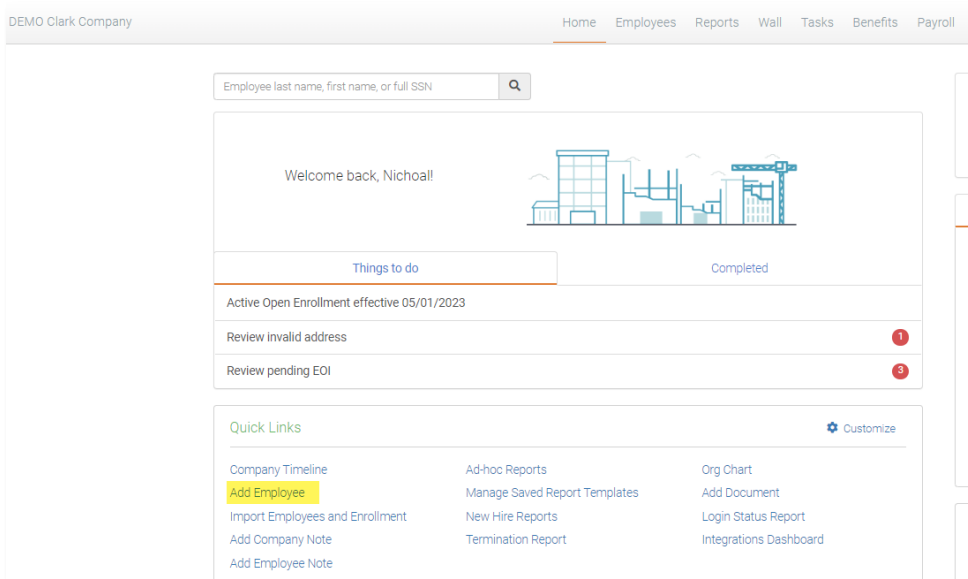




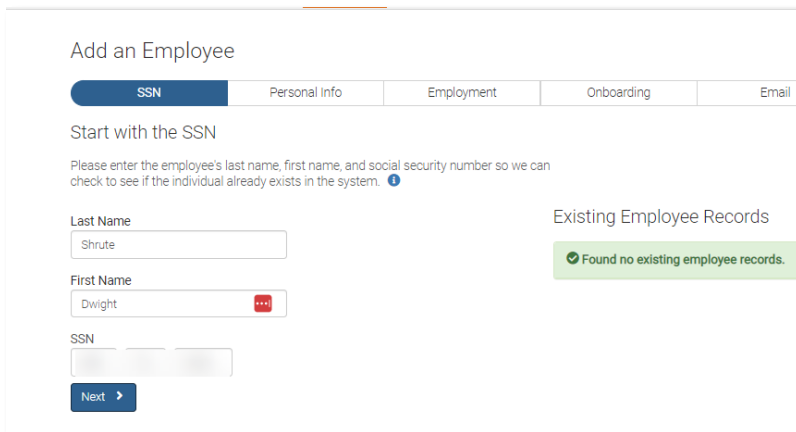
HOW TO PROCESS A NEW HIRE/REHIRE

Processing a New Hire:

1. Log in to Employee Navigator
2. Select **Add Employee** from Quick Links



3. Type in the employee's name and SSN



Note: The system will advise if the employee is already listed – if they are, please read further on for the rehire process



HOW TO PROCESS A NEW HIRE/REHIRE

Existing Employee Records

✖ Found existing SSN match record:

4. Add the employee's personal information

Add an Employee

SSN Personal Info Employment Onboarding

Then add the employee information

The following data is required to establish a new employee record

SSN [Redacted]

First Name

Middle Name

Last Name

Suffix

Sex Male Female

Gender Identity Male Female Non-Binary

Date of Birth

State of Residence

Payroll Work State

Work Email

Personal Email

Primary Email Type

5. Add the employee's employment information and click **Next**

Note:

- Please add the employee's salary to the **Annual Base Salary** field – do **not** enter any information in the Annual Benefit Salary field



HOW TO PROCESS A NEW HIRE/REHIRE

- If they have a working day waiting period, please enter their benefits effective date as the hire date

Then add the employee information

The following data is required to establish a new employee record

SSN 098-76-5432

Hire Date 04/03/2023

Job Title Assistant To The Regional Manager

Class Administrators (Associates)

Payroll Group Monthly

Manager

Salary fields

Pay Basis Salary

Hourly Rate

Hours Per Week 40.00

Annual Base Salary 6500.00

Annual Benefit Salary

ACA / Statutory Classifications

ACA Classification --Select--

Statutory Class --Select--

Is Seasonal Yes No

Division --Select--

6. Select Finish up

Add an Employee

SSN Personal Info Employment Onboarding Email Finish

Dwight Shrute has been added

You haven't set up any onboarding tasks yet.

Check out the Tasks tab when you're finished entering employees to turn on this feature!



HOW TO PROCESS A NEW HIRE/REHIRE

7. If your district is employee facing, you can send the employee a welcome email from Employee Navigator that will advise them to register and elect their benefits

Note: If you are **not** employee facing then select **No, not now** and then **Go to profile**

The screenshot shows a web interface for adding an employee. At the top, a progress bar indicates the current step is 'Email', with previous steps being 'SSN', 'Personal Info', 'Employment', 'Onboarding', and 'Finish'. The main heading is 'Add an Employee'. Below this, the question is 'Send Dwight Shrute a registration email?'. There is an 'Email:' dropdown menu with 'Shrute@dmcc.net' selected. Two buttons are visible: a green 'Send' button and a blue 'No, not now' button. Below this section, the heading is 'What do you want to do next?'. There are three options: 'Unlock Open Enrollment' (with a lock icon), 'Go to profile' (with a person icon and highlighted in yellow), and 'Add another employee' (with a refresh icon). Below these options, the word 'or' is displayed, followed by a blue 'Finished' button.



HOW TO PROCESS A NEW HIRE/REHIRE

- 8. Update the employee’s additional information, such as their employee ID, address and contact information
Demographic corrections:

Dwight Schrute [Add a note](#)

Employee Management **Profile** Update Benefits Benefits Summary Documents Timeline Integrations

Employee Record **Profile** Employment Leave Status Addresses Contact Compensation ACA Scheduled Changes Personal

Profile

Social security number [Save](#)

First name

Middle name

Last name

Suffix

Preferred name

Office

Employee ID:

Dwight Schrute [Add a note](#)

Employee Management **Profile** Update Benefits Benefits Summary Documents Timeline Integrations

Employee Record **Employment** Profile Leave Status Addresses Contact Compensation ACA Scheduled Changes Personal

Employment

Employee ID [Save](#)

Payroll ID

Statutory class

Time clock ID

Employment status

Hire date



HOW TO PROCESS A NEW HIRE/REHIRE

Address:

Employee Management | **Profile** | Update Benefits | Benefits Summary | Documents | Timeline | Integrations

Employee Record

- Profile
- Employment
- Leave Status
- Addresses**
- Contact
- Compensation
- ACA
- Scheduled Changes

Addresses

[Add Address +](#)

Home
Michigan

The address has not yet been validated.

[Edit](#) [Delete](#)

Note: Employee Navigator will verify the address to ensure its correct

Verify Address

Recommended

8721 Beet Hwy
Scranton, PA 18503
Lackawanna County

[Use this address](#)

City, state, and zip validated

Alternatives

Close and edit my address

[Back to edit](#)

8721 Beet Hwy
Scranton, PA 18503

[Keep entered address](#)

Dwight Schrute [Add a note](#)

Employee Management | **Profile** | Update Benefits | Benefits Summary | Documents

Employee Record

- Profile
- Employment
- Leave Status
- Addresses**
- Contact
- Compensation
- ACA
- Scheduled Changes

Addresses

[Add Address +](#)

Home
8721 Beet Hwy
Scranton Pennsylvania 18503
Lackawanna County

City, state, and zip code are valid.



HOW TO PROCESS A NEW HIRE/REHIRE

Phone Number/Personal Email:

The screenshot shows the 'Profile' tab for Dwight Schrute. The 'Contact' section is active, displaying the following fields:

- Email Addresses:**
 - Work Email: Shrute@dmpc.net
 - Personal Email: (empty)
 - Primary Email Type: Work
- Phones:** (empty)

Buttons for 'Save' and 'Add Phone +' are visible.

9. If your district is district facing, you have two options for adding the employee's dependents:
 - a. On the Dependents tab under Supplemental Info as displayed below
 - b. The dependent screen in the **new hire enrollment life event process**, featured in the [How to Make Benefit Elections on Behalf of the Employee](#) section further in this guide

Note: It is our recommendation to add the social security numbers for both the spouse and the dependents to facilitate proper enrollment in their medical, dental and vision carriers.



HOW TO PROCESS A NEW HIRE/REHIRE

Option A:

Dwight Schrute [Add a note](#)

[Employee Management](#) **Profile** [Update Benefits](#) [Benefits Summary](#)

Employee Record ▼

- Profile
- Employment
- Leave Status
- Addresses
- Contact
- Compensation
- ACA
- Scheduled Changes
- Personal

Supplemental Info ▼

→ Dependents

Dependents

[Add dependent +](#)

Dependent ×

First name *

Middle name

Last name

Suffix

Relationship

Sex Male Female

DOB

Age

SSN

Tobacco user Yes No

Fulltime college student Yes No

Disabled Yes No

Address

[Save](#) [Cancel](#)

Note: All required fields will be noted with a red asterisk – please mark disabled yes or no to ensure a disabled dependent will not automatically age off the policy incorrectly

SSN

Tobacco user Yes No

Fulltime college student Yes No

Disabled Yes No

Disabled start date

Address

[Save](#) [Cancel](#)



HOW TO PROCESS A NEW HIRE/REHIRE

How to Make Benefit Elections on Behalf of the Employee:

1. Select **New Hire Enrollment** from the Employee Management tab

Dwight Schrute [Add a note](#)

Employee Management Profile Update Benefits Benefits Summary Documents Timeline Integrations

Dwight Schrute ⓘ Status

Administrators (Associates)
Assistant To The Regional Manager
Shrute@dmpc.net

HRIS required fields complete
 EE-entered fields for enrollment complete
 Benefits required fields complete

Manage Enrollments

New Hire Enrollment HR has 11 days left to complete or make changes to new hire enrollment.
You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.

Modify Current Enrollments The employee has 0 days available to complete open enrollment. Employee's last day to enroll: 04/07/2023. [Unlock Open Enrollment](#) to extend the window.

Open Enrollment Employee is not eligible for any newly eligible benefits.

Newly Eligible Enrollment

Tasks

Incomplete	0
Complete	0
HR Pending	0

Actions ⓘ

- Terminate Employment
- Manage COBRA
- Unlock Open Enrollment
- Unlock New Hire Enrollment
- Set New Hire Complete

2. Review the employee’s personal information, then click **Save & Continue**

Personal Information

First Name ⓘ

Middle Name

Last Name

Suffix

Preferred Name

Sex Male Female

Gender Identity Male Female Non-Binary

Date of Birth

SSN

Tobacco User Yes No

Phone Number

Work Email Address

Personal Email Address

Primary Email Type ⓘ

Save & Continue

Progress: 1 of 10



HOW TO PROCESS A NEW HIRE/REHIRE

Address

8721 Beet Hwy
Scranton, PA 18503

Edit

Progress: 2 of 10

View steps >

Save & Continue

- 3. If you did not add the employee’s applicable dependents in their profile tab, you can add them here on step three of the new hire election process

Note: It is our recommendation to add the social security numbers for both the spouse and the dependents to facilitate proper enrollment in their medical, dental, and vision carriers

Dependent Information

Add dependent +

	Name	Sex	DOB	SSN	Relationship
Edit	Angela Schrute	F	03/01/1977	***-**-6789	Spouse

Progress: 3 of 10

View steps >

Save & Continue



HOW TO PROCESS A NEW HIRE/REHIRE

Edit Dependent

First Name: Phillip

Middle Name:

Last Name: Schrute

Suffix: --Select--

Relationship: --Select--

Sex: Male Female

Date of Birth: May 9, 2013

Age: 9

SSN:

Fulltime College Student: Yes No

Disabled:

Tobacco User: Yes No

Address: Home

Save Cancel

Dependent Information

Add dependent +

	Name	Sex	DOB	SSN	Relationship
Edit	Angela Schrute	F	03/01/1977		Spouse
Edit	Phillip Schrute	M	05/09/2013		Child

Save & Continue

4. For the benefit elections in the next steps, make sure to select the applicable dependents **and** the correct plan.



HOW TO PROCESS A NEW HIRE/REHIRE

Medical


Enrolling in Medical insurance can protect you from paying the full cost of medical services when you're injured or sick. Select a plan below to safeguard your financial security in the event of a health care emergency.

Progress: 4 of 10


Who am I enrolling?

- Myself
- Select All
- Angela Schrute (Spouse)
- Phillip Schrute (Child)

Which plan do I want?

	2022 Waived Medical Cash-in-Lieu Administrators Copy
\$0.00	Effective on 04/03/23
Cost per pay period	Employee + Family
<input type="button" value="Compare"/>	<input type="button" value="Details"/>
<input checked="" type="button" value="Selected"/>	

5. If the employee chooses to waive a benefit, scroll down to the bottom of the page and select **Don't want this benefit?**

	2023 PH POS HSA 80-60% \$1500 -3000
\$300.00	Effective on 04/03/23
Cost per pay period	Employee + Family
<input type="button" value="Compare"/>	<input type="button" value="Details"/>
<input type="button" value="Select"/>	



HOW TO PROCESS A NEW HIRE/REHIRE

6. If the employee elects voluntary life that requires an Evidence of Insurability form to be completed, the system will prompt you to complete the form

Health Questions Needed for 2023 Reliance Voluntary Life

Your requested benefit amount requires completing a set of health questions known as an Evidence of Insurability (EOI). Your HR or Benefits team will need to provide this form to you to complete.

⚠ Attention: Please reach out to your benefit administrator to receive your health question form

You have elected over the Guaranteed Issue amount for this plan.
Employee requested **\$250,000** but is only pre-approved for **\$100,000**
pending approval amount is **\$150,000**

Spouse requested **\$60,000** but is only pre-approved for **\$30,000** pending approval amount is **\$30,000**

Your designated beneficiary cannot receive the pending amount until this form has been submitted to, and approved by, the carrier.

[Continue](#)

7. Review the employee's elections and select **Click to Sign** to confirm they are complete and accurate

At this point it will send the benefit elections to SET SEG for processing. You will know that they have been submitted when you see a green Acknowledged and Submitted box at the top of the page.

Note: If a correction is needed, please see the next section



HOW TO PROCESS A NEW HIRE/REHIRE

Enrollment Summary Print

Below is a summary of your elections and cost for the upcoming plan year. If you have any questions about your enrollment or would like to make changes, please contact HR.

⚠️ Signature required
You've elected all your benefits, but we still require a signature before advancing.

Please review the acknowledgment below.

As an eligible employee, I acknowledge that I understand the benefits, rights, and obligations available to me under the plan. I certify the facts contained in this summary are true and complete to the best of my knowledge. I understand that deductions can be made on a pre-tax or post-tax basis. Furthermore, I understand that elections for plans that are deducted on a pre-tax basis cannot be changed during the plan year unless I experience a Qualified Life Event.

⚠️ Sign to complete enrollment Click to Sign

Progress: 9 of 10
View steps >

Enrollment Summary Print

Below is a summary of your elections and cost for the upcoming plan year. If you have any questions about your enrollment or would like to make changes, please contact HR.

✅ Acknowledged and Submitted

Almost Finished! The enrollment you just completed is for the current election period. Our company is currently in open enrollment. You **MUST** complete your open enrollment process before the election window closes on 4/7/2023.

If your district is employee facing, please reference the **Online Enrollment End User Guide** to see how a new hire will make their own online elections. Once your employees have completed their elections, you will need to approve them. When employees complete their benefits, their elections will await your review. You can review and approve them from the home screen here:

Welcome back [Name]

Things to do | Completed

Approve pending benefit enrollments 1



HOW TO PROCESS A NEW HIRE/REHIRE

Error Correction:

If upon reviewing an employee's benefits you discover an error, follow the steps below to correct it:

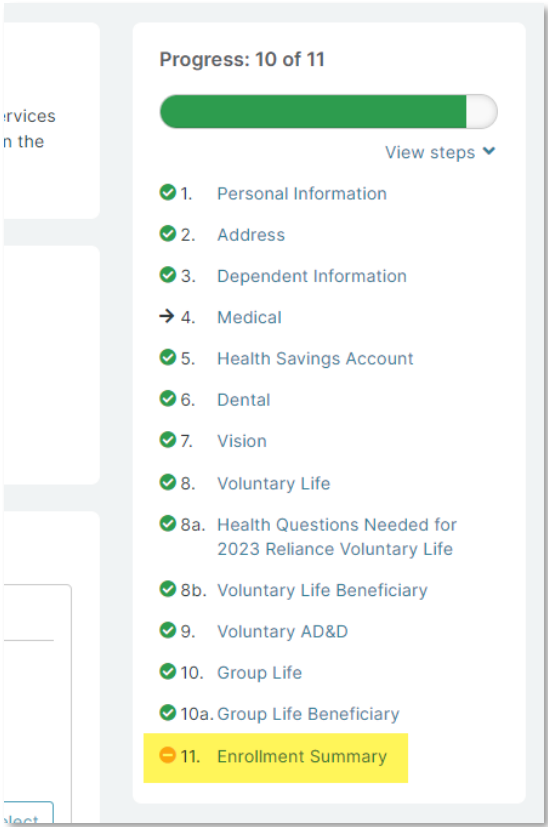
1. Click **View steps** on the progress bar

The screenshot shows a web interface for an enrollment summary. At the top left, it says "Enrollment Summary" with a "Print" button. Below this is a paragraph of text: "Below is a summary of your elections and cost for the upcoming plan year. If you have any questions about your enrollment or would like to make changes, please contact HR." A yellow warning box contains a triangle icon and the text "Signature required" followed by "You've elected all your benefits, but we still require a signature before advancing." Below this is a section titled "Please review the acknowledgment below." with a paragraph of text: "As an eligible employee, I acknowledge that I understand the benefits, rights, and obligations available to me under the plan. I certify the facts contained in this summary are true and complete to the best of my knowledge. I understand that deductions can be made on a pre-tax or post-tax basis. Furthermore, I understand that elections for plans that are deducted on a pre-tax basis cannot be changed during the plan year unless I experience a Qualified Life Event." At the bottom of this section is a yellow warning box with a triangle icon and the text "Sign to complete enrollment" next to a green "Click to Sign" button. On the right side of the page, there is a "Progress: 10 of 11" indicator with a green progress bar and a yellow "View steps >" button. At the bottom left, there is a section titled "Enrolled Plans".

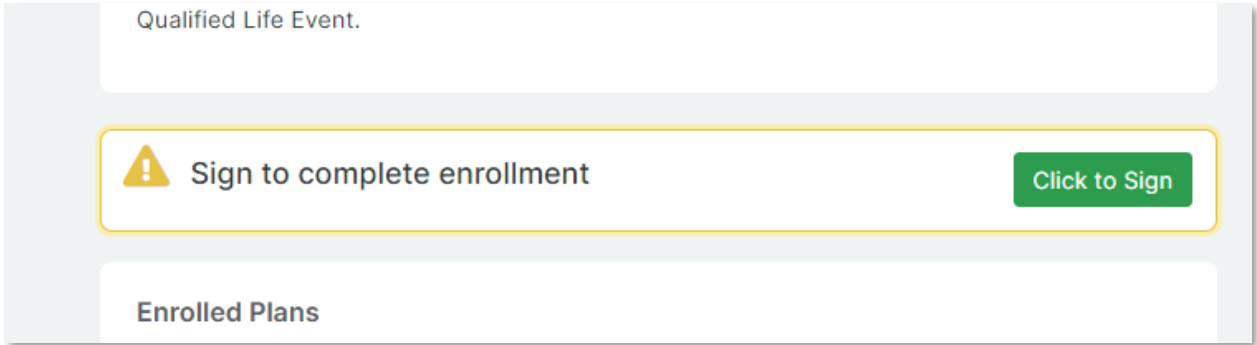
2. Click on the benefit that requires correcting
3. Make the desired change
4. Click **Enrollment Summary**



HOW TO PROCESS A NEW HIRE/REHIRE




5. If the benefits look correct, select **Click to Sign** to complete the employee’s benefits





HOW TO PROCESS A NEW HIRE/REHIRE

Enrollment Summary

 Print

Below is a summary of your elections and cost for the upcoming plan year. If you have any questions about your enrollment or would like to make changes, please contact HR.



Acknowledged and Submitted

Enrollment completed on Wednesday, May 10, 2023 11:23 AM



HOW TO PROCESS A NEW HIRE/REHIRE

How to Rehire an Employee:

1. Log in to Employee Navigator and search for the former employee's name
2. Select **Rehire** under Termination Actions

Dwight Schrute [Add a note](#)

Employee Management Profile Update Benefits Benefits Summary Documents Timeline Integrations

Dwight Schrute **Status**

- Administrators (Associates)
- Assistant To The Regional Manager
- Shrute@dmpc.net

Employee has been terminated.

Manage Enrollments

- New Hire Enrollment
- Modify Current Enrollments
- Open Enrollment
- Newly Eligible Enrollment

Tasks

- Incomplete 2
- Complete 0
- HR Pending 2

Termination Actions

- Rehire**
- Undo Termination
- Terminate Editor ^{5:13}

3. Add the employees rehire date and click **Next**

Rehire an Employee

Rehire Employee Personal Info Employment Onboarding Send an Email Finish

Dwight Schrute

* If you intend to change the termination date or reason then use the new [Terminate Editor](#) tool instead of rehiring and terminating.

Rehire Date

04/18/2023

Hire Date: 04/17/2023

Termination Date: 04/17/2023

Terminated On: 04/18/2023

Reason: Voluntary Termination

COBRA Status: Not On COBRA

Previous Benefits

- 2022 Waived Medical Cash-in-Lieu Administrators Copy
- 2023 Reliance Voluntary Life
- 2023 Reliance Group Life

Employee was recently terminated. Carriers may not have received notice to end benefit coverage. It will be your responsibility to check with your carriers to ensure the termination was processed or contact them directly with any needed information.

Next [Cancel rehire](#)



HOW TO PROCESS A NEW HIRE/REHIRE

4. Review the employee’s information to ensure it is still correct

Rehire an Employee

Rehire Employee | Personal Info | Employment | Onboarding

Dwight Schrute

If applicable, update any of the personal fields below for the employee. Changes to these fields may impact the employee's benefits.

SSN 098-76-5432

First Name Dwight

Middle Name K

Last Name Schrute

Suffix --Select--

Sex Male Female

Gender Identity Male Female Non-Binary

Date of Birth 09/01/1975

State of Residence Pennsylvania

Payroll Work State Michigan

Work Email Shrute@dmpc.net

Personal Email

Primary Email Type Work

[Back](#) [Next](#)



HOW TO PROCESS A NEW HIRE/REHIRE

5. Make any changes to position and salary on the Employment screen

Dwight Schrute

If applicable, update any of the employment fields below for the employee. Changes to these fields may impact the employee's eligibility

SSN	098-76-5432
Hire Date	<input type="text" value="04/18/2023"/>
Job Title	<input type="text" value="Assistant Regional Manager"/>
Class	<input type="text" value="Administrators (Associates)"/>
Payroll Group	<input type="text" value="Monthly"/>
Manager	<input type="text" value="type manager's last name"/> <input type="button" value="Q"/>

No manager

Salary fields ⓘ

Pay Basis	<input type="text" value="Salary"/>
Hourly Rate	<input type="text"/>
Hours Per Week	<input type="text" value="40.00"/>
Annual Base Salary	<input type="text" value="6500.00"/>
Annual Benefit Salary	<input type="text"/>

ACA / Statutory Classifications ⓘ

6. Finish up the employee's onboarding



HOW TO PROCESS A NEW HIRE/REHIRE

Note: If your district is employee facing, you can send the employee a welcome email from Employee Navigator that will advise them to register and elect their benefits – if you are not employee facing then select **No, not now** and then **Go to profile**

Rehire an Employee

Rehire Employee | Personal Info | Employment

Send Dwight Schrute a registration email?

Email:

Shrute@dmpc.net

Send No, not now

- 7. Once the employee’s rehire is complete, you can update their address by selecting **Go to profile** or going to their enrollment to complete benefit elections (see above steps)

Rehire an Employee

Rehire Employee | Personal Info | Employment | Onboarding | Send an Email | Finish Up

Dwight Schrute has been rehired

Open Enrollment Is Active!
The open enrollment window is from 04/07/2023 to 04/07/2023. This employee has 0 days to enroll as of today. If needed, you can extend the employee's open enrollment window by using the Unlock Open Enrollment tool.

What do you want to do next?

Unlock Open Enrollment | Go to profile | Go to enrollment | Go check COBRA records

or

Finished