

**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*

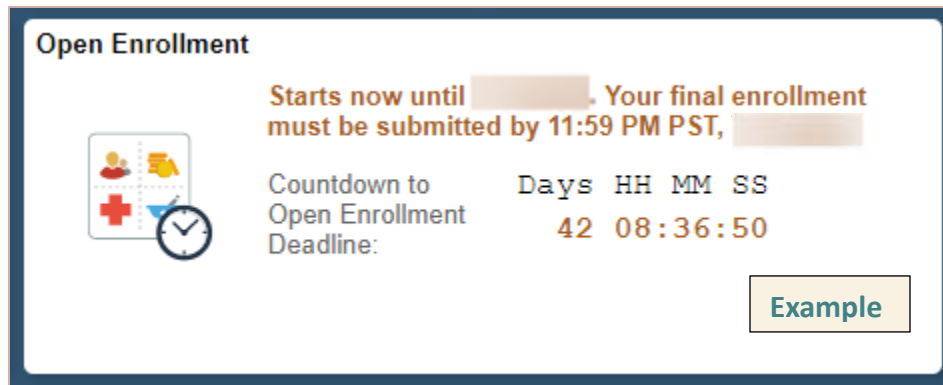
Revised: June 2020

## 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](http://training.ccsd.net) 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.

**Open Enrollment**

Enrollment Period xx/xx/20xx - xx/xx/20xx  
 CHRISTINE HILL

Welcome to Open Enrollment  
 Visited

As Of 06/03/2020  
 Refresh

Type of Benefit	Plan Description	Coverage or Participation
Health	HMO - Support Professionals	Employee + 1 Dependents
Life	Support Professionals	\$50000
PERS	Support Professionals	Participating
Workers Comp	Support Professionals	Participating
Employer Group Insurance (EGI)	Support Professionals	\$599.72/monthly

Deduction	Effective Date	Deduction End Date	Deduction Amount
403(b) AXA Equitable Life Ins	01/01/2020		\$35
Silver State Schools Credit U	01/01/2020		\$300

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.

**Life**  
 CHRISTINE HILL  
 To view your benefits as of another date, enter the date and select Go.

06/03/2020 Go

**Life**

Plan Name Support Professionals  
 Plan Provider Clark County School District  
 Coverage Level \$50000  
 Group Number

**Covered Beneficiaries**  
 You do not have any beneficiaries as of the date shown on this page.  
 Select Edit if you would like to change or add beneficiaries

Edit

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%.

Life Support Professionals  
**CHRISTINE HILL**  
 To change the allocations for your current beneficiaries, choose an Allocation type. An individual can not be both a primary and a secondary beneficiary. Enter an amount or percent.  
 To add a new beneficiary, use the Add a New Beneficiary button.

**Allocation Type**

Enter Primary Allocations as  A

Enter Secondary Allocations as

**Allocation Details**

	Name	Relationship	Current Primary Percent	Current Secondary Percent	New Primary Allocation	New Secondary Allocation
<input type="checkbox"/>	CHRISTOPHER HILL	Spouse			<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	CHRISTY HILL	Child			<input type="text"/>	<input type="text"/>

B
C

D

0
0

- 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.

## Dependent/Beneficiary Personal Information

**CHRISTINE HILL**

Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Jun 3, 2020.

### Personal Information

**i**

\*First Name

Middle Name

\*Last Name

Name Prefix

Name Suffix

Date of Birth

\*Gender

Social Security Number

\*Relationship to Employee

### Status Information

**ii**

\*Marital Status  Single As of

\*Student  No As of

\*Disabled  No As of

\*Smoker  Non Smoker As of

### Address and Telephone

**iii**  Same Address as Employee

Country United States [Change Country](#)

Address

**iv** Edit Address

**iv**

Edit Address

Country United States [Change Country](#)

Address 1

Address 2

Address 3

City  State

Postal

County

**v**

**vi**  Same Phone as Employee

Phone

**vii**

**viii**

Personal Information

Save Confirmation

The Save was successful.

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

**Next >**

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.

**Benefits Enrollment**

The Enrollment Overview displays which benefit options are open for edits.  
Please click the HEALTH box below to change your health insurance elections.

▼ **Enrollment Summary**

Your Pay Period Cost **\$ XXX.XX**

Status Submitted

Full Cost **\$ XXX.XX**

[Review Enrollment](#) **A**

[Submit Enrollment](#)

Health

**Benefit Plans**

**Health**

Current HMO - Support Professionals  
New HMO - Support Professionals  
Status Visited  
👤 2 Dependents

Pay Period Cost **\$ XXX.XX**

[Review](#) **B**

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.

**Health** Done

▼ **Enroll Your Dependents**

Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

Dependents	Relationship
<input checked="" type="checkbox"/> CHRISTOPHER HILL	Spouse
<input checked="" type="checkbox"/> CHRISTY HILL	Child

**Add Dependent** a

▼ **Enroll in Your Plan**

The Family cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Plan Name	Cost (Before Tax)	Cost (After Tax)	Pay Period Cost
<input checked="" type="checkbox"/> HMO - Support Professionals <span style="font-size: small;">?</span>	\$142.95	\$142.95	\$142.95
<input type="checkbox"/> Select Point of Service - Support Pro <span style="font-size: small;">?</span>	\$424.74		\$424.74
<input type="checkbox"/> Select PPO - Support Professionals <span style="font-size: small;">?</span>	\$725.41		\$725.41
<input type="checkbox"/> Select HMO After-Tax - Support Prof <span style="font-size: small;">?</span>		\$142.95	\$142.95
<input type="checkbox"/> Select POS After-Tax Support Prof <span style="font-size: small;">?</span>		\$424.74	\$424.74
<input type="checkbox"/> Select PPO - After Tax Support Prof <span style="font-size: small;">?</span>		\$725.41	\$725.41
<input type="checkbox"/> Select Waive			\$0.00

**Overview of All Plans**

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

**Dependent and Beneficiary Information** x

**Add Individual** b

Name	Relationship	Beneficiary	Dependent
CHRISTOPHER HILL	Spouse	✓	✓ >
CHRISTY HILL	Child	✓	✓ >

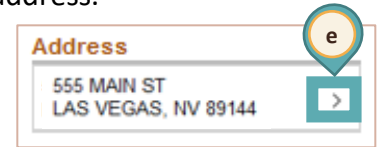
- c) Click the **Add Name** button to enter the Dependent/Beneficiary name. A new window will appear to enter the person's name. Click the **Done** button to return to the previous page.

The screenshot shows the 'Add Individual Dependent/Beneficiary Information' form. A 'Name' sub-form is open, showing fields for Name Format (English), Name Prefix, \*First Name (John), Middle Name, \*Last Name (Hill), and Name Suffix. The main form has sections for Personal Information, Address, National ID, Phone, and Email. Callouts 'c' through 'h' highlight the 'Add Name' button, the 'Personal Information' section, the 'Add National ID' button, the 'Add Phone' button, the 'Add Email' button, and a right arrow button. A 'Done' button is also visible in the top right of the sub-form.

- 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



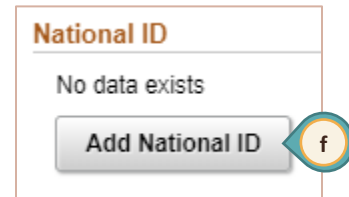
- e) In the address field, click the > right arrow to enter the person's address.



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.

A screenshot of a dialog box titled 'Address'. It has 'Cancel' and 'Done' buttons. The 'Same as mine' field is a toggle switch set to 'Yes'. Below it is an 'Address Type' dropdown menu set to 'Home'. Further down are fields for 'Country' (United States), 'Address 1' (555 MAIN ST), 'Address 2', 'Address 3', 'City' (LAS VEGAS), 'State' (Nevada), 'Postal' (89144), and 'County'.

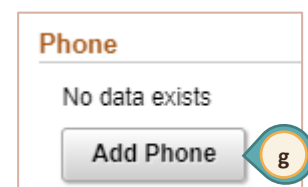
- f) Click the **Add National ID** button to add the person's Social Security Number.



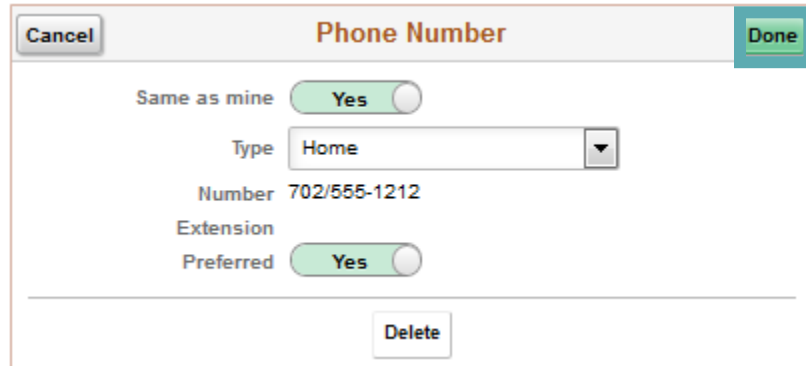
Click the drop-down box to select **United States** in the Country field. In the National ID Type field, select **Social Security Number**. Enter the Social Security number in the National ID box. Click the **Done** button after entering the information.

A screenshot of a dialog box titled 'National ID'. It has 'Cancel' and 'Done' buttons. The '\*Country' field is a dropdown menu set to 'United States'. The '\*National ID Type' field is a dropdown menu set to 'Social Security Number'. The '\*National ID' field contains the text 'XXX-XX-XXXX'. The 'Primary' field is a toggle switch set to 'Yes'.

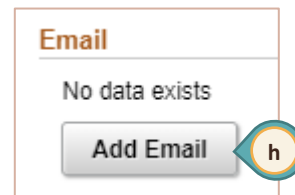
- g) Click the **Add Phone** button to enter the person's phone number.



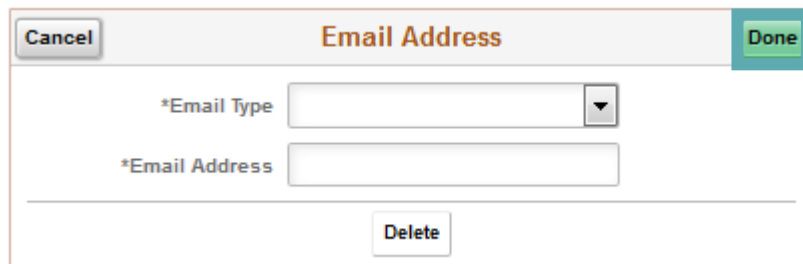
In the new window, if the **Phone Number** for the dependent/beneficiary is the same as the employee, select **Yes** in the **Same as mine** field. If the **Phone Number** is different, set the **Same as mine** field to **No**, select the **Type** from the drop-down box, and enter the **Phone Number**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



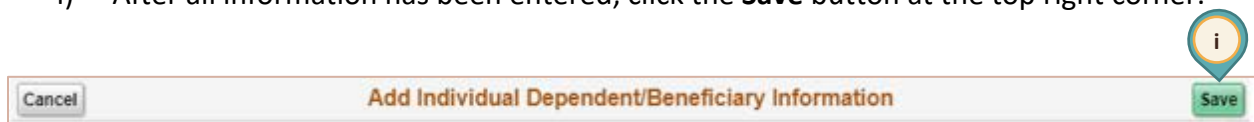
h) To add an email address, click the **Add Email** button.



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.

Name	Relationship	Beneficiary	Dependent
CHRISTOPHER HILL	Spouse	✓	✓
CHRISTY HILL	Child	✓	✓
CHRISTIAN HILL	Child	✓	✓

- 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.

**Health** Cancel Done

▼ **Enroll Your Dependents**  
 Dependents that the employee has registered are listed here. To add a new dependent, go to the Dependent/Beneficiary Information.

Dependents	Relationship
<input checked="" type="checkbox"/> CHRISTOPHER HILL	Spouse
<input checked="" type="checkbox"/> CHRISTY HILL	Child
<input checked="" type="checkbox"/> CHRISTIAN HILL	Child


Add Dependent

▼ **Enroll in Your Plan**  
 The Family cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

Plan Name	Cost (Before Tax)	Cost (After Tax)	Pay Period Cost
<input checked="" type="checkbox"/> HMO - Support Professionals	\$142.95		\$142.95
<span>Select</span> Point of Service - Support Pro	\$424.74		\$424.74
<span>Select</span> PPO - Support Professionals	\$725.41		\$725.41
<span>Select</span> HMO After-Tax - Support Prof		\$142.95	\$142.95
<span>Select</span> POS After-Tax Support Prof		\$424.74	\$424.74
<span>Select</span> PPO - After Tax Support Prof		\$725.41	\$725.41
<span>Select</span> Waive			\$0.00

Overview of All Plans

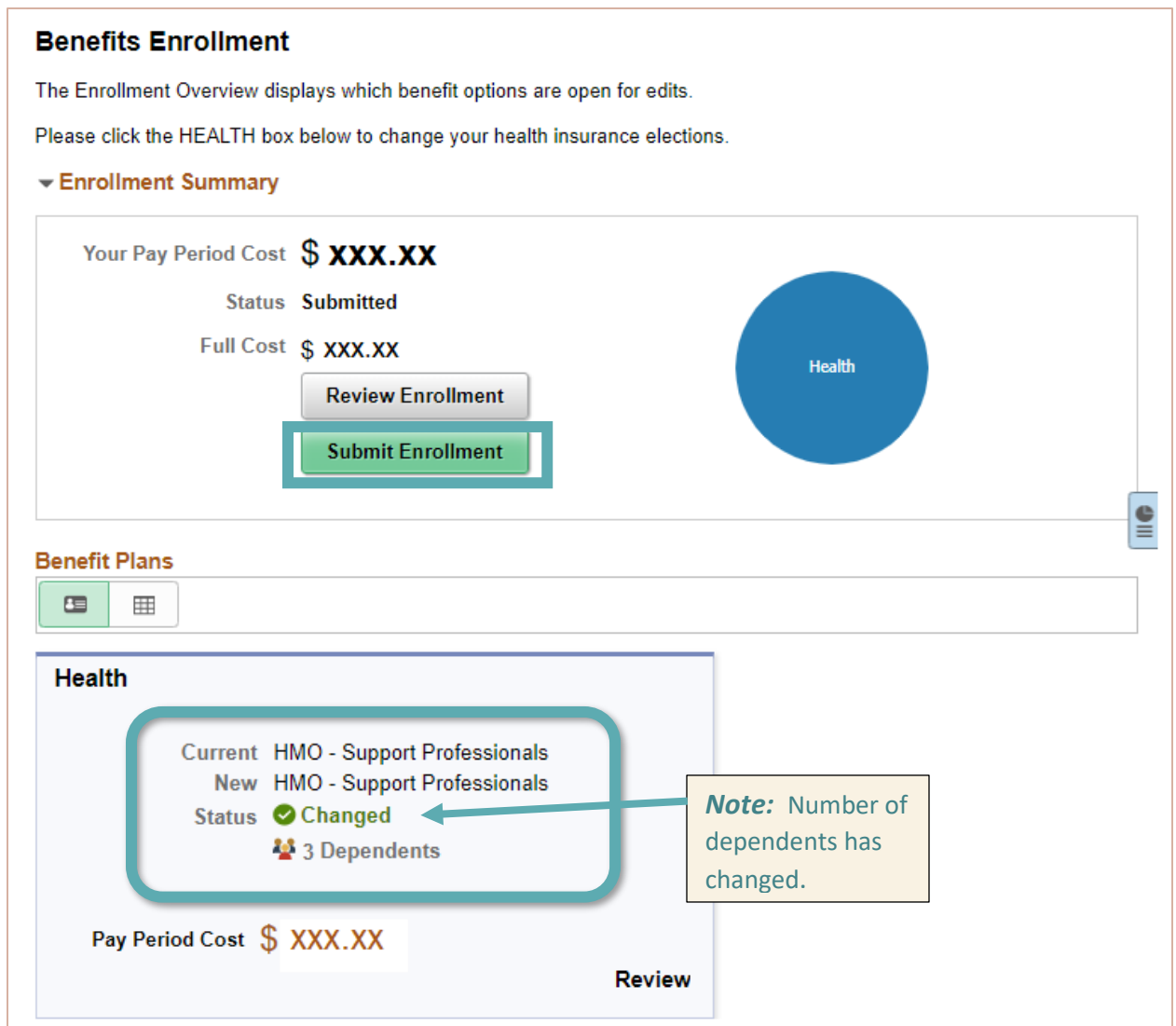
**Note:** Once a dependent or beneficiary is added, they cannot be “deleted” entirely from the HCM System.

- 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.)

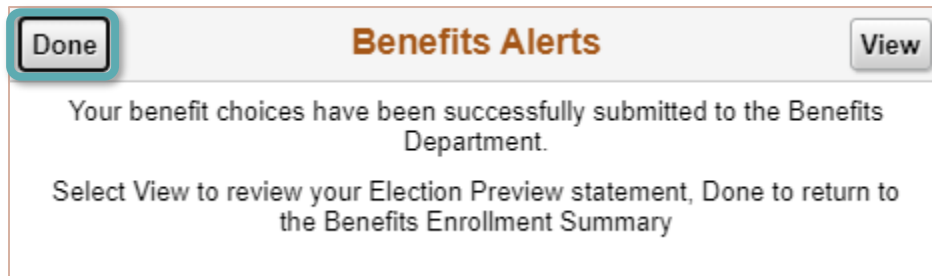
- m) When finished, select the **Done** button in the upper right corner.



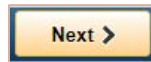
The **Benefits Enrollment** page is displayed again and reflects updates. Click the **Submit Enrollment** button to submit any changes that were made.

A screenshot of the "Benefits Enrollment" web page. The page title is "Benefits Enrollment". Below the title, there is a paragraph: "The Enrollment Overview displays which benefit options are open for edits. Please click the HEALTH box below to change your health insurance elections." Underneath, there is a section titled "Enrollment Summary" with a dropdown arrow. This section contains a box with the following information: "Your Pay Period Cost \$ XXX.XX", "Status Submitted", and "Full Cost \$ XXX.XX". There are two buttons: "Review Enrollment" and "Submit Enrollment", with the latter highlighted by a red box. To the right of this box is a large blue circle labeled "Health". Below the "Enrollment Summary" section is a "Benefit Plans" section with a calendar icon and a list icon. Under "Benefit Plans", there is a "Health" section. It shows "Current HMO - Support Professionals" and "New HMO - Support Professionals". The "Status" is "Changed" with a green checkmark icon. Below that, it says "3 Dependents" with a family icon. A red box highlights the "Status" and "3 Dependents" information, with a callout box pointing to it that says "Note: Number of dependents has changed." At the bottom of the "Health" section, it shows "Pay Period Cost \$ XXX.XX" and a "Review" button.

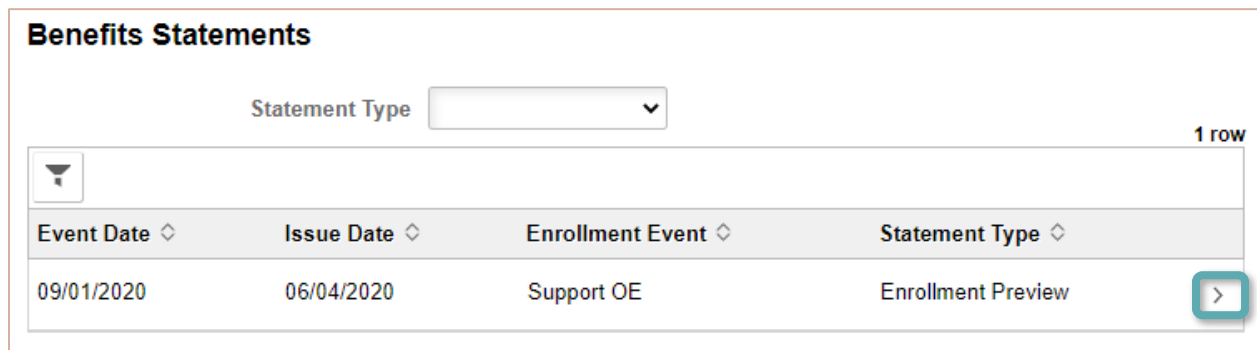
A **Benefits Alert** window appears stating the updated benefit choices have been successfully submitted to the Benefits Department. There is also a **View** button that displays an **Enrollment Preview** statement, which records the Open Enrollment benefit selections and pay period costs, dependent 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.



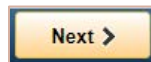
Select the **Next** button (upper right corner) to proceed to **Benefits Statements** page.



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.

The screenshot shows the 'Open Enrollment' interface for Christine Hill. The top navigation bar includes an 'Exit' button (highlighted with a red box), the title 'Open Enrollment', and a 'Previous' button. The main content area is divided into a left sidebar and a right main panel. The sidebar lists four items: 'Welcome to Open Enrollment' (Visited), 'Benefits Enrollment' (Complete), 'Benefits Statements' (Visited), and 'Summary' (Visited, highlighted in green). The main panel has a 'Summary' heading and contains a red 'WARNING' message about documentation requirements. Below the warning, it instructs the user to click the 'Submit Enrollment' button and provides a deadline of 11:59pm on xx/xx/20xx. A blue 'Exit' button is also shown in the text, with a red box around it. At the bottom, there is a breadcrumb trail for documentation upload navigation.

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.

The dialog box contains the text: 'Submitted enrollments have been forwarded to the Benefits Dept. If you have not submitted, you can return until Open Enrollment closes. Exit now?'. At the bottom of the dialog, there are two buttons: 'Yes' (highlighted with a red box) and 'No'.

**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

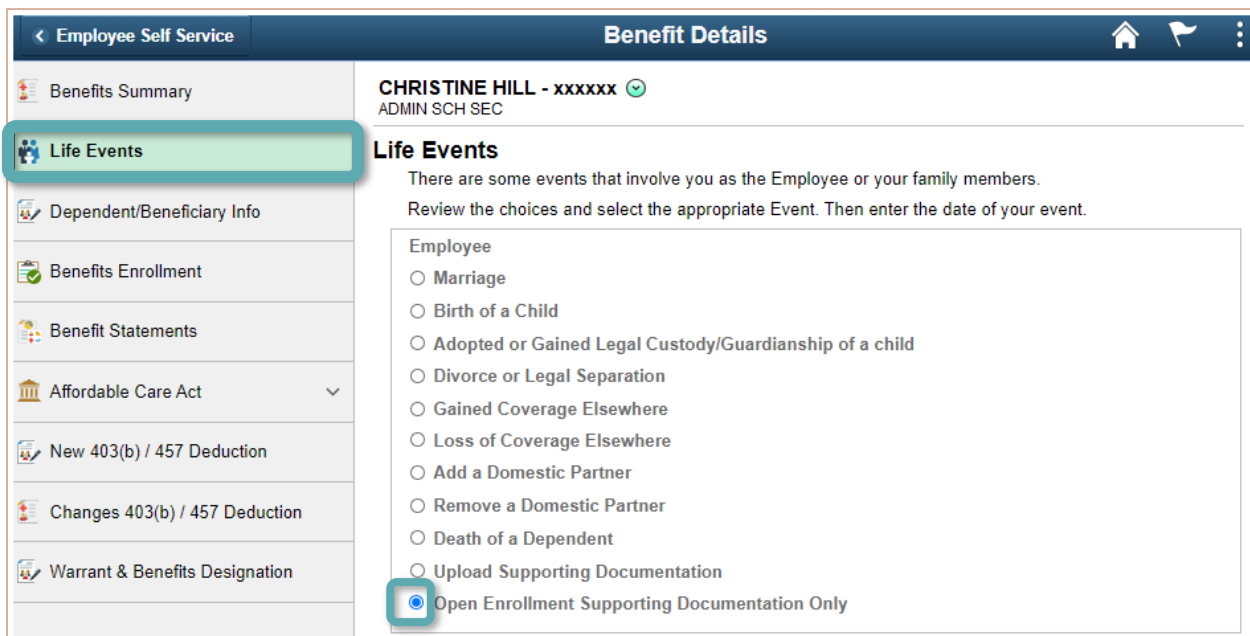
As stated on the Summary page of the Open Enrollment process, any instances in which a family member is added (such as a new spouse or a child), additional documentation must be uploaded. This is not done through the **Open Enrollment** tile, but rather through the **Benefit Details** tile in ESS via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

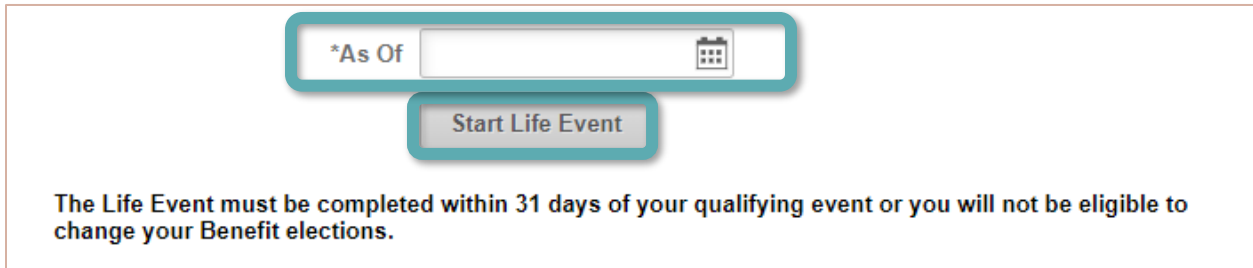
To upload supporting documents for Open Enrollment, click the **Benefit Details** tile from the ESS dashboard.



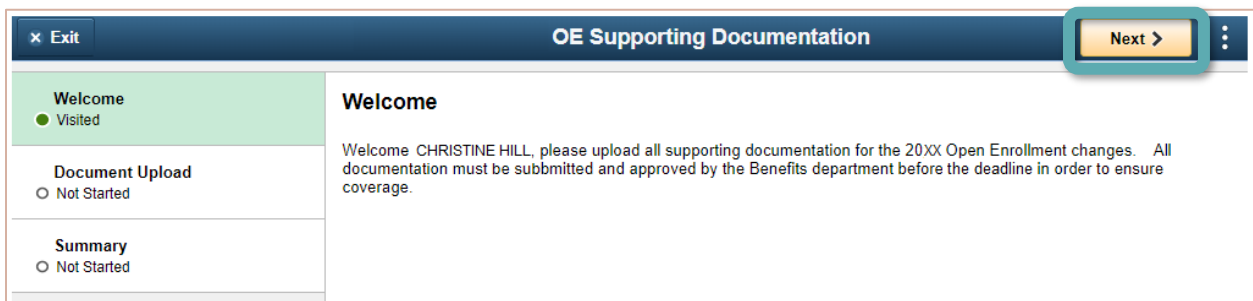
Click **Life Events** from the panel on the left. Select **Open Enrollment Supporting Documentation Only** from the list of available options.



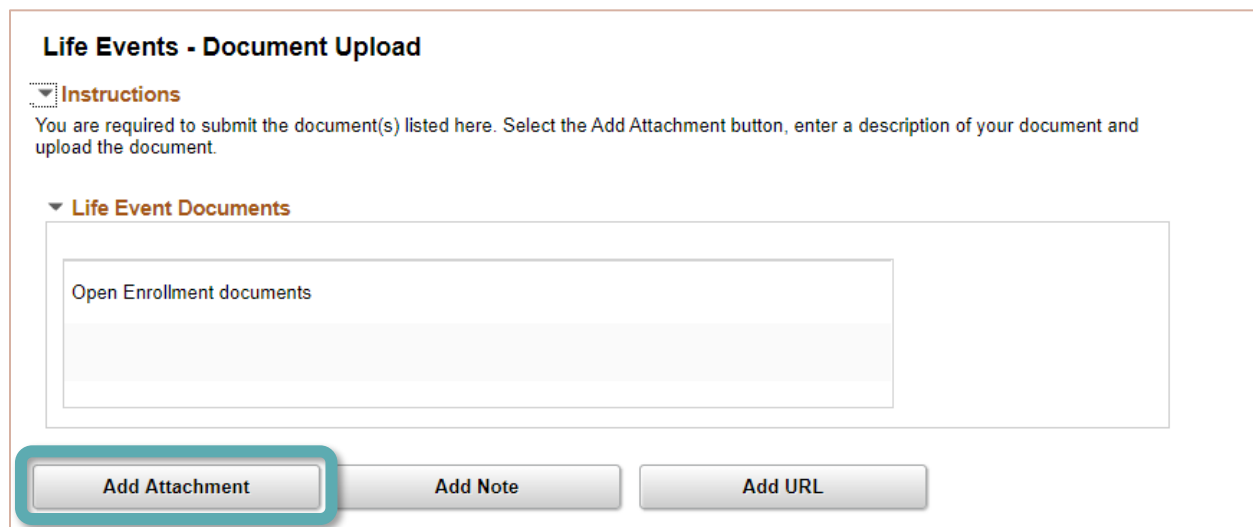
Enter the current date in the **\*As Of** field. If the date is typed in *manually*, press the Tab key when finished so that the **Start Life Event** button becomes active. If the **calendar icon** is used to select a date, the button becomes active as soon as the date is selected. The letter “t” can 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.

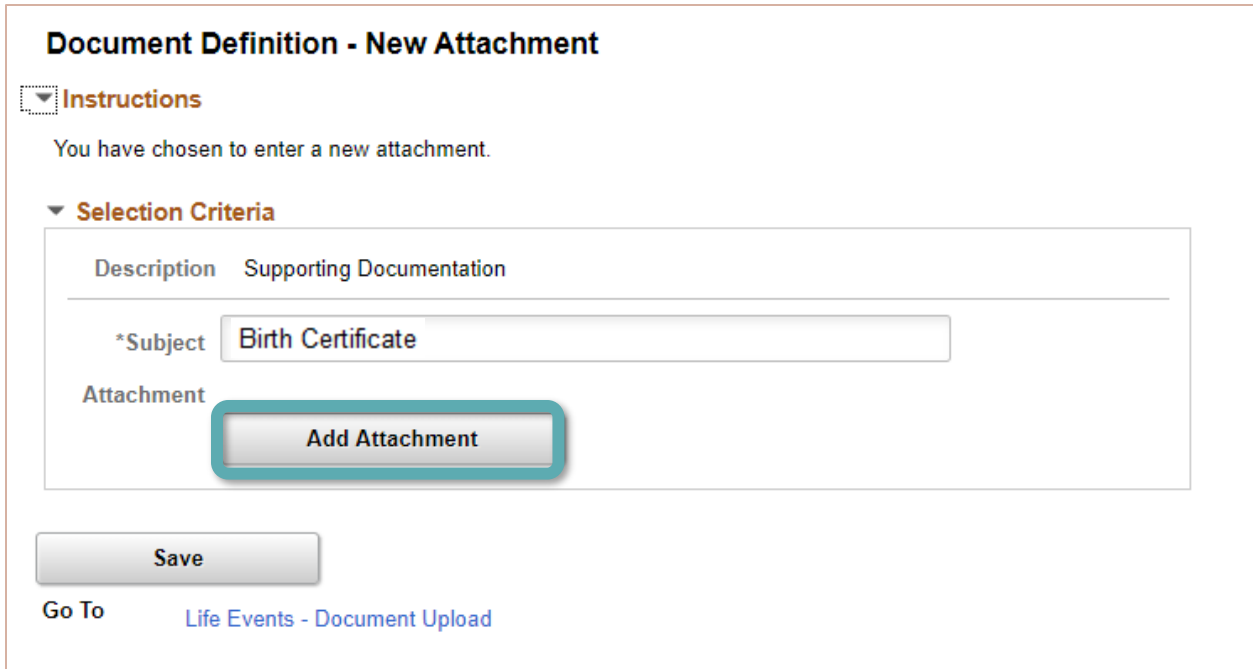


Review the **Instructions** provided on the page to upload the required documents then select the **Add Attachment** button.





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.



**Document Definition - New Attachment**

**Instructions**  
You have chosen to enter a new attachment.

**Selection Criteria**

Description	Supporting Documentation
-------------	--------------------------

\*Subject

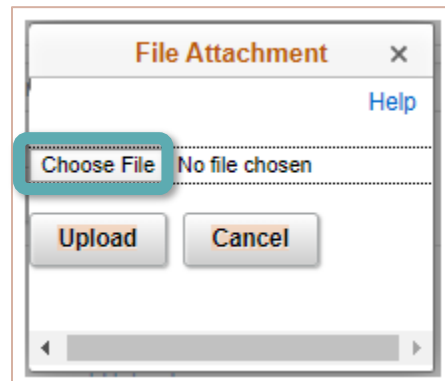
Attachment

**Add Attachment**

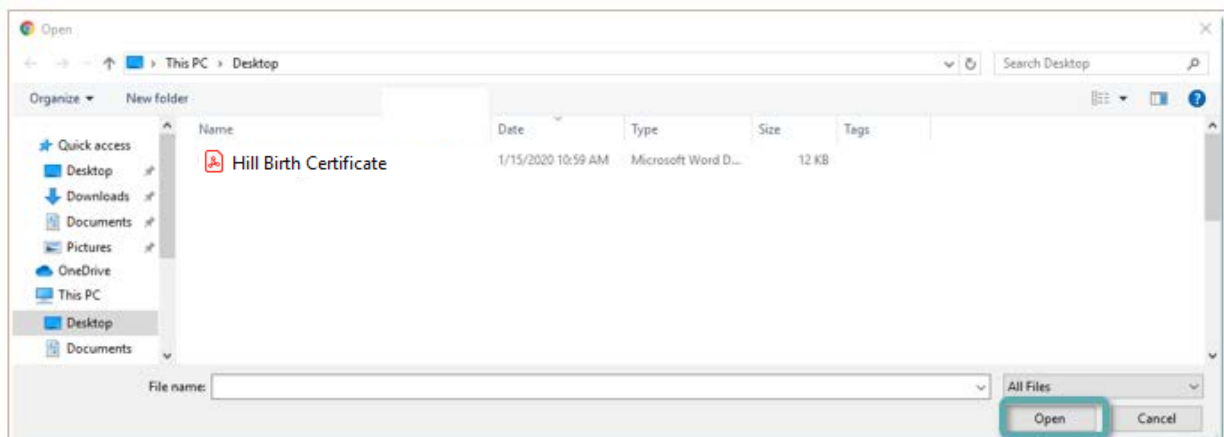
**Save**

Go To [Life Events - Document Upload](#)

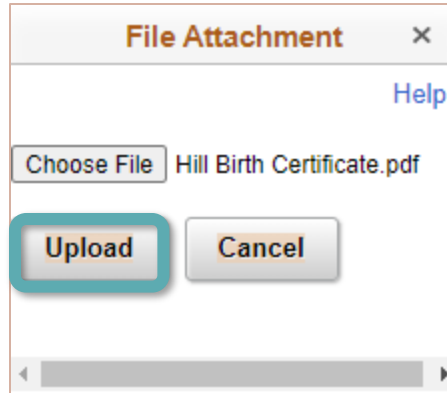
Click **Choose File** button in the window that follows to browse for the supporting documentation required for the changes made during the Open Enrollment process.



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.

### Document Definition - New Attachment

▼ **Instructions**  
You have chosen to enter a new attachment.

▼ **Selection Criteria**

Description	Supporting Documentation
*Subject	<input type="text" value="Birth Certificate"/>
Attachment	Hill_Birth_Certificate.pdf

Go To [Life Events - Document Upload](#)

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.

**Life Events - Document Upload**

**Instructions**  
 You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description of your document and upload the document.

**Life Event Documents**

Open Enrollment documents

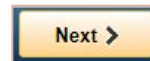
Add Attachment Add Note Add URL

**Attachments**

Select	Sequence	Created	Author	Entry ID	Subject	Status
<input type="checkbox"/>	1	xx/xx/20xx :50PM	CHRISTINE HILL	Supporting Documentation	Birth Certificate	Submitted

Delete

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.

**OE Supporting Documentation** < Previous

Welcome Visited

Document Upload Complete

**Summary** Visited

**Complete**

Thank you, CHRISTINE HILL, for uploading your supporting documentation. If there are any questions you will be contacted shortly.

**Steps** 2 rows

Step	Status	Date Completed	Go to Step
Welcome	● Visited		Go to Step
Document Upload	● Complete	xx/xx/20xx	Go to Step

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**.