




# Step by Step Enrollment Guide

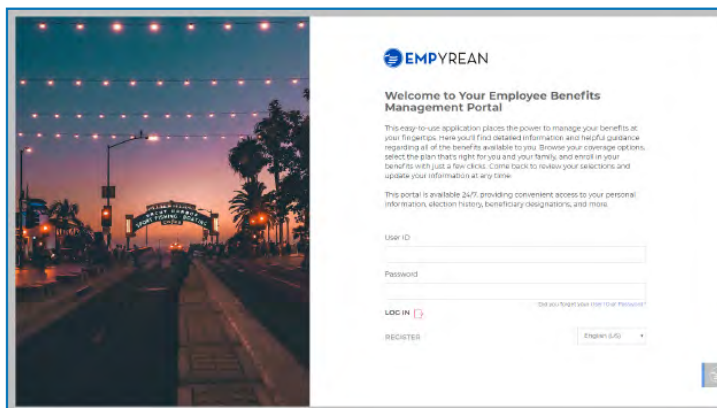
This guide explains our online benefits enrollment tool. Use it to reference key steps that maximize and lock in your benefits.



# Start by Registering Your User Account

## - Direct Access

*For Employees of UNC Press Only all other Employees, go to page3*



1. Visit your enrollment site to create your user ID and password.
  2. Click on **REGISTER**.
  3. Enter your
    - First, Last Name (as filed with employer),
    - Date of Birth
    - Employee ID
- CLICK **NEXT** WHEN FINISHED —
4. Add a new User ID (work email address, for example).
  5. Create a new password with at least:
    - eight characters
    - one letter
    - one number
    - one symbol (i.e., \* & + # \$)
  6. Set a security question and answer (at least six characters), in case you forget your password.
- CLICK **NEXT** WHEN FINISHED —
7. Read the terms of use agreement. To continue enrolling, click **I AGREE** at the bottom of the page.

### NOTE

**You only register once.** Return and log in with your user ID and password. Our system recognizes you.

### HAVE THE FOLLOWING INFORMATION HANDY

Provide eligible dependents' and beneficiaries':

- Full names
- Dates of birth
- Social security numbers

### NOTE

Your Plan may require you to provide documents to verify your dependents before they can be covered.

### NOTE

Your Plan may require you to complete an Evidence of Insurability (EOI) during the enrollment process

**Your registration is complete.**  
**Please go to 'Get Ready to Enroll for Your Benefits' on page 4.**

# Single Sign On - *No registration required*

*For all Employees, except for  
Employees of UNC Press*

1. Visit your enrollment site and follow the login instructions.
2. Click to access. Read the terms of use agreement. To continue enrolling, click *AGREE* at the bottom of the page.

#### HAVE THE FOLLOWING INFORMATION HANDY

Provide eligible dependents' and beneficiaries':

- Full names
- Dates of birth
- Social security numbers

#### NOTE

Your Plan may require you to provide documents to verify your dependents before they can be covered.

#### NOTE

Your Plan may require you to complete an Evidence of Insurability (EOI) during the enrollment process

Please go to 'Get Ready to Enroll for Your Benefits' on page 4.

# Get Ready to Enroll for Your Benefits.

## LAUNCH YOUR ENROLLMENT

When you log in you'll see a pending event screen (i.e. open enrollment or new hire event). (figure 1)

Click on Continue,

Begin on *My Information* step of the enrollment flow.

Follow the prompts in each step.

An indicator shows your progress per step.

**MY INFORMATION STEP** – Personal information (figure 2)

1.1 Review your information (automatically populated).

1.2 Click the *EDIT* button to make changes.

—— Click *I'M DONE REVIEWING MY INFORMATION* when finished ——

## USER TIPS

Your progress is saved when you click to continue to the next screen in the flow. You can log in later to finish your enrollment.

Click *BACK TO PREVIOUS PAGE* to review elections or make changes.

**Make sure to finish your enrollment.**

Elections are **NOT** recorded in the system **UNTIL** you save and accept them and get confirmation. (figure 10)

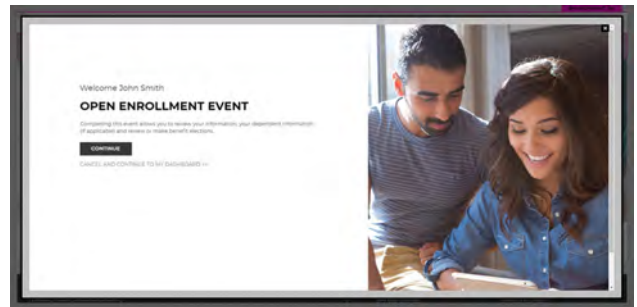


figure 1

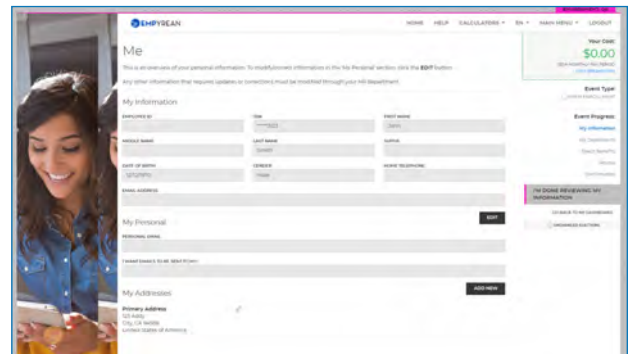


figure 2

# Continue Your Enrollment

## MY DEPENDENTS STEP - My family (figure 3)

- 2.1 To add Spouse and/or Child(ren), Click **ADD NEW**.
- 2.2 Click the *pencil icon* to make changes.

— CLICK **I'M DONE WITH DEPENDENTS** WHEN FINISHED —

### NOTE

If proof of a dependent's relationship to you is required, **PENDING** appears in the *Verification Status* column.

## SELECT BENEFITS STEP - Select your benefits plans (figure 4)

- 3.1 Review high level benefit details on the tile (Plan Selected, Cost Per Pay Period, etc.)

### To make a change...

- 3.2 Select **CHANGE** on the Life Insurance benefit tile.
- 3.3 Select the plan you want. (figure 5)

— CLICK **I'M DONE WITH MY SELECTION** WHEN FINISHED —

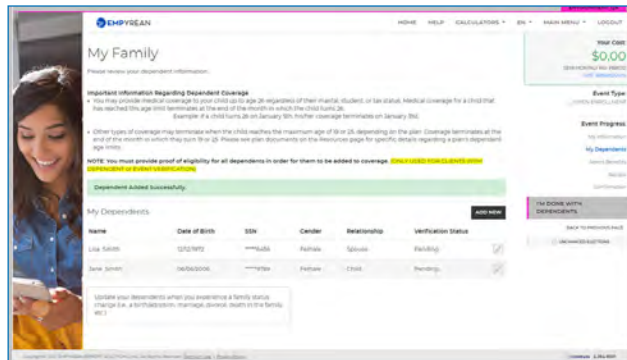


figure 3

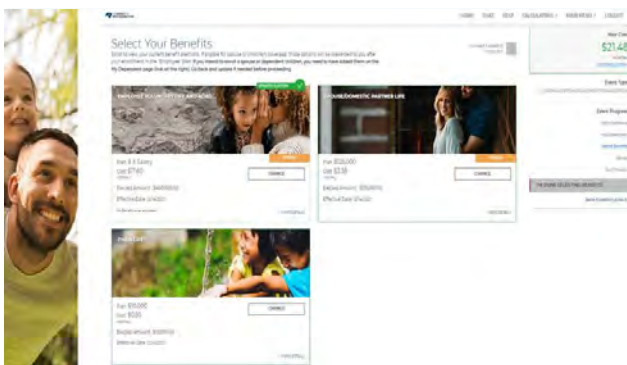


figure 4

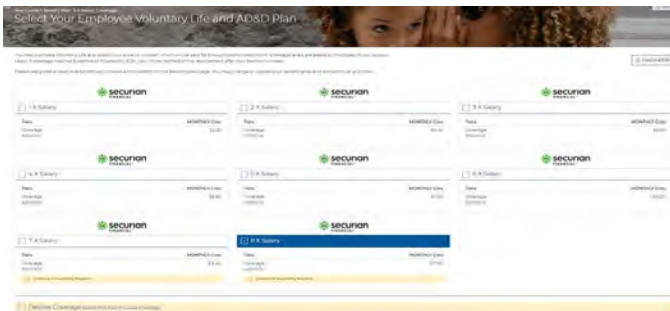


figure 5

**SELECT BENEFITS STEP** — Review your beneficiaries (figure 6)

3.4 If everything on this page is correct, click "I'm ready to proceed"

3.5 If updates are needed, click to 'Add New Beneficiary' and follow the prompts.

— CLICK *I'M READY TO PROCEED* WHEN FINISHED —

**SELECT BENEFITS STEP** — Continue reviewing benefits (figure 6a) 3.7  
Click Save My Election once you have reviewed the chosen coverage.

— CLICK *I'M DONE SELECTING BENEFITS* (figure 6b) WHEN FINISHED —

**NOTE**

Elections screens vary per benefit (i.e., life vs. spouse life).

**NOTE**

To learn more about a benefit, click *MORE DETAILS* in the lower right corner of the associated benefit tile.

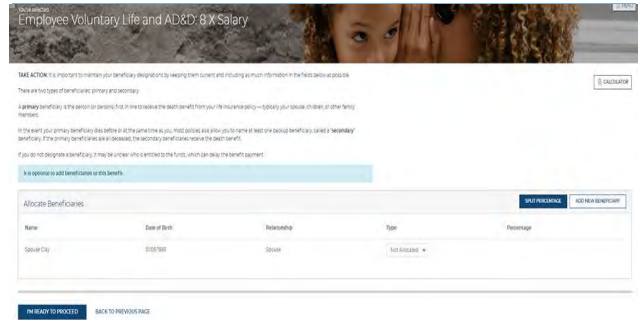


figure 6



figure 6a

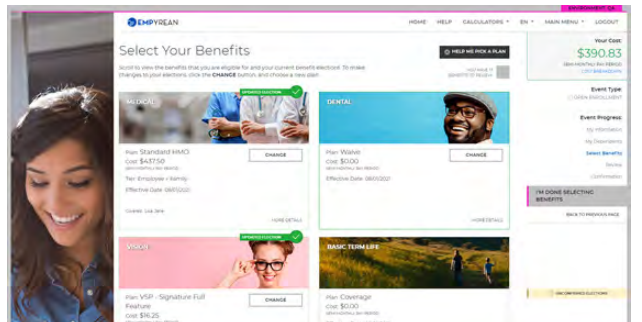


figure 6b

**EVENT REVIEW STEP** — Review Beneficiary Allocation (figure 7)

- 4.1 Review, update or change designated beneficiaries.
- 4.2 Click **ADD NEW BENEFICIARY** to add one.
  - a. Click on the *pencil icon* to edit data.
  - b. To delete a beneficiary, click on the *X icon*.
  - c. Click on **CHANGE ALLOCATION** to change allocations.

— CLICK **I'M DONE WITH BENEFICIARIES** WHEN FINISHED —

**NOTE**

A red warning sign / flag and message appears if:

- A (required) beneficiary is not designated;
- You didn't allocate a portion to each beneficiary;
- Less than 100% is allocated to primary beneficiary/ies.
- Follow message prompts.

**EVENT REVIEW STEP** — Evidence of Insurability (EOI) (figure 8)

If applicable, complete/provide EOI.

— CLICK **I'M READY TO FINALIZE MY ELECTIONS** WHEN FINISHED —

**NOTE**

A warning sign and message box will indicate pending actions. Follow message prompts to fulfill them.

If you continue enrolling without completing the pending actions, certain coverage may not fully apply until they are met.

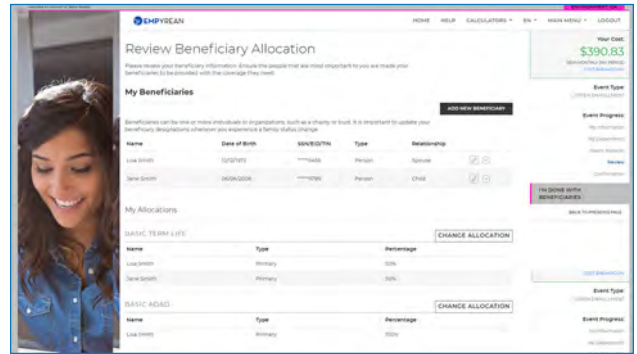


figure 7

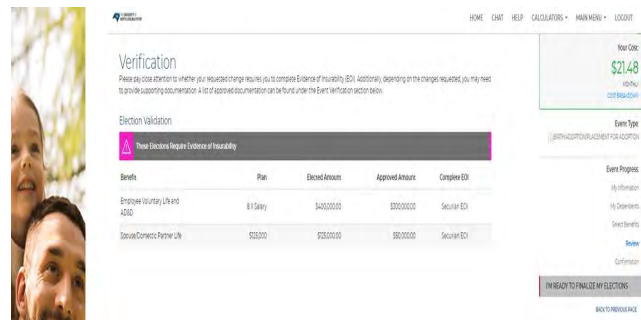


figure 8

**EVENT REVIEW STEP** — Final Review (figure 9)

- 6.1 Carefully review cost summary, benefit elections, and dependent data for accuracy.
- 6.2 Click the *pencil icon* to make changes.

— CLICK *SUBMIT MY ELECTIONS* WHEN FINISHED —

**One last pop-up message appears...**

- 6.3 To continue reviewing or updating click on *DENY* or  
To confirm your enrollment click *ACCEPT*.

**NOTE**

When you click *ACCEPT*, updates are recorded into the system and ready to go into effect when the event closes(i.e. events may be new hire, QLE or annual enrollment).

If you do not click *ACCEPT*, pending updates will not take effect

**CONFIRMATION STEP** — Confirmation (figure 10)

- 7.1 Review the final confirmation summary and use the confirmation number for future reference.

**NOTE**

Total costs will not match approved costs in the first four columns if:

- A part of additional life insurance is pending EOI,

- 7.2 To print for your records, click *PRINT*,  
or  
To print later, login and click *Benefits History* from the *Home page*.

— LOG OUT WHEN FINISHED —

Return to manage your benefits whenever you need.  
See page 9 for more information.



figure 9

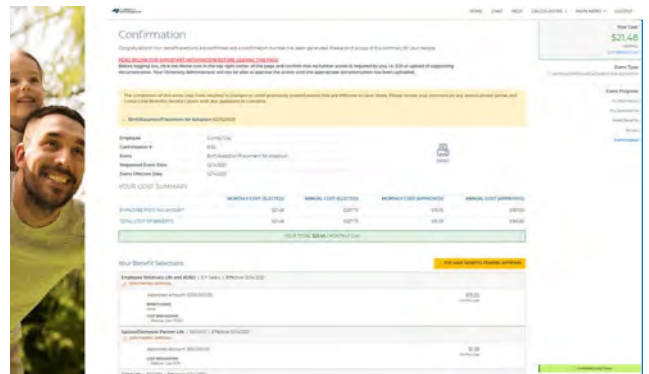


figure 10

**Congratulations! You're enrolled.**



# Have you experienced a Qualifying Life Event - start here!

## MANAGE MY BENEFITS

This includes creating a qualified life event to add/drop dependents or make benefit changes.

You can do this by clicking [CHANGE YOUR CURRENT BENEFITS](#) from the Home page. (figure 11)

## CREATE LIFE EVENT — Select Life Event Type (figure 12)

- 6.1 Review the life options available and click the appropriate radio button.

—— CLICK [SAVE AND CONTINUE](#) WHEN FINISHED ——

## CREATE LIFE EVENT — Select Date Life Event Occurred (figure 13)

- 7.1 Enter in the date the life event occurred.

### NOTE

Some changes may force you to use the current date as the date of the change.

See page 4 for more information on the workflow. Some pages/steps may not apply based on the selected life event type.

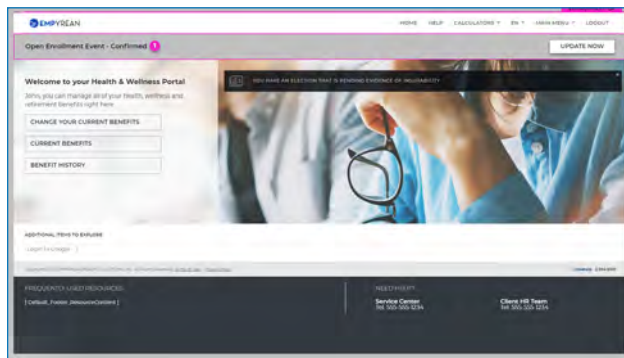


figure 11

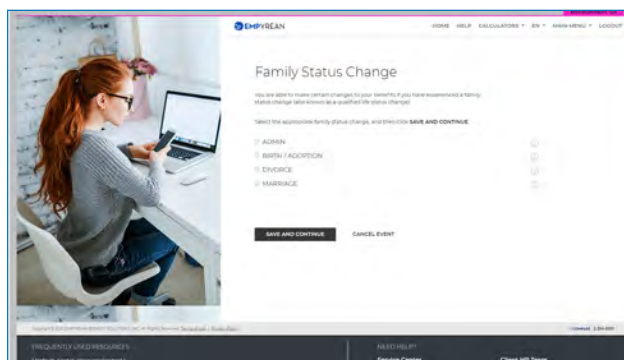


figure 12

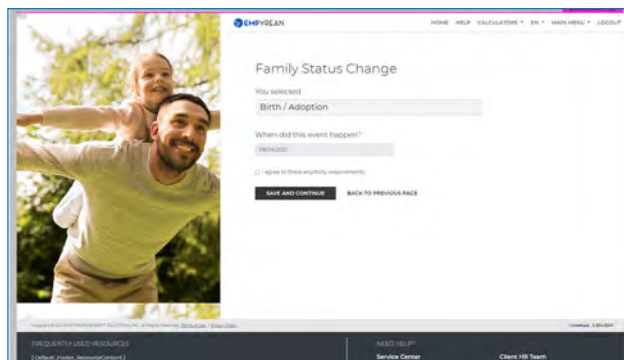


figure 13

## Congratulations! You've updated your benefits.