

HR New Hire or Life Event Benefit Setup



From your HR Dashboard click on Benefits again



Benefits

- Plan / Policy
- Employee Benefit
- Carrier
- Classes
- General Agent
- Life Event Reason
- Waiting Rule
- Dependents
- Beneficiaries
- Open Enrollment Setup**
- Monitor Open Enrollment
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- Benefit Reports

Click on New Hire or Life Event

Open Enrollments  

[New](#) [Download](#)

Actions	Company	Name	Start Date	End Date	Special Enrollment
	Ginger's Pet Care	2023 Open Enrollment	10/10/2022	10/31/2022	No Yes
	Ginger's Pet Care	2023 Test OE	01/01/2022	12/31/2022	No Yes
	Ginger's Pet Care	Life Event	01/01/2022	12/31/2022	No Yes
	Ginger's Pet Care	New Hire	01/01/2022	12/31/2022	No Yes
	ID HRP	Open Enrollment 2022	01/02/2022	12/31/2022	No Yes
	Ginger's Pet Care	Status Change Enrollment	01/01/2022	12/31/2022	No Yes

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[Save Changes](#) [Save & Next Record](#) [Prev Record](#) [Next Record](#) [Close](#)

Open Enrollment: **New Hire**

Company

Company: Ginger's Pet Care (GMPC)

Open Enrollment Info

Name: New Hire

Start Date: 01/01/2022

End Date: 12/31/2022

Introduction

This introduction will be displayed to employees when they begin open enrollment

Welcome to your New Hire Enrollment!

Custom Acknowledgement

This language will be displayed to employees when they review and e-sign open enrollment

Thank you for completing your New Hire Enrollment.

You will see all the benefits that you made available for a New Hire or Life Event

Benefit Plans			
Select plans to include in this Open Enrollment			
Include?	Plan	Type	Plan Start Date
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 BC/BS	Medical Insurance	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 Dental	Dental Insurance	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 Flexible Spending Account	Flexible Spending Account	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 HRA	Flexible Spending Account	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 HSA	Health Savings Account	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 QSEHRA	Flexible Spending Account	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	2022 VSP Vision	Vision Insurance	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	401(k)	401(k) Plan	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	401(k) ROTH	401(k) Plan	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Basic Life	Basic Life Insurance	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Employee Voluntary Life	Voluntary Life Insurance	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Long Term Disability	Long Term Disability Insurance	1/1/2022
No <input type="checkbox"/> Yes <input checked="" type="checkbox"/>	Short Term Disability	Short Term Disability Insurance	1/1/2022

Special Enrollment will be marked Yes from your previous setup. Click on the dropdown menu for Employees to Invite and select your employee. Click on the dropdown menu for Enrollment Reason and select New Hire or corresponding Life Event reason. Complete the date you want the Invitation to be sent and the Effective date of the employee's benefits and click Save Changes

Special Enrollment

Mark this enrollment as "Special Enrollment" (for hiring/life event purposes)

No Yes

Requested Enrollment Invitation Date
Requested Enrollment Invitation Date

Employees to Invite
Please Choose (represents BLANK)

Benefit/Plan Start Date
Benefit/Plan Start Date

Enrollment Reason
Please Choose (represents BLANK)

[Invite Employees to Special Enrollment](#)

Open Enrollment: New Hire

An email invitation will be sent to the employee on the date you request for the invitation

Click on Monitor Open Enrollment

Benefits

Plan / Policy

Life Event Reason

Monitor Open Enrollment

Employee Benefit

Waiting Rule

Copy Benefits

Carrier

Dependents

Benefit Reports

Classes


Beneficiaries

General Agent


Open Enrollment Setup

Select your New Hire Enrollment or Life Event, that corresponds with the enrollment invitation that you just sent out, from the dropdown menu

Monitor Open Enrollments

Which Open Enrollment? 
 Please Choose an Open Enrollment to Load Grid ▼

Nothing To Approve Download


filter grid... Status Contains: ▼ 

Company	Name ▲	Employee ID	Plan Type	Plan	Coverage Type	Status
No Records						


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You will see that your New Hire Enrollment has not been started yet

Monitor Open Enrollments

Which Open Enrollment? 
 New Hire ▼

Nothing To Approve Download


filter grid... Status Contains: ▼ 

Company	Name ▲	Employee ID	Plan Type	Plan	Coverage Type	Status
Ginger's Pet Care	Lynn, Kelli	220	Medical			Not Started
Ginger's Pet Care	Lynn, Kelli	220	Dental			Not Started
Ginger's Pet Care	Lynn, Kelli	220	Vision			Not Started
Ginger's Pet Care	Lynn, Kelli	220	Basic Life			Not Started
Ginger's Pet Care	Lynn, Kelli	220	HSA			Not Started
Ginger's Pet Care	Lynn, Kelli	220	Voluntary Life			Not Started


When the employee has completed and submitted their enrollment, their status will change to completed or completed (waived) but HR must approve their enrollment

From your HR Dashboard, Click on Monitor Open Enrollment

Monitor Open Enrollments

Which Open Enrollment? 
 New Hire ▼

Approve 6 Records Download

filter grid... Status Contains: ▼ 

Company	Name ▲	Employee ID	Plan Type	Plan	Coverage Type	Status
Ginger's Pet Care	Lynn, Kelli	220	Medical	2022 BC/BS	Employee Plus Children	Completed
Ginger's Pet Care	Lynn, Kelli	220	Dental	2022 Dental	Employee Plus Children	Completed
Ginger's Pet Care	Lynn, Kelli	220	Vision			Completed (Waived)
Ginger's Pet Care	Lynn, Kelli	220	Basic Life	Basic Life	Employee Only	Completed
Ginger's Pet Care	Lynn, Kelli	220	HSA	2022 HSA	Whole Family	Completed
Ginger's Pet Care	Lynn, Kelli	220	Voluntary Life	Employee Voluntary Life	Employee Plus Children	Completed

Click Approve (#) Records

You will see the message below



Starting update process...

*** Updating benefits. Please be patient. ***

Benefits updated.

Payroll deductions updated.

Update process completed.



When you review the Enrollment Dashboard again, you will see that the status shows as Updated or Updated (Waived)

Name	Employee ID	Plan Type	Plan	Coverage Type	Status
Lynn, Kelli	220	Medical	2022 BC/BS	Employee Plus Children	Updated
Lynn, Kelli	220	Dental	2022 Dental	Employee Plus Children	Updated
Lynn, Kelli	220	Vision			Updated (Waived)
Lynn, Kelli	220	Basic Life	Basic Life	Employee Only	Updated
Lynn, Kelli	220	HSA	2022 HSA	Whole Family	Updated
Lynn, Kelli	220	Voluntary Life	Employee Voluntary Life	Employee Plus Children	Updated

The enrollments will remain visible when you open the enrollment type for that year. You can use the filter option if you only want to see one employee