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Payroll User Group April 2016 Meeting

with Keith Schmidt

5/2/2016



Agenda

- Welcome and introduction
- Benefit Self Service for Microsoft Dynamics GP
- Q&A: Open questions

Benefit Self Service provides:

- Employees with enhanced capabilities for viewing and enrolling into benefits
- Capabilities for administrators to manage benefits and enrollment.
- An entry point for employees to access their:
 - Personal information
 - Existing benefits
 - To participate in open enrollment periods
- HR Administrators with:
 - Configuration options for eligibility
 - Enrollment
 - Related administration of all benefits

- Setup
 - Benefit Attributes
 - Plan Options
 - Plan Benefits
 - Packages
 - Eligibility Rules
 - Enrollments
 - Benefit
- Administer Benefit Enrollments
 - Viewing Enrollments
 - Returning / Deleting Enrollments
 - Posting Enrollments
 - Reports
 - Types
- Tasks
 - Package Override Utility
- Beneficiaries/Dependents
 - Overview
 - HR Benefit Options
 - Status & Reasons

Employee Benefits Overview

Employee Benefit

File Edit Tools Help Debug sa Dextordinary Inc. 07/14/2014

Employee ID: ACKE0001
Name: Pilar Ackerman

View: ☒ Current ☐ Pending
Benefits: ☒ Active ☐ All

Code	Description
401K	401(k) Deduction
CHD	Child Care Deduction
EPU	Employee Purchases
FIT4U	Fitness Benefit
INS	Insurance Premium
INS1	Insurance (+1 dependent)
INS2	Insurance (family coverage)
LIVES	Standard Life Insurance
MED	Medical Flex
UW	United Way

Benefit Code	INS
Benefit Description	Insurance Premium
Benefit Effective Date	01/01/2015
Group Number	23432234
Policy	New Policy 01
Frequency	Semimonthly
Carrier	BCBS of IL
Type of Coverage	SINGLE
Coverage Description	Single employee only coverage
Major Medical	1.11%
Maximum Out-of-Pocket	\$11,100.00
Insured Amount	\$500,000.00
Cost to Employee	\$35.00
Cost to Employer	\$50.00
Deductible	\$150.00
COBRA Premium	\$52.00

Copay Information	Value
Generic Drugs	\$8.00
Office Visit	\$10.00
Prescription Drugs	\$15.00

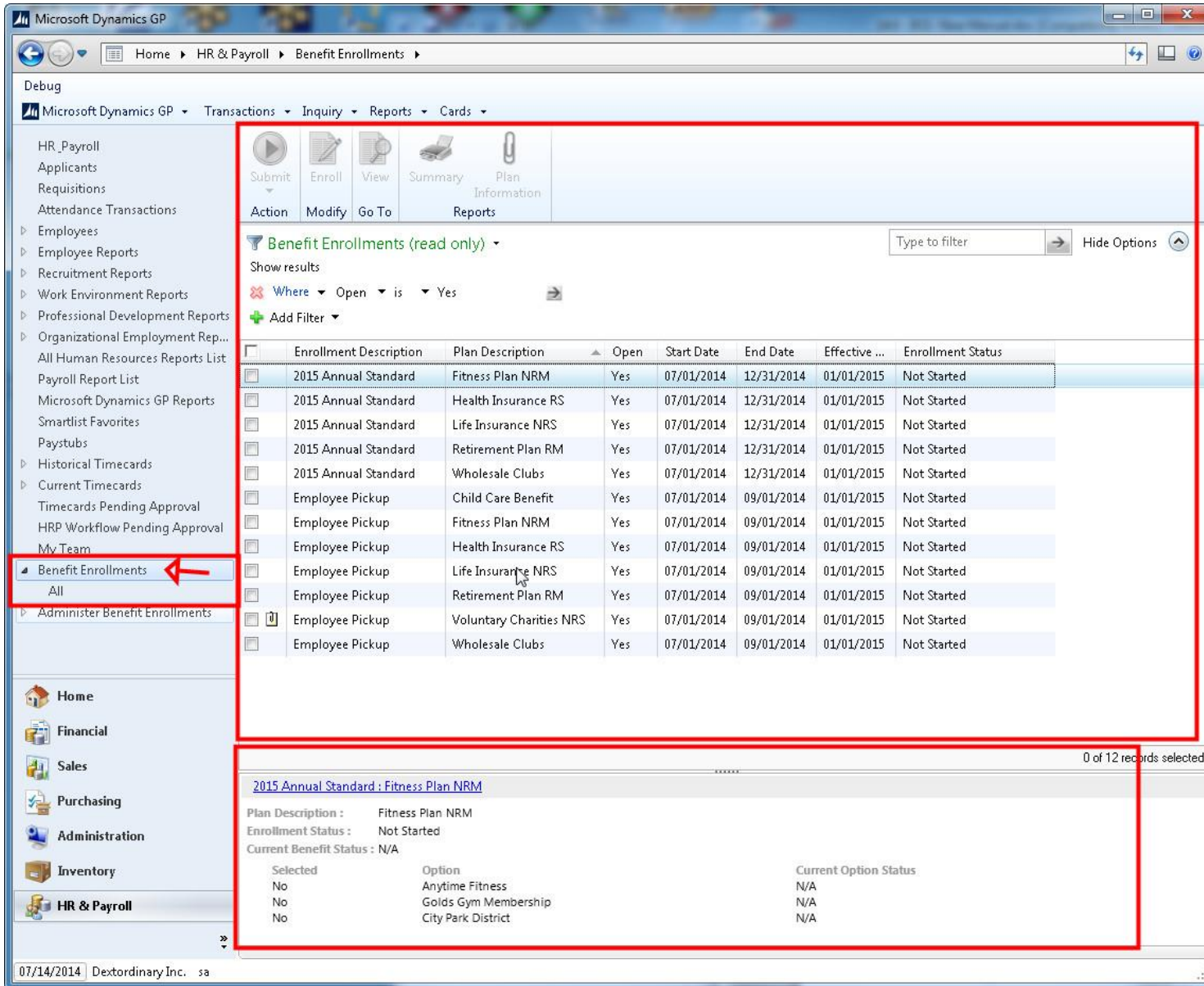
Attribute Description	Attribute Value
Anniversary Date	03/03/2013
Driver's License Number	W-333-1405
Membership ID	333
Outside Group Affiliations	American Medical Association

OK

Red = System Attributes
Green=User Defined

Benefit Code	INS
Benefit Description	Insurance Premium
Benefit Effective Date	01/01/2015
Group Number	23432234
Policy	New Policy 01
Frequency	Semimonthly
Carrier	BCBS of IL
Type of Coverage	SINGLE
Coverage Description	Single employee only coverage
Major Medical	1.11%
Maximum Out-of-Pocket	\$11,100.00
Insured Amount	\$500,000.00
Cost to Employee	\$35.00
Cost to Employer	\$50.00
Deductible	\$150.00
COBRA Premium	\$52.00
Copay Information	Value
Generic Drugs	\$8.00
Office Visit	\$10.00
Prescription Drugs	\$15.00
Attribute Description	Attribute Value
Anniversary Date	03/03/2013
Driver's License Number	W-333-1405
Membership ID	333
Outside Group Affiliations	American Medical Association

Benefits Enrollment



Microsoft Dynamics GP

Home > HR & Payroll > Benefit Enrollments

Debug

Microsoft Dynamics GP > Transactions > Inquiry > Reports > Cards

HR_Payroll
Applicants
Requisitions
Attendance Transactions
Employees
Employee Reports
Recruitment Reports
Work Environment Reports
Professional Development Reports
Organizational Employment Rep...
All Human Resources Reports List
Payroll Report List
Microsoft Dynamics GP Reports
Smartlist Favorites
Paystubs
Historical Timecards
Current Timecards
Timecards Pending Approval
HRP Workflow Pending Approval
My Team
Benefit Enrollments
Administer Benefit Enrollments

Submit Enroll View Summary Plan Information
Action Modify Go To Reports

Benefit Enrollments (read only)

Type to filter Hide Options

Show results

Where Open is Yes

Add Filter

	Enrollment Description	Plan Description	Open	Start Date	End Date	Effective ...	Enrollment Status
☐	2015 Annual Standard	Fitness Plan NRM	Yes	07/01/2014	12/31/2014	01/01/2015	Not Started
☐	2015 Annual Standard	Health Insurance RS	Yes	07/01/2014	12/31/2014	01/01/2015	Not Started
☐	2015 Annual Standard	Life Insurance NRS	Yes	07/01/2014	12/31/2014	01/01/2015	Not Started
☐	2015 Annual Standard	Retirement Plan RM	Yes	07/01/2014	12/31/2014	01/01/2015	Not Started
☐	2015 Annual Standard	Wholesale Clubs	Yes	07/01/2014	12/31/2014	01/01/2015	Not Started
☐	Employee Pickup	Child Care Benefit	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Fitness Plan NRM	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Health Insurance RS	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Life Insurance NRS	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Retirement Plan RM	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Voluntary Charities NRS	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Wholesale Clubs	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started

0 of 12 records selected.

[2015 Annual Standard : Fitness Plan NRM](#)

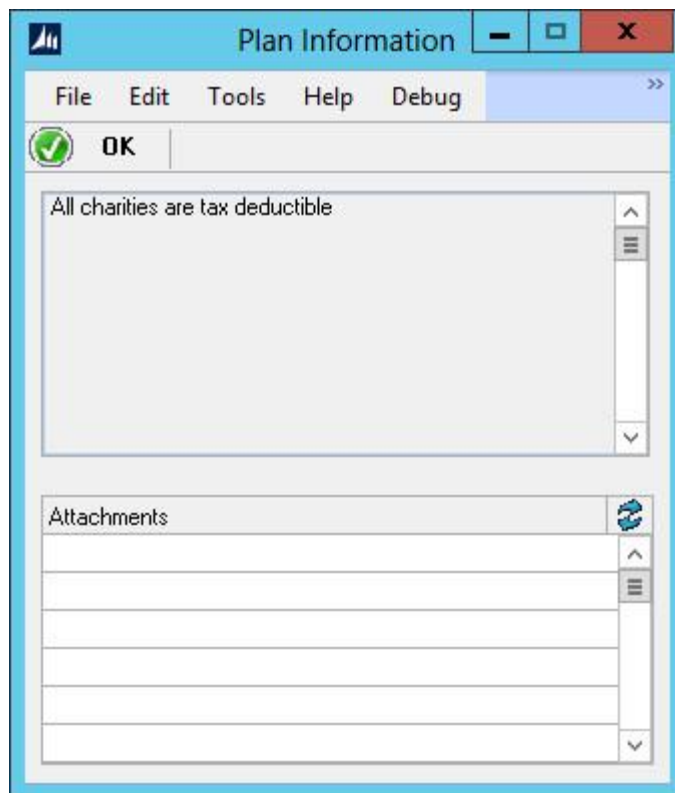
Plan Description : Fitness Plan NRM
Enrollment Status : Not Started
Current Benefit Status : N/A

Selected	Option	Current Option Status
No	Anytime Fitness	N/A
No	Gold's Gym Membership	N/A
No	City Park District	N/A

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- Actions
 - Submit
 - Enroll
 - View
 - Summary

Plan Information: Pressing this button will open a window which displays a message and also the ability to view any attachments that the administrator may have included with the benefit plan.



Submit: This tool is used when the employee is ready to submit one or more benefits to the HR Administrator



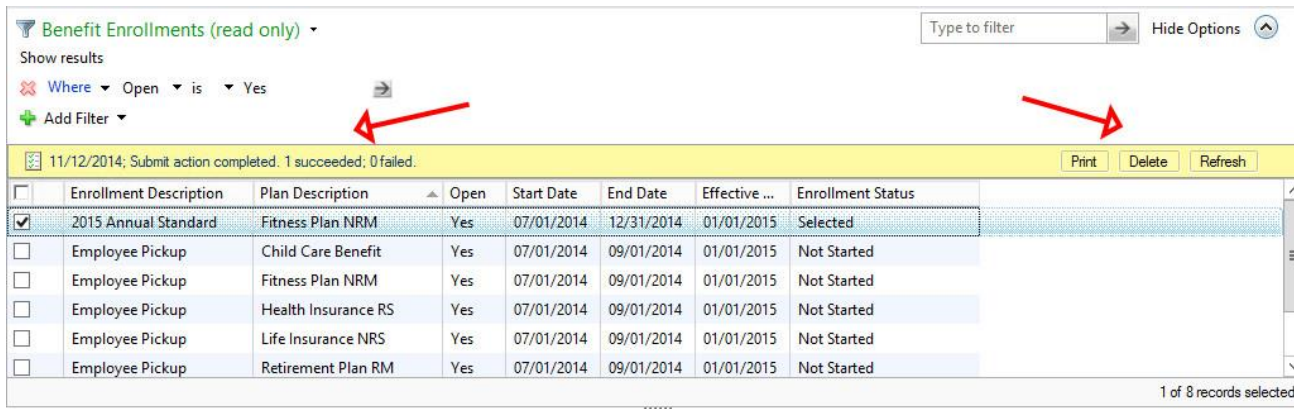
Submit

Electronic Signature

D\W

Comments
Please see email sent 9-9-2014

Submit Cancel



Benefit Enrollments (read only)

Show results

Where Open is Yes

Add Filter

11/12/2014; Submit action completed. 1 succeeded; 0 failed.

Print Delete Refresh

	Enrollment Description	Plan Description	Open	Start Date	End Date	Effective ...	Enrollment Status
☒	2015 Annual Standard	Fitness Plan NRM	Yes	07/01/2014	12/31/2014	01/01/2015	Selected
☐	Employee Pickup	Child Care Benefit	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Fitness Plan NRM	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Health Insurance RS	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Life Insurance NRS	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started
☐	Employee Pickup	Retirement Plan RM	Yes	07/01/2014	09/01/2014	01/01/2015	Not Started

1 of 8 records selected.

View: Opens the Enrollment Submission window with the data prepopulated for the benefit selected in the navigation list in read only mode.

Summary: Generates the Benefit Enrollment Report for the selected benefit or benefits.

Screen Output - APR Benefit Enrollment Report

File Edit Tools Find Help Debug sa Dextordinary Inc. 07/14/2014

Print Send To Modify 100% Completed 2 Pages Page 1

System: 11/12/2014 11:47:08 AM Dextordinary Inc.
User Date: 07/14/2014 Benefit Enrollment Report
US Payroll

Enrollment Description Employee Pickup
Start Date: 07/01/2014
End Date: 12/31/2014
Effective Date: 01/01/2015

Benefit Description Health Insurance RS
Enrollment Status: Not Started
Current Benefit Status: Enrolled

Option	Selected	Current Option Status
Whole Family	Yes	Enrolled

Attribute	Effective at Enrollment	Current	Future Effective
CO2 Footprint (Tons/Year)	5		
Voluntary Contribution	\$5.00		
Prior Conviction	No		
Auto Donation Deduction	500.00%		
Driver's License Number	W-555		
Supplemental Retirement	500.00%		
Membership ID	500		
Outside Group Affiliations	Environmental Protection		
Benefit Code	INS2		
Benefit Description	Insurance (family coverage)		
Benefit Effective Date	01/01/2015		
Carrier	BCBS of IL		
COBRA Premium	\$75.00		
Copay Information			
Cost to Employee	\$72.95		
Cost to Employer	\$0.00		
Coverage Description	Family coverage		
Deductible	\$250.00		
Enrollment Effective Date	01/01/2015		
Frequency			
Group Number	35443253435		

Enrollment Submission

- To open the Enrollment Submission window the user can double-click on a benefit in the Benefits Enrollment navigation list or by selecting a benefit and pressing the “enroll” button. The window consists of two parts:
- Enrollment Submission Main Form
- Enrollment Option Details companion window

Enrollment Submission sa Dextordinary Inc. 07/14/2014

File Edit Tools Help Debug

Save Cancel Submit

Enrollment: 2015 Annual Standard
Benefit: Health Insurance RS

Start Date: 07/01/2014
End Date: 12/31/2014
Effective Date: 01/01/2015

Enrollment Progress: Required Options Selected Dependents Completed Beneficiaries Completed Enrollment Submitted Enrollment Posted

Action: Enroll Current Benefit Status: N/A

Selected	Option	Current Status
☐	Whole Family	N/A
☒	EE + Spouse	N/A
☐	Employee Self Only	N/A

View:
☐ Current
☒ Effective at Enrollment
☐ Pending Changes

Selected Option	EE + Spouse	Dependent	Beneficiary Information			
Name	Relationship	Active	Active	Primary	%	
Ackerman, Pilar	Self	☐	☐	☐	0.00%	
Adams, Jay	Child	☐	☐	☐	0.00%	
Ackerman, Kyle	Child	☒	☒	☒	100.00%	

Max Dependents: 1

Total Primary Percentages: 100.00%
Total Secondary Percentages: 0.00%

Enrollment Option Details 07/14/2014

File Edit Tools Help Debug

Option: EE + Spouse

Anniversary Date: 04/04/2014
CO2 Footprint (Tons/Year): 4
Voluntary Contribution: \$4.00
Prior Conviction: ☐
Auto Donation Deduction: 4.00%
Driver's License Number: W-444
Supplemental Retirement: 4.04%
Membership ID: 44
Outside Group Affiliations: Environmental Protection
Benefit Code: INS1
Benefit Description: Insurance (+1 dependent)
Benefit Effective Date: 01/01/2015
Enrollment Effective Date: 01/01/2015
Group Number: 2435243
Policy: NP 001
Frequency: Semimonthly
Carrier: BCBS of IL
Type of Coverage: EMP+1
Coverage Description: Employee + 1 Coverage
Major Medical: 0.00%
Maximum Out-of-Pocket: \$0.00
Insured Amount: \$750,000.00
Cost to Employee: \$47.95
Cost to Employer: \$0.00
Deductible: \$200.00
COBRA Premium: \$52.00

Copay Description	Copay Amount
Generic Drugs	\$8.00
Office Visit	\$10.00
Prescription Drugs	\$15.00

Action: Allows the employee to *enroll*, *waive*, or *not enroll* into the benefit.

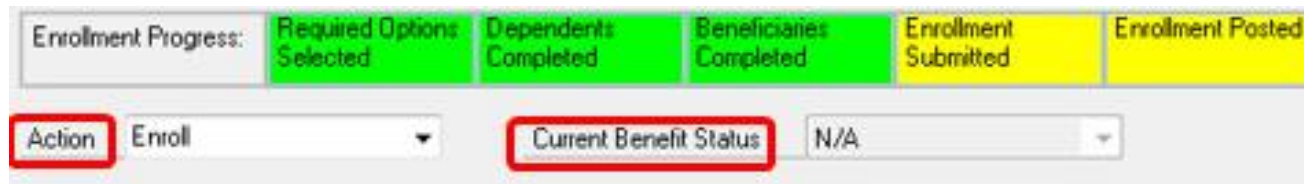
Which options appear in the drop down will depend upon whether the benefit has a required selection.

If the benefit requires selection then the employee must either enroll or waive and submit.

If the benefit does not require a selection then the employee can either *enroll* or fail to enroll (ie...*not enroll*)

Current Benefit Status: If the employee is currently enrolled into at least one option as a result of a previous year's enrollment or other occasion, the status will indicate "enrolled".

If the user had previous waived coverage then the status will indicate "waived".



The screenshot shows a progress bar with six steps: Enrollment Progress, Required Options Selected, Dependents Completed, Beneficiaries Completed, Enrollment Submitted, and Enrollment Posted. Below the bar, there is an 'Action' button, a dropdown menu currently set to 'Enroll', a 'Current Benefit Status' button, and a dropdown menu currently set to 'N/A'.

View: The view radio group allows the employee to change the contents of the companion window

Current – Shows the read-only current detail for the benefit option as is currently in force for the employee.

Effective at enrollment – shows the detail for the benefit as will be in effect after enrollment is posted. This is the default and most often used setting as it tells the employee what the details of the benefit will be once the enrollment effective date arrives.

Pending Changes – shows the read-only detail for the benefit that reflect changes scheduled to take effect after the enrollment period is over and the effective date has passed. In this way the employee can gain visibility in any future effective records schedule to be activated after the enrollment effective date has passed.



The screenshot shows a 'View' button and a radio group with three options: 'Current', 'Effective at Enrollment' (which is selected), and 'Pending Changes'.

Q&A open forum

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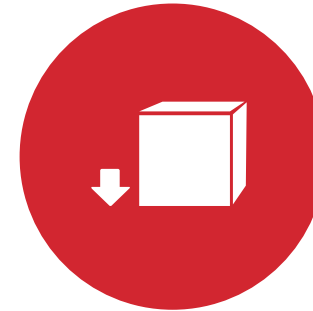
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Thank You!

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