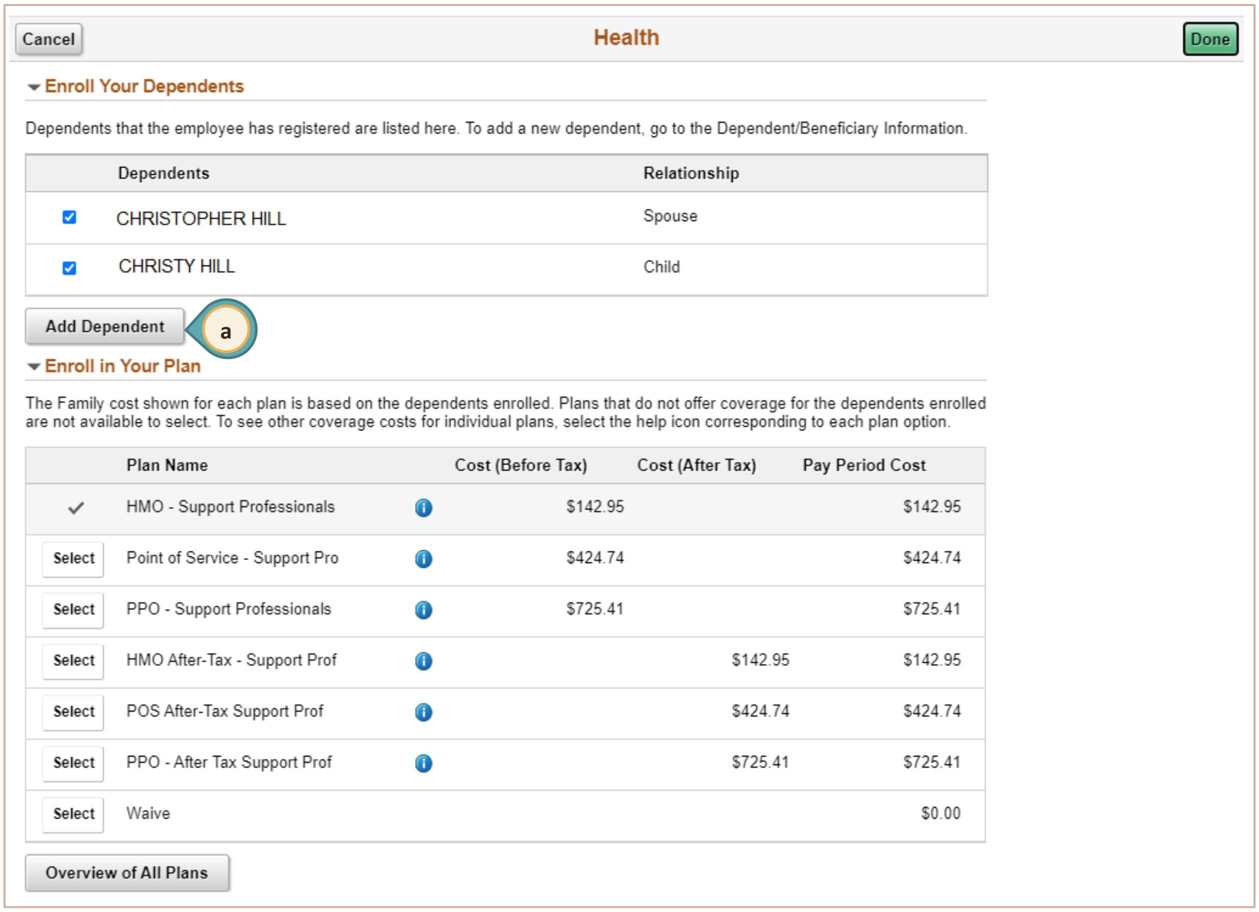
   A. To review the current enrollment, select the **Review Enrollment** button. Click **Expand All** button to view details. (The **Print View** button will generate a pdf document in a new window which then can be easily printed.) Click the **X** button to close the **Review Enrollment** window.

   B. To change Health insurance information, click into the **Health box** near the bottom of the screen to update.

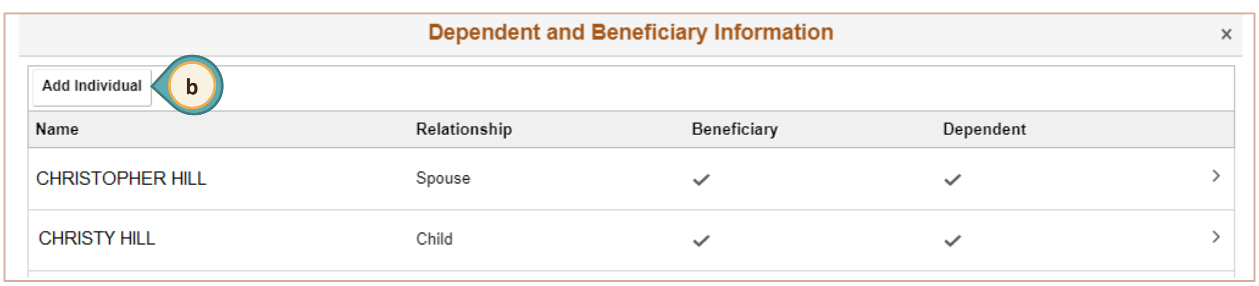


In the new window, dependents can be selected, de-selected or added. In addition, all available health plans and the current costs per pay period are displayed. (The **Overview of All Plans** button will open up a new window with Online Enrollment information. This information can be printed as a PDF by clicking **Print Preview.**)

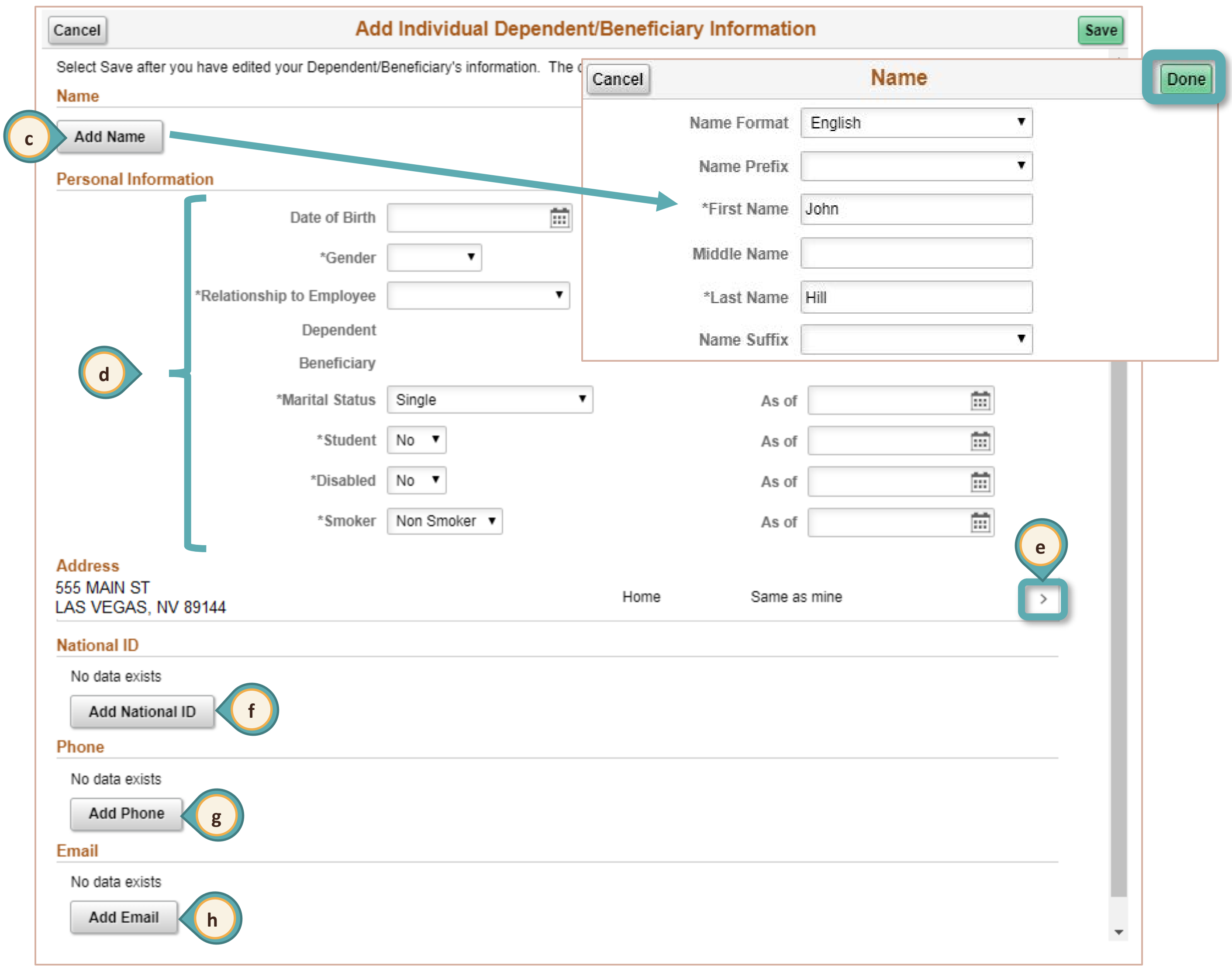
a) Click the **Add Dependent** button to add a new Dependent, if needed.



b) In the new window, select the **Add Individual** button to add a Dependent/Beneficiary. Another window will appear to enter the information.



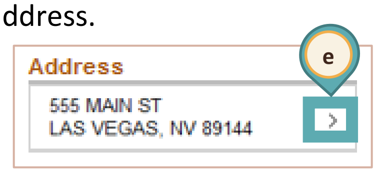
c) Click the **Add Name** button to enter the Dependent/Beneficiary name. A new window will appear to enter the person's name. Click the **Done** button to return to the previous page.



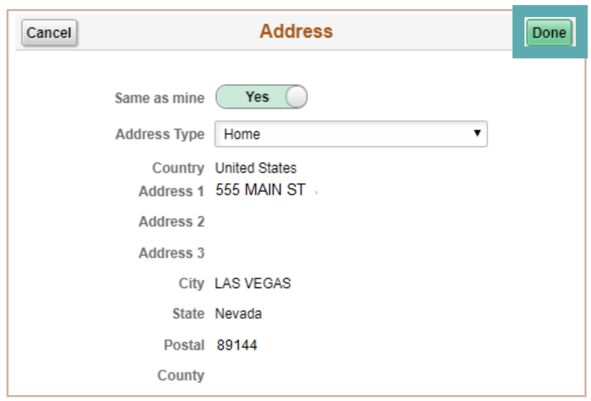
d) In the **Personal Information** section, enter the following:

- Date of Birth
- Gender
- Relationship to the Employee
- Marital Status
- Status for Student, Disabled, Smoker fields

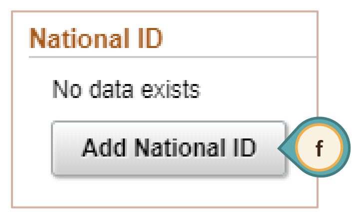
e) In the address field, click the **>** right arrow to enter the person's address.



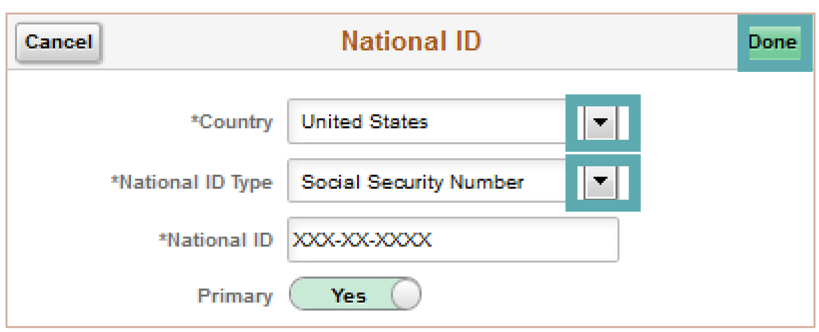
In the new window, if **Yes** is selected in the **Same as mine** field, the system will populate the address from the employee's address. If the address is different, select **No** in the **Same as mine** field and enter a different address for the person. Click the **Done** button when finished.



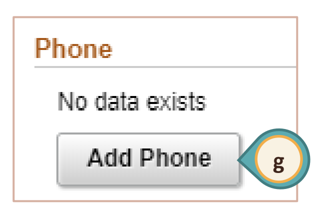
f) Click the **Add National ID** button to add the person's Social Security Number.



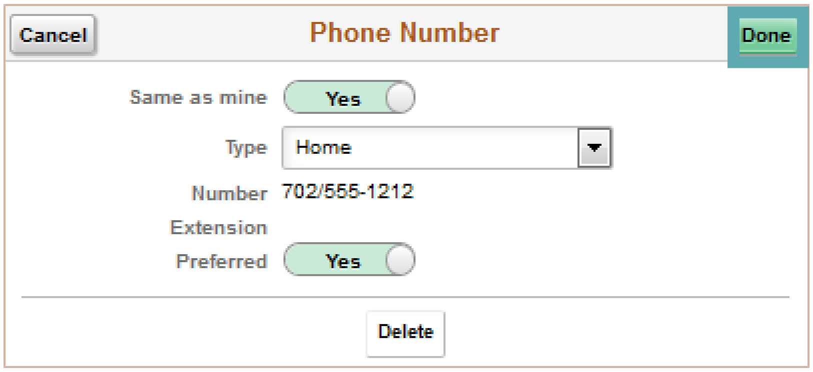
Click the drop-down box to select **United States** in the Country field. In the National ID Type field, select **Social Security Number**. Enter the Social Security number in the National ID box. Click the **Done** button after entering the information.



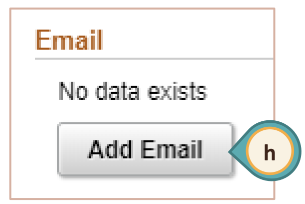
g) Click the **Add Phone** button to enter the person's phone number.



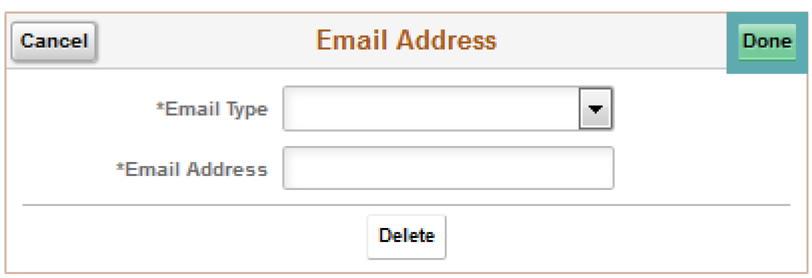
In the new window, if the **Phone Number** for the dependent/beneficiary is the same as the employee, select **Yes** in the **Same as mine** field. If the **Phone Number** is different, set the **Same as mine** field to **No**, select the **Type** from the drop-down box, and enter the **Phone Number** in the space provided. Click the **Done** button when finished.



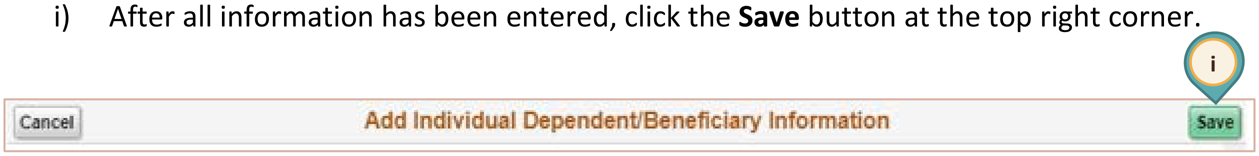
h) To add an email address, click the **Add Email** button.



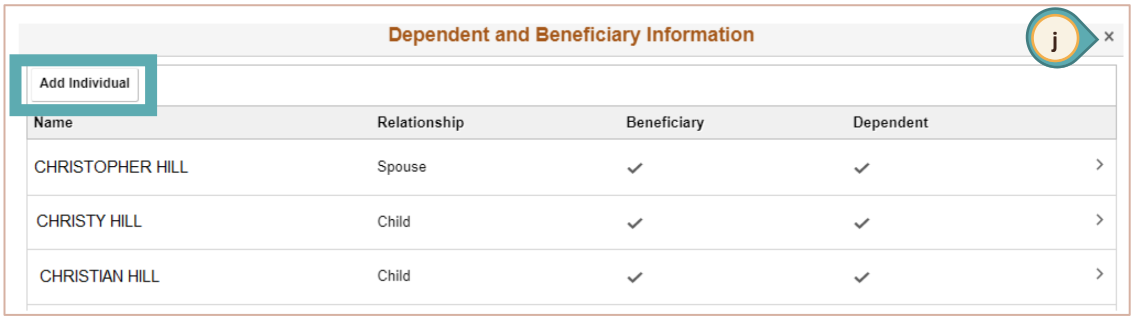
In the new window, select the Email Type from the drop-down box.
(The available options are **Business**, **Campus**, **Dormitory**, **Home** and **Other**.)
Enter the email address in the space provided. Use the **Delete** button to remove an email address if necessary. Click the **Done** button when finished.



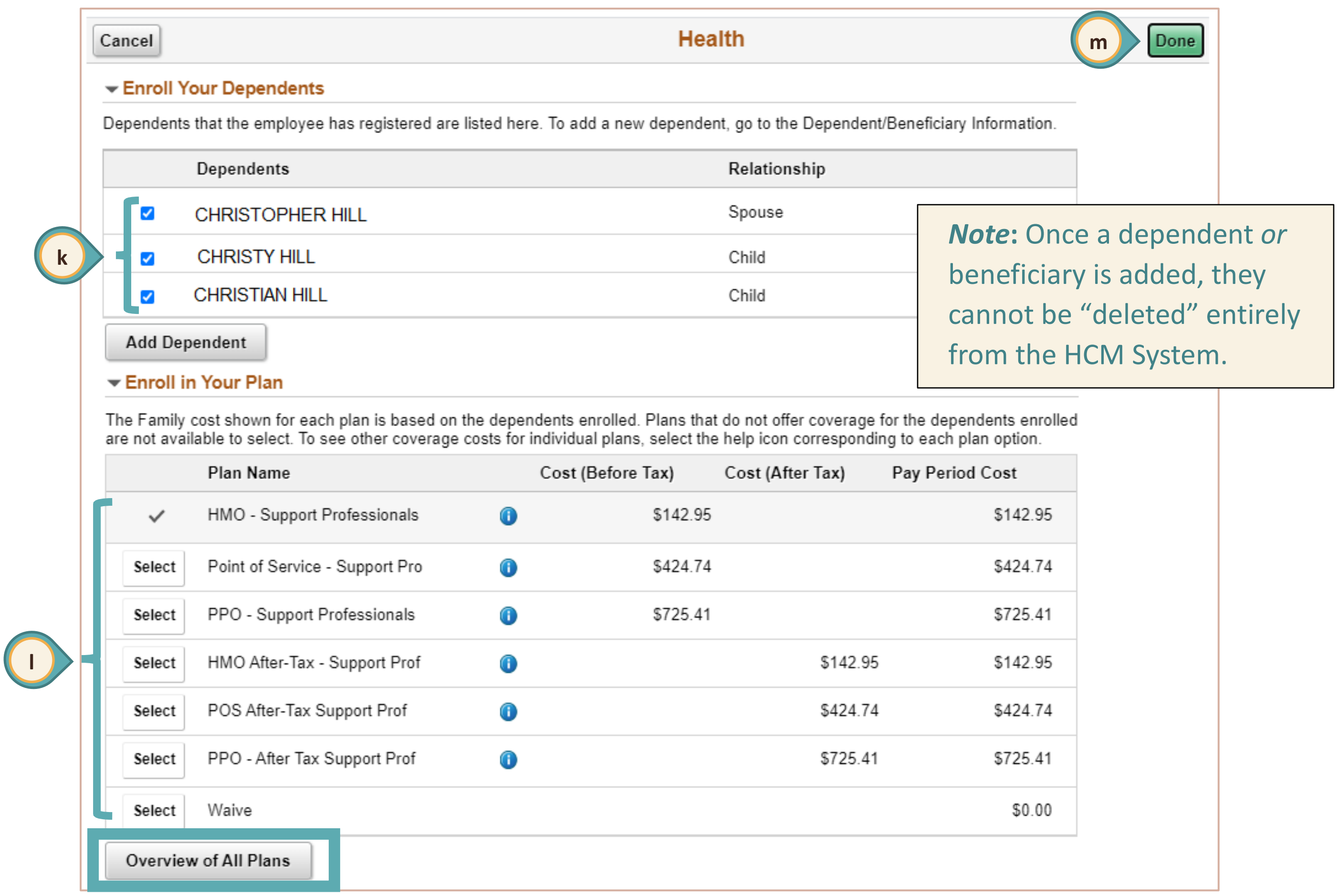
i) After all information has been entered, click the **Save** button at the top right corner.



j) Once the dependent/beneficiary information has been entered, additional dependents/beneficiaries can be entered by clicking the **Add Individual** button and repeating the process of adding a dependent/beneficiary. When finished, click the “**X**” to return to the **Health** page.



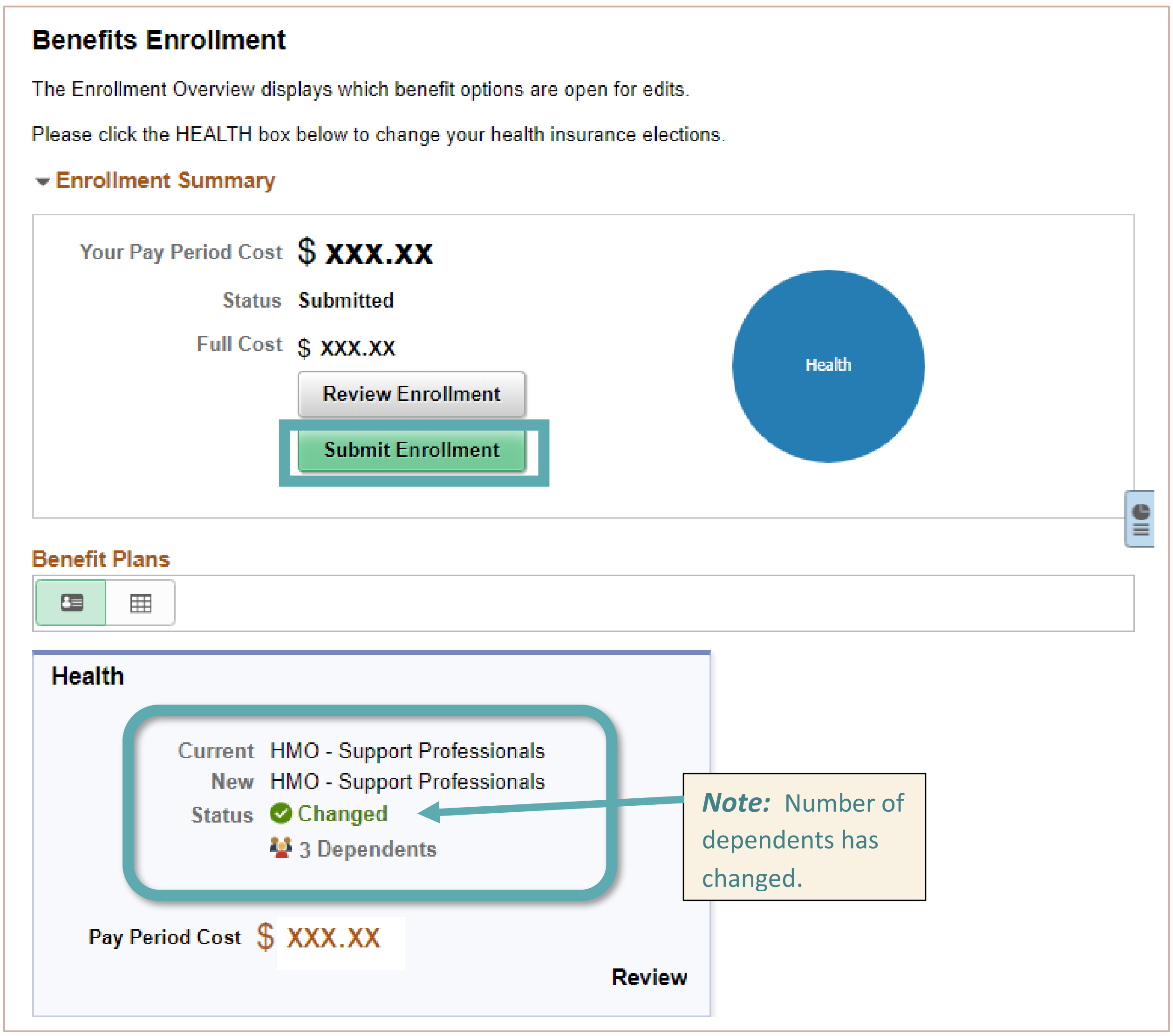
k) All dependents/beneficiaries will appear on the page. To enroll a dependent in one of the health plans, select the checkbox in front of the name. To remove a dependent from the health plan, simply de-select the box in front of the name. The cost of each plan type will be updated in the **Enroll in Your Plan** section at the bottom.



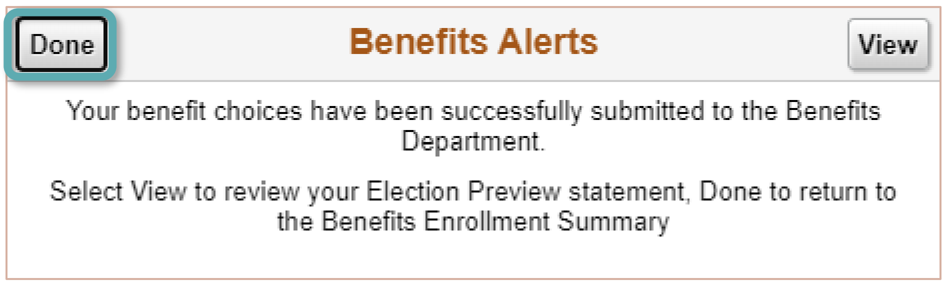
l) In the **Enroll in Your Plan** area, the current Health Plan is indicated with a checkmark. To select a different Health Plan, click the **Select** button next to the Plan Name for the plan type being chosen. To see other coverage costs, select the information icon next to the Plan Name. (For detailed information about all health plans, select the **Overview of All Plans** button.)

m) When finished, select the **Done** button in the upper right corner.

The **Benefits Enrollment** page is displayed again and reflects updates. Click the **Submit Enrollment** button to submit any changes that were made.

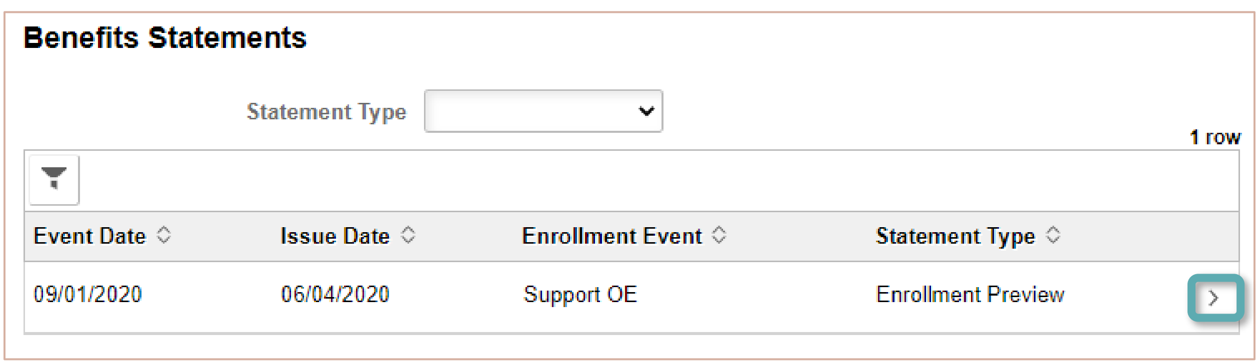


A **Benefits Alert** window appears stating the updated benefit choices have been successfully submitted to the Benefits Department. There is also a **View** button that displays an **Enrollment Preview** statement, which records the Open Enrollment benefit selections and pay period costs, dependent information, and beneficiary information at the time the enrollment is submitted. Click the **Print View** button to generate a printable PDF of the statement. (To close the Enrollment Preview statement screen, click the **X** button in the top right corner.)
Click the **Done** button to continue.

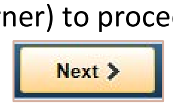


Select the **Next** button (upper right corner) to proceed to **Benefits Statements** page.

3. The **Benefits Statements** page gives the employee another opportunity to view and print the **Enrollment Preview** statement by selecting the **>** symbol on the right side.

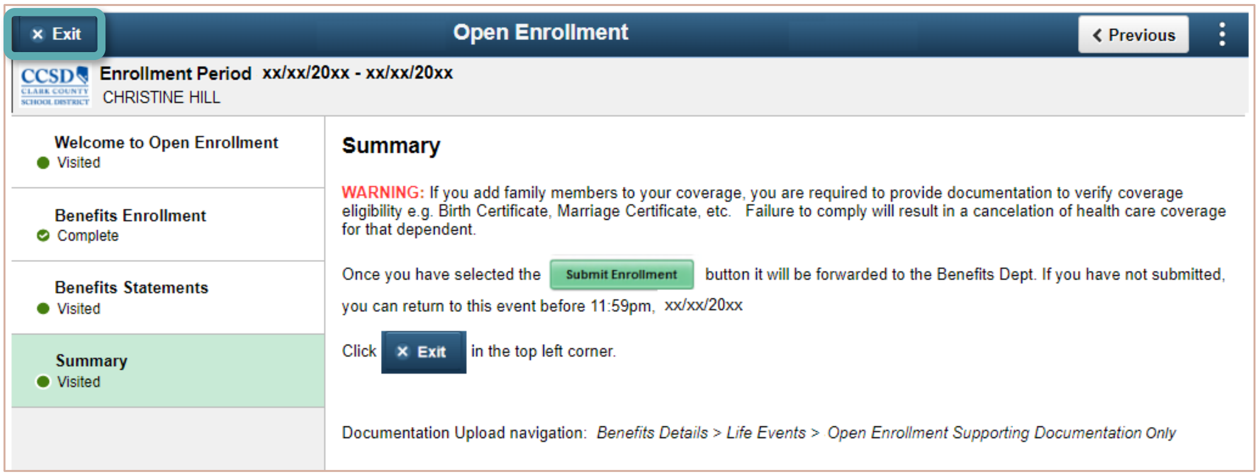


Click the **Next** button (upper right corner) to proceed to **Summary** page.

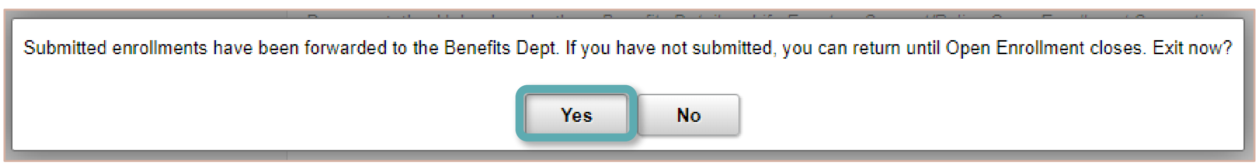


4. The **Summary** page contains information regarding the requirement to provide additional documentation (such as a birth or marriage certificate) if and when family members have been added to the coverage. (Failure to comply will result in a cancelation of health care coverage for that dependent.) It also re-states the deadline for submitting the open enrollment to the Benefits Department.

To close out of the Open Enrollment process, click the **Exit** button in the upper left corner.



A dialog box appears stating that any submitted enrollments have been forwarded to the Benefits Department, and if changes have not been submitted, that the employee can return to the process until Open Enrollment closes. Click **Yes** to exit and return to the ESS dashboard.



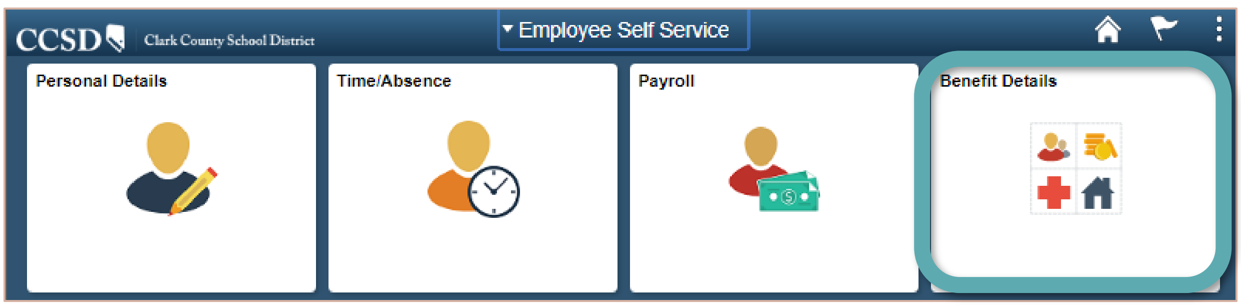
> ***Note***: There is no **"Save/Close"** button because users can return to the Open Enrollment screen and make modifications at any time ***within the Open Enrollment period for their employee group***.

Supporting Documentation for Open Enrollment

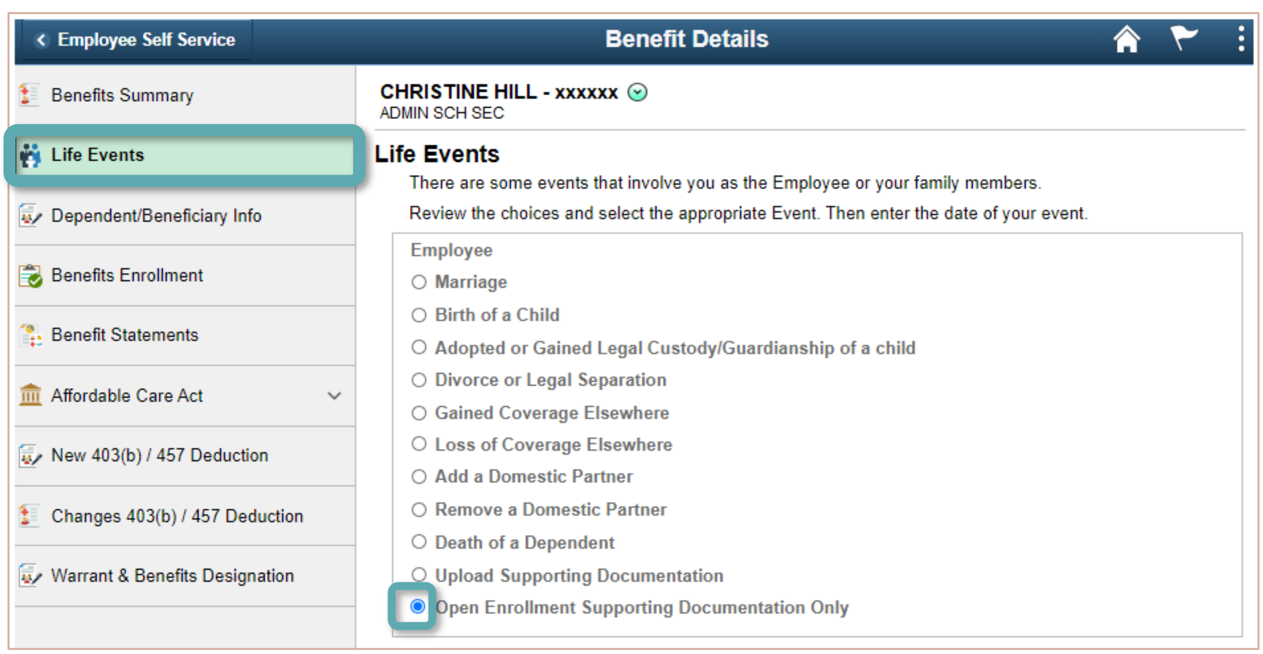
As stated on the Summary page of the Open Enrollment process, any instances in which a family member is added (such as a new spouse or a child), additional documentation must be uploaded. This is not done through the **Open Enrollment** tile, but rather through the **Benefit Details** tile in ESS via the **Life Events** option.

> ***Note***: Although it doesn't matter if supporting documents are uploaded before or after completing the Open Enrollment process, the Benefits Department ***cannot*** authorize requested changes for new family members without the required documents.

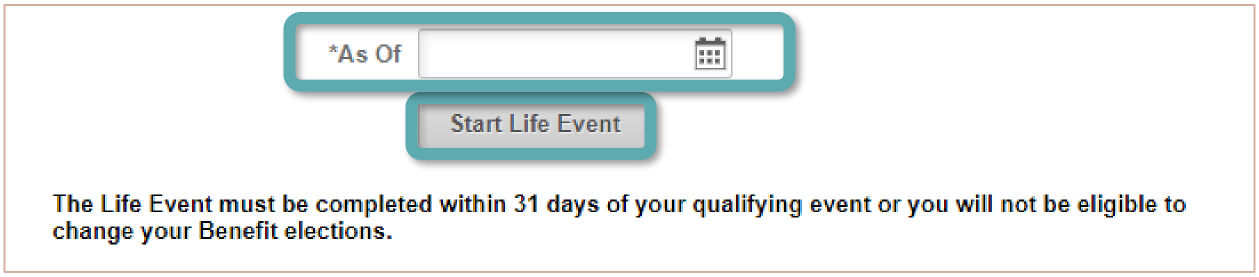
To upload supporting documents for Open Enrollment, click the **Benefit Details** tile from the ESS dashboard.



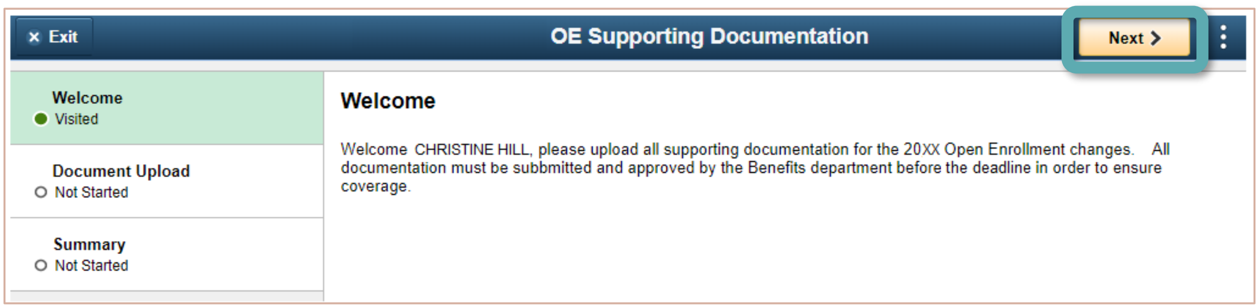
Click **Life Events** from the panel on the left. Select **Open Enrollment Supporting Documentation Only** from the list of available options.



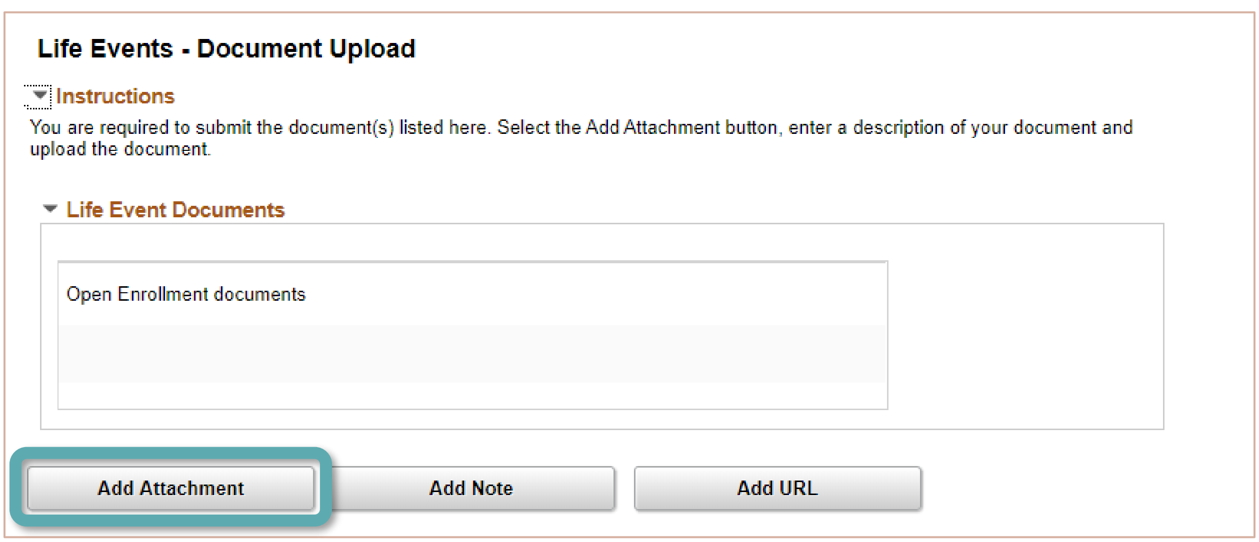
Enter the current date in the ***As Of** field. If the date is typed in *manually*, press the Tab key when finished so that the **Start Life Event** button becomes active. If the **calendar icon** is used to select a date, the button becomes active as soon as the date is selected. The letter "t" can be typed the in the field and then press Tab key; this automatically enters today's date. Click **Start Life Event** after the date has been entered.



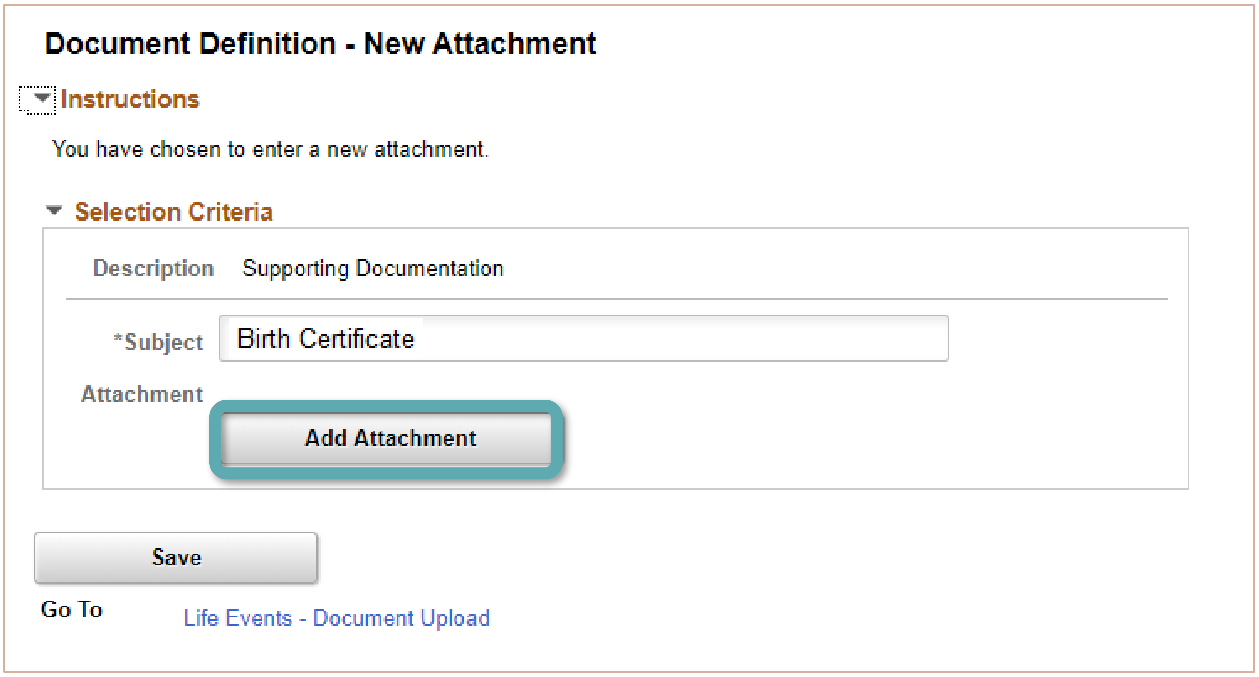
The **Welcome** page of the Open Enrollment Supporting Documentation process appears. Click the **Next** button in the top right corner to proceed to the **Document Upload** step.



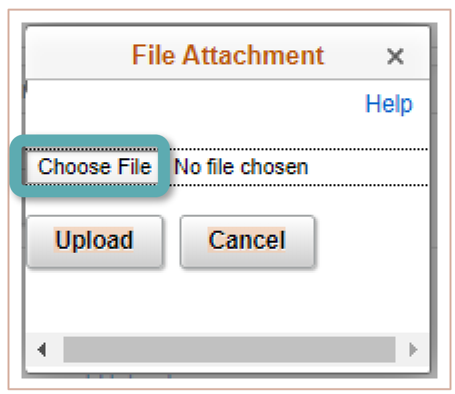
Review the **Instructions** provided on the page to upload the required documents then select the **Add Attachment** button.



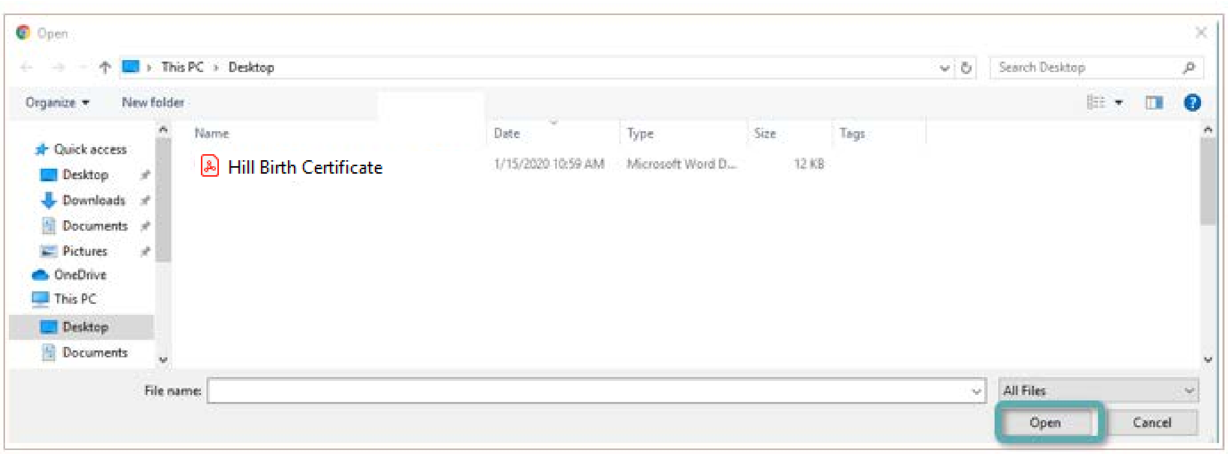
In the new window, enter the name of the document (such as "Birth Certificate") in the ***Subject** field, and then click **Add Attachment** button again.



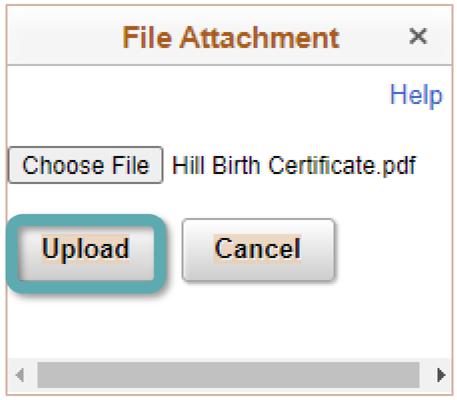
Click **Choose File** button in the window that follows to browse for the supporting documentation required for the changes made during the Open Enrollment process.



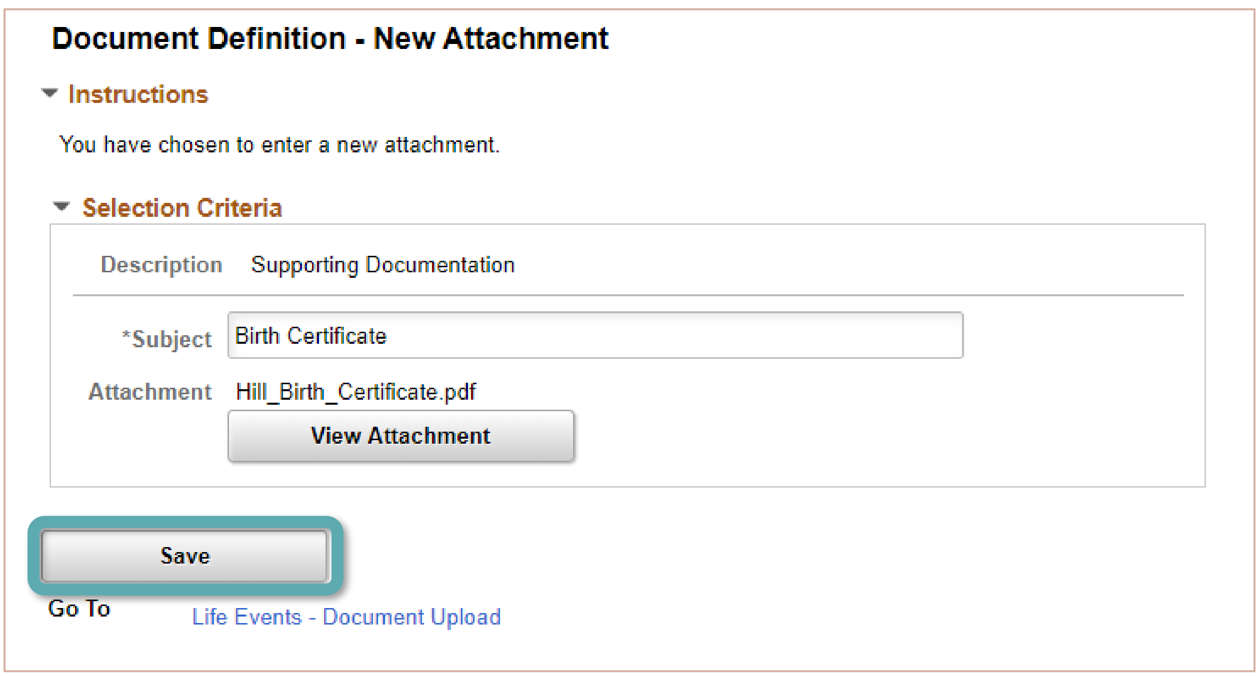
Navigate to the **desired file name**, select it, and then click the **Open** button.



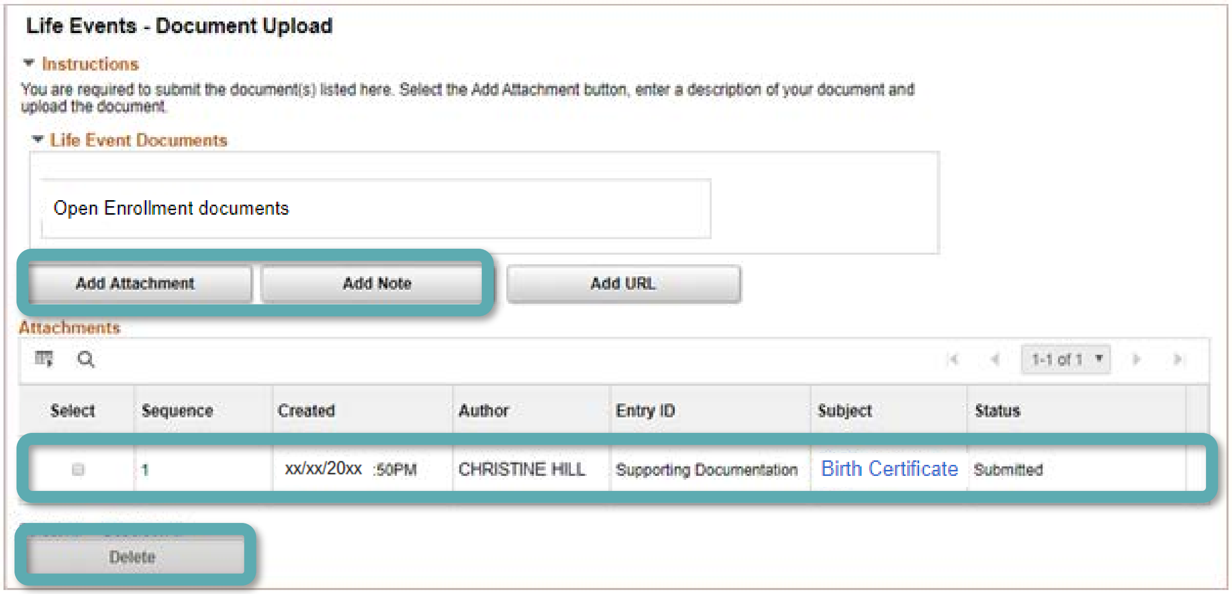
The selected file is displayed and is ready to be uploaded. Click the **Upload** button to upload the displayed file.



When the file has been uploaded, it will be displayed on the page. The **View Attachment** button can be selected to confirm the correct attachment was uploaded if desired. Click the **Save** button.

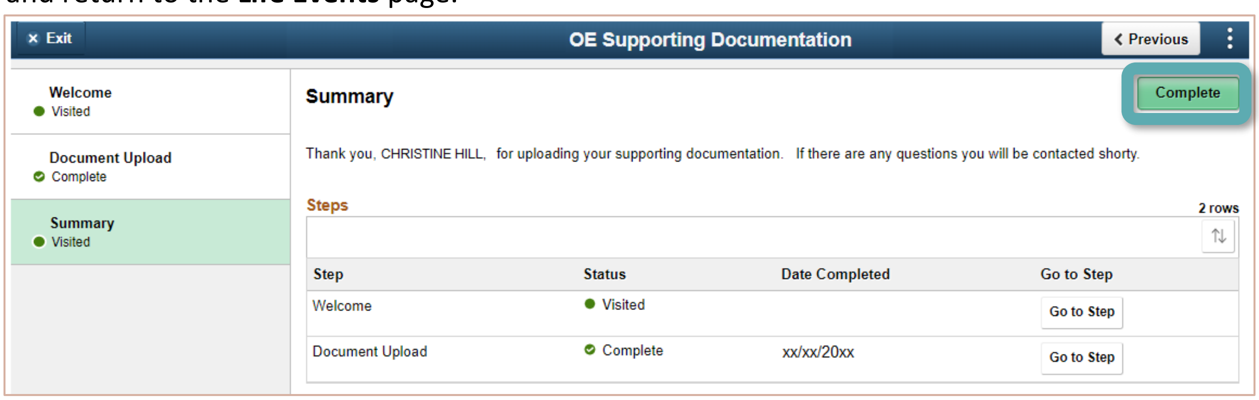


The **Life Events – Document Upload** page now displays the attachment and its status. Click the **Add Attachment** button to upload additional documents if needed. Click the **Add Note** button to enter comments about the event or the documentation that has been provided if needed. If the wrong document was uploaded, click the checkbox next to the file name and then click the **Delete** button.



Click the **Next** button (upper right corner) to proceed to **Summary** page. 

On the **Summary** page, the **Steps** area displays the prior steps in the document upload process, their statuses, and **Go to Step** buttons that return to the step in question when clicked. If all documents have been uploaded, click the **Complete** button in the upper right corner to finish and return to the **Life Events** page.



On the **Life Events** page, to re-visit the document upload process to make changes or add other documents, select **Open Enrollment Supporting Documentation Only** from the list of available options again. Otherwise, click the **home** icon to return to the ESS dashboard.

If additional information is needed, please contact the **Benefits Department** at **(702) 799-5418**.