How to Enroll into Health Benefits via Employee Self Service: Open Enrollment 2017

Employee Self Service (ESS):
Online Benefits Open Enrollment allows fast and convenient processing of your Benefits Enrollment elections through Employee Self Service (ESS). ESS is an online module within PeopleSoft where employees have access to view and update their personal information, including their Health Benefits elections. You can jump to different sections by selecting the different links. If you are looking at this job aid for this first time it is recommended that you view all sections.

Supporting Documentation will be required for any modification and/or addition of Dependent Information.

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1. After successfully authenticating and logging into PeopleSoft, your Home page displays as shown below.
Navigating to the Benefits Screen

1. Click on the Open Enrollment tile.
Reviewing Your Qualifying Event and Event Date

**Event Description** → This is your Qualifying Event
*Clicking the blue “i” button will give you a brief description of the Qualifying Event*

**Event Date** → This is the date your new Benefits Coverage will take effect

**Event Status** → Only Events in an Open or Submitted Status can be edited

**Job Title** → This is your current Corporate Title which determines your eligibility

1. Click the “Select” button to continue.
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Reviewing Your Current Health Coverage and Costs

Here, you are able to do the following:

- Edit your Health Plan Elections
- View your Current and potential New Medical Plan(s)

1. Click the “Edit” button to change your Medical coverage or Add/Drop Dependents.
Reviewing Health Plan Options and Selecting a Plan

This page allows you to view all of the Plans that you are currently eligible for with their corresponding costs per Pay-Period. In addition, you can use the following tools:

- **Overview of All Plans** → Gives you a shorter list of all eligible plans and their Costs
- **Costs** → Both Employee Only and Family Costs

1. Select the plan in which you would like to enroll, by clicking the circle next to the plan name. If you have dependents, continue to the **ADDING DEPENDENTS** section.

If you do not have dependents, click the "**Update Elections**" button.
Adding Dependents

1. Click the “Add/Review Dependents” button to add your dependent(s).

![Add/Review Dependents](image)

2. Click the “Add a dependent or beneficiary” button to add your dependent(s) personal information.

![Add a dependent or beneficiary](image)
Adding Dependents (Cont.)

3. Enter the required fields and click the **Save** button:

4. You will get the following Save Confirmation. Click the **OK** button.
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Adding Dependents (Cont.)

5. This will take you back to the dependents information page. Click on back button **W3eb Depben Rvw** then again on **W3eb Enr 1x Elect**.
Covering Dependents

1. Scroll down to Enroll Your Dependents on this page and check the Enroll box next to all the dependents that you want to cover. This allows you to add dependents for Health Coverage purposes ONLY. This has no impact on your Tax withholding.

**REMEMBER**, only dependents with the “Enroll” checkbox checked next to their name as shown above will be covered! If you are covering a domestic partner, **DO NOT CHECK THEM OFF IN THIS STEP.** They are to be added to your policy in a different section of the module. *(Note: Domestic Partners will be taxed differently, if you are adding a domestic partner please refer to page 18.)* Additionally, if adding domestic partners to plan, a modified election process will be performed.

**REMEMBER**, Supporting Documentation will be required for all modifications and additions of Dependents. Please see the [Submit Supporting Documentation](#) section for more information!
Covering Dependents (Cont.)

2. Click the “Update Elections” button when you have completed both your Health Coverage Elections AND reviewed your dependents.

3. Click the “Update Elections” button to store your choices.
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Reviewing Your Future Plan and Cost

1. You will be prompted to review your Current Plan and Costs against your New Plan and Costs. After reviewing click on Submit.

Employee Certification

1. You will be required to confirm that you read New York City's Employee Certification in order to enroll in Health Benefits. After reviewing click on Submit.
Submission Confirmation

This is the confirmation page you will receive once your changes have been submitted.

**REMEMBER**, Supporting Documentation is required for any changes involving dependents!

**REMEMBER**, check your Outlook email in order to make sure your changes have been approved by HRSS/Benefits. If there are any problems, HRSS/Benefits will contact you via email. If you fail to respond, your requests will **NOT** be processed.

1. Click on the “**Add Benefit Supporting Documentation**” link to begin submitting Supporting Documentation for your new dependent.
Submitting Supporting Documentation

1. Click on the “Dependent Supporting Documentation” or “Domestic Partner Supporting Documents” link to begin submitting Supporting Documentation for your new dependent(s).

Please note: Whenever adding or modifying a dependent it is required to submit necessary supporting documentation to HRSS/Benefits.

2. This will take you to the Form tab. Answer the question on this page and add any additional information in the More Information box. Click the Save button. Proceed to the Instructions tab.
Submitting Supporting Documentation (Cont.)

The **Instructions** tab will explain which supporting documents are acceptable.

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### Dependent Documentation Form

If you have not added your Domestic Partner to your Health Plan in eBenefits, please navigate to Main Menu > Self Service > Benefits > Benefits Enrollment, to update your Coverage and then submit applicable forms:

1. **Please go to the Attachments tab and attach the necessary documentation (see below for details).**
2. **Review the document “Instructions for the Addition of Domestic Partners to City Health Plan Coverage” located on the Attachments tab.**
3. **Complete and attach a Health Benefits Application on the Attachments tab.** This form can be viewed in a new window when clicking the Open link and then printed.
4. Please provide a Domestic Partner Affidavit Certificate; for partnerships of more than one year, also provide proof of joint ownership or proof of cohabitation. 
   a. For a complete list of required documentation, please go to the Attachments tab and click on the Open link for the New Documentation Requirements.
5. **Click on the Attach button on the Attachments tab to submit a scanned copy of the certificate and any additional documentation.**
6. **After attaching all required documents on the Attachments tab, return to the Form tab and click Submit.**

For instructions on how to scan and upload documentation, please read the How to guide on the ESS website: [http://ess.nychealth.org](http://ess.nychealth.org)

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3. **After you have read the instructions, select the Attachments tab.** Click the **Open** links to view and/or print the different blank forms. Complete these form(s) with the appropriate information, if applicable. Then scan any supporting documents and attach the electronic documents by clicking the **Attach** button. You can add additional attachments by selecting the + button and delete them by selecting the – button.
Submitting Supporting Documentation (Cont.)

4. The File Attachment pop up appears. Click the **Browse**... button to search for your document.

   ![File Attachment screenshot]

   After finding your document, click the **Upload** pushbutton to upload your document. [Click the **Cancel** pushbutton to cancel].

5. After you have attached all files, go back to the **Form** tab. Click the **Submit** button at the bottom for your Form to be sent to HRSS/Benefits for review.

   ![Form tab screenshot]
Submitting Supporting Documentation (Cont.)

6. The following screen will appear that shows the status as Pending. Click the OK button at the bottom.

Your documentation will now be reviewed by HRSS Benefits. You will receive an email notifying you of any updates to the status of your supporting documentation.
If Adding a Domestic Partner

1. When on your Health Benefits Enrollment page click on the second **EDIT** button to add the domestic partner to insurance.

**Domestic partners health care policy must match the employee plan. If you wish to change to another plan, you must make the change on the primary insurance record under the top edit button.**
If Adding a Domestic Partner (Cont.)

2. Click Update Elections to submit Domestic Partner information for coverage.

3. Review your choices and click Update Elections.
4. Click the “Submit” button to continue.
If Adding a Domestic Partner (Cont.)

5. You will be required to confirm that you read New York City’s Employee Certification in order to enroll in Health Benefits.
If Adding a Domestic Partner (Cont.)

This is the confirmation page you will receive once your changes have been submitted.

**REMEMBER**, Supporting Documentation is required for any changes involving dependents!

**REMEMBER**, check your Outlook email in order to make sure your changes have been approved by HRSS/Benefits. If there are any problems, HRSS/Benefits will contact you via email. If you fail to respond, your requests will **NOT** be processed.

6. Click on the “**Add Benefit Supporting Documentation**” link to begin submitting Supporting Documentation for your new dependent.
Submitting Supporting Documentation for DP

1. Click on the “Dependent Supporting Documentation” or “Domestic Partner Supporting Documents” link to begin submitting Supporting Documentation for your new dependent.

![Image of documentation selection]

What type of documentation do you wish to submit?

- Buyout Waiver Supporting Documents
- Dependent Supporting Documentation
- Domestic Partner Supporting Documentation

Please note: Whenever adding or modifying a dependent it is required to submit necessary supporting documentation to HRSS/Benefits.

2. This will take you to the **Form** tab. Answer the question on this page and add any additional information in the **More Information** box. Click the **Save** button. Proceed to the **Instructions** tab.

![Image of domestic partner form]
Submitting Supporting Documentation for DP (Cont.)

The **Instructions** tab will explain which supporting documents are acceptable.

3. After you have read the instructions, select the **Attachments** tab. Click the **Open** links to view and/or print the different blank forms. Complete these form(s) with the appropriate information, if applicable. Then scan any supporting documents and attach the electronic documents by clicking the **Attach** button. You can add additional attachments by selecting the + button and delete them by selecting the – button.
Submitting Supporting Documentation for DP (Cont.)

4. The File Attachment pop up appears. Click the **Browse**... button to search for your document.

After finding your document, click the **Upload** pushbutton to upload your document. [Click the **Cancel** pushbutton to cancel].

5. After you have attached all files, go back to the **Form** tab. Click the **Submit** button at the bottom for your Form to be sent to HRSS/Benefits for review.
Submitting Supporting Documentation for DP (Cont.)

6. The following screen will appear that shows the status as Pending. Click the OK button at the bottom.

![Image of Domestic Partner Form with status pending]

Your documentation will now be reviewed by HRSS/Benefits. You will receive an email notifying you of any updates to the status of your supporting documentation.

If you have any questions about your elections you can contact HRSS/Benefits by phone at (646) 458-5634 or by email at HHCBenefits@nychhc.org.