



2024

Benefits Admin Guide



Camptra Technologies
1309 W 15th Street
Suite 240
Plano, TX 75075



info@camptratech.com

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Camptra Technologies

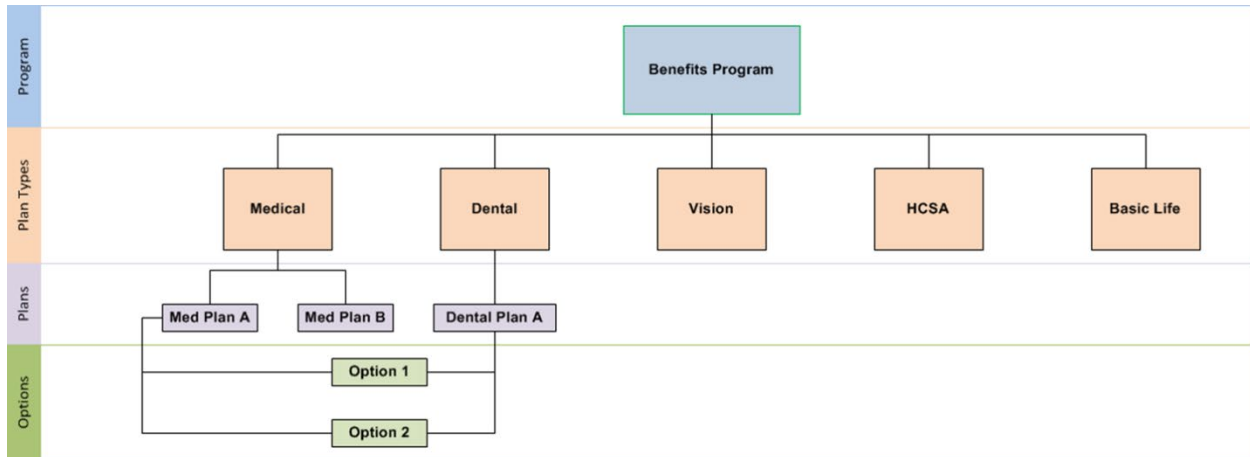
1/1/2024

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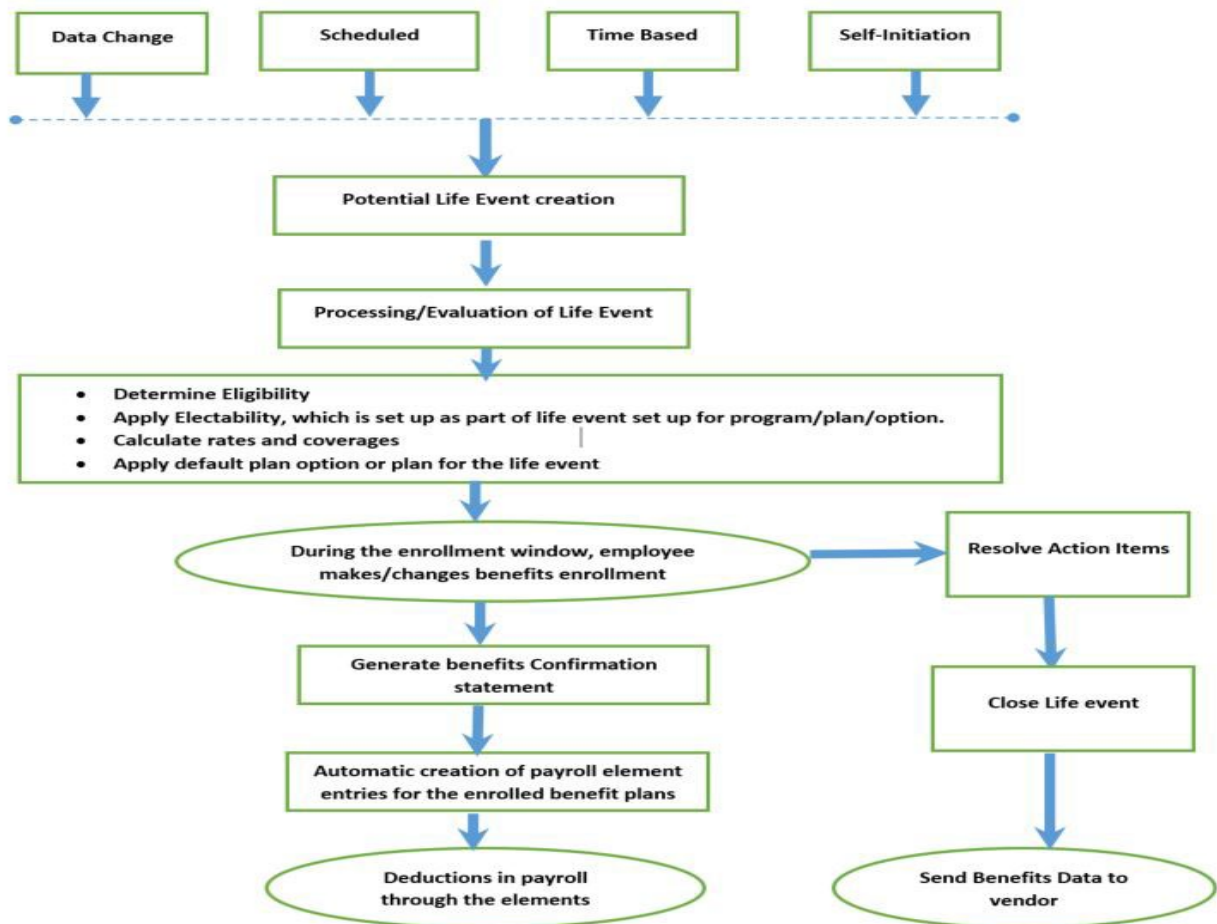
Overall Process Flow

Before we begin with the training content, it's important to understand the overall process flow of information in Oracle Cloud for the Benefits module.

Here is the Oracle Cloud Benefits Structure:



Here is the Oracle Cloud Benefits Flow:



Glossary of Terms

Below we have included a list of common terms associated to the Benefits module. Please review the terms below to familiarize yourself with the Oracle Cloud terms used throughout this guide.

Benefit Program

- ✦ A program is a grouping of benefits plans defined, Example: Active Program, Retiree Program, etc.

Plan Types

- ✦ Plan types is a group benefit plans according to the type of benefit provided. Example: Medical, Dental, Life Insurance etc.

Plan

- ✦ A plan is the benefit offering. Generally, insurance providers handle the claims. Example: Delta, CEC Vision.

Option

- ✦ An electable choice within a plan, Example: Employee only, Employee + Spouse.

Life Event

- ✦ A change in an employee's coverage status such as birth, marriage, etc.

Eligibility

- ✦ Eligibility is determined by a list of criteria that a Employee has to satisfy to be able to enroll in a benefit program, plan and option, and maintain the enrollment. It may be related to a person's personal information, employment, age, enrollments, other complex calculations. For example: Employee needs to be full time to be eligible for a particular benefit program or plan(s).
- ✦ Eligibility is also used to determine the rate for a particular group of employees or dependents. For example: A part time Employee's medical cost is higher than a full time Employee's medical cost.
- ✦ Eligibility criteria may apply to dependents as well. For example: Only Relationship of Spouse or Child is eligible, Child should be less than 26 years age.

Eligibility Profile

- ✦ Eligibility profile can be attached at program, plan, and option level. Program level being the highest level followed by the plan and the option level. Eligibility profile attached at the lower levels augments the eligibility profile added at the higher levels.

Benefits Life Event

- ✦ A Life Event is a change in a person's life that would result in a change to his/her benefits eligibility, enrollment, or contribution rate. Example: Marriage, Birth of a Child, Promotion, Transfer.
- ✦ Types of life events available in Oracle Cloud:

- Explicit: Life events that gets created either automatically due to employee's data change with respect to work or if an employee creates self-initiated life events.
 - Example: New Hire, Employee Status Change, Transfer, Promotion, Termination.
- Temporal: Life events that are predefined and occurs with the passage of time.
 - Example: Age Change, Dependent Age Out.
- Scheduled: Life events which are assigned to the eligible employees to provide them an enrollment opportunity.
 - Example: Open enrollment.
- Unrestricted: Life events which are not time dependent. Employees can modify their elections at any point of time.
 - Example: Savings Plan enrollment.

Benefit Group

- ◆ Benefit group is a benefit object that is created to identify a specific group of Employees. This is primarily used to tag Employees for eligibility purposes.
 - For example: A group of 50 Employees who were hired before 1971 were eligible for a plan which is frozen now. In that case, these 50 Employees can be assigned a benefits group 'Grandfathered group'. In parallel, eligibility for the frozen plan can be configured to allow only 'Grandfathered group' benefits group Employees to be eligible for this plan.

Benefits Balances

- ◆ Benefit balance is a benefit object that is created to hold values such as monetary amount, hours worked etc., that are used in Employee's benefits processing.
 - For example: Benefits balance 'LiveWELL incentive' can be created to hold the amount of monetary reward which an employee gains after completing certain health tests. This amount, in turn, will be used to determine how much more can an Employee contribute towards HSA plan during the plan year.

Benefit Action Items & Certifications

- ◆ Certain benefit offerings require Employees to submit certifications to enroll or change the benefit elections. In Oracle cloud terminology, requirement to produce certificate for one or more plan offering is known as 'Action Items'. Employees can view the action items which requires their attention in 'Pending Actions' in their benefits self-service page.

For example:

- Employee needs to provide marriage certificate to cover spouse into the benefits coverage.
- ✦ Employee needs to provide proof of good health to enroll in Life insurance plan above certain coverage or to increase coverage levels.
- ✦ Enrollment in the benefit plans can be configured to be suspended until the certification is received. The suspension can also be configured to be optional. Typically, life insurance amount certification, which requires 'Evidence of Insurability', is always set up to suspend until the elected amount is approved.
- ✦ Employees should be assigned an interim coverage until certification is received and new coverage becomes effective. No further life event processing can take place for the Employee while enrollment is suspended.

Benefit Rates

- ✦ Rates define employee's cost and/or employer's cost for a benefit offering. The employee's cost can be defined as pre-tax, after-tax, and imputed income such as Domestic Partner rates.

Examples:

- LiveWELL Medical Employee + Spouse: EE Cost = \$200/month, ABC Health Cost = \$600/month
- Basic Life Insurance \$200K: Employee Cost = \$0 ABC Health Cost = \$2/month
- Supplemental Life Insurance 1X Salary: Employee's cost is based on age.
- Under 35 yrs. \$0.048/month, Age 35 -39 \$0.030/month per \$1k coverage, etc. ER Cost = \$0

Benefit Coverages

- ✦ Coverages define the level of benefits coverage a participant receives under plans.
 - \$200,000 for Basic Life Insurance \$200K benefit
 - \$120,000 for Supplemental Life Insurance 2X Salary benefit where Employee's salary is \$60K

Variable Rates and Variable Coverages

- ✦ In Oracle Cloud, rates and coverages can be flat amounts or derived based on certain criteria. Flat amounts could be rates for plans like dental. For rates that are derived, variable rate profiles are used. Likewise for coverages that are derived, variable coverage profiles are used. However, variable rates are tied to standard rates. Every plan option has a standard rate attached to it which specifies the final rate for that plan option.
 - Example of variable rate: Employee's optional life insurance rate is based on the coverage amount and the age of the employee. The coverage amount for an employee is \$15,000 and the employee is 28 years old. For the age

group 25-29, the biweekly cost will have a factor of 0.017210. Therefore, the biweekly rate will be: $(15000 * 0.017210)/1000 = 0.25$.

- Example of variable coverage: Employee's basic life coverage reduces to 75% at the age of 65. Suppose the basic life insurance coverage for an employee is set to the 2X annual salary and that equals \$350000. When the employee reaches the age 65, the coverage drops to \$262500. This drop of coverage is applicable only for employees who are 65 or older. This is controlled by the variable coverage profile.
- ✦ This varying of rate/ coverage based on age is controlled by the variable rate profile/variable coverage profile respectively which in turn has an eligibility profile with the required age criteria.

Integration with Payroll

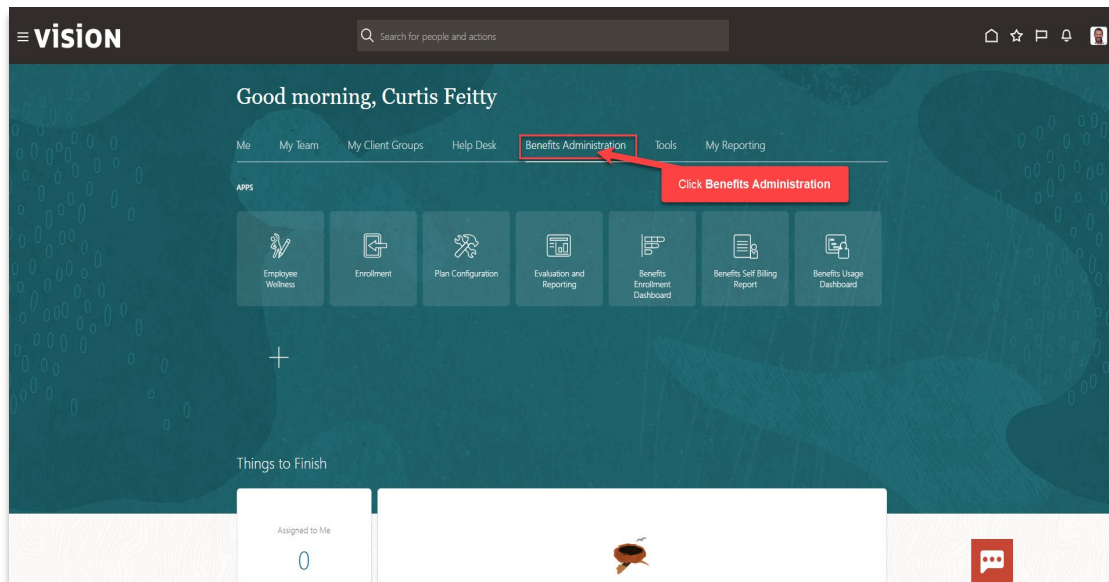
- ✦ Every plan which incurs a deduction in paycheck must have a payroll element associated with it. This attachment is done through the rates associated with the plans.
- ✦ Rates associated with every benefit plan options or plans are directly tied to specific payroll elements. When an employee submits enrollment, then element entries get created for every plan they elect with an effective start date, which is the date when the plan rate is effective.
- ✦ Likewise, when the rates end (For example during termination), there is an end date passed to the element entries.
- ✦ When payroll is run for employees, these elements are processed and there are deductions incurred for the enrolled plans.

Day to Day Operations Guide

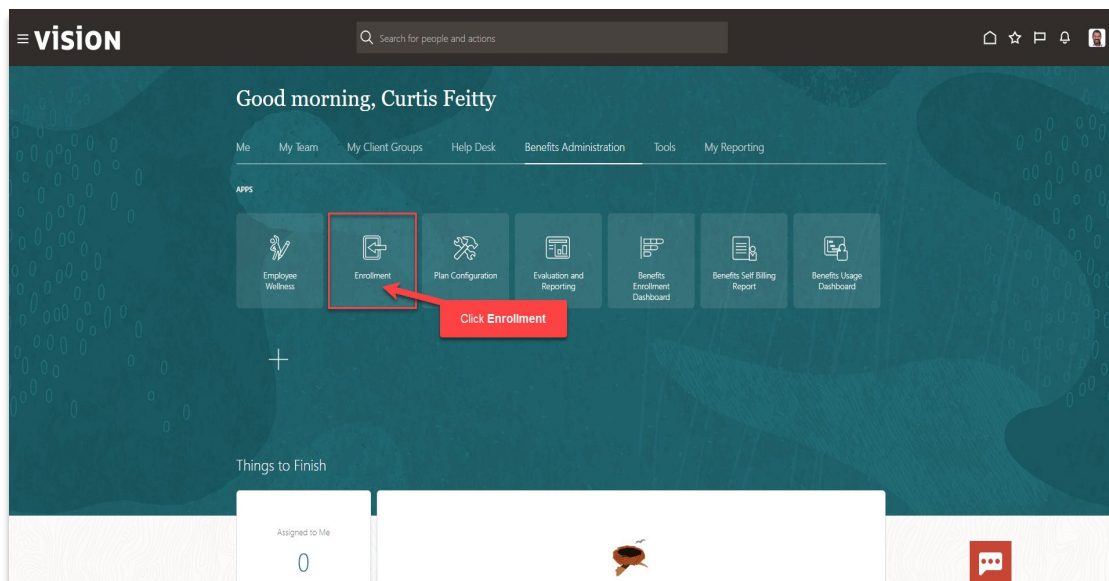
Search For An Employee (Active, Future Hire, or Terminated Employee)

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Advanced Search>Show Filters>Search Employee

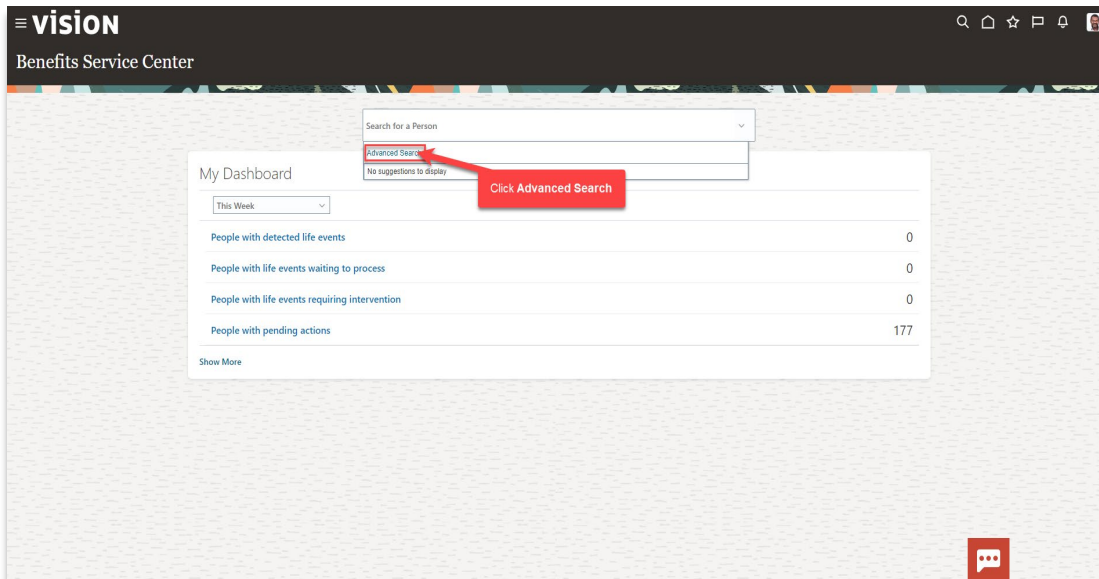
From the home screen, click **Benefits Administration**



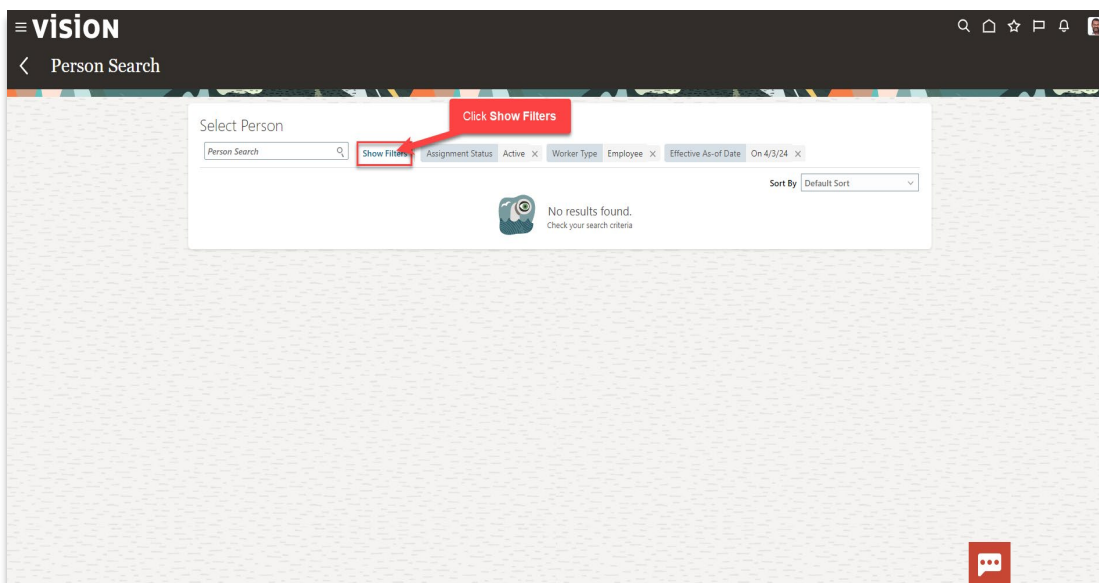
Next, click **Enrollment**



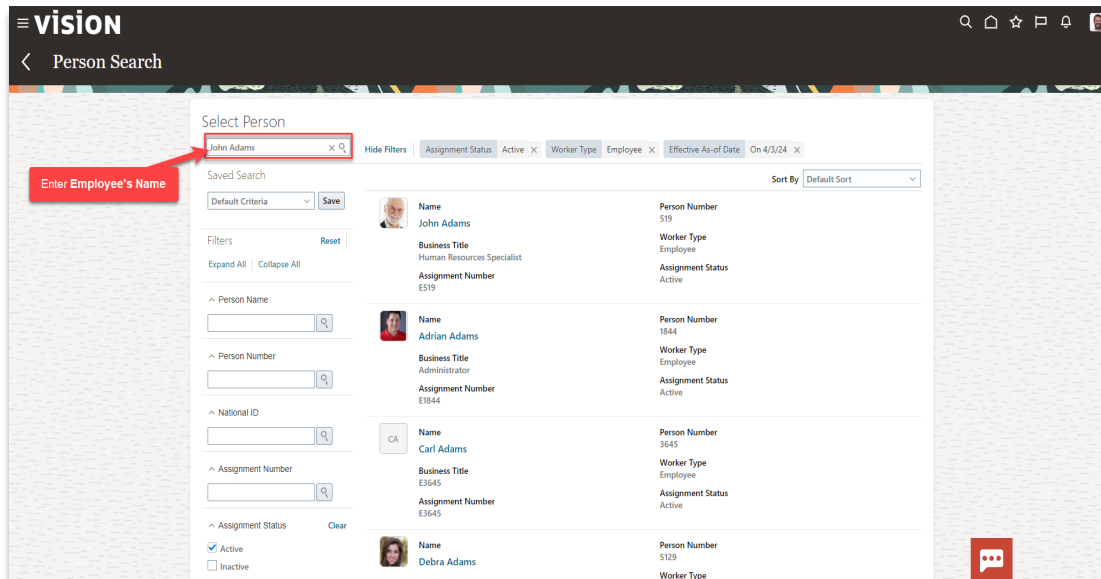
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Click on the Search Box and Select **Advanced Search**.



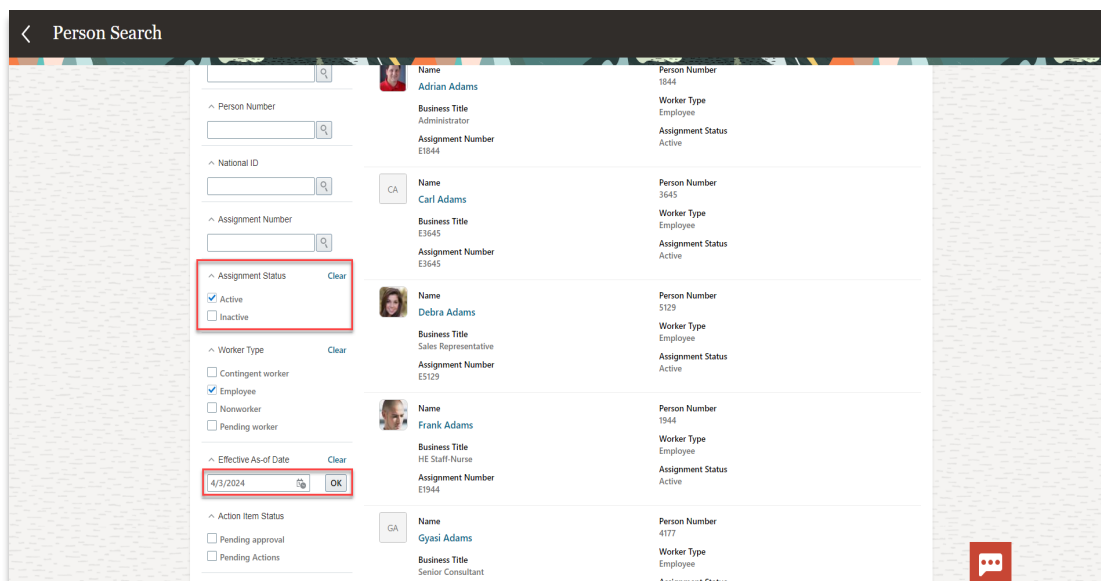
Next, click **Show Filters**



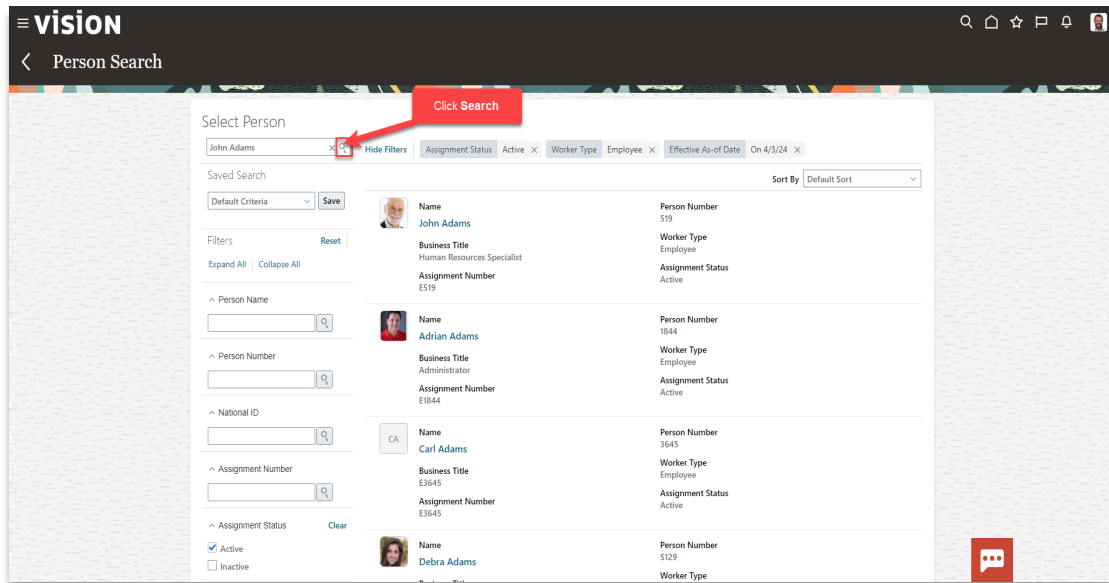
Use the various filters to search for your employee. Enter the employees name in the **Person Search** box



Next, scroll down and use the **Assignment Status** filter to sort for Active or Inactive (terminated) employees. Use the **Effective As-of Date** filter and enter a future date to search for a future hire and click **OK**



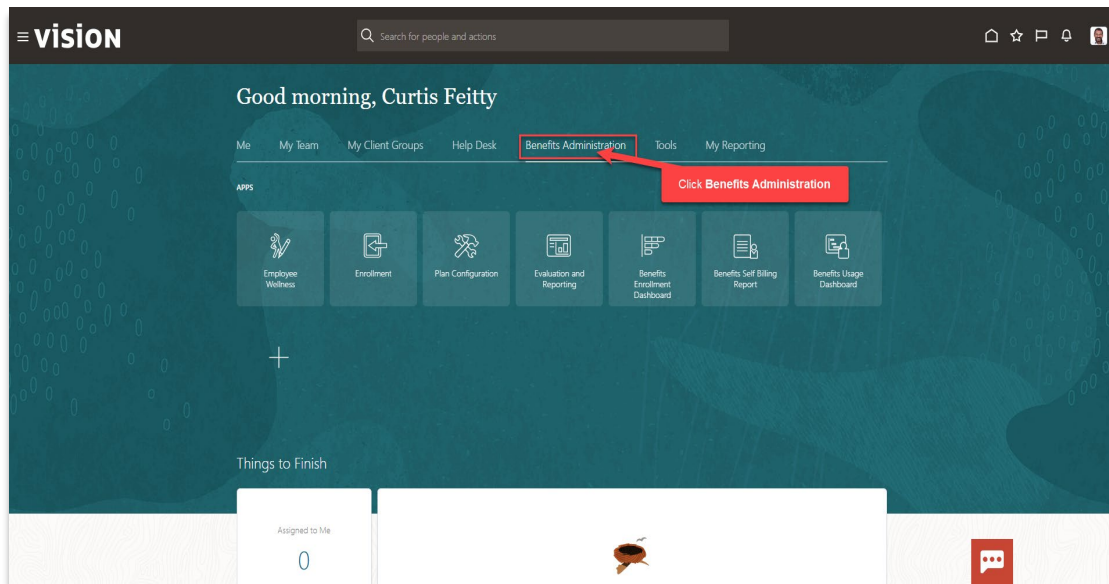
Lastly, click the magnifying glass beside the employee's name in the **Person Search** box to generate the search results.



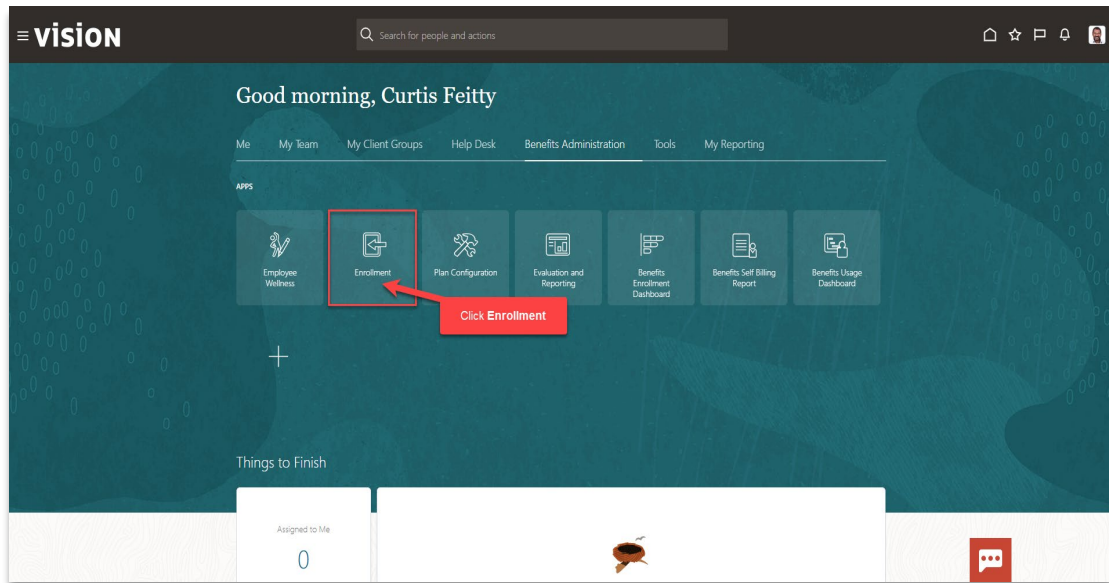
Benefits Service Center

Navigation: Home>Benefits Administration>Enrollment>Benefits Service Center

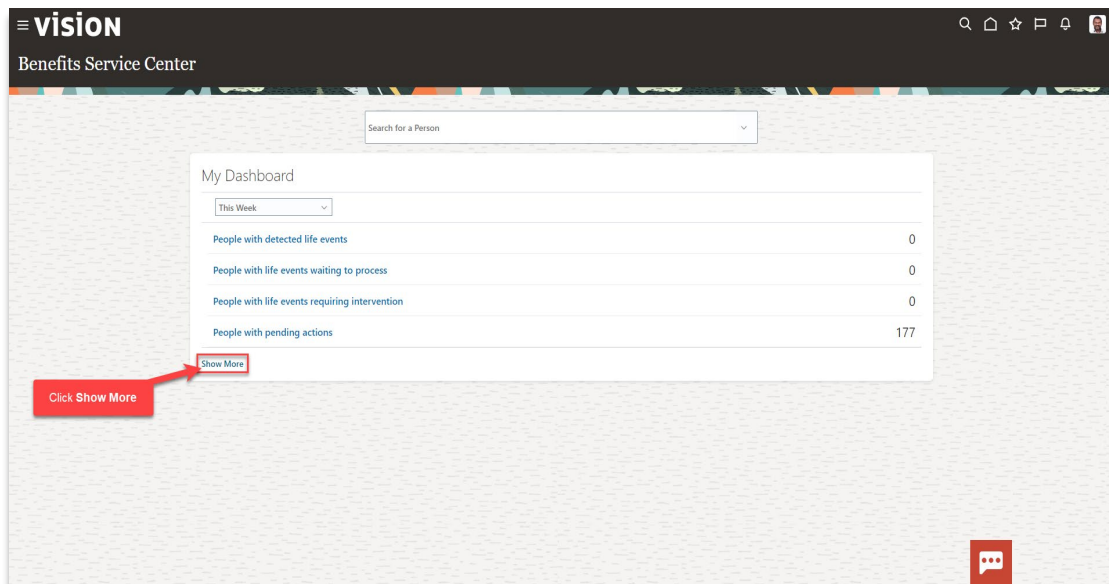
From the home screen, click **Benefits Administration**



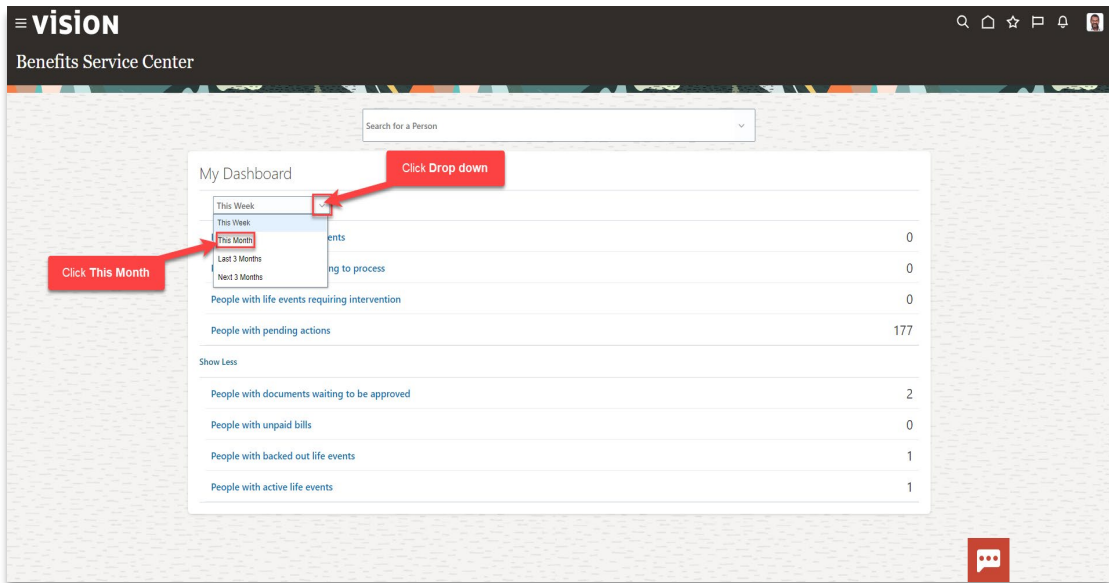
Next, click **Enrollment**



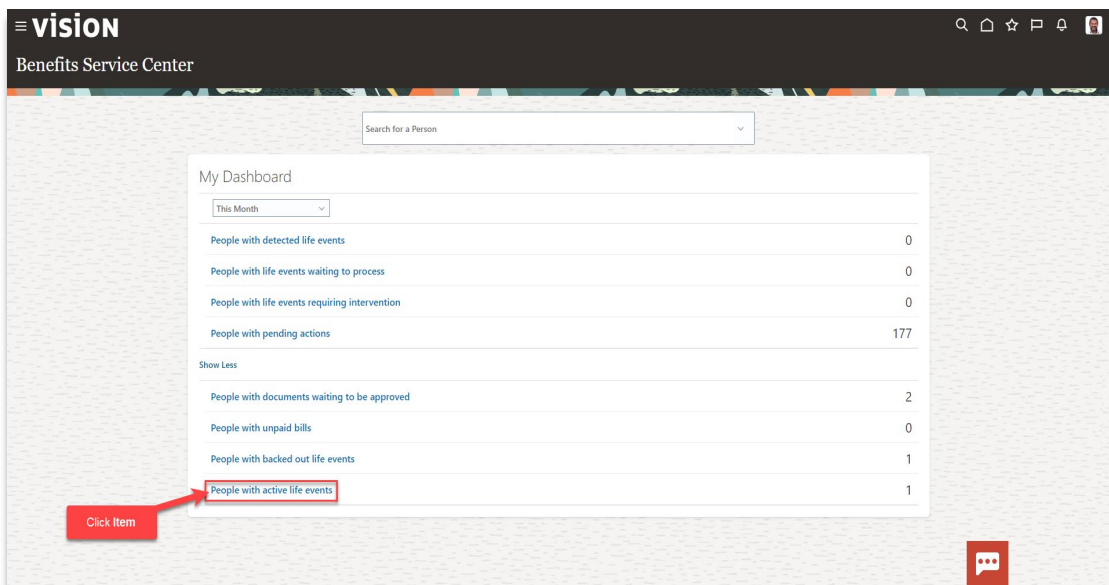
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Click **Show More**



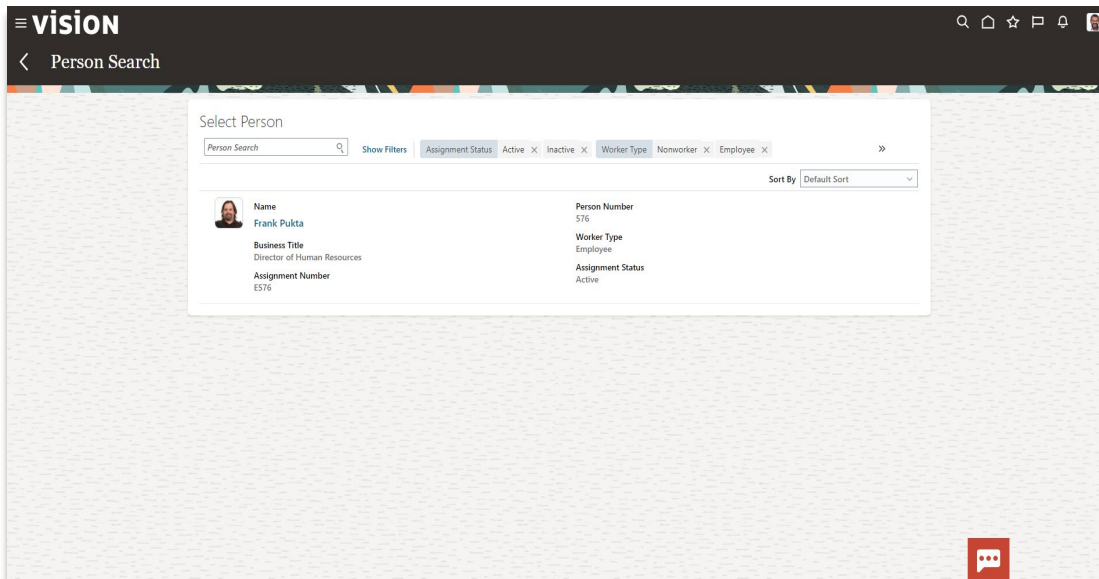
Here we can view the status of several items as of this week. To change the time period, select the desired time period from the drop down



Next, we can take action on any of the items on our Dashboard by clicking the item



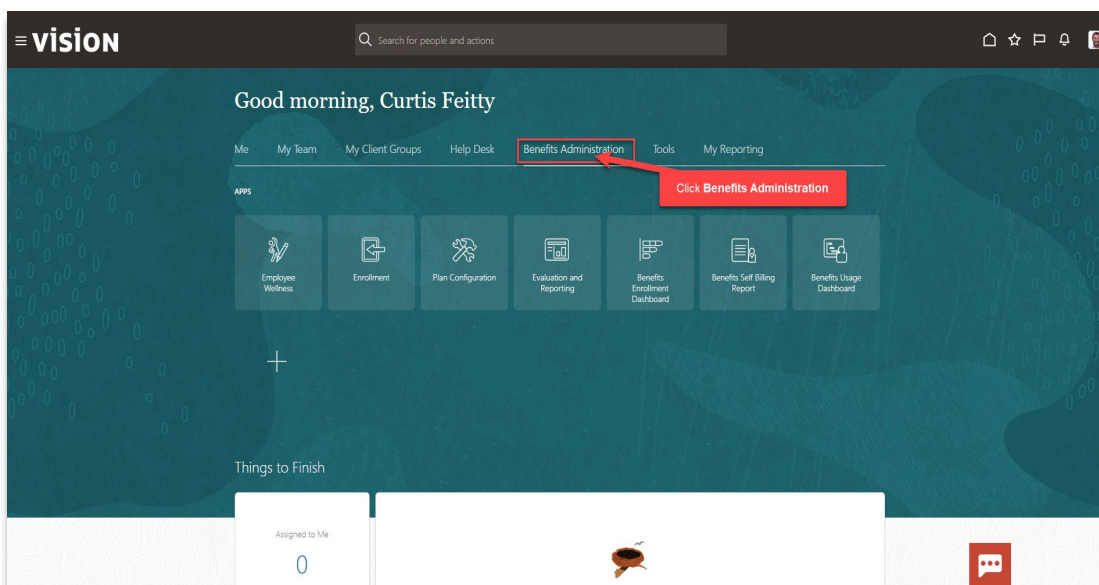
Here we can view the Item details and take actions, if needed



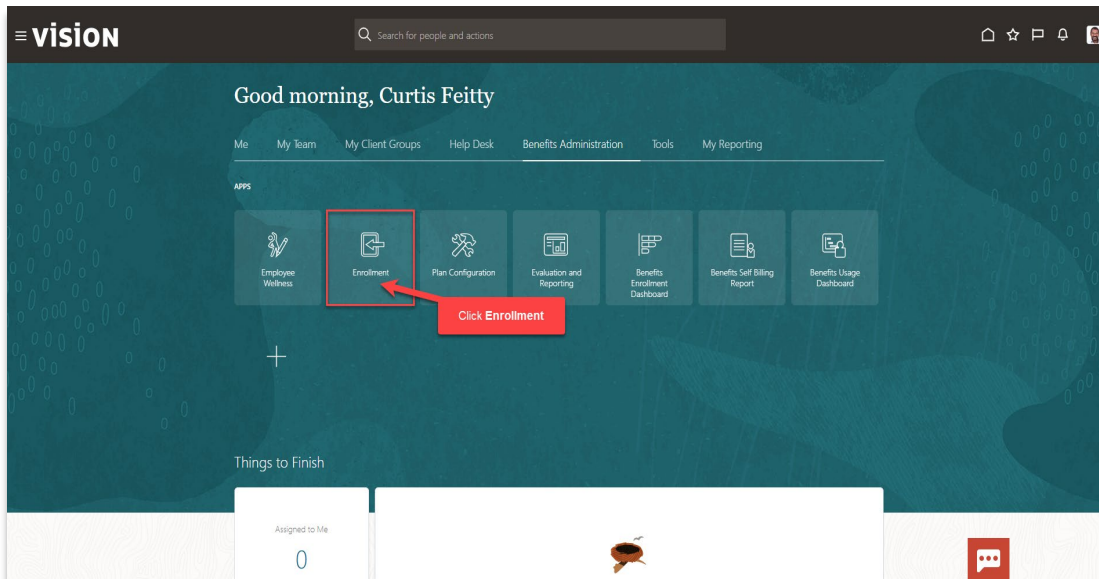
View Current, Past, and Future Enrollments For An Employee

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Effective As-of Date

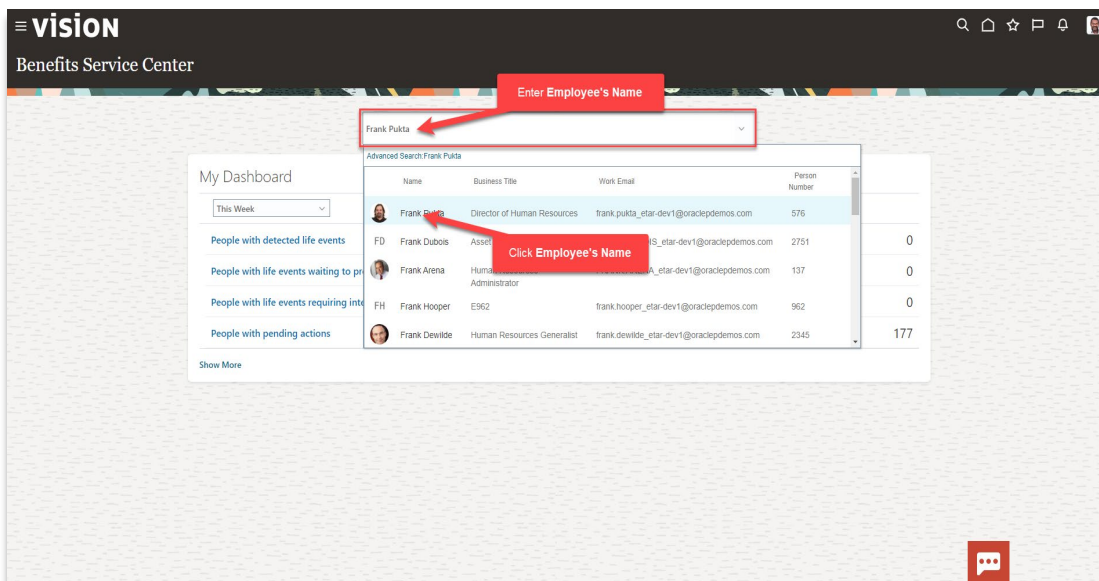
From the home screen, click **Benefits Administration**



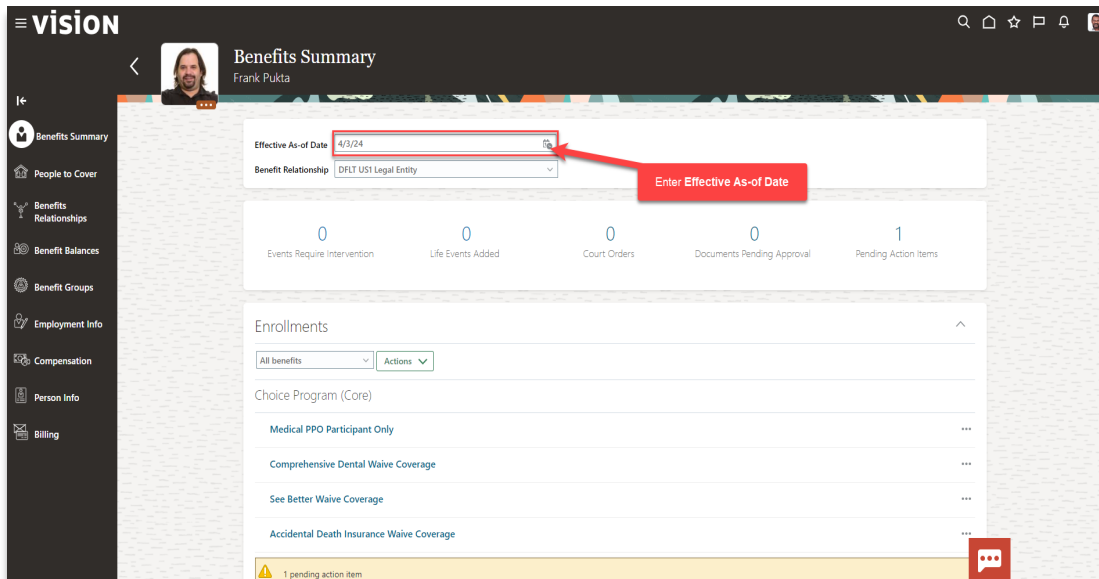
Next, click **Enrollment**



After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.

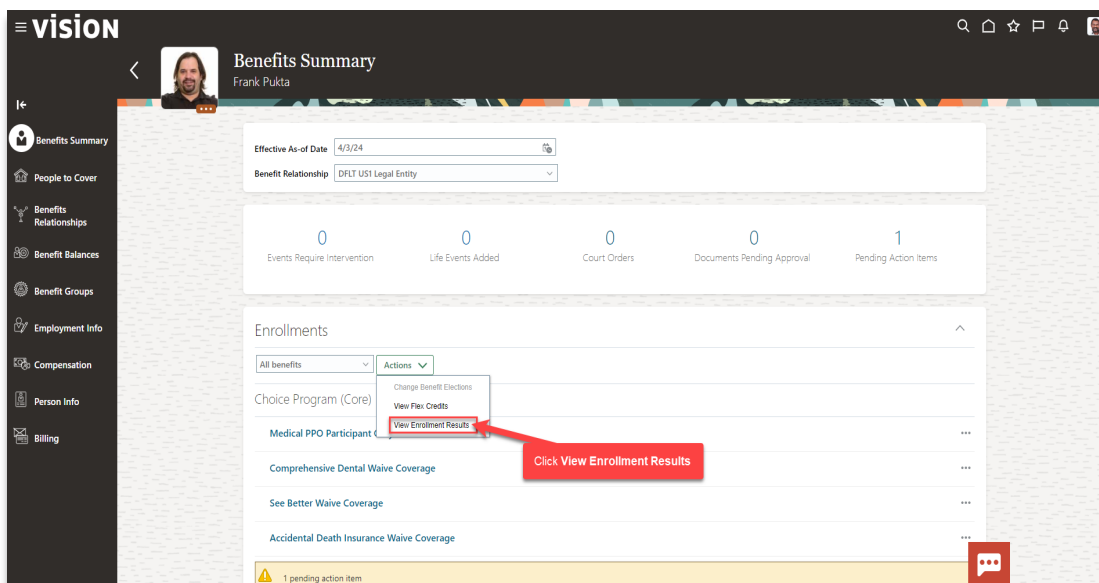


We are now viewing the Benefits Summary Page. To view an employee's benefit enrollments as of a specific date (current, past, or future date), enter the applicable date in the **Effective As-of Date** field.

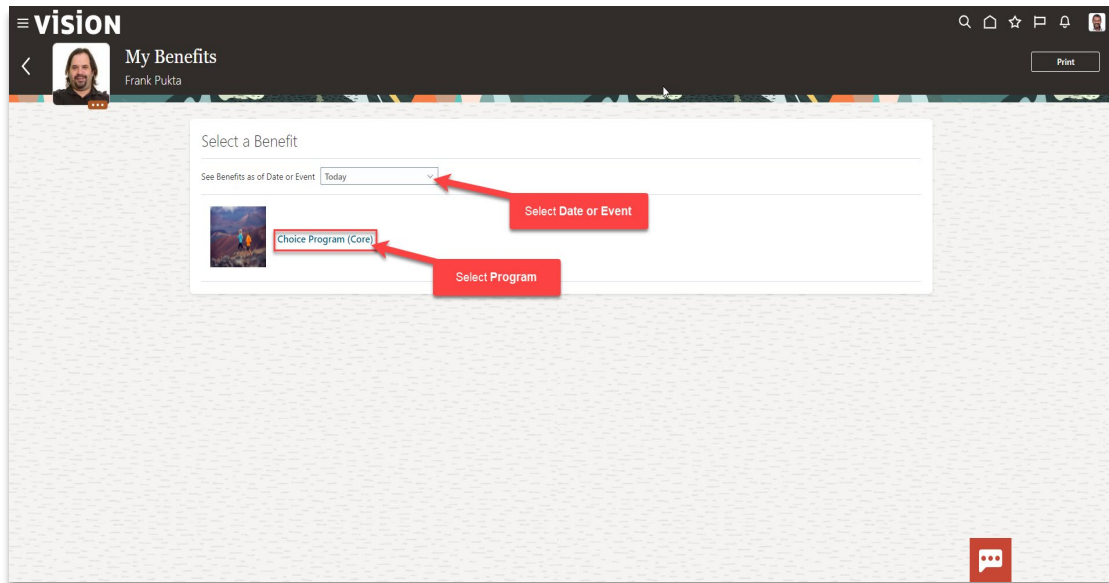


The enrollments as of this date will populate below. Scroll down to view the benefit enrollments as of the date entered.

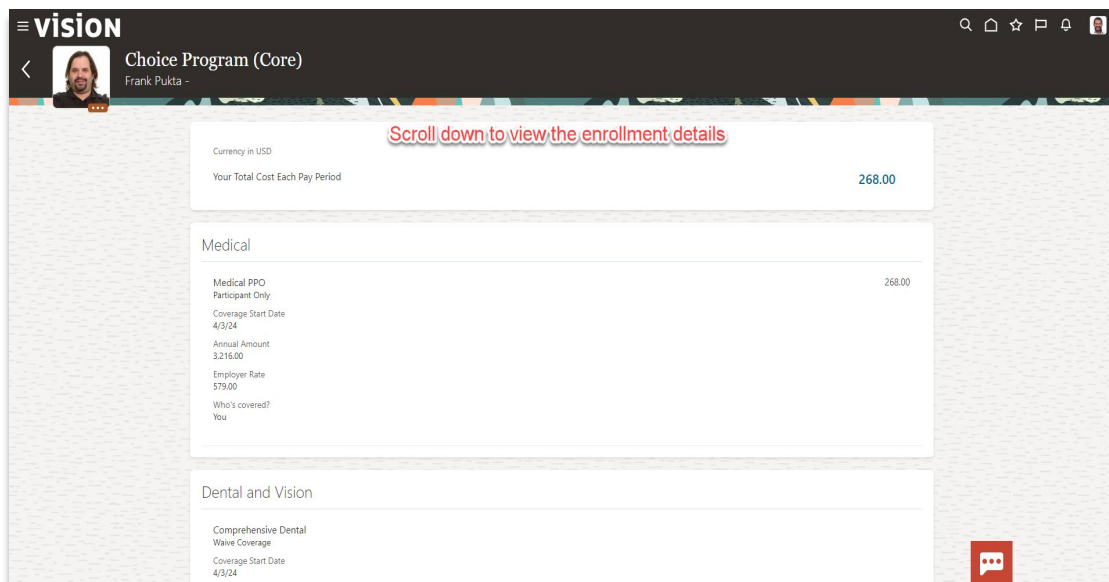
We can also click **Actions**, then **View Enrollment Results**



Select the **See Benefits as of Date or Event** and then, select the **Program**. We can also click **Print** to print the Enrollment Information



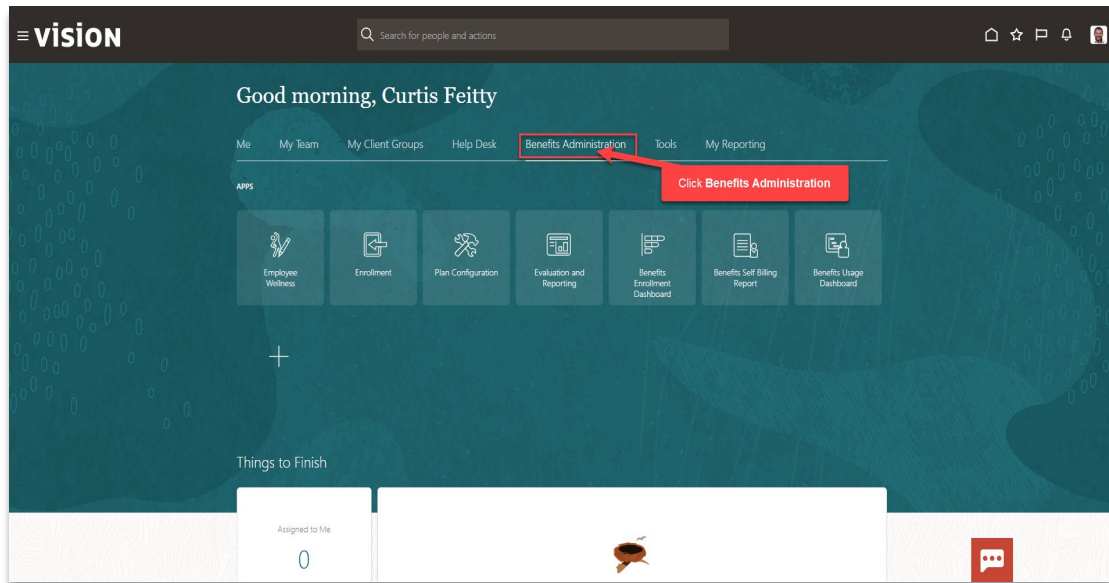
Here we can view the Employee's Enrollment Information



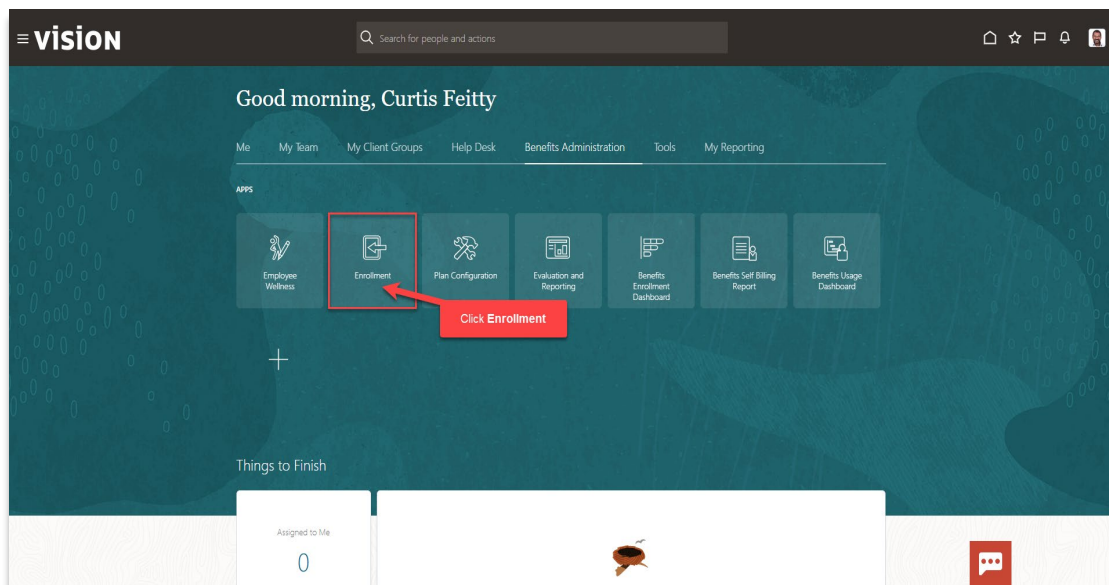
Adding A Life Event

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Potential Life Events>Click Add>Save and Close

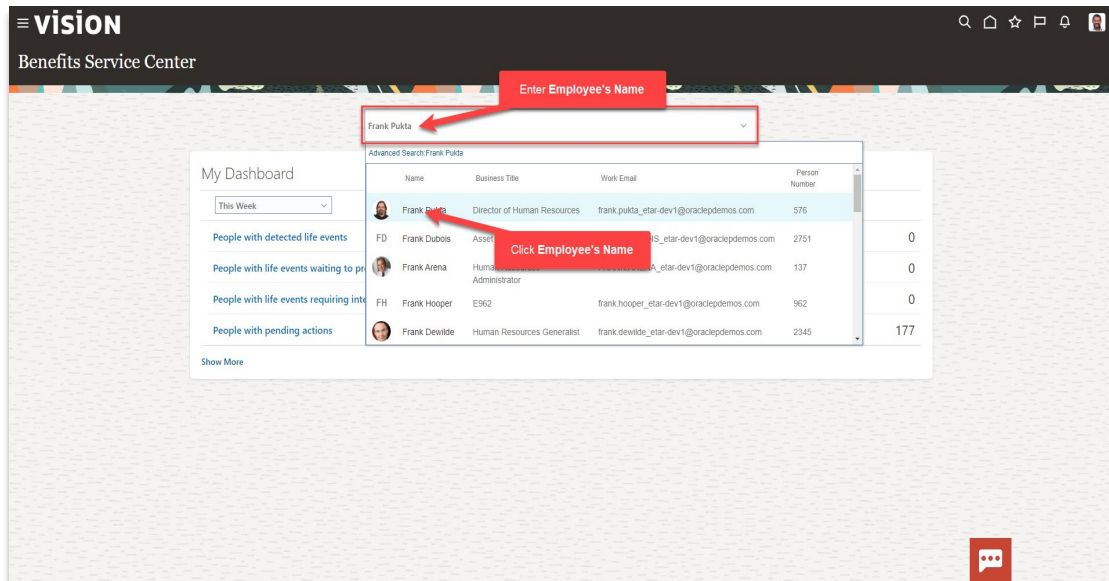
From the home screen, click **Benefits Administration**



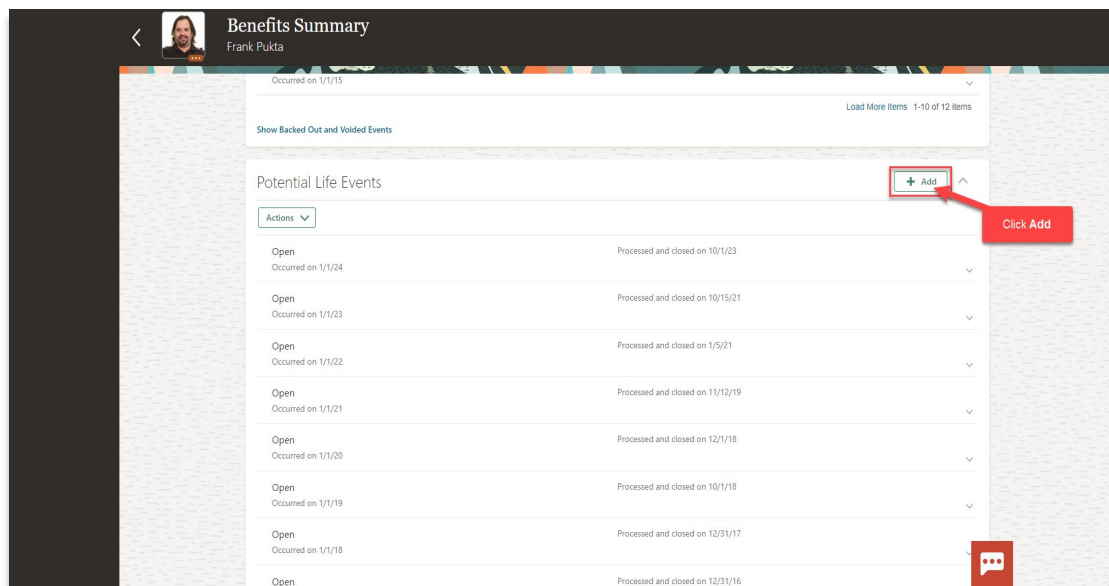
Next, click **Enrollment**



After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. Scroll down to **Potential Life Events** section. Click **Add**



Next, select the **Life Event** that needs to be added from the dropdown. The **Occurred Date** is the date in which the Life Event occurred. **Reported Date** and **Status Date** can also be the same as the Occurred Date.

vision
Add Life Event

Save and Close Cancel

Details **Enter the below information**

*Life Event
Marriage

Status
Unprocessed

*Occurred Date
4/3/24

Reported Date
4/3/24

*Status Date
4/3/24

✓ Visible to employees

Lastly, Click **Save and Close**

vision
Add Life Event

Save and Close Cancel

Details

*Life Event
Marriage

Status
Unprocessed

*Occurred Date
4/3/24

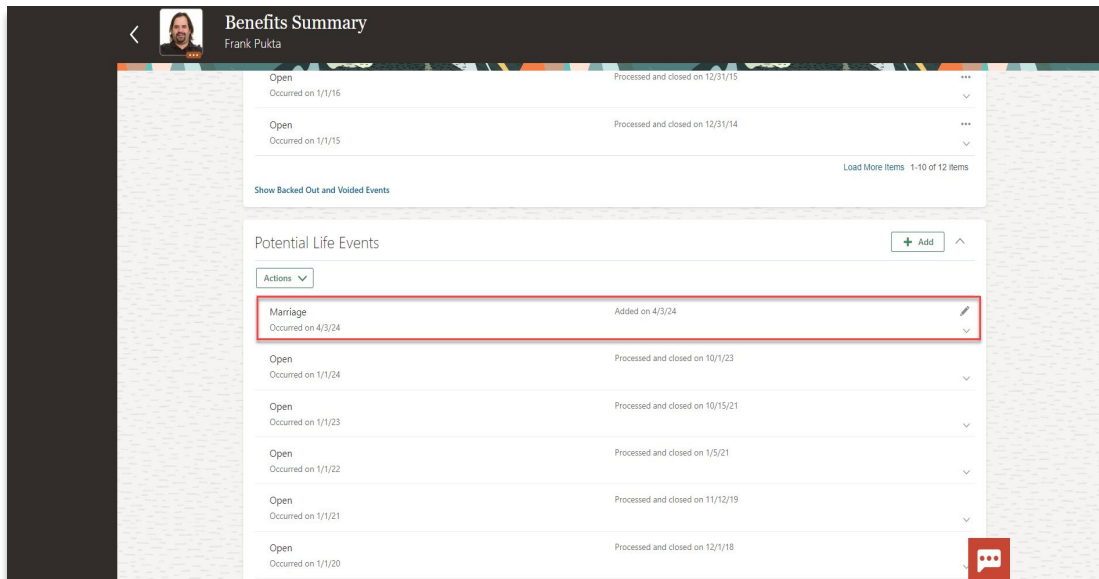
Reported Date
4/3/24

*Status Date
4/3/24

✓ Visible to employees

Click Save and Close

Now the Life Event is added, it will be displayed in the Potential Life Events section as **Added** with the **Occurred Date** and will need to be evaluated to update benefit enrollments.

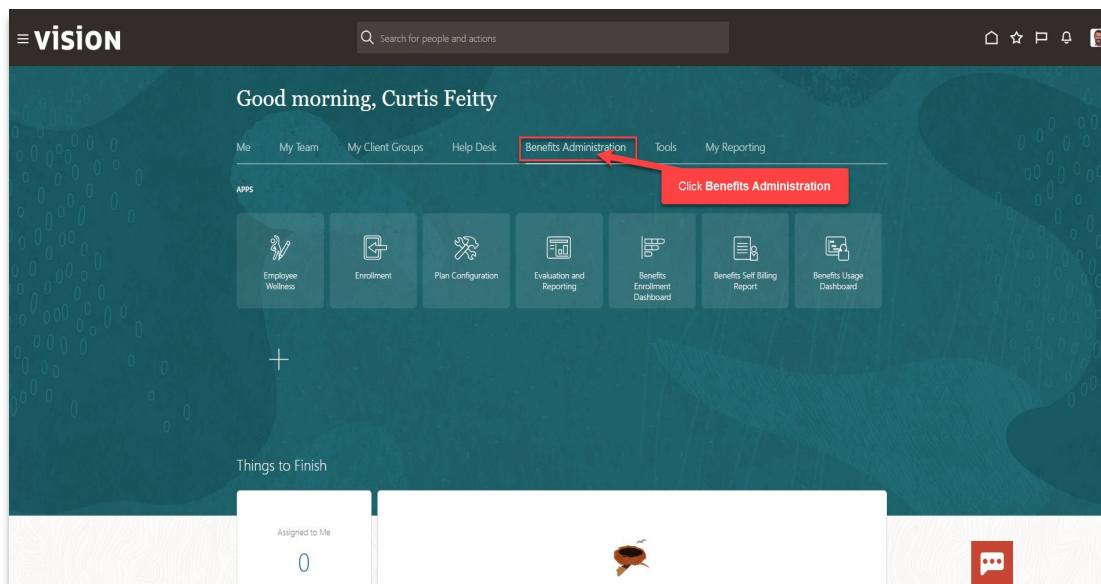


Next, we need to Evaluate the Life event.

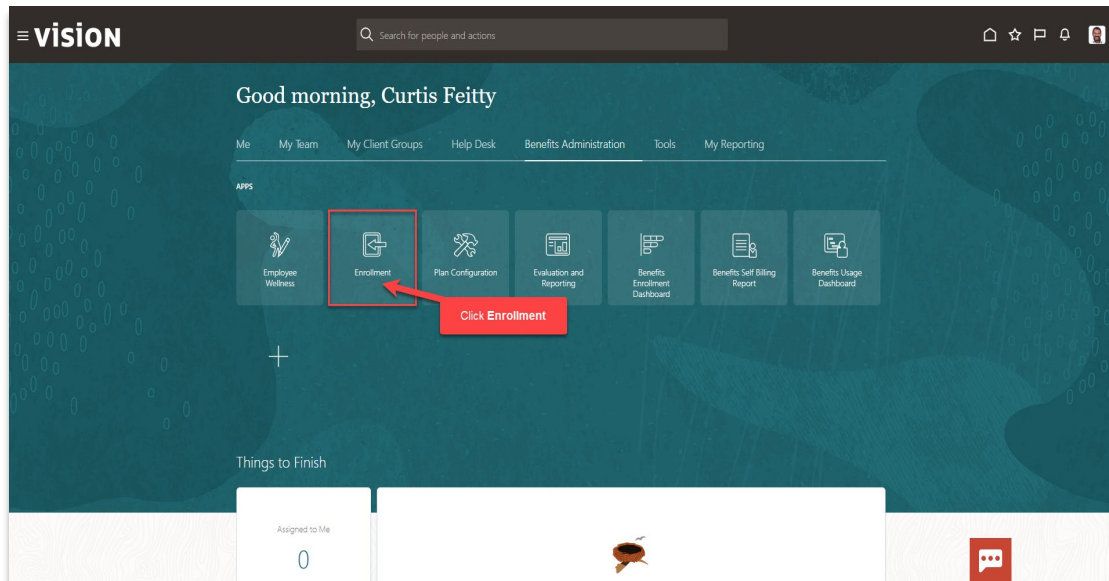
Evaluating A Life Event

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Potential Life Events>Actions>Process>Submit

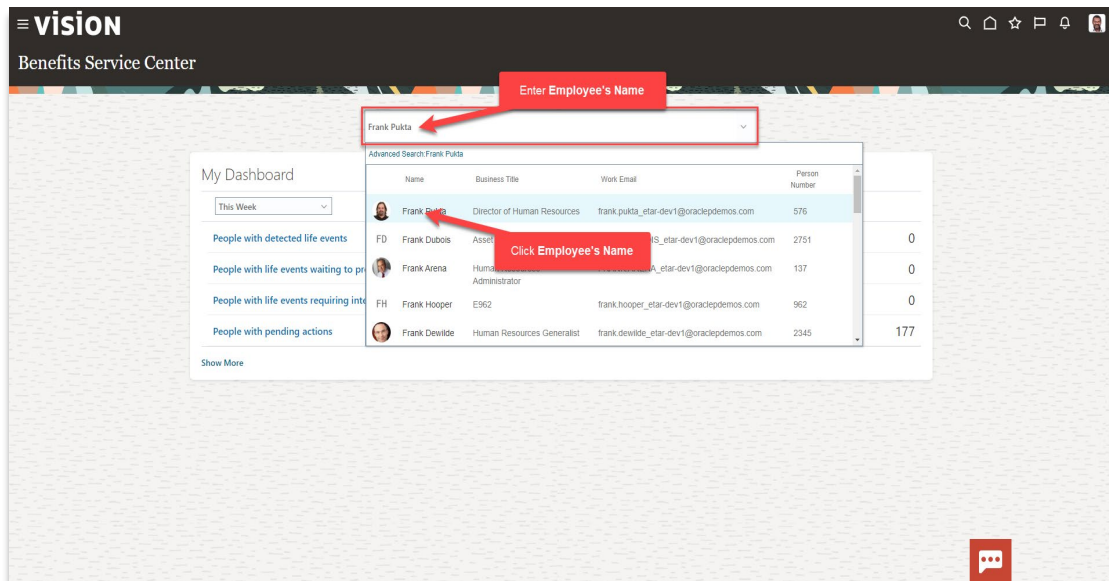
From the home screen, click **Benefits Administration**



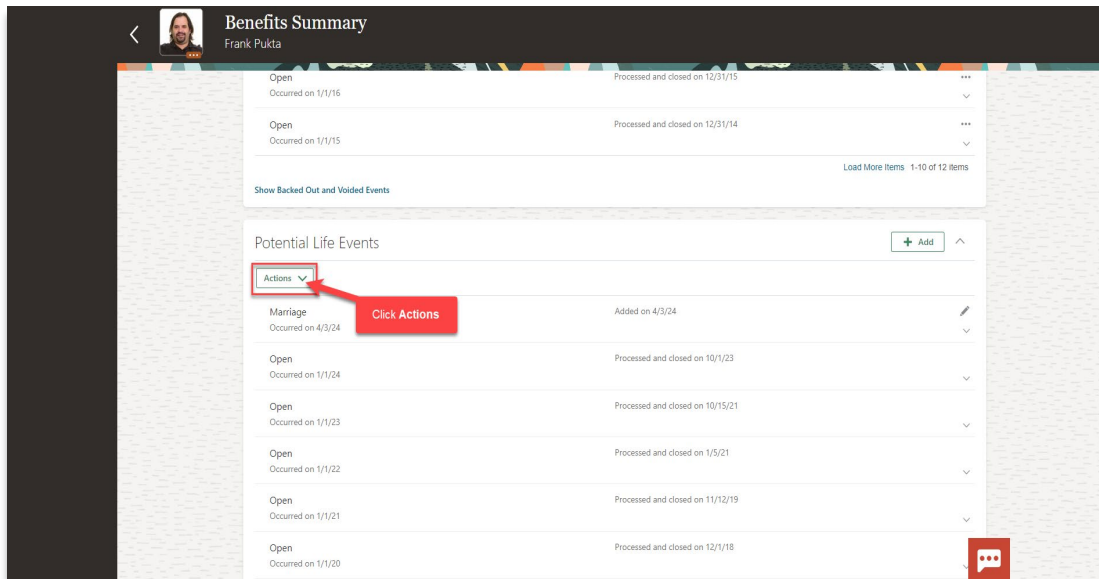
Next, click **Enrollment**



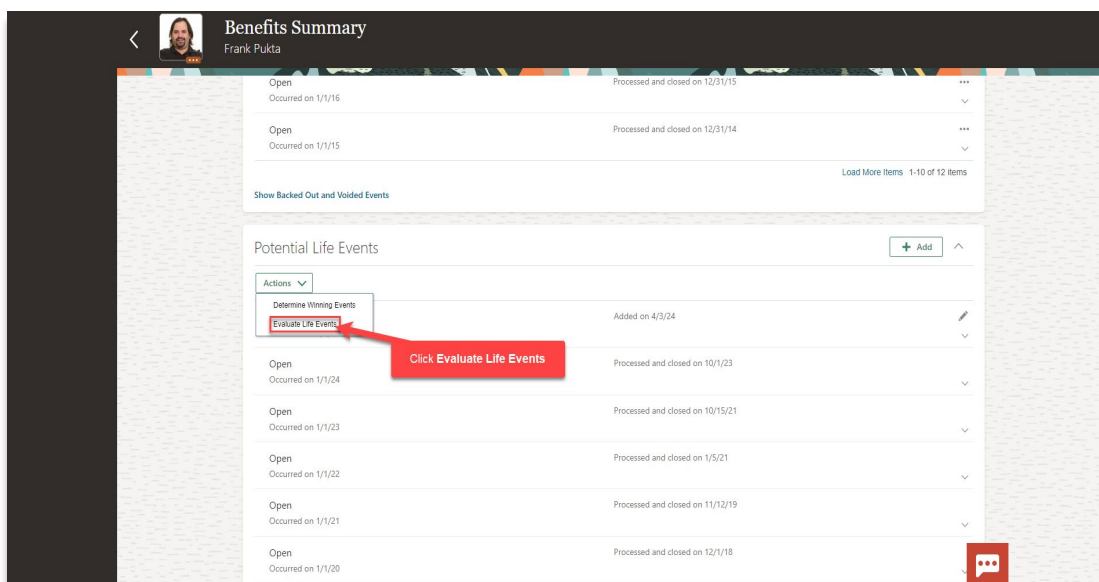
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. To evaluate a life event, scroll down to Potential Life Events and click **Actions**



From the Actions dropdown, click **Evaluate Life Events**

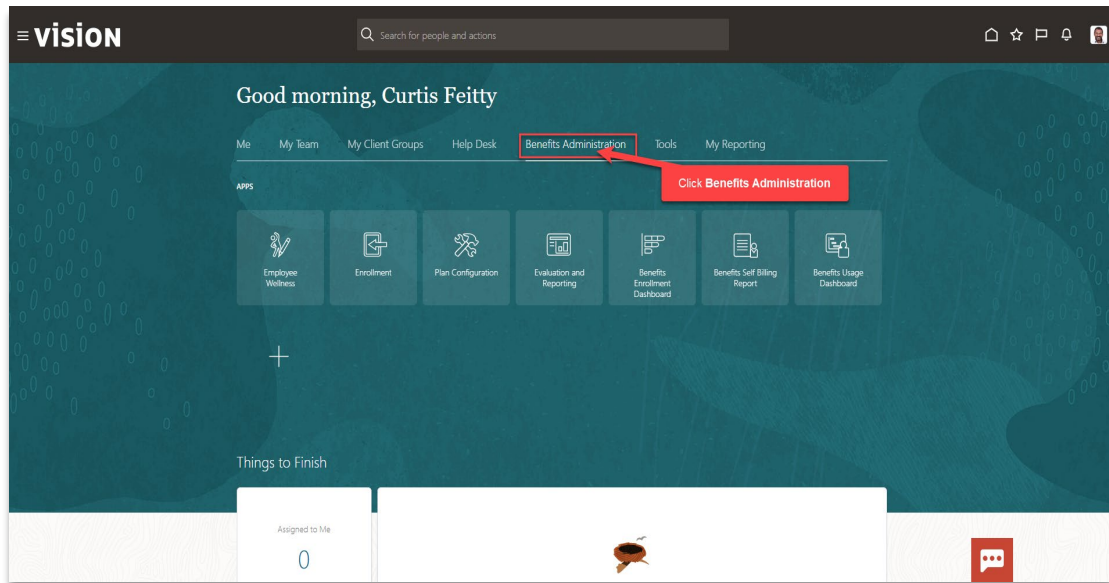


Next, the Evaluation Results will populate. The Enrollment window started, and the employee and Benefits Admin can now make benefit elections.

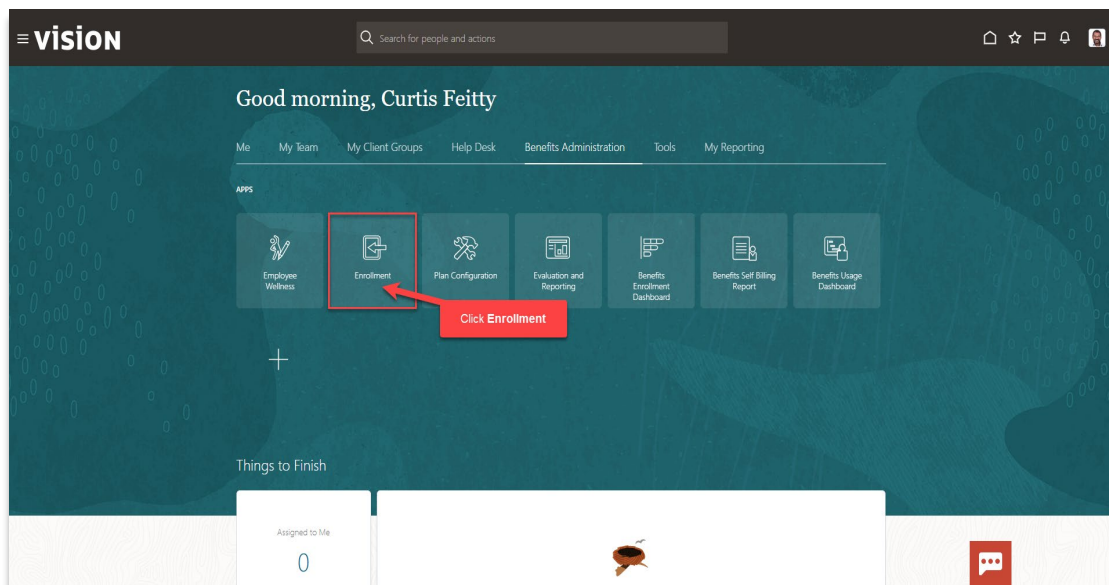
Make Benefits Elections As A Benefits Administrator

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Evaluated Life Events>Enroll>Submit

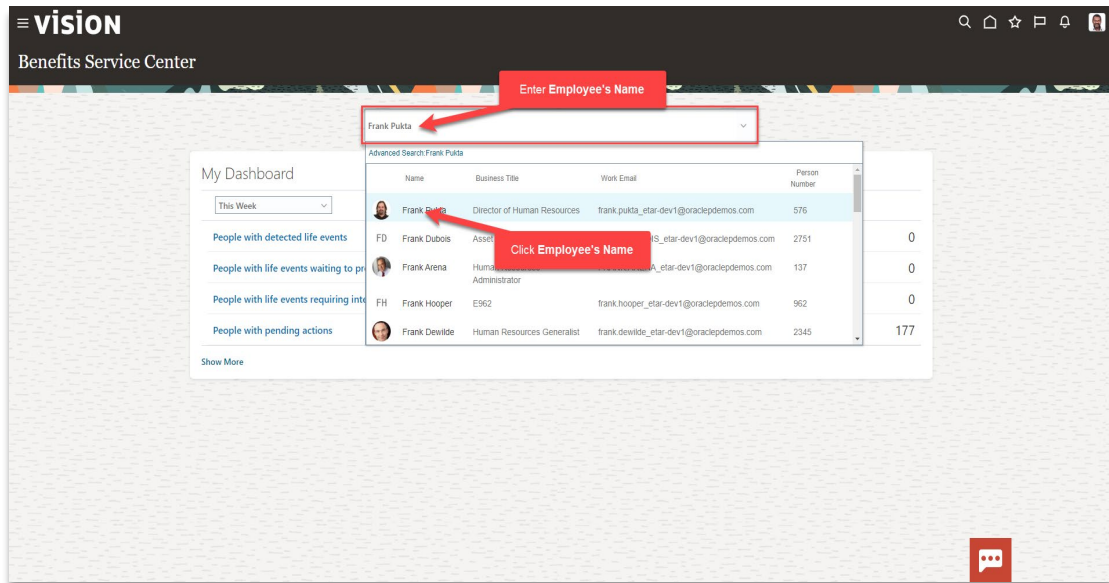
From the home screen, click **Benefits Administration**



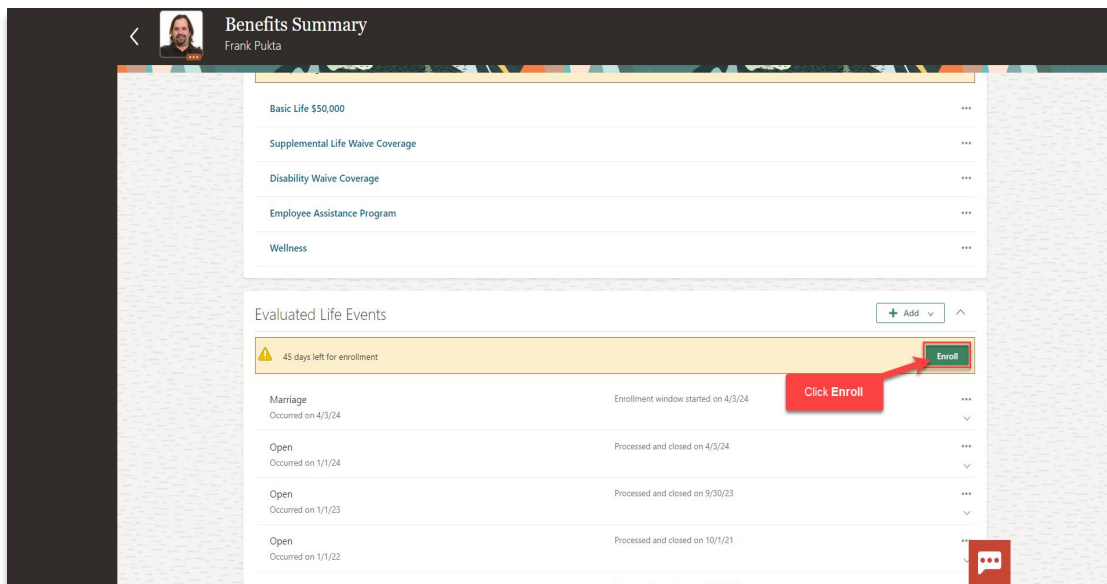
Next, click **Enrollment**



After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. To make benefits elections, scroll down to **Evaluated Life Events** and click **Enroll**



Read the authorization statement and click **Accept**

vision
Start Enrollment

Authorization

CHOICE BENEFITS

The information I am providing is accurate, and I authorize the coverage selections and the associated payroll deductions.

I understand that to maintain the [Health Care Flexible Spending Account](#) and [Dependent Care Spending Account](#), I must re-enroll each year. Enrollments remain in effect until changed or canceled by me during an annual open enrollment, or when permitted by a qualified life event.

I understand that my eligibility for benefits may be affected if I subsequently change my contracted work schedule.

I understand that my elections are binding, based upon Choice Program plan provisions and applicable laws and regulations.

I also understand that the coverages I am applying for may require that I provide additional information. We reserve the right to terminate any plan, policy, or procedure at any time and at our [sole discretion](#).

[Accept](#) [Decline](#)

Click Accept

Cancel

Next, click **Edit** across from the Medical plan to enroll

vision
Choice Program (Core)
Marriage

Submit Cancel

Currency in USD

Your Total Cost 268.00
Per Pay Period

Medical

Medical

Medical PPO Participant Only 268.00

Click Edit

Edit

Dental and Vision

Dental

Comprehensive Dental Waive Coverage

Vision

See Better Waive Coverage

Select the plan and the tier of coverage. If the tier selected covers dependents, select the dependent you wish to cover. Click **OK**

Medical

Medical PPO

☐ Participant Only
3,216.00 Annually
Employer Rate
268.00
579.00

☒ Participant Plus One
Annual Amount
4,296.00
Employer Rate
732.00
358.00
Employee Rate

Who do you want to cover?

☒ Mary Spouse (Spouse)

☐ Employee Plus Spouse_No Surcharge

☐ Employee Plus Spouse_Surcharge

☐ Waive Coverage

Click OK

OK Cancel

Continue Cancel

Click Continue

Medical

Medical PPO

☐ Participant Only
3,216.00 Annually
Employer Rate
268.00
579.00

☒ Participant Plus One
4,296.00 Annually
Employer Rate
732.00
358.00
Employee Rate

Who's covered?
You, Mary Spouse

☐ Employee Plus Spouse_No Surcharge

☐ Employee Plus Spouse_Surcharge

☐ Waive Coverage

Click Continue

Continue Cancel

You can now view the benefit election for medical. To update the election, click **Edit**. If no updates are needed, proceed with the Dental and Vision election. Across from Dental and Vision, click **Edit**

Choice Program (Core)
Marriage

Currency in USD

Your Total Cost 358.00
Per Pay Period

Medical Edit

Medical

Medical PPO Participant Plus One 358.00
Who's covered? You, Mary Spouse

Dental and Vision Edit

Dental

Comprehensive Dental Waive Coverage

Vision

See Better Waive Coverage

Click Edit

Follow this same process to enroll in each benefit plan. Once elections are made, review your elections, and click **Submit**

vision

Choice Program (Core)
Marriage

Currency in USD

Your Total Cost 358.00
Per Pay Period

Medical Edit

Medical

Medical PPO Participant Plus One 358.00
Who's covered? You, Mary Spouse

Dental and Vision Edit

Dental

Comprehensive Dental Waive Coverage

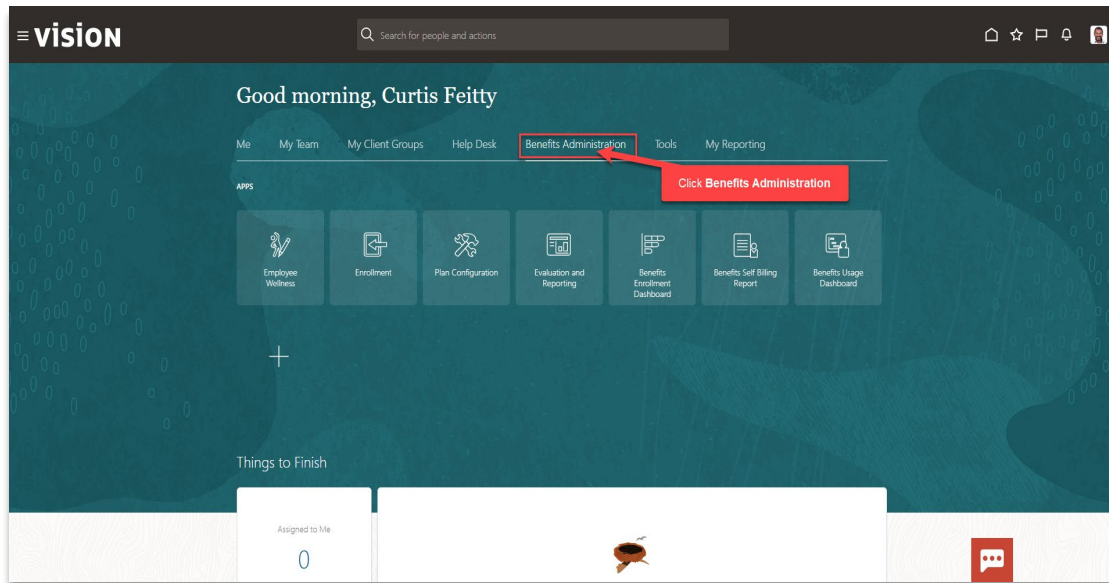
Vision

Click Submit

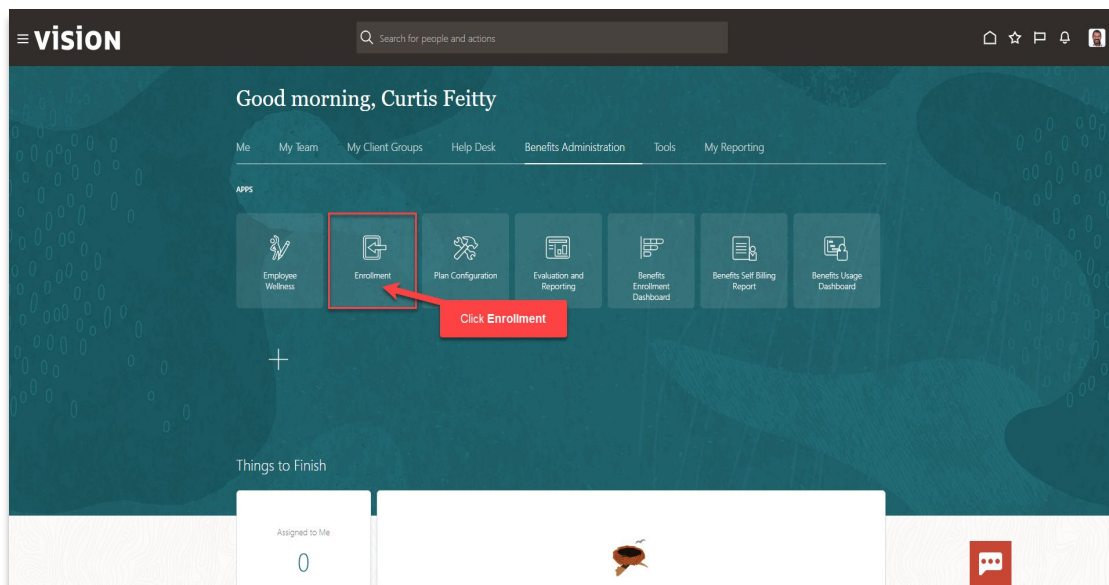
Close Life Events

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Evaluated Life Events>Close

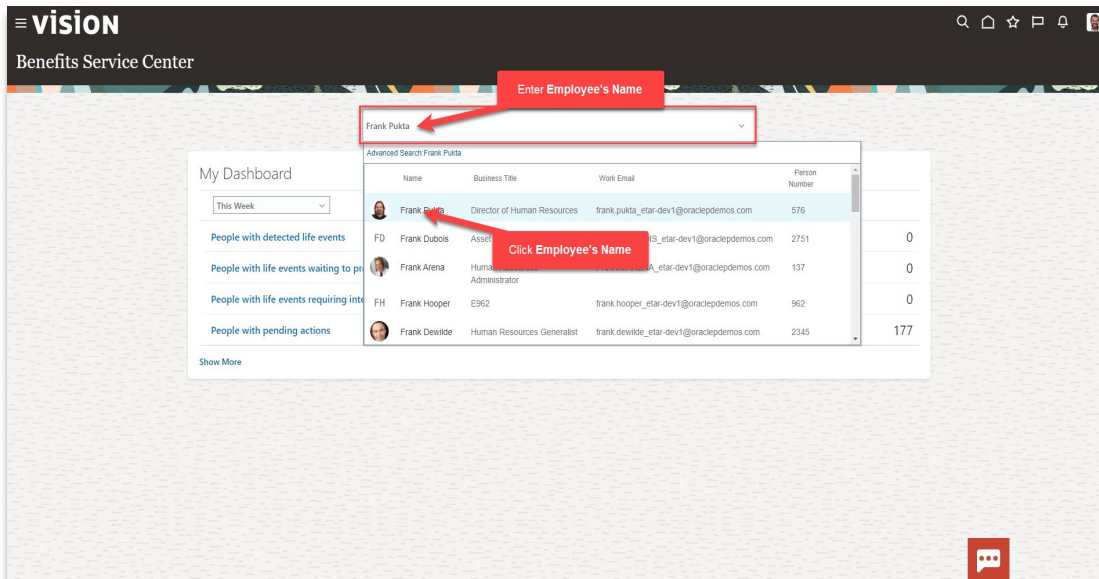
From the home screen, click **Benefits Administration**



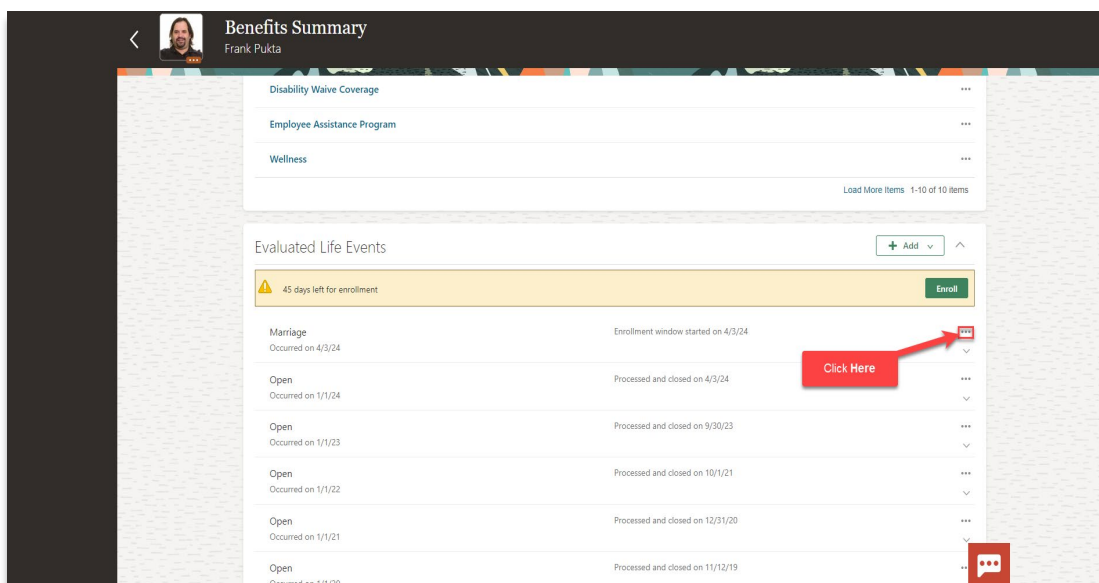
Next, click **Enrollment**



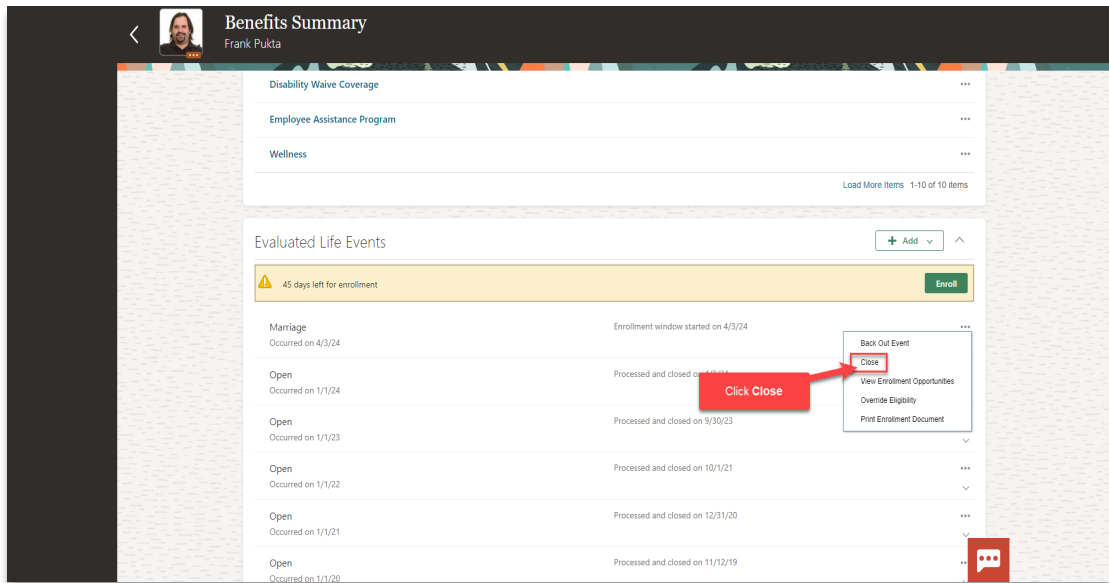
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



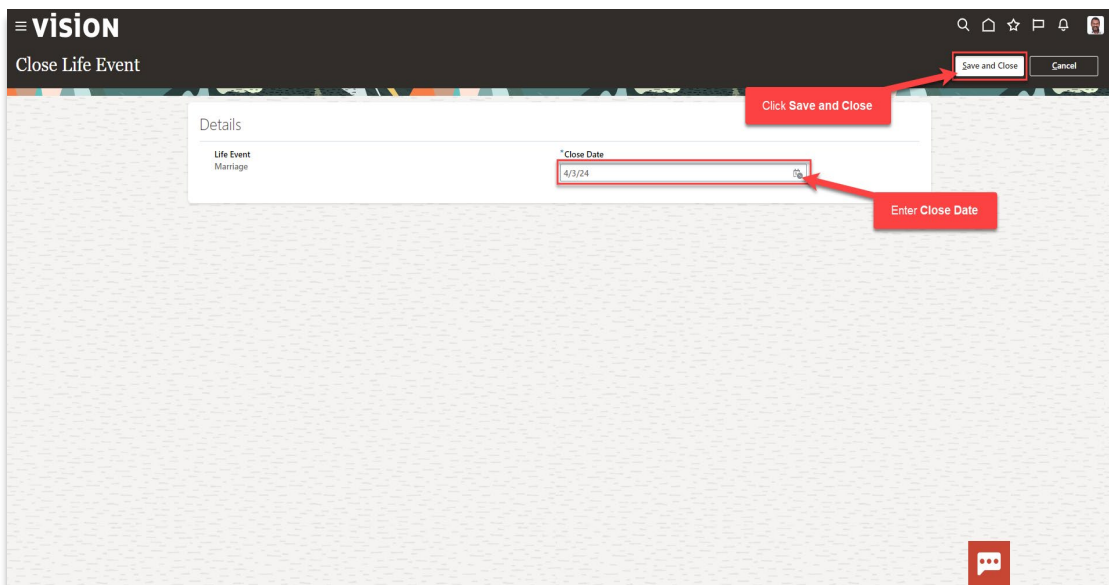
We are now viewing the Benefits Summary Page. To make benefits elections, scroll down to **Evaluated Life Events** and click the **three dots** across from the Open Life Event



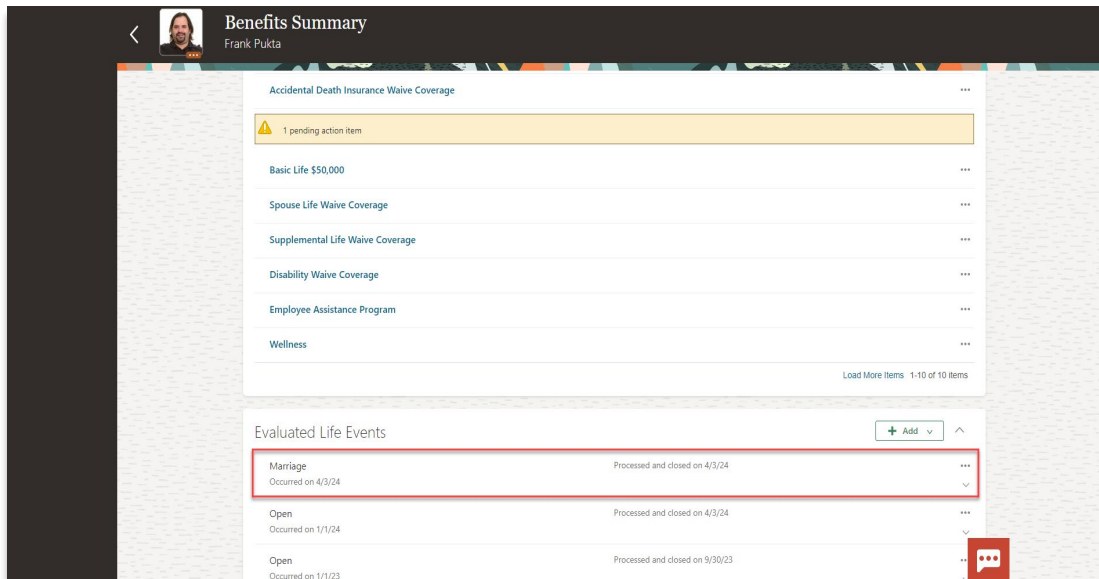
Click Close



Enter the **Close Date** and click **Save and Close**



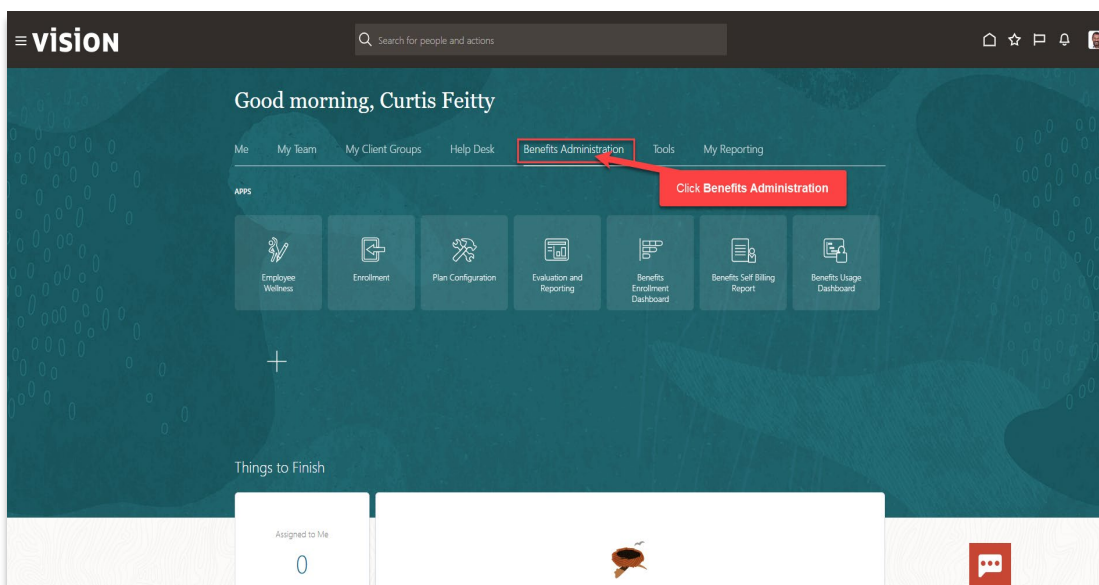
The Life Event has been Closed



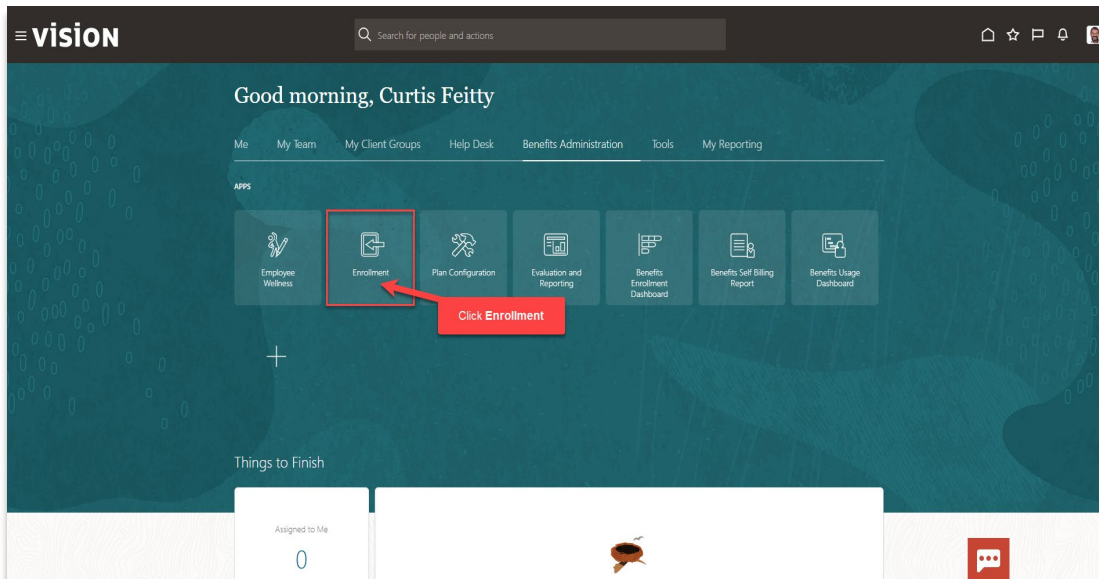
Adding Dependents/Beneficiaries For An Employee

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>People To Cover>Add>Submit

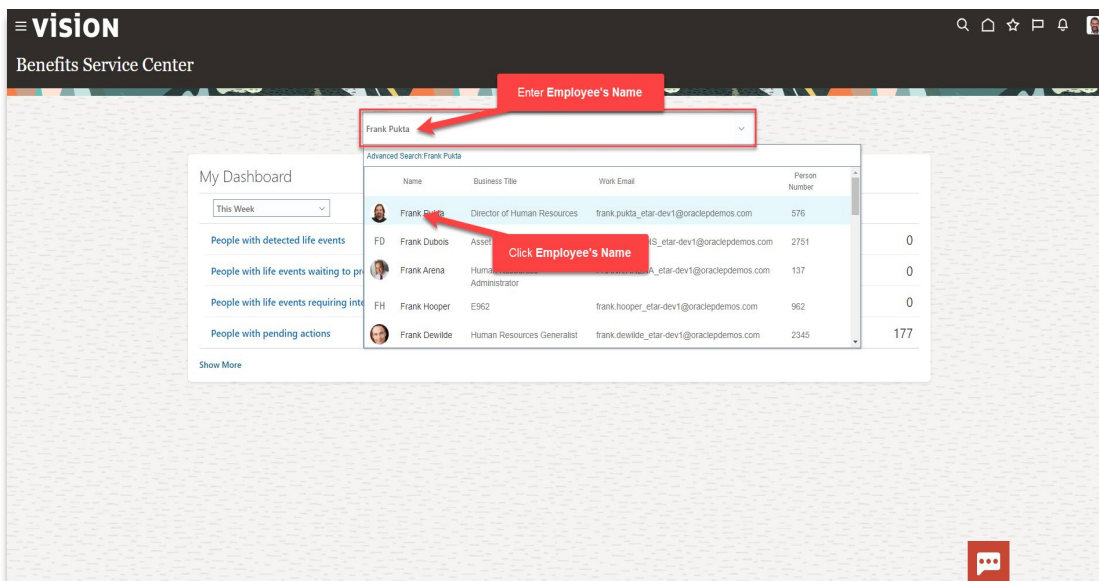
From the home screen, click **Benefits Administration**



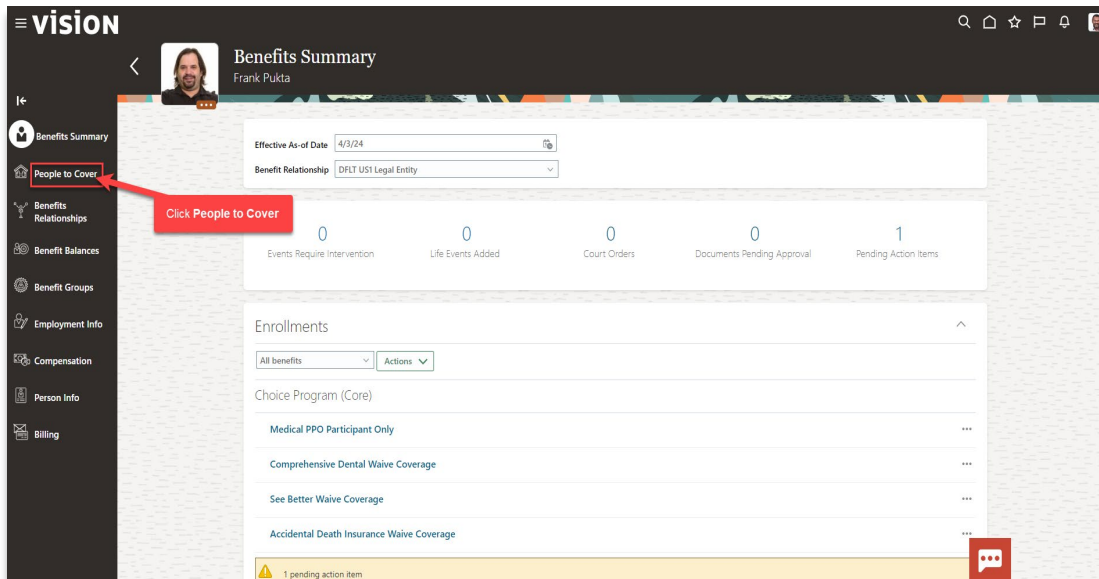
Next, click **Enrollment**



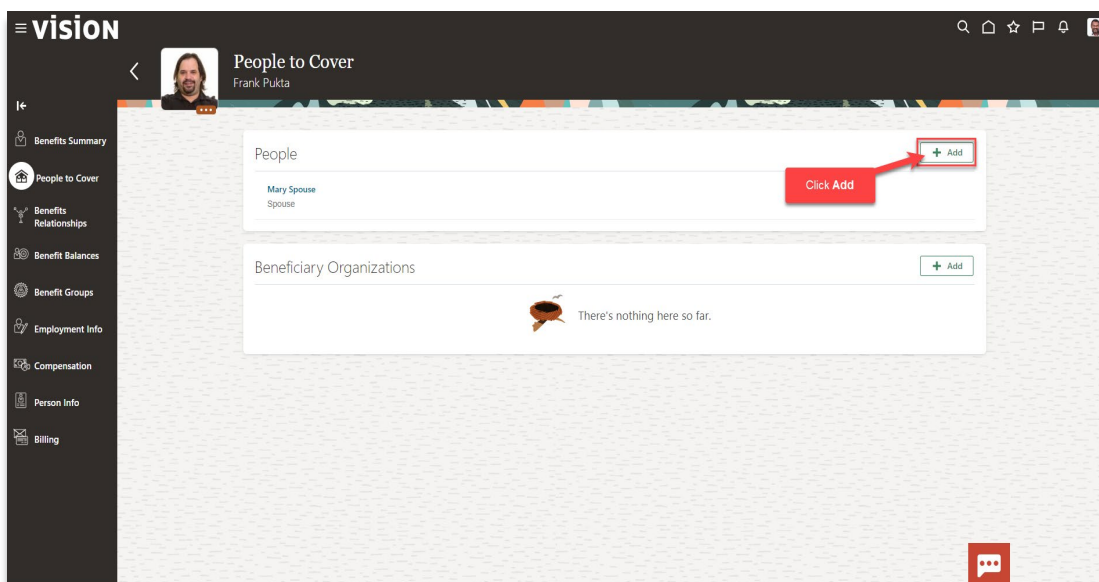
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. To make add a new beneficiary or dependent, click **People To Cover**



Click Add



Enter the **Basic Information, Communication, Address, and National Identifiers**. As a reminder, add the Social Security Number & Date of Birth for all dependents you plan to cover for Medical, Dental, Vision, etc. This information is required.

vision New Contact

Submit Cancel

Basic Information Enter the below information

*Last Name: Child
 First Name: Test
 Preferred Pronouns: Select a value
 Title: Select a value
 Prefix:
 Suffix:
 *Relationship: Child
 *What's the start date of this relationship?: 4/3/24
 Gender: Female
 Date of Birth: 1/1/00

Middle Name:
 Honors:
 Preferred Name:
 Previous Last Name:
 Job Display Name:
☐ This person is an emergency contact
 TIN Type: Social Security Number
 TIN Number: 1112223333
 Benefits Offered Conditionally:

Click Submit

vision New Contact

Submit Cancel

Basic Information

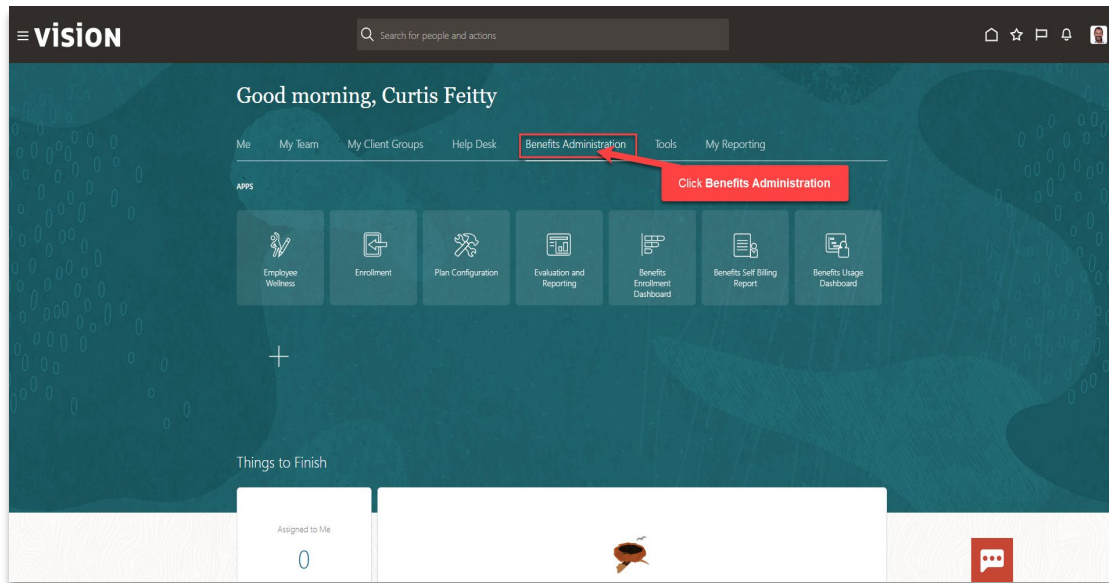
*Last Name: Child
 First Name: Test
 Preferred Pronouns: Select a value
 Title: Select a value
 Prefix:
 Suffix:
 *Relationship: Child
 *What's the start date of this relationship?: 4/3/24
 Gender: Female
 Date of Birth: 1/1/00

Middle Name:
 Honors:
 Preferred Name:
 Previous Last Name:
 Job Display Name:
☐ This person is an emergency contact
 TIN Type: Social Security Number
 TIN Number: 1112223333
 Benefits Offered Conditionally:

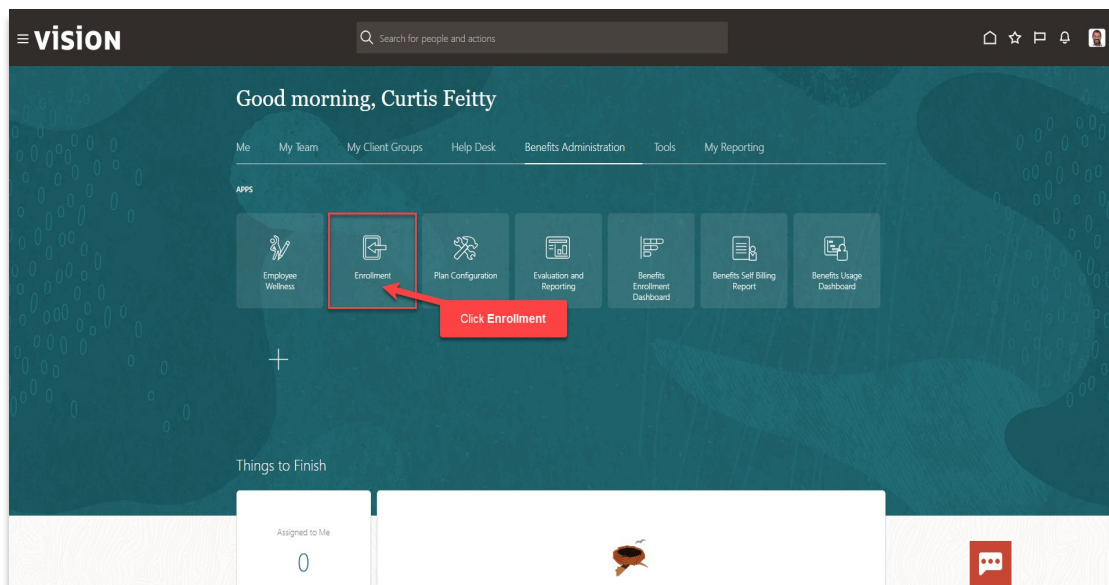
Update Disability Type For A Disabled Contact

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>People To Cover>Update>Submit

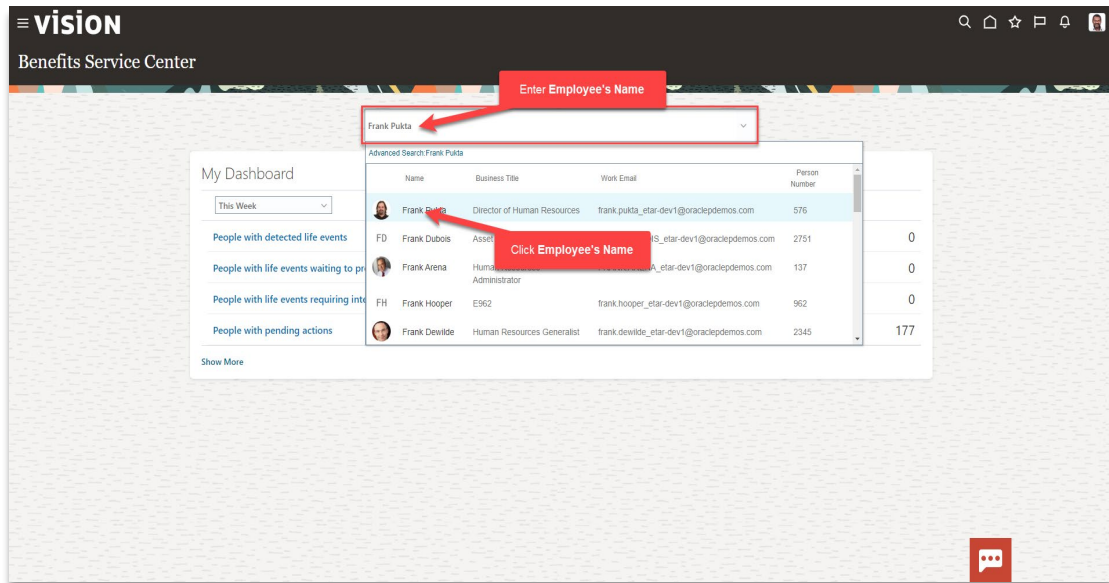
From the home screen, click **Benefits Administration**



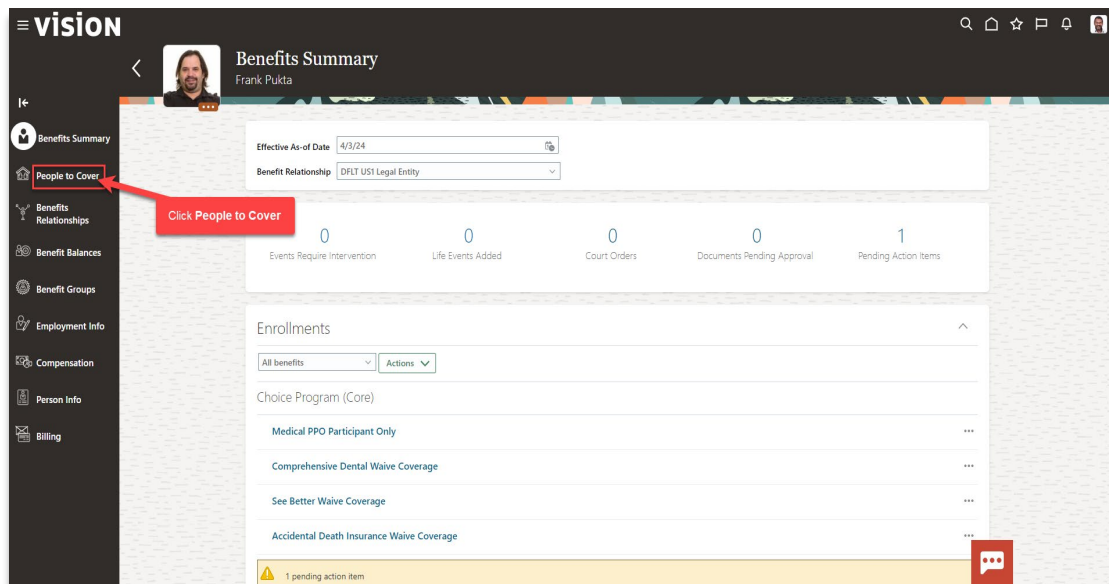
Next, click **Enrollment**



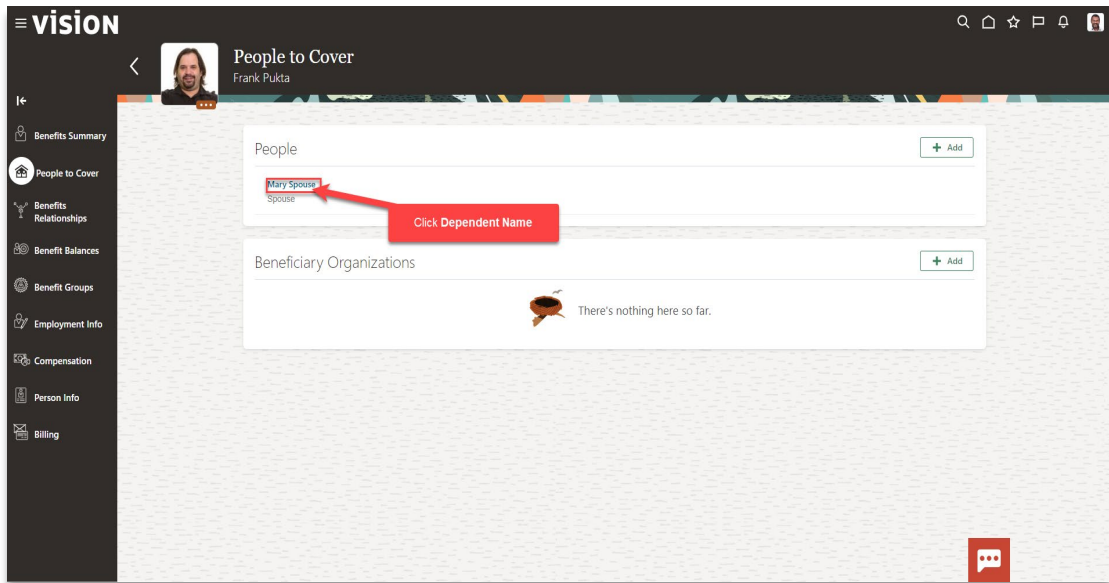
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



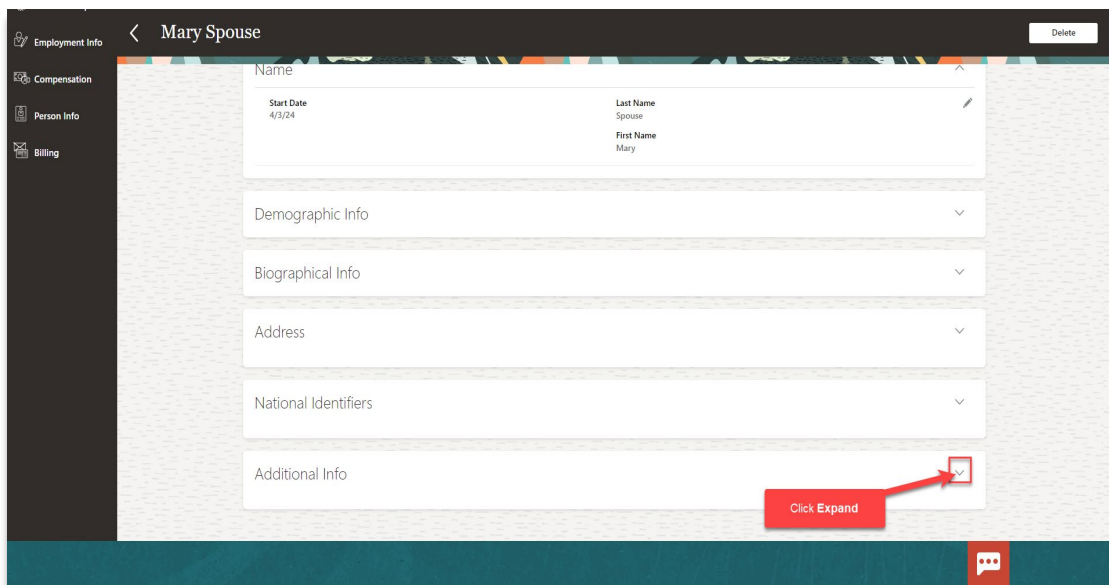
We are now viewing the Benefits Summary Page. To update disability information for a dependent, click **People To Cover**



Click the dependent's name



Scroll down and **Expand** Additional Info



Click **Add**

Compensation < Mary Spouse Delete

Person Info

Billing

First Name
Mary

Demographic Info

Biographical Info

Address

National Identifiers

Additional Info

There's nothing here so far.

+ Add

Click Add

Enter the **Disability Type** and click **Submit**

< Mary Spouse Delete

Biographical Info

Address

National Identifiers

Additional Info

Enter the below information

*Start Date
4/3/24

Student Status
Full-time student

Disability Type
Yes - fully disabled

Disability Status
Approved

Tobacco Use
None

Covered by another plan?
No

Plan

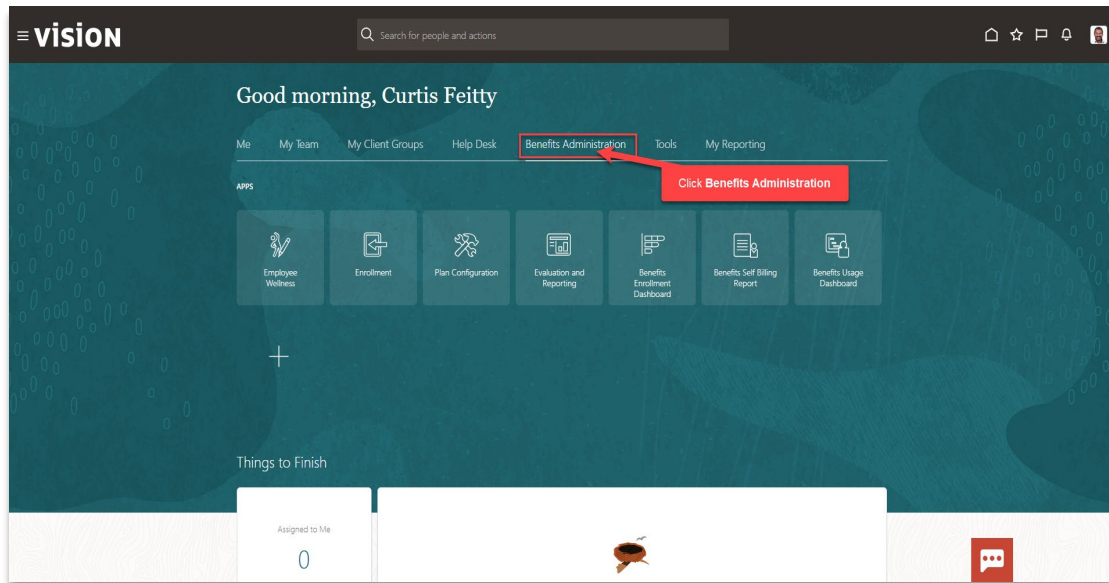
Submit Cancel

Click Submit

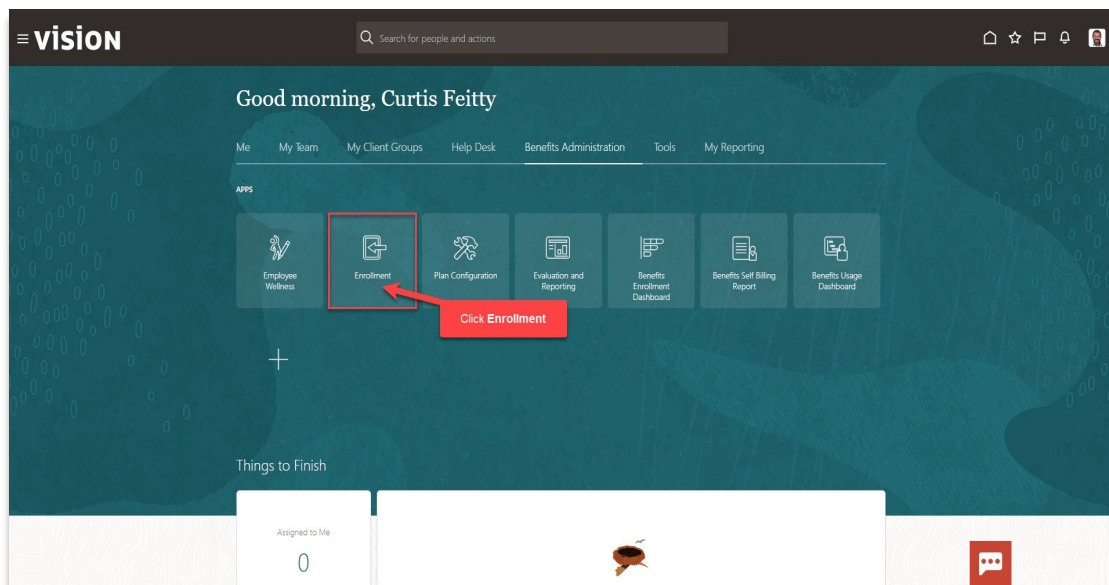
Enroll Dependents Into Benefits

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>People to Cover>Add>Submit>Evaluated Life Events>Enroll>Submit

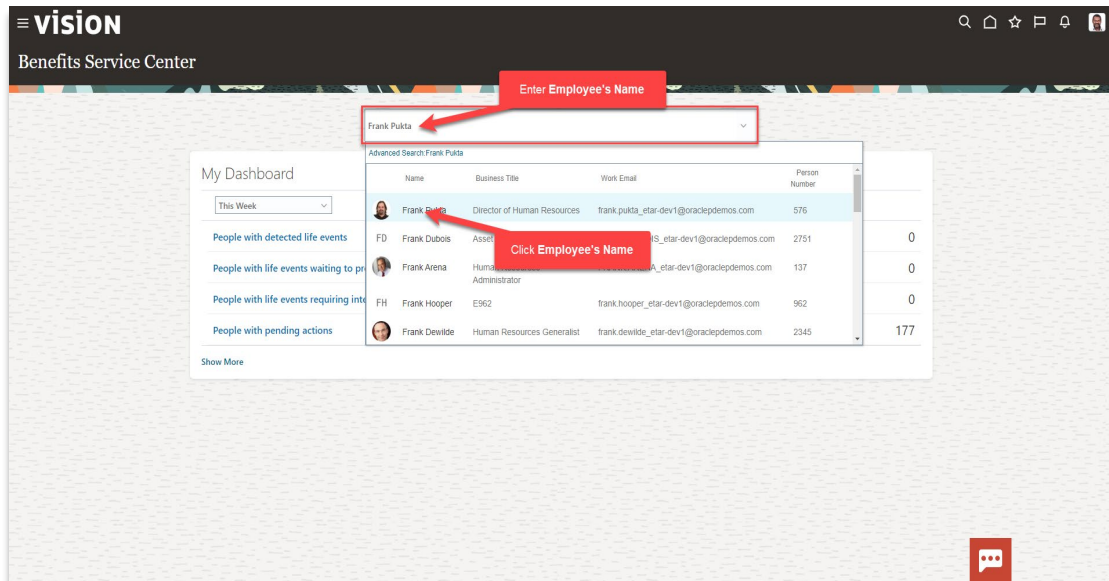
From the home screen, click **Benefits Administration**



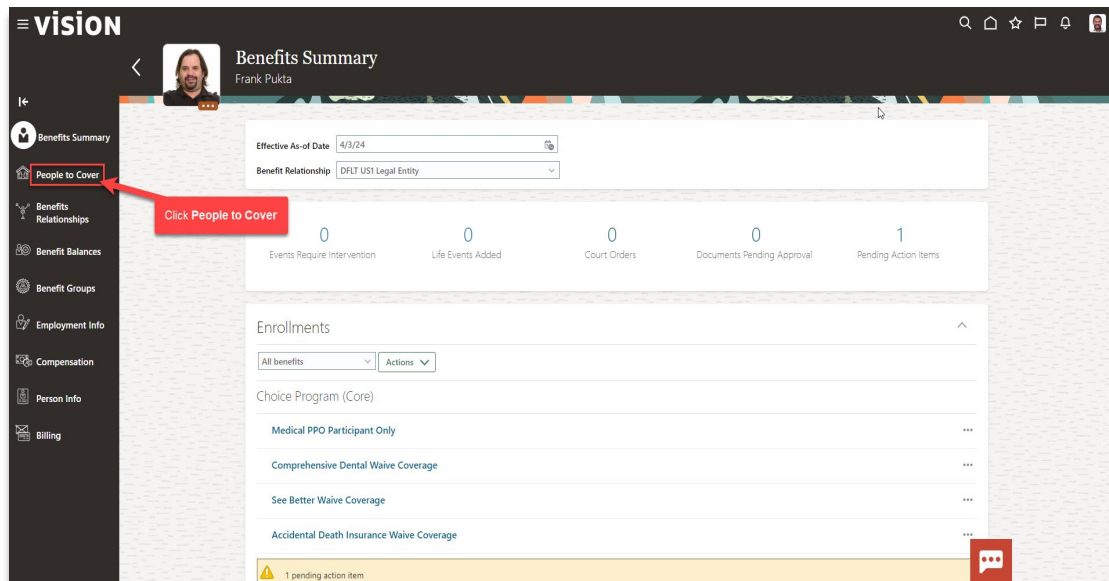
Next, click **Enrollment**



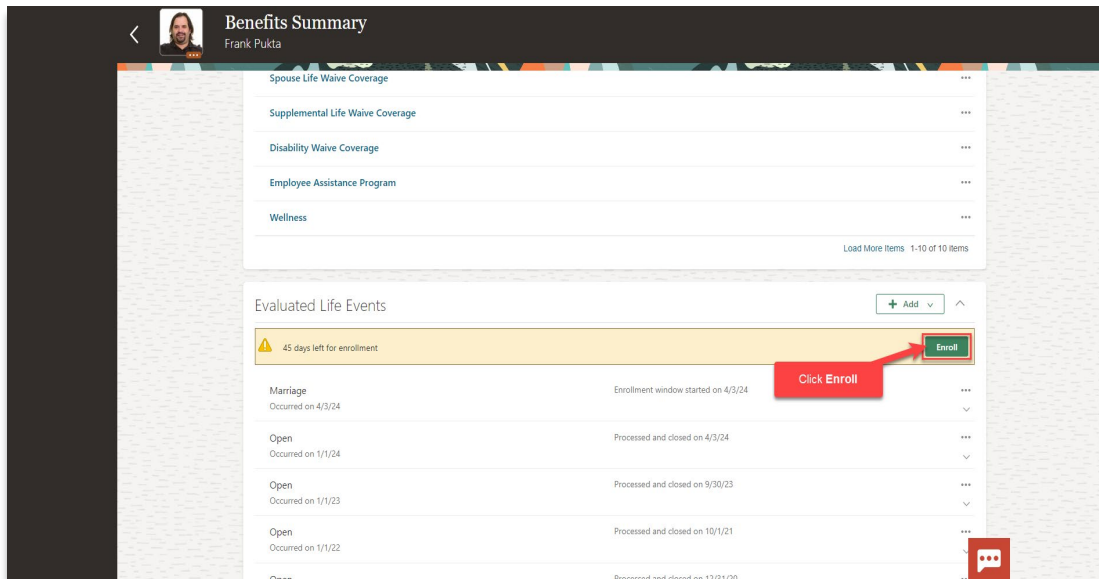
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



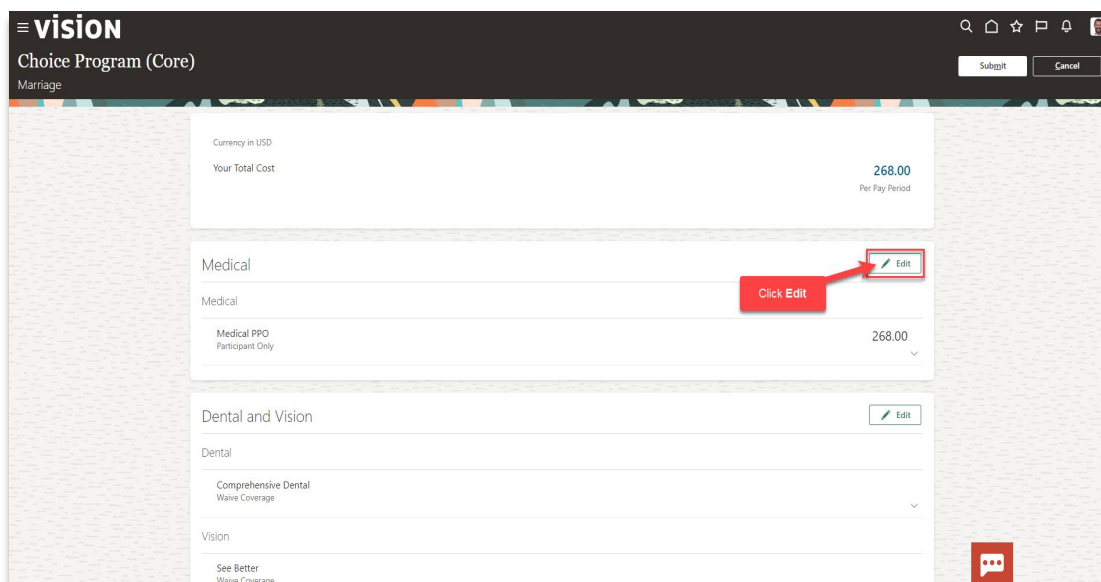
We are now viewing the Benefits Summary Page. Before you can enroll a dependent into the medical plan, the dependent must first be added in People to Cover. Click **People to Cover**



If the dependent is not currently added under People, follow the process to Create the Dependent. Once the Dependent is added in **People to Cover**, we need to **Add A Life Event**. Once the Life Event is added, we need to **Evaluate the Life Event**. Once the Life Event is Evaluated, click **Enroll**



Click **Edit** across from the Medical plan to enroll



Select the plan and the tier of coverage. The tier selected covers dependents; select the dependent you wish to cover. Click **OK**

Medical Continue Cancel

Medical
The key features and provisions of the medical plans are available [here](#).
[Click here to compare plans](#)
Please visit [Vision Benefits](#) website where you can learn more about our benefits.

Medical

Medical PPO

☐ Participant Only
3,216.00 Annually
Employer Rate
579.00

268.00
Employee Rate

Medical PPO
Participant Plus One
Annual Amount
4,296.00
Employer Rate
732.00

358.00
Employee Rate

Who do you want to cover?
☒ Mary Spouse (Spouse)
☐ Employee Plus Spouse_No Surcharge

Select Dependent

Click OK

OK Cancel

Click Continue

Medical Continue Cancel

Medical
The key features and provisions of the medical plans are available [here](#).
[Click here to compare plans](#)
Please visit [Vision Benefits](#) website where you can learn more about our benefits.

Medical

Medical PPO

☐ Participant Only
3,216.00 Annually
Employer Rate
579.00

268.00
Employee Rate

☒ Participant Plus One
4,296.00 Annually
Employer Rate
732.00

358.00
Employee Rate

Who's covered?
You, Mary Spouse

☐ Employee Plus Spouse_No Surcharge
☐ Employee Plus Spouse_Surcharge

Click Continue

You can now view the benefit election for medical. To update the election, click **Edit**. If no updates are needed, proceed with the Dental and Vision election. Across from Dental and Vision, click **Edit**

vision
Choice Program (Core)
Marriage

Currency in USD
Your Total Cost
358.00
Per Pay Period

Medical
Medical
Medical PPO
Participant Plus One
Who's covered?
You, Mary Spouse

358.00

Dental and Vision
Dental
Comprehensive Dental
Waive Coverage
Vision

Click Edit

Follow this same process to enroll the dependent into each benefit plan. Once elections are made, review your elections, and click **Submit**

vision
Choice Program (Core)
Marriage

Currency in USD
Your Total Cost
358.00
Per Pay Period

Medical
Medical
Medical PPO
Participant Plus One
Who's covered?
You, Mary Spouse

358.00

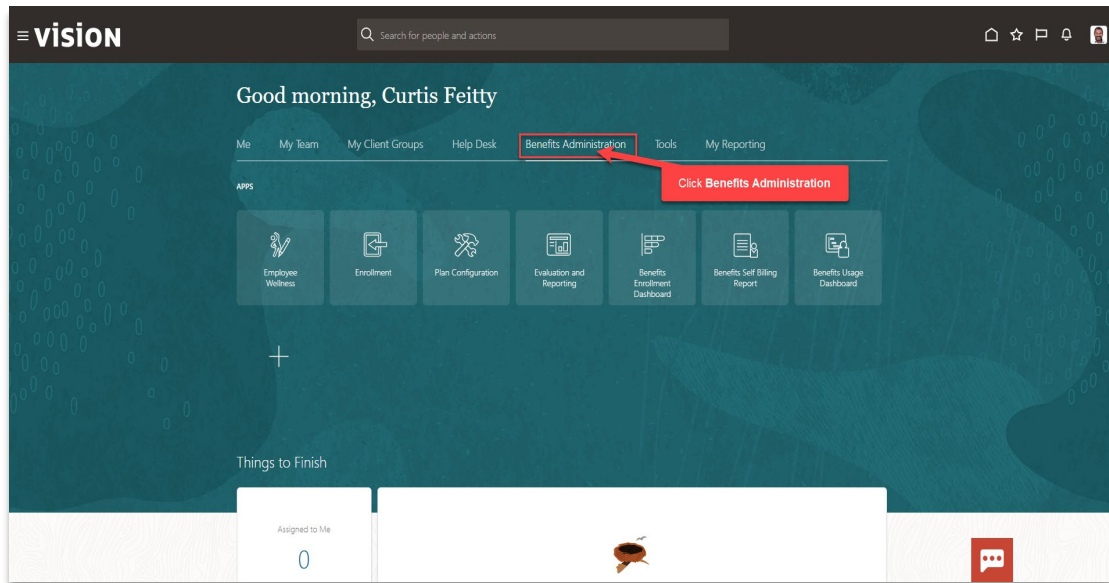
Dental and Vision
Dental
Comprehensive Dental
Waive Coverage
Vision

Click Submit

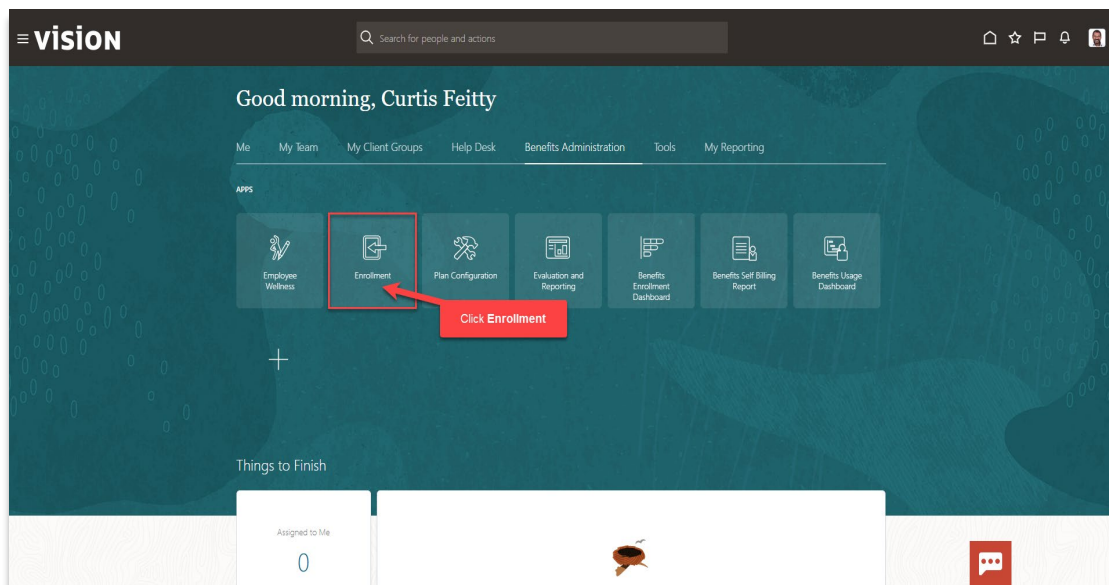
Unprocess A Life Event

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Evaluated Life Events>Backout Life Event>Submit

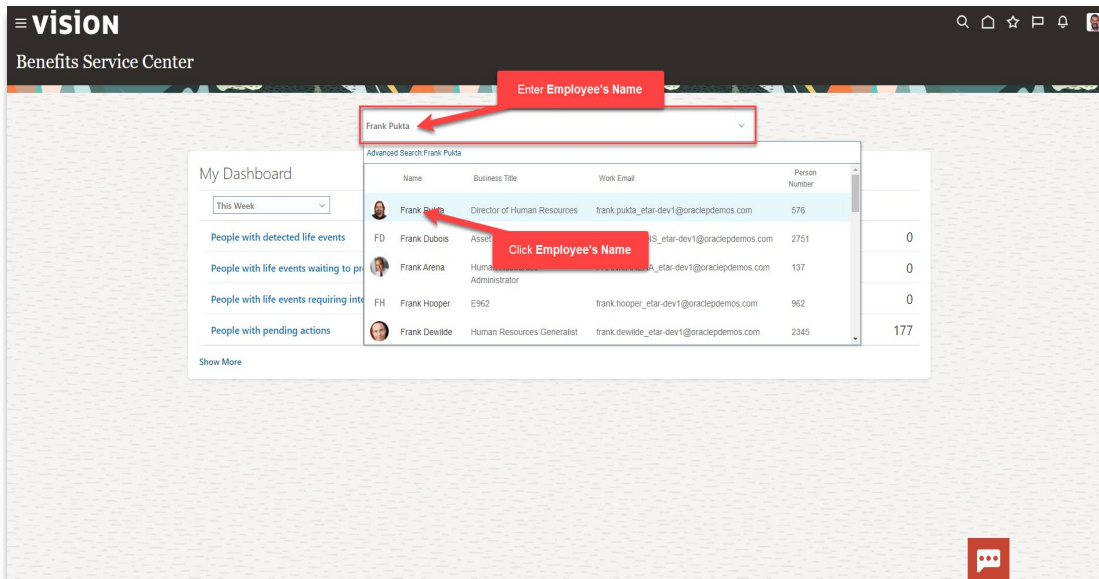
From the home screen, click **Benefits Administration**



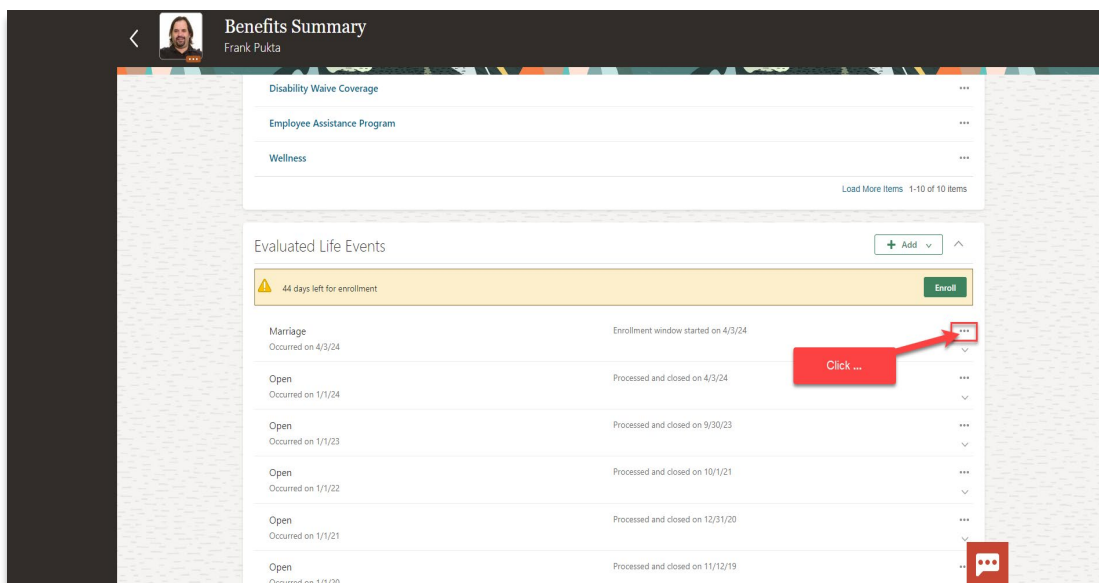
Next, click **Enrollment**



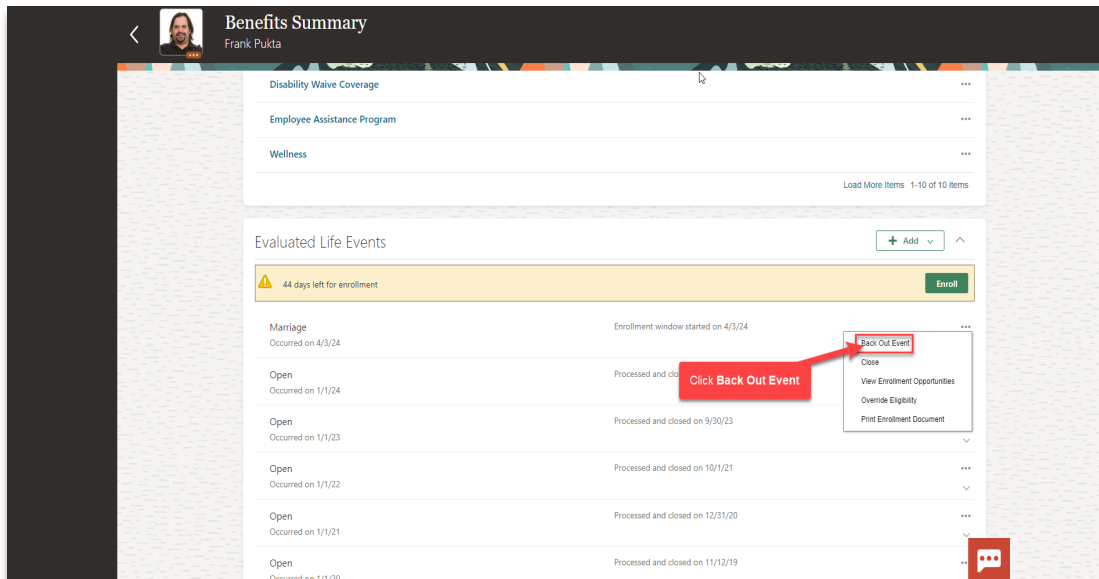
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



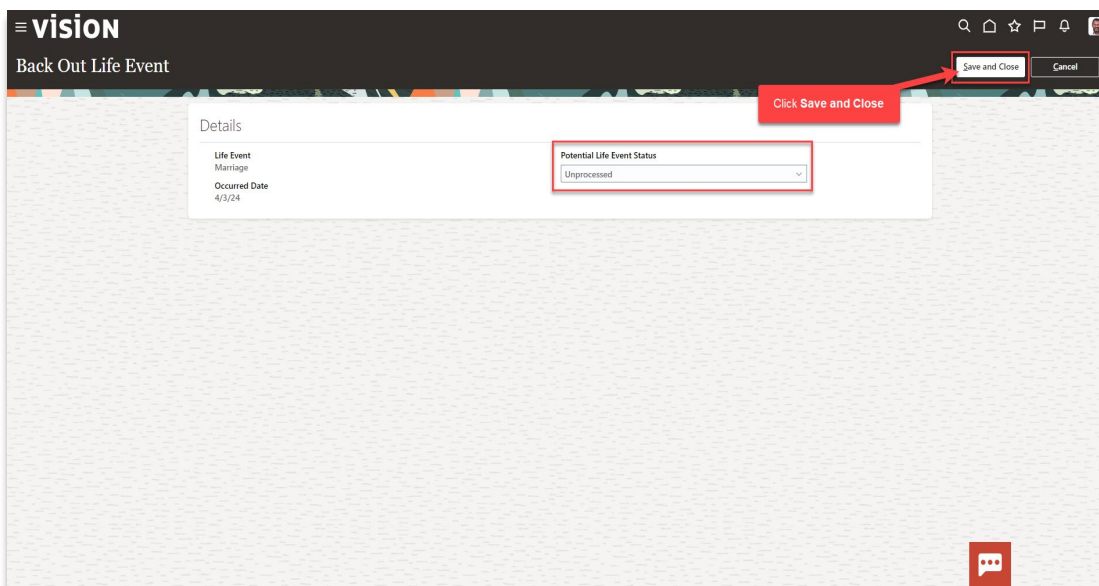
We are now viewing the Benefits Summary Page. Scroll down to **Evaluated Life Events** and click the (...) across from the Life Event we need to unprocess



Click **Back Out Event**



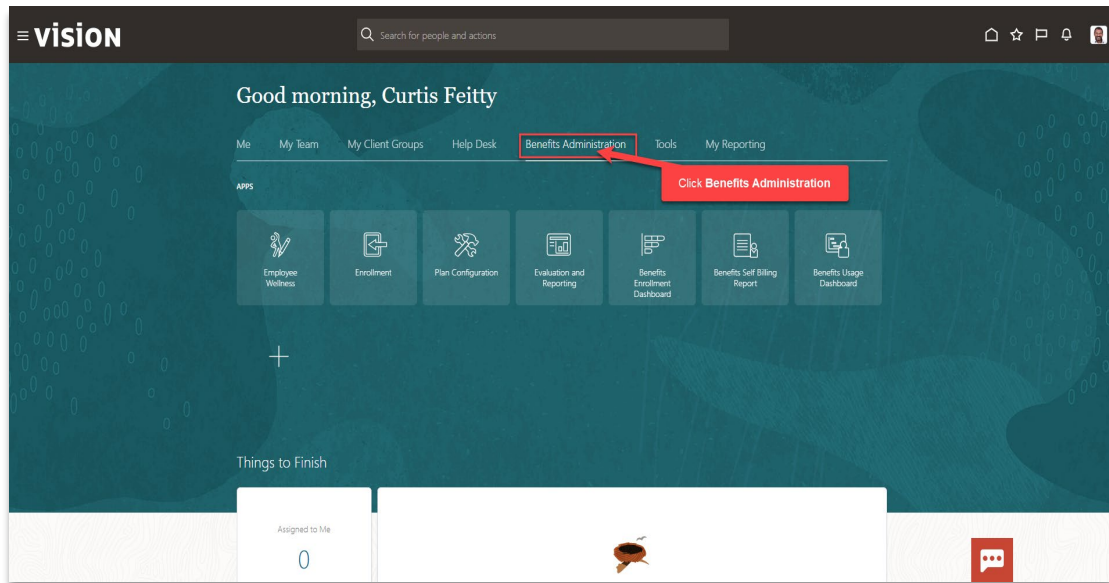
The **Potential Life Event Status** will default to Unprocessed. As a note, selecting **Unprocessed** will allow you to process the Life Event later (i.e. after adding dependents) from **Potential Live Events**. If you select the **Potential Life Event Status** as Voided, the life event will be voided and you will be unable to reprocess later; the Life Event will have to be readded. Click **Save and Close**



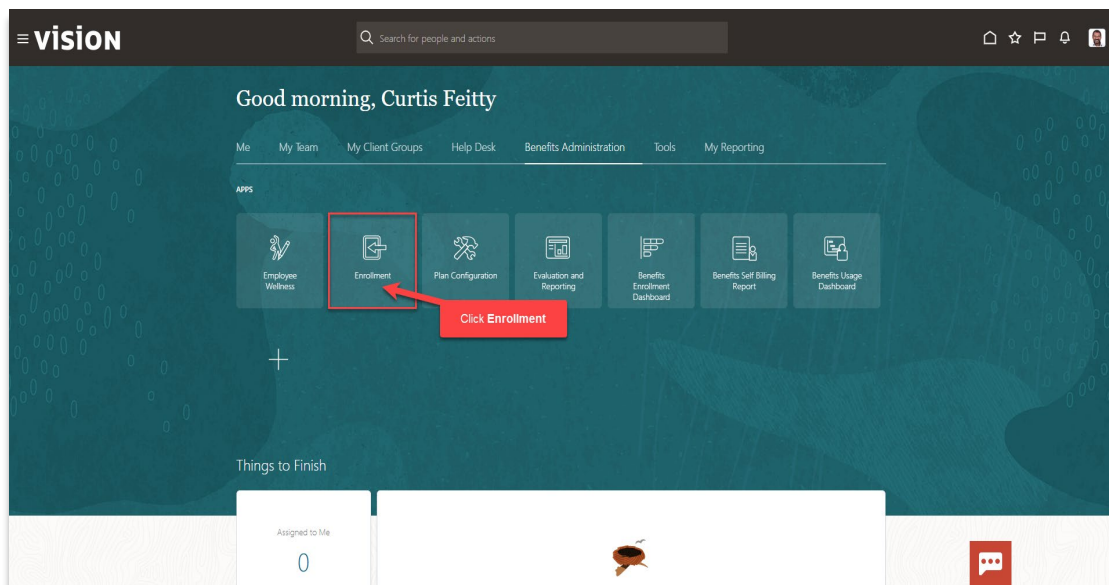
Delete A Life Event

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Potential Life Events>Delete>Submit

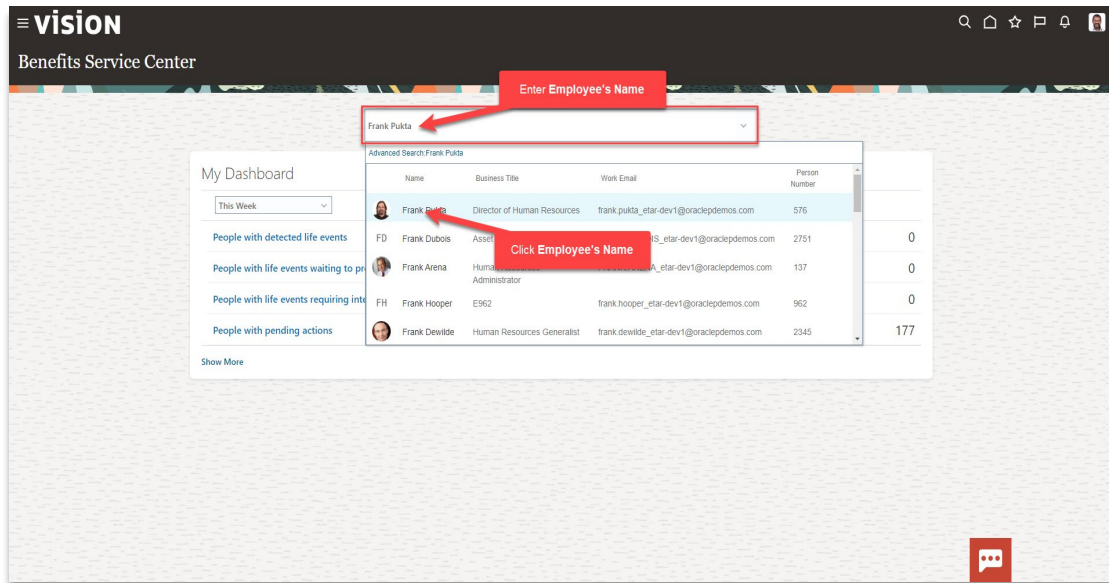
From the home screen, click **Benefits Administration**



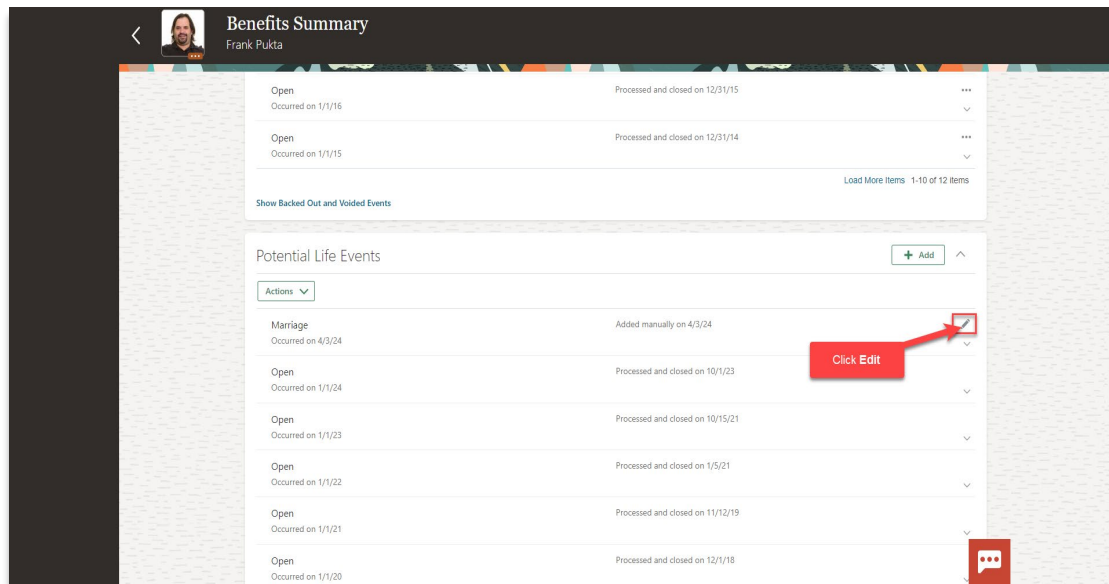
Next, click **Enrollment**



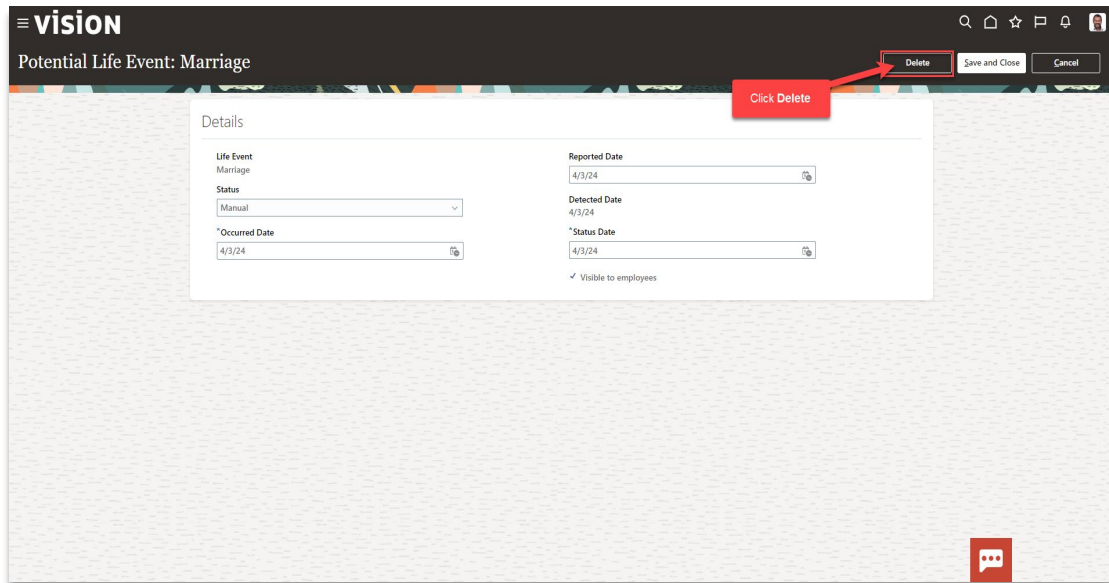
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. Scroll down to **Potential Life Events** and click the **Edit** across from the Life Event we need to Delete. As a note, we only delete a life event if it was created in error. All associated enrollments will be deleted and revert to prior Life Event enrollments.



Next, click **Delete**

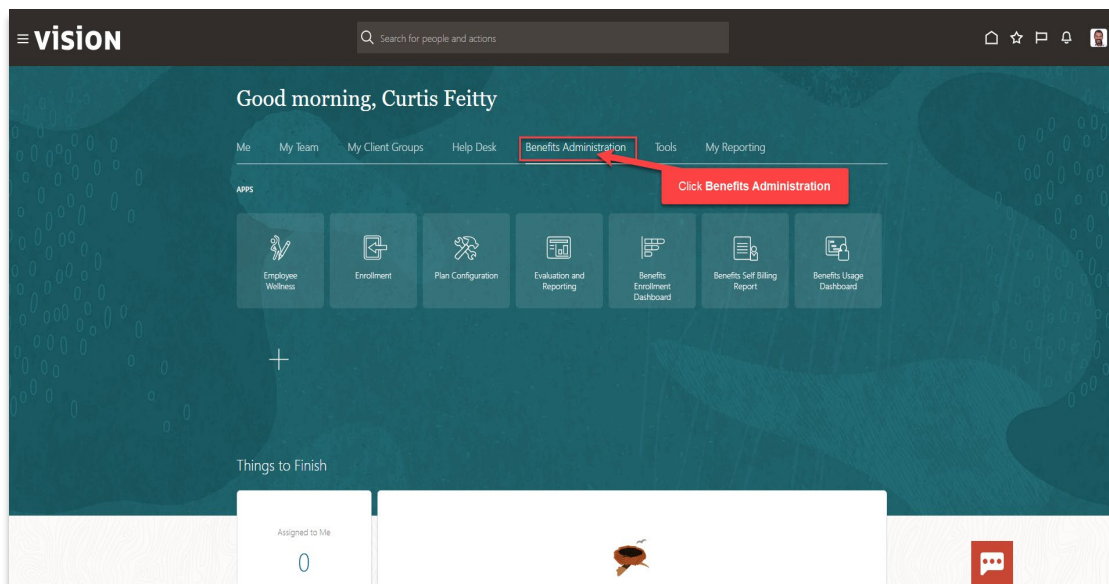


The Life Event has been deleted.

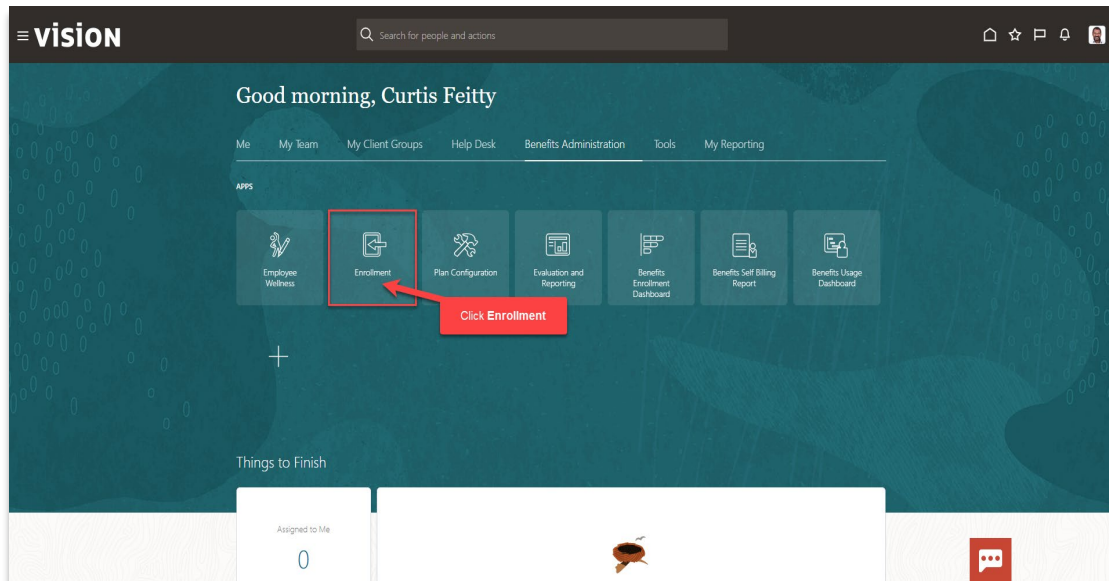
Voiding A Life Event

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Evaluated Life Events>Backout Life Event>Voided>Submit

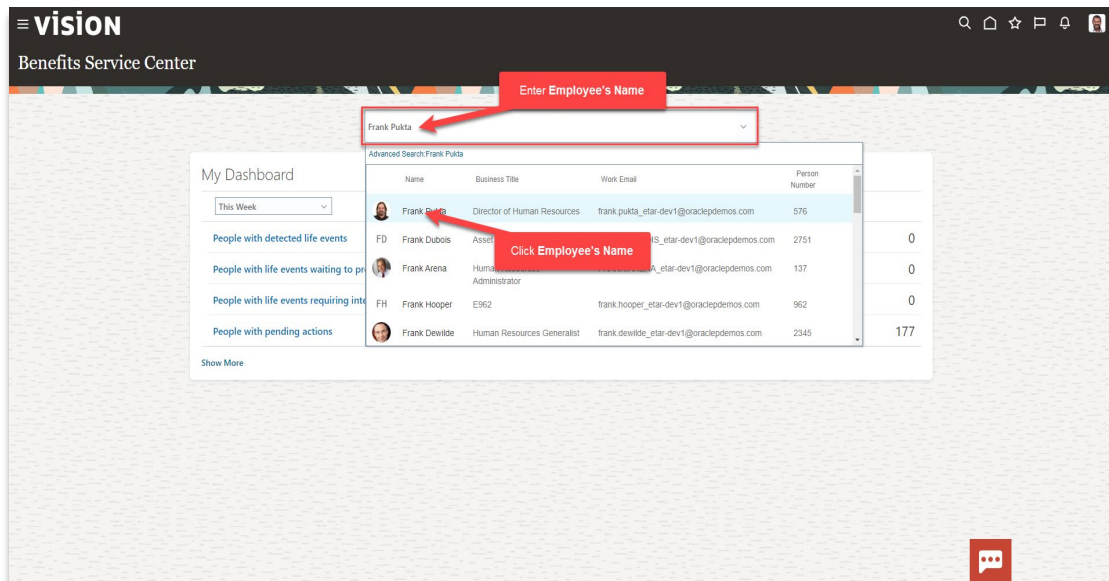
From the home screen, click **Benefits Administration**



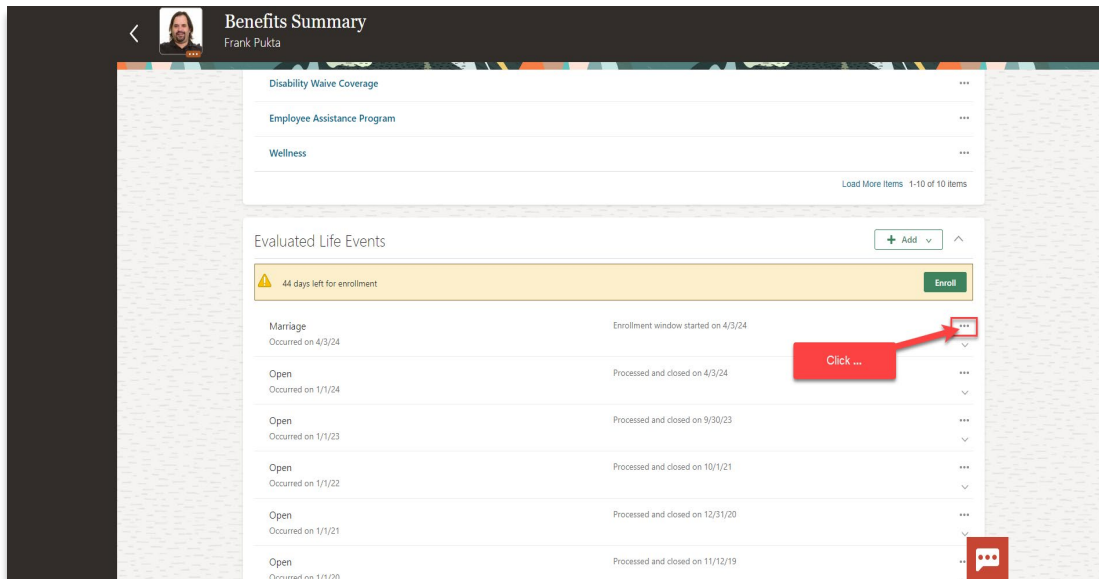
Next, click **Enrollment**



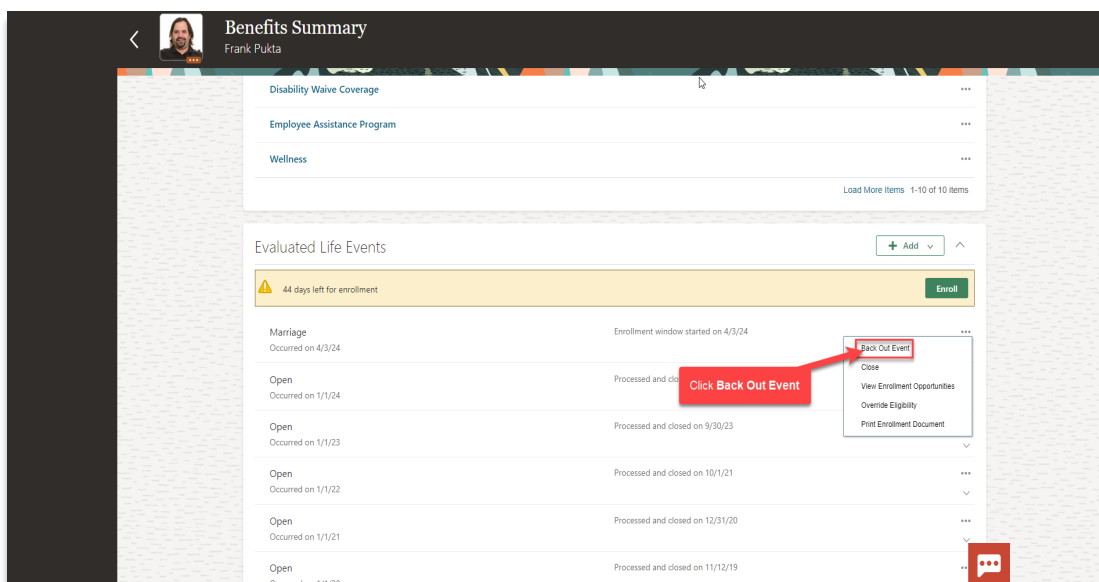
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



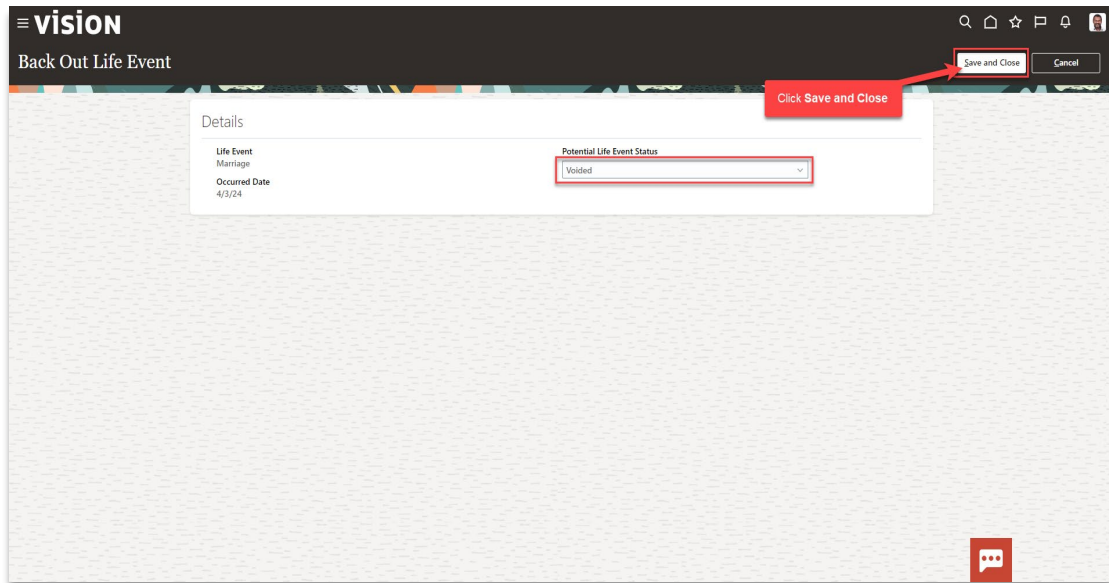
We are now viewing the Benefits Summary Page. Scroll down to **Evaluated Life Events** and click the (...) across from the Life Event we need to Void



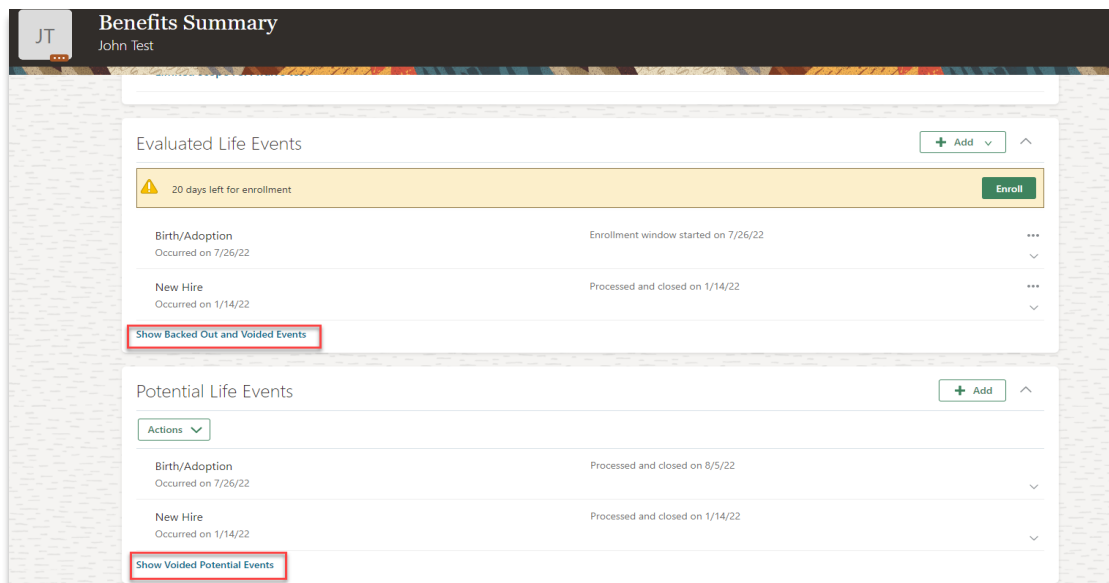
Click Back Out Event



The **Potential Life Event Status** will default to Unprocessed. Select the **Potential Life Event Status** as **Voided** to void the Life Event. Click **Save and Close**



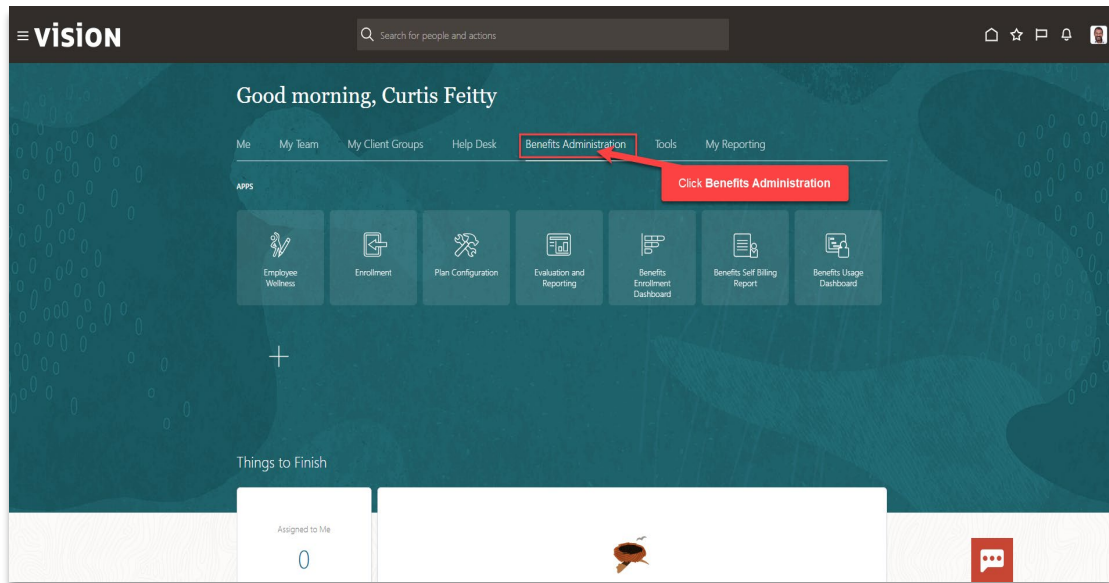
As a note, you can view Backed Out and Voided Events in the Evaluated Life Events section and the Potential Life Events section by clicking **Show Backed Out and Voided Events**



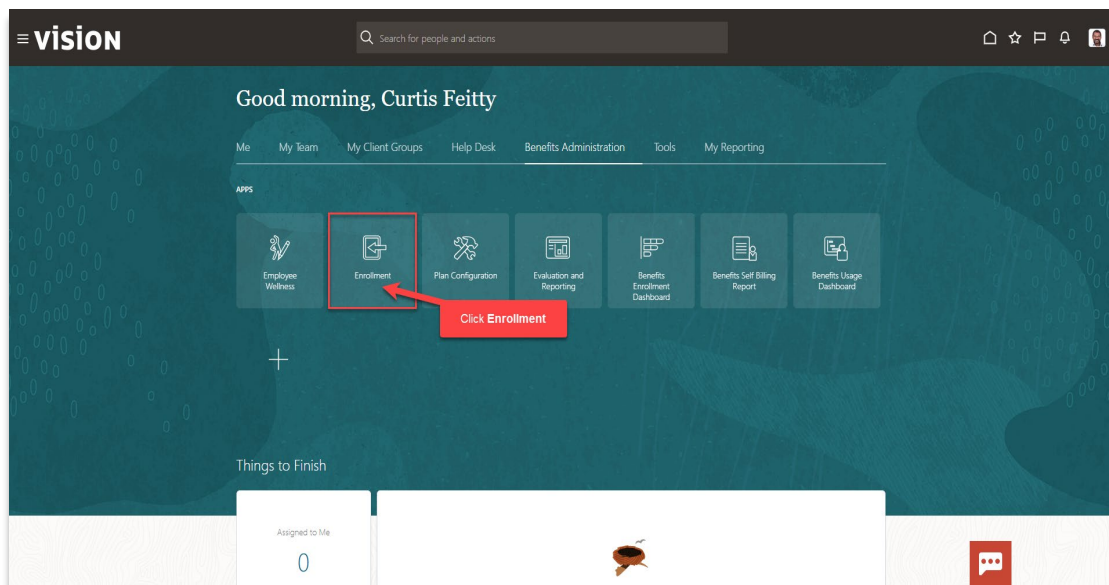
Review and Close Pending Action Items

Navigation: Home>Benefits Administration>Enrollment>Benefits Service Center>People With Pending Actions>Select Employee>Enter Information>Save and Close

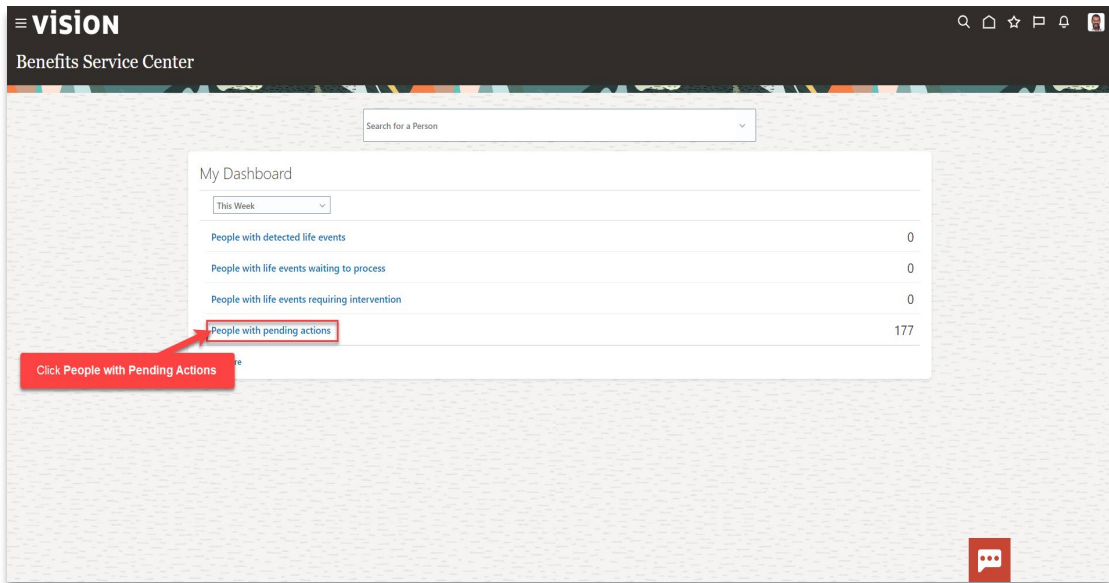
From the home screen, click **Benefits Administration**



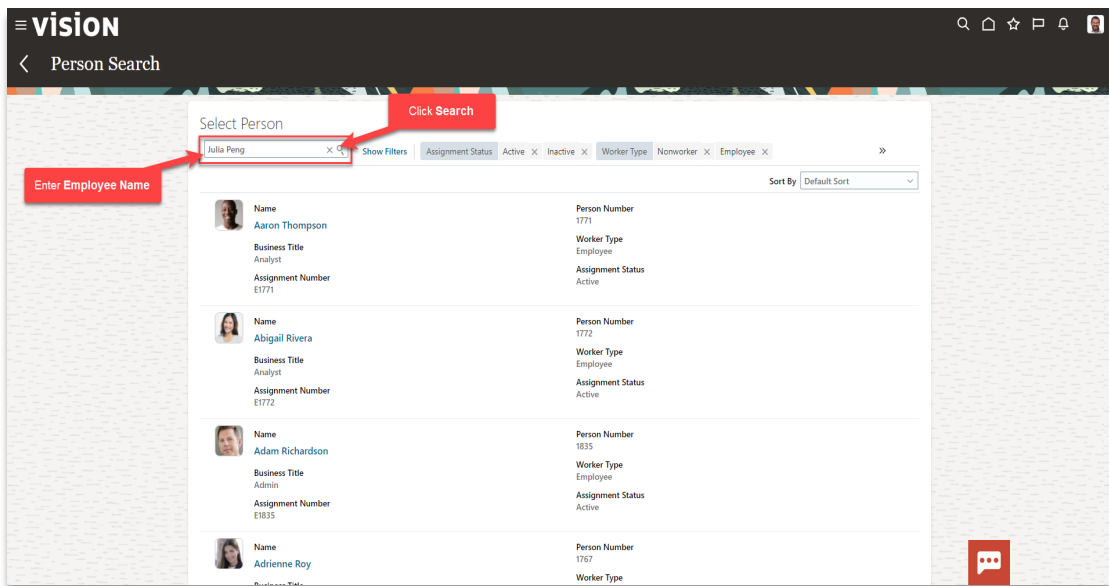
Next, click **Enrollment**



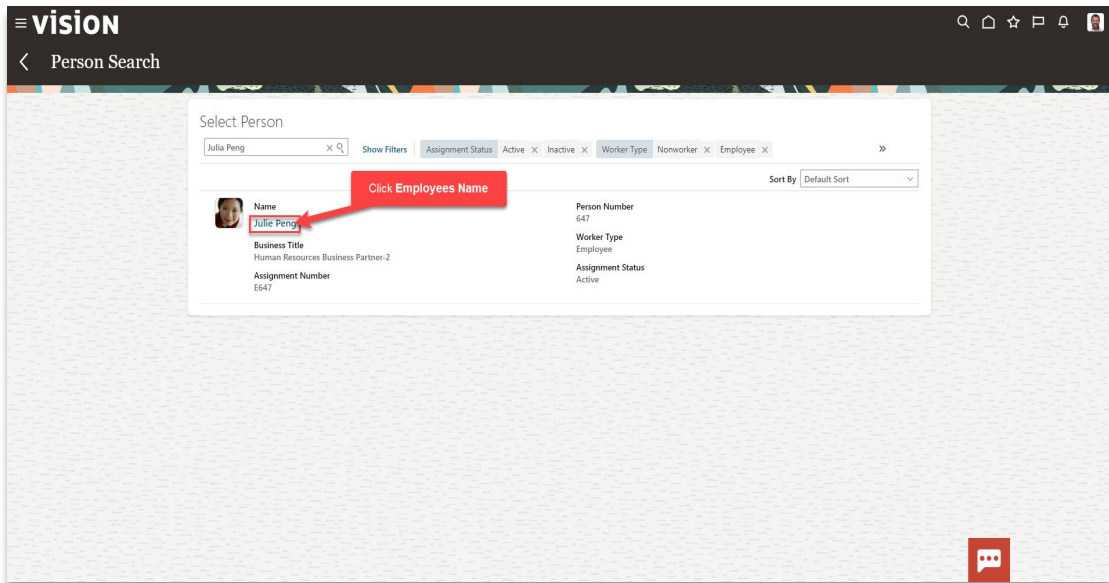
After clicking **Enrollment**, the Benefits Service Center Page is displayed. To view employees with pending actions, Click **People with pending actions**



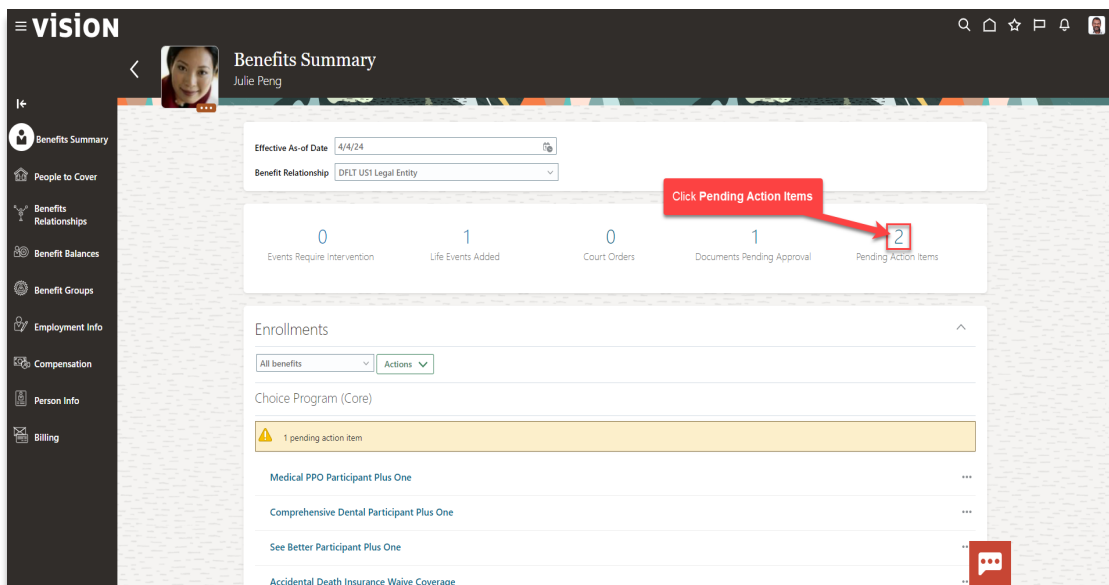
Enter the Employee's name and click **Search**. Or, if the Employee's name is listed, we can simply click on the **Employee's Name**



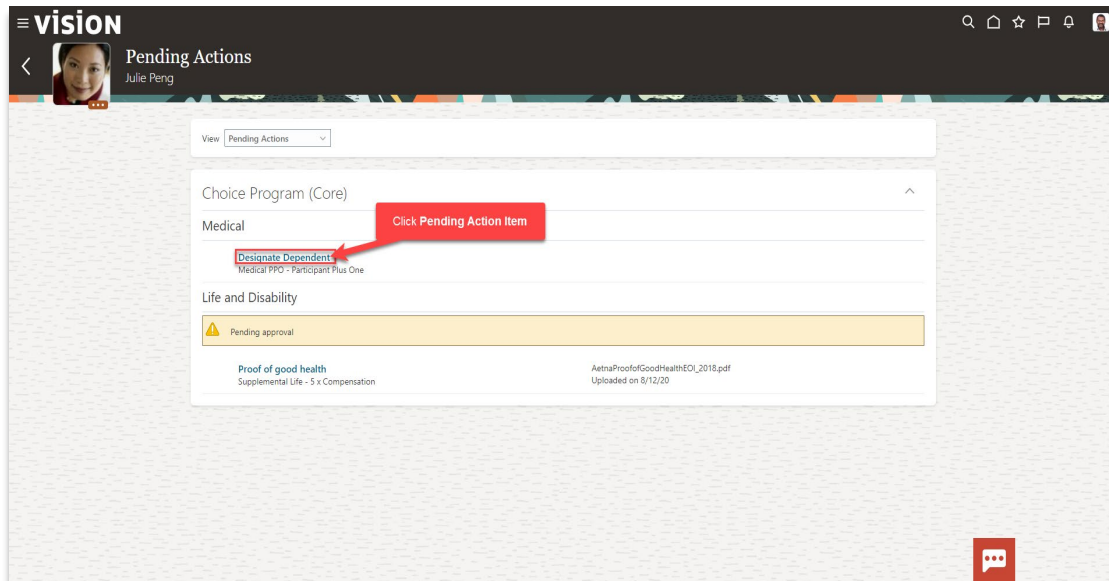
Click **Employee's Name**



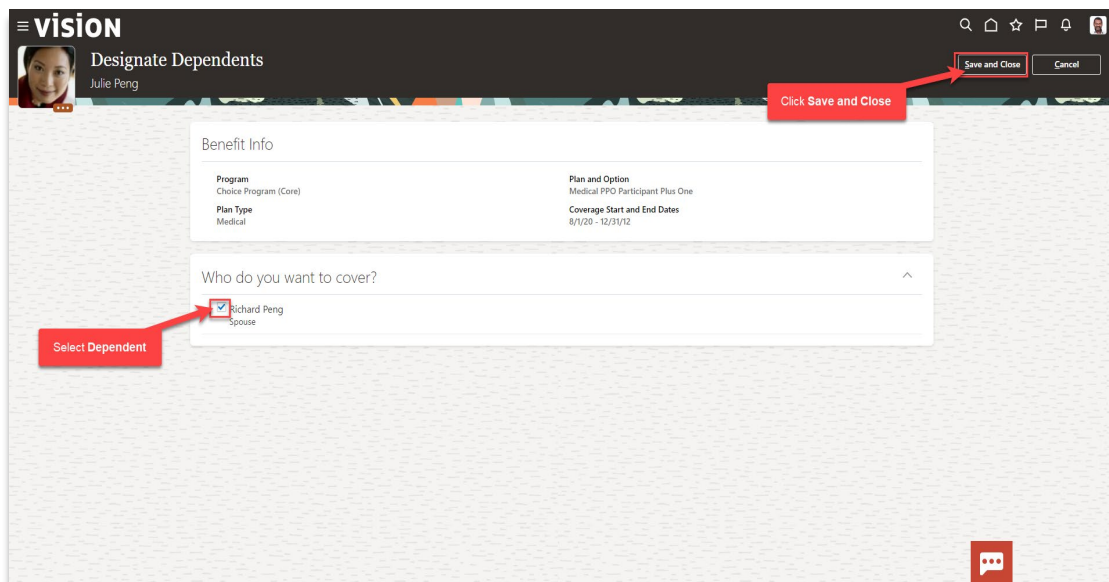
Here you can view the **Pending Action Items**. Click **Pending Action Items**



Click the **Pending Action Item** to take action



Enter the information for the action, and click **Save and Close**

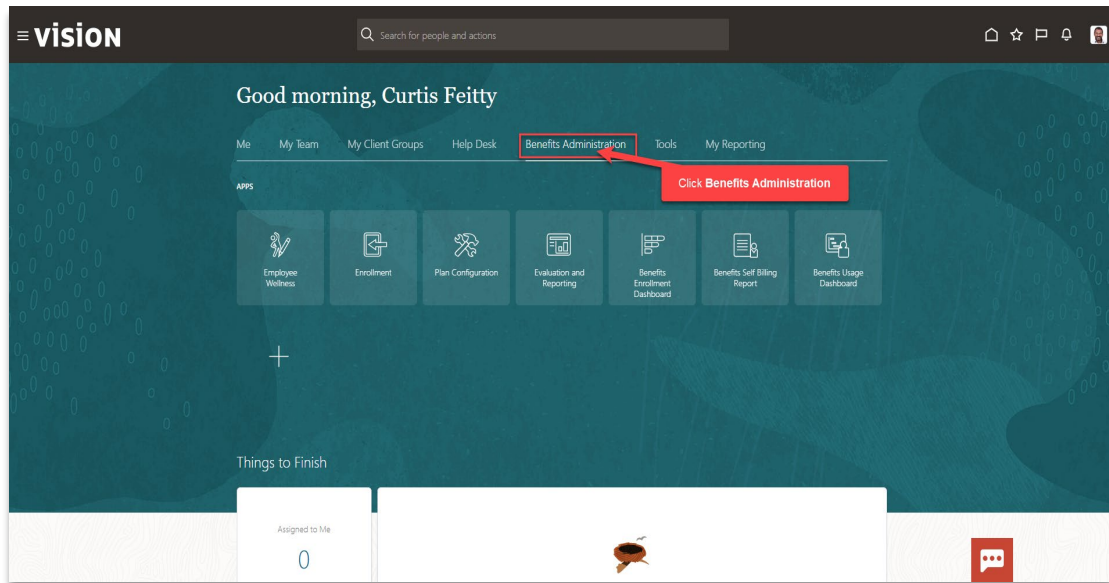


The Action Item has been completed.

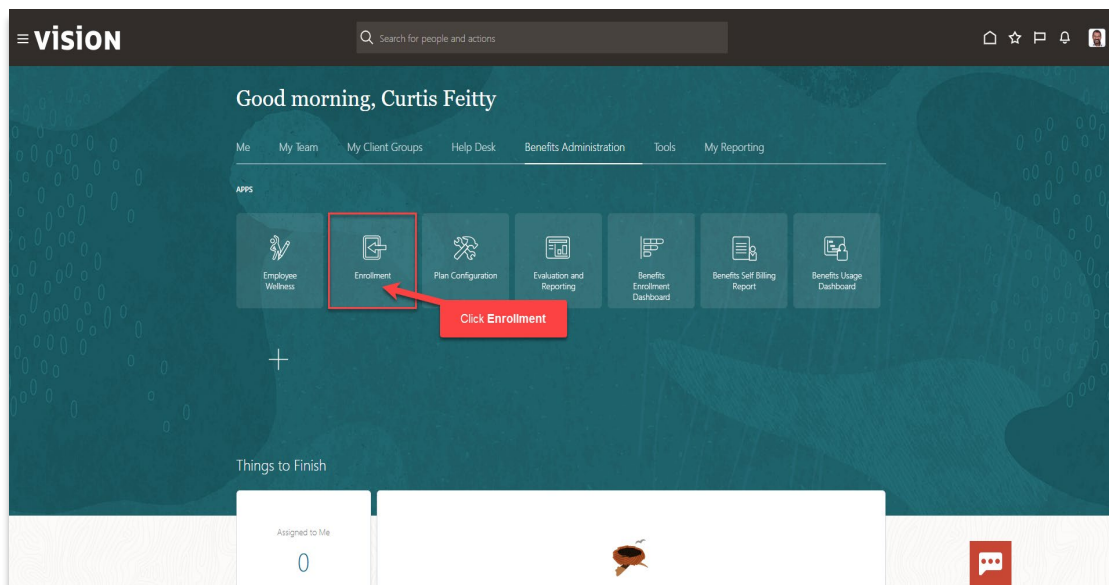
Review And Approve Documents Pending Approval

Navigation: Home>Benefits Administration>Enrollment>Benefits Service Center>People with documents waiting to be approved>Select Employee>Enter Information>Save and Close

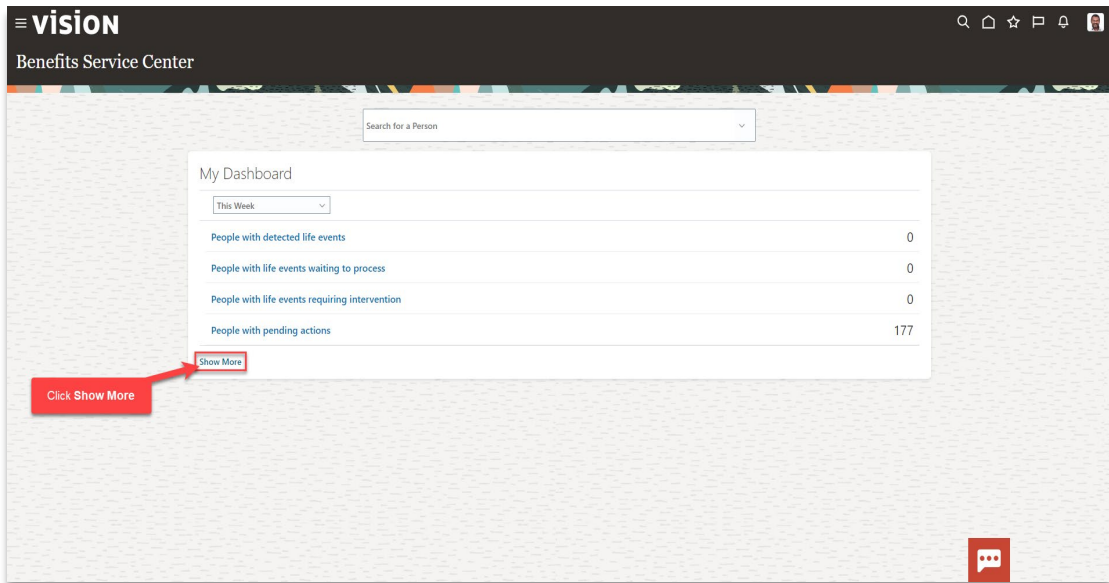
From the home screen, click **Benefits Administration**



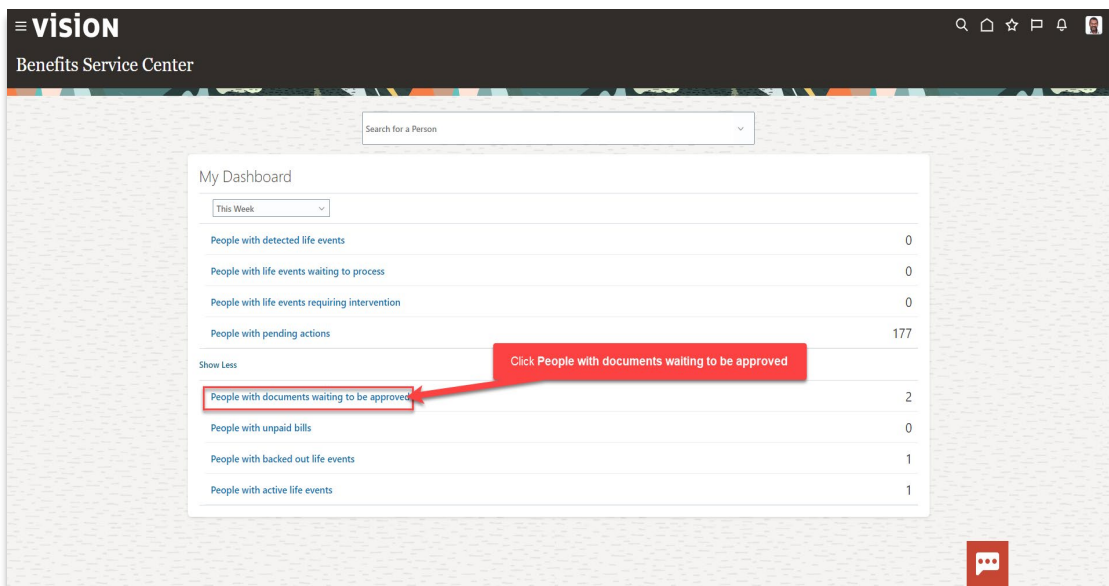
Next, click **Enrollment**



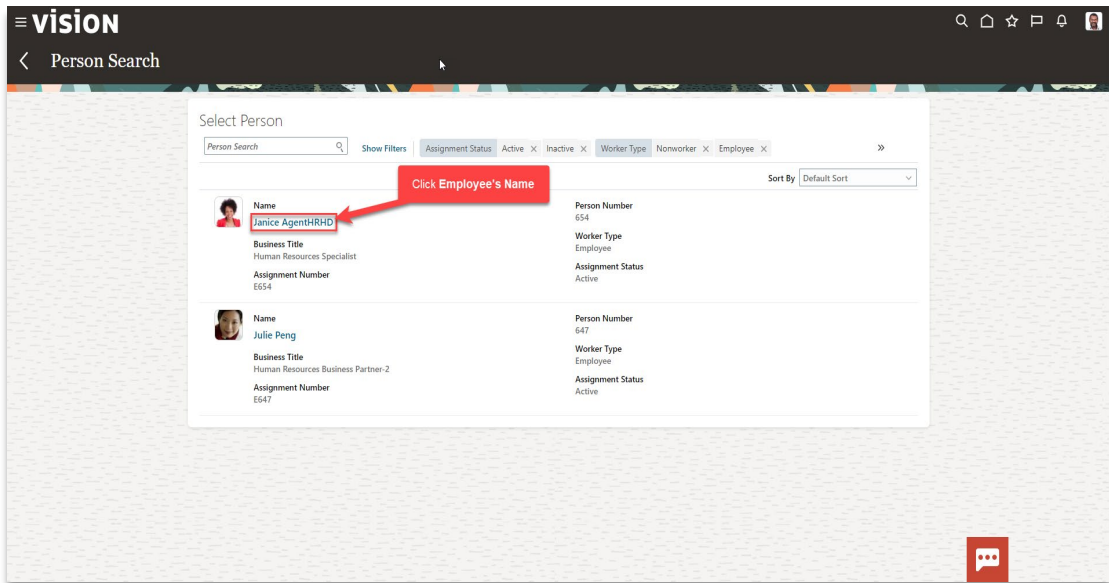
After clicking **Enrollment**, the Benefits Service Center Page is displayed. To view employees with pending actions, click **Show More**



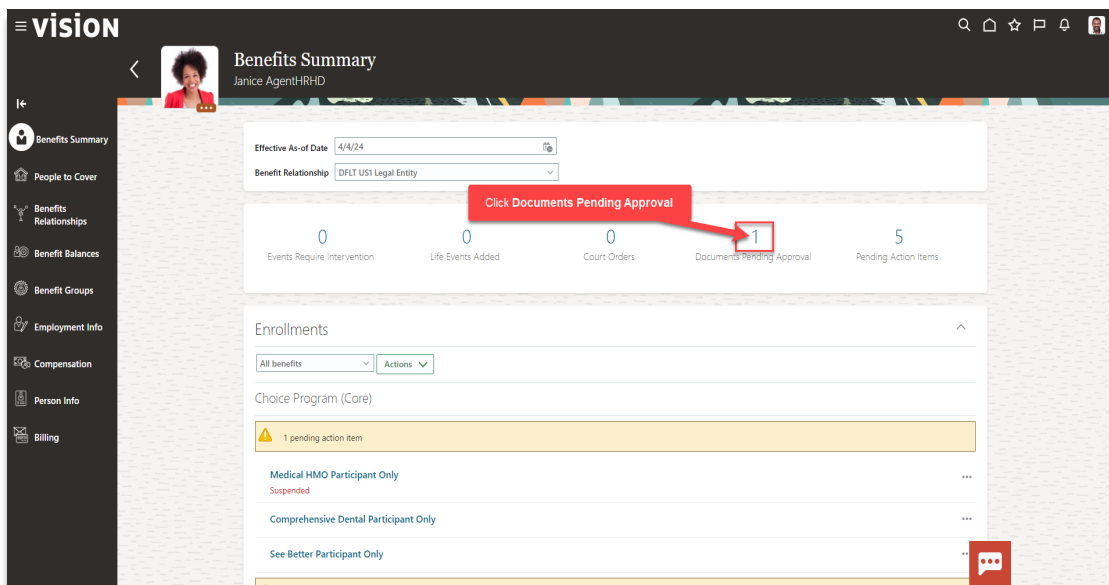
Click **People with documents waiting to be approved**



Click **Employee's Name**



Click Documents Pending Approval



Across from Proof of good health, click ...

Benefits Summary
Janice Agenth-IRHD

Court Orders
There's nothing here so far.

Certification
Pending approval

Proof of good health
Submitted

Document Type
Certification

Document Name
AetnaEOI_2018.pdf
Received on 10/13/20

Click ...

Notes
There's nothing here so far.

Click either **Approved** or **Reject**

Benefits Summary
Janice Agenth-IRHD

Court Orders
There's nothing here so far.

Certification
Pending approval

Proof of good health
Submitted

Document Type
Certification

Document Name
AetnaEOI_2018.pdf
Received on 10/13/20

Click Approve

Approve
Reject

Notes
There's nothing here so far.

Enter the **Received Date** and click **Submit**

vision

Approve Proof of good health
Janice Agent-HRHD

Document Details

Document Type
Proof of good health

Name
Janice Demarco

Relationship
Self

Attachments
AetnaEOI_2018.pdf

Valid Start and End Dates
1/1/20 - 12/31/12

Received Date
4/4/24

Comments

Click Submit

Enter Received Date

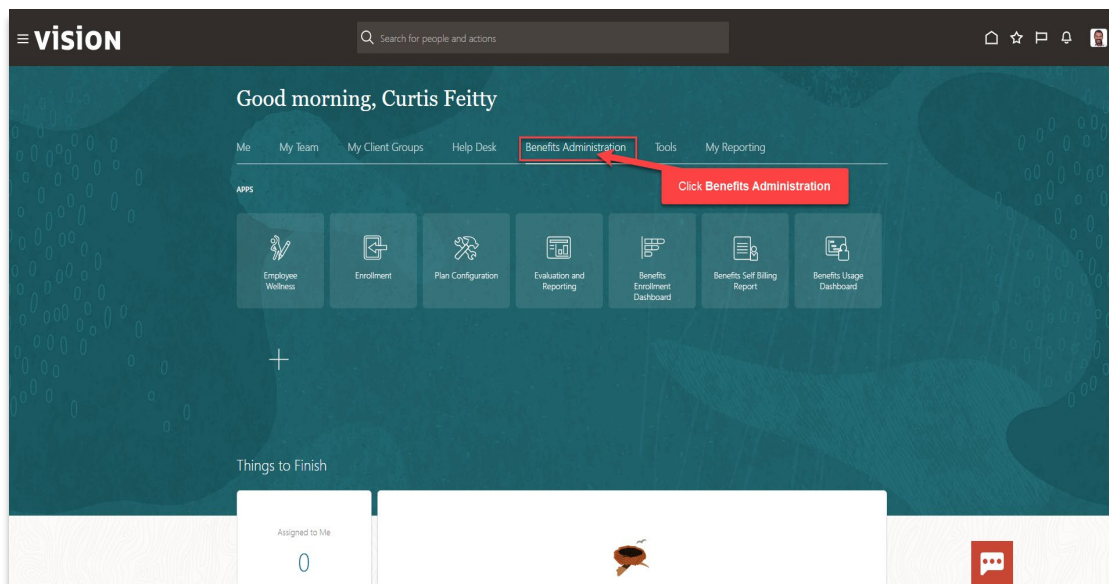
Submit Cancel

The document has been approved.

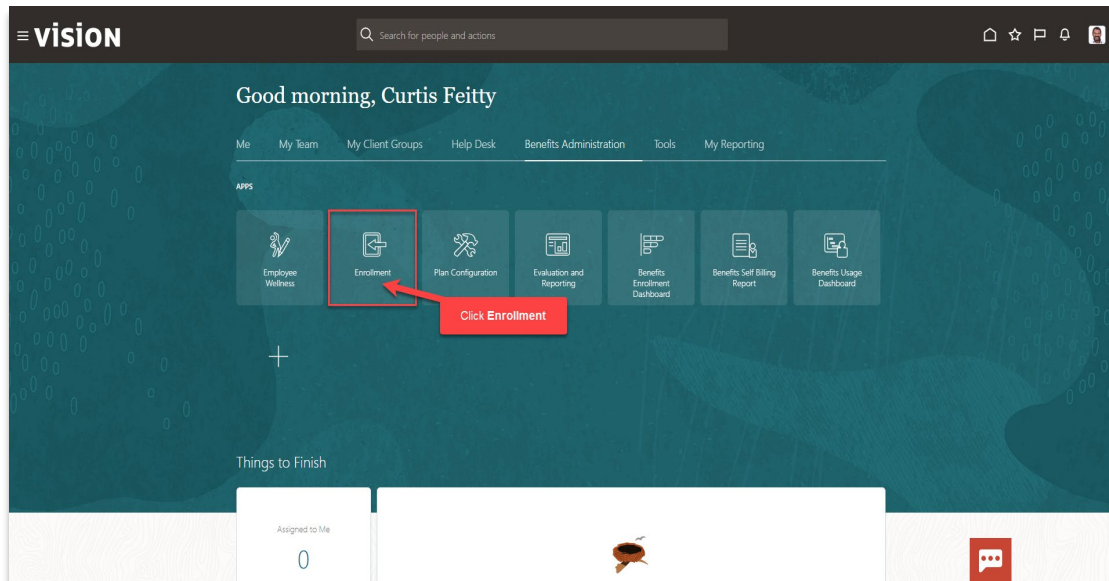
Review Benefit Rates & Coverages For An Employee

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Actions>View Enrollment Results

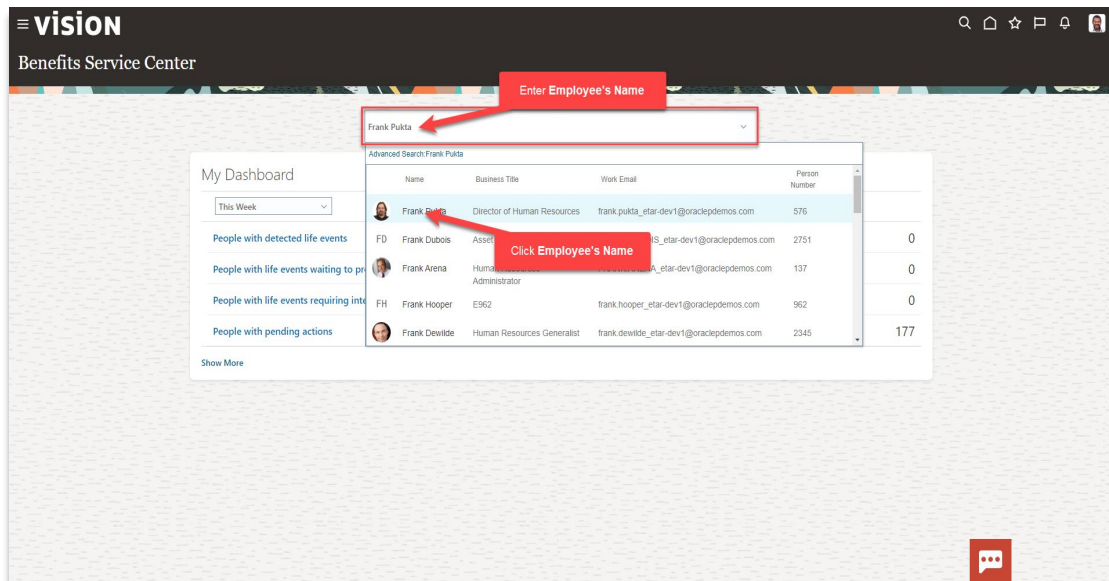
From the home screen, click **Benefits Administration**



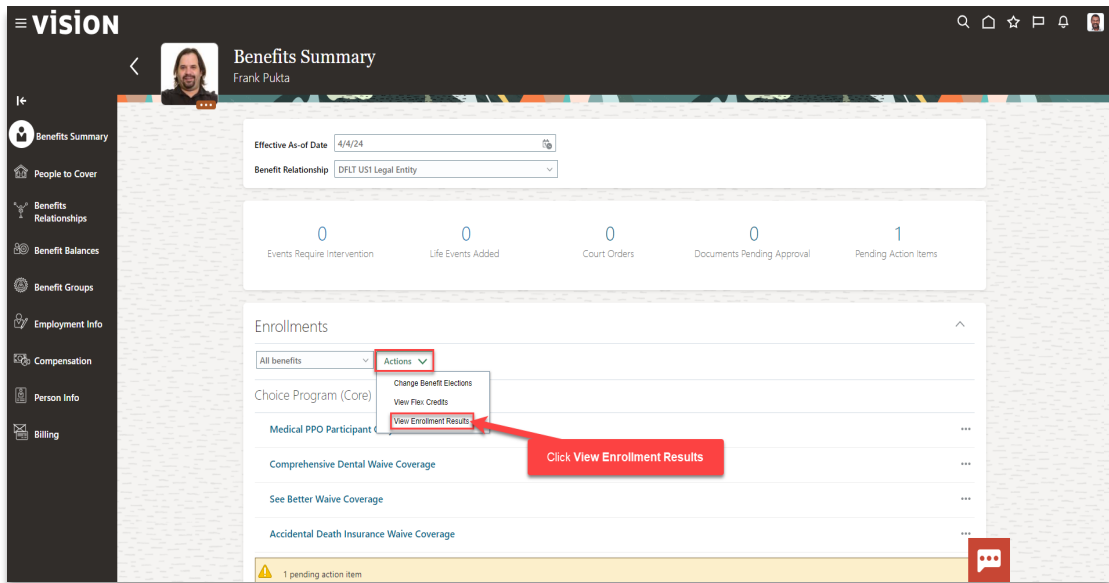
Next, click **Enrollment**



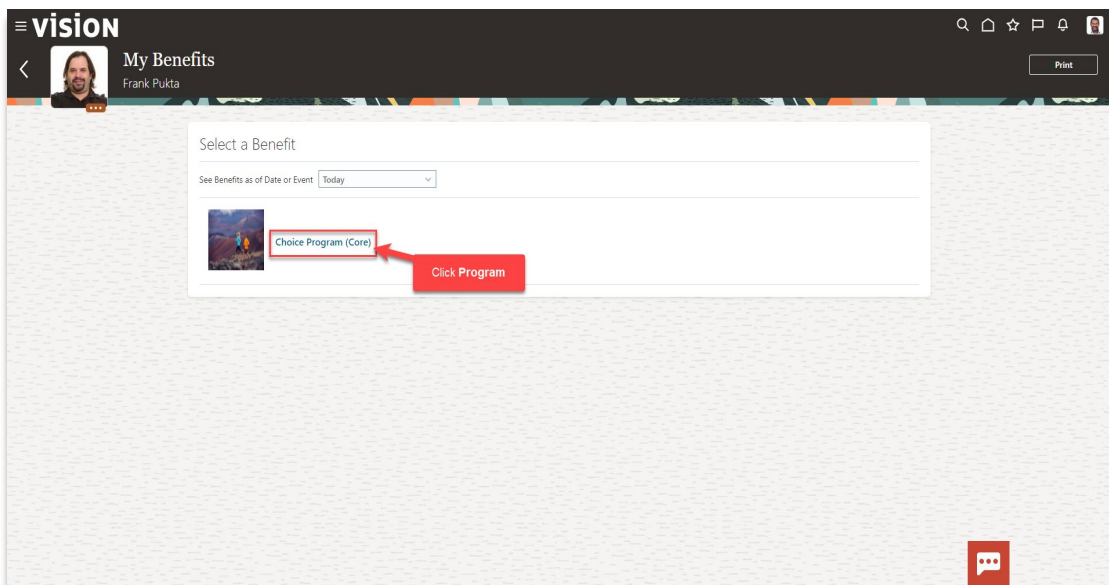
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



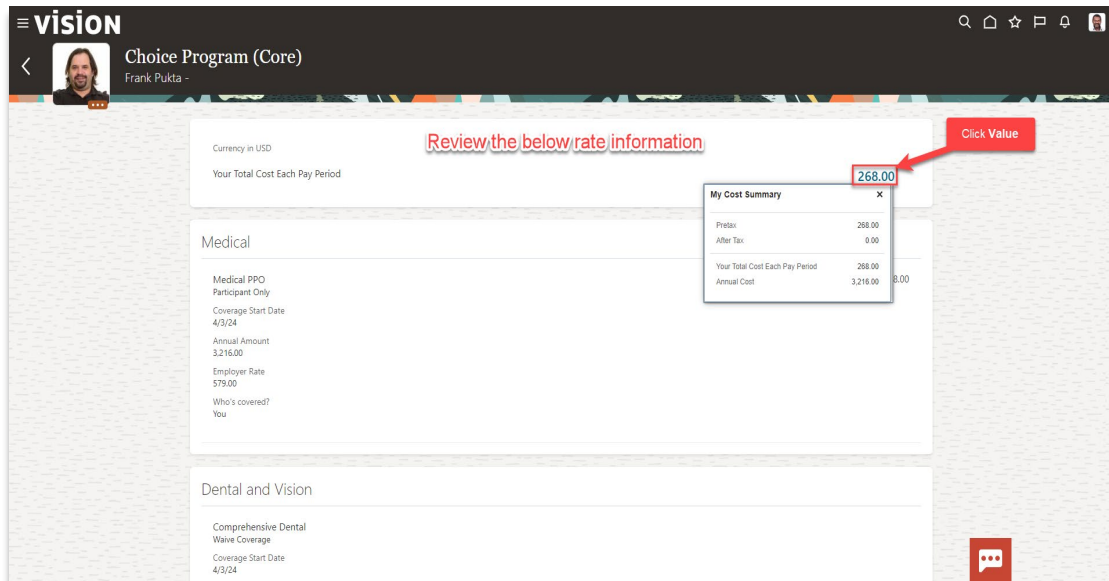
We are now viewing the Benefits Summary Page. To view the rates and coverages for an employee, from the **Actions** dropdown, click **View Enrollment Results**



Select the Program



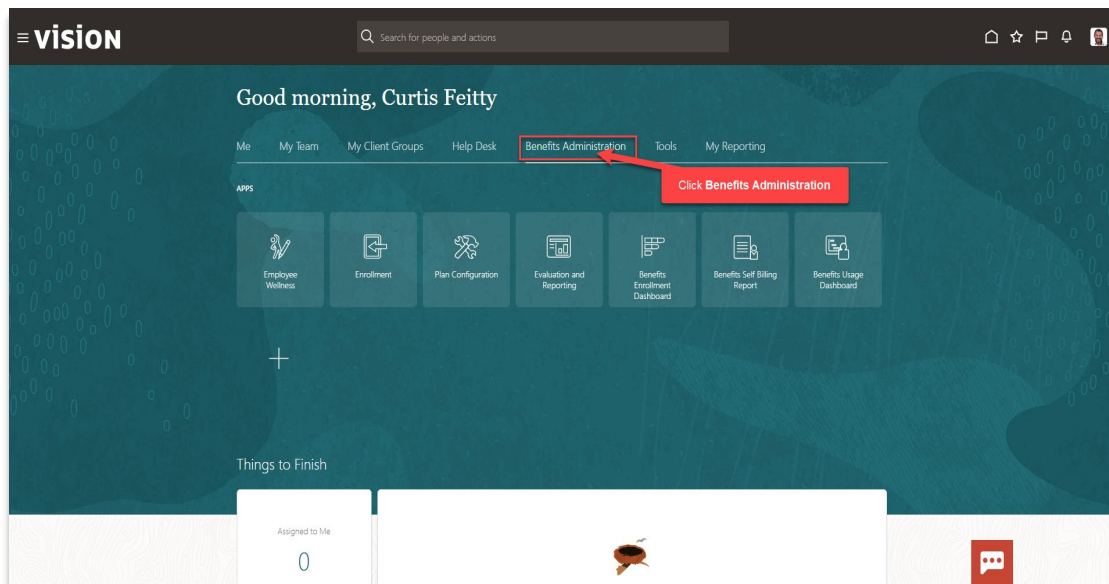
Scroll down to view the rates and coverage information for each plan. We can also click the Per Pay **Amount** to view the rate details



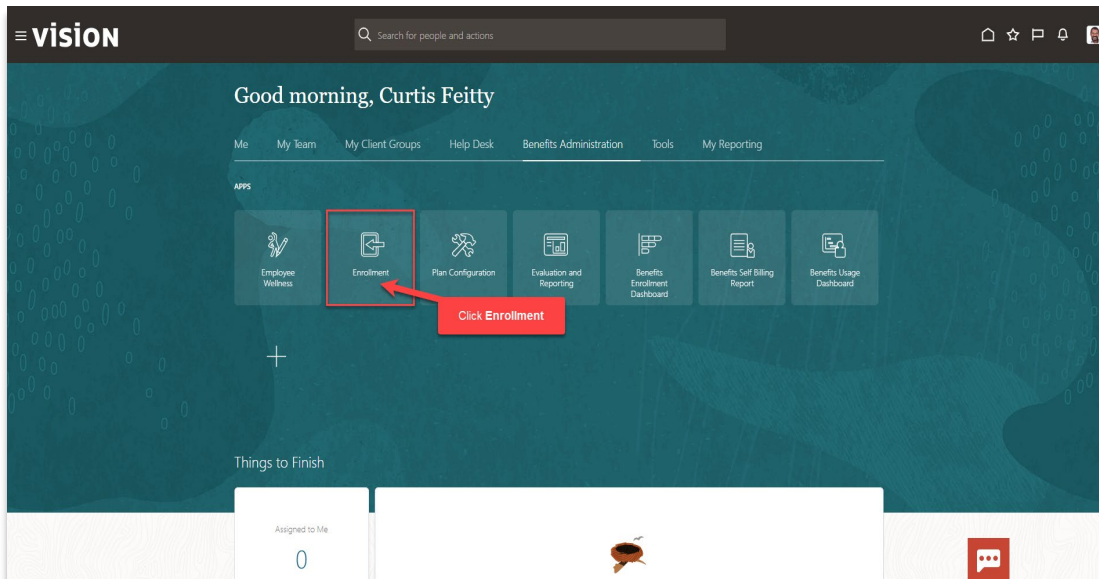
View Payroll Elements Created By Benefits Rates

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Plan>View Payroll Information

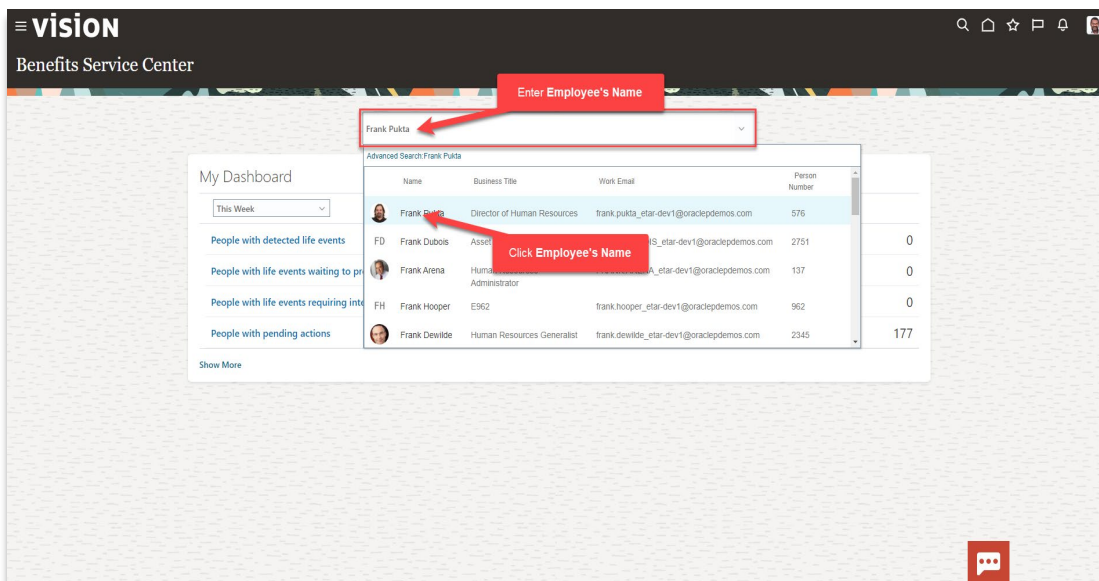
From the home screen, click **Benefits Administration**



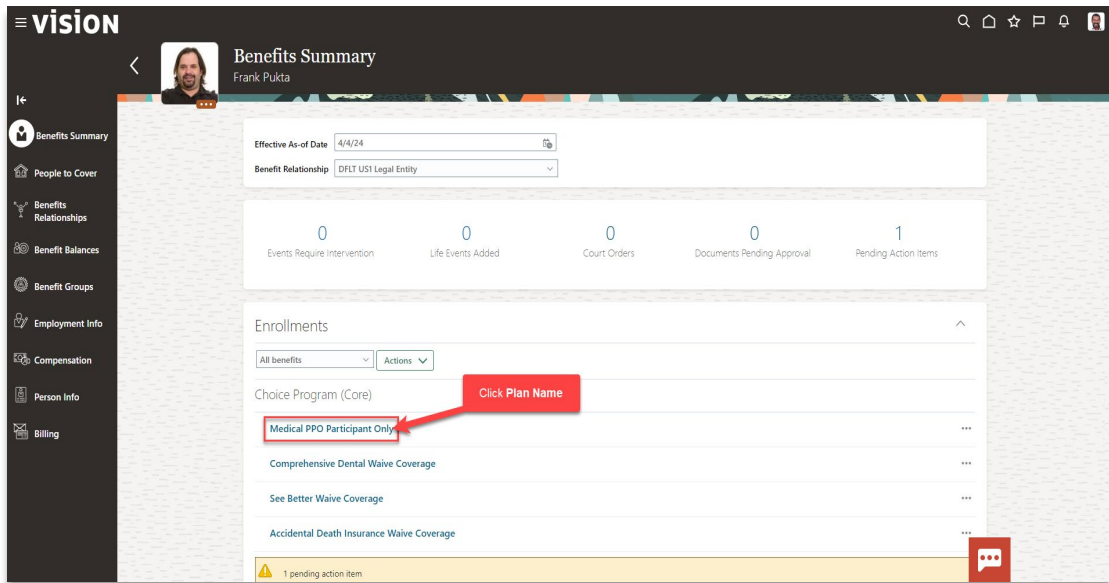
Next, click **Enrollment**



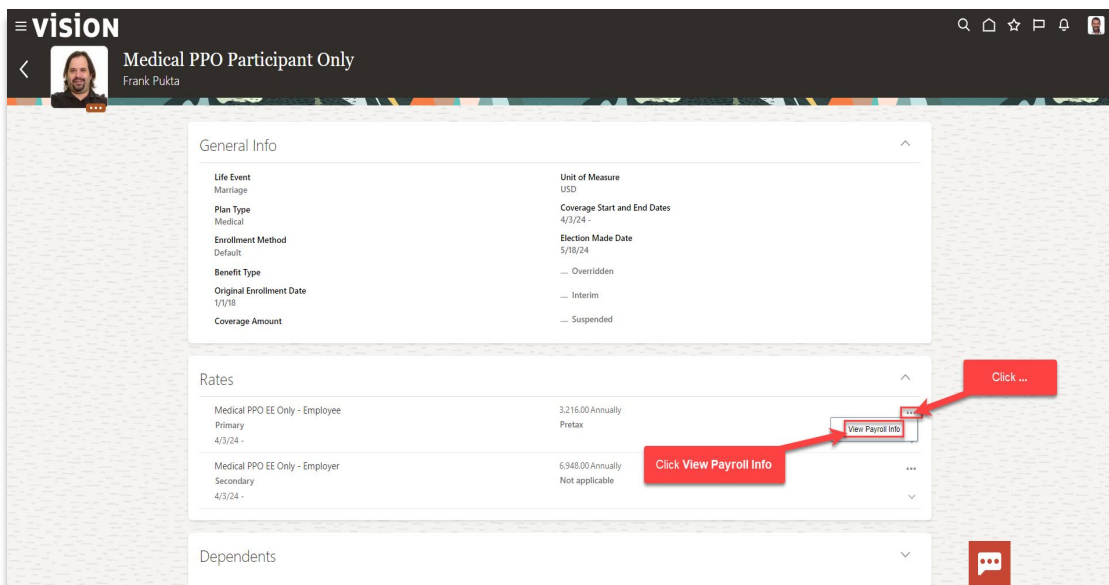
After clicking **Enrollment**, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their payroll elements. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. Select the plan under **Enrollments**



Click (...) across from the Employee Rates and click **View Payroll Info**



Here you can view the Payroll Element Details

vision Medical Pretax View the rate information below

Basic Information

Element Name Medical Pretax	Element Processing Type Recurring
Element Classification Pre-Statutory Deductions	Payroll Relationship 576

Entry Values

Start and End Dates 4/3/24 - Ongoing	Period Type Periodically
Pay Value	Clear Arrears Yes
Amount 61.85	Deduction Start
	Partial Flag Yes

Cost Accounts

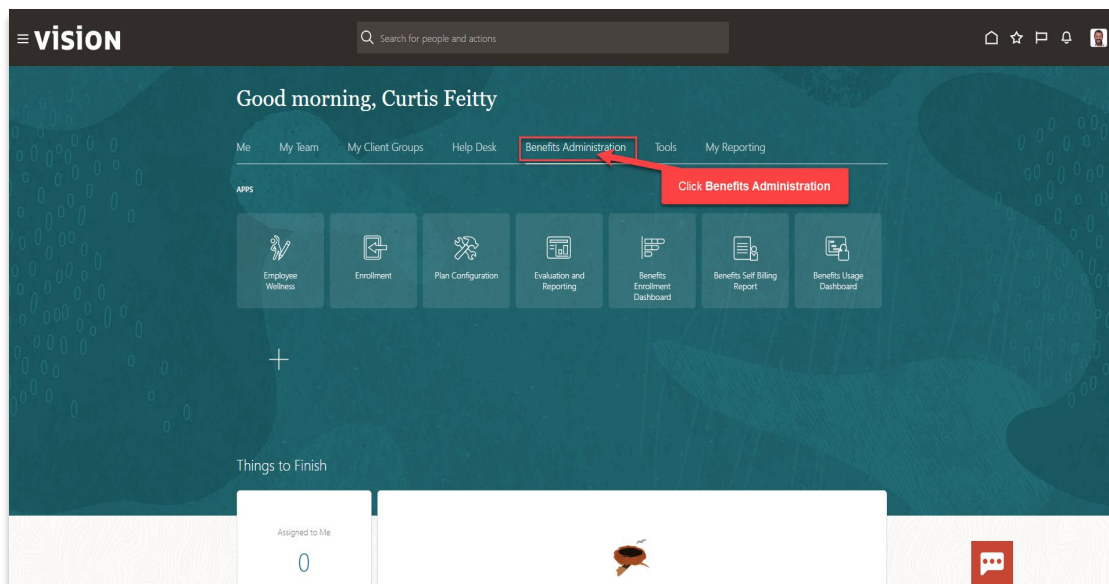
No data to display.

Other Details

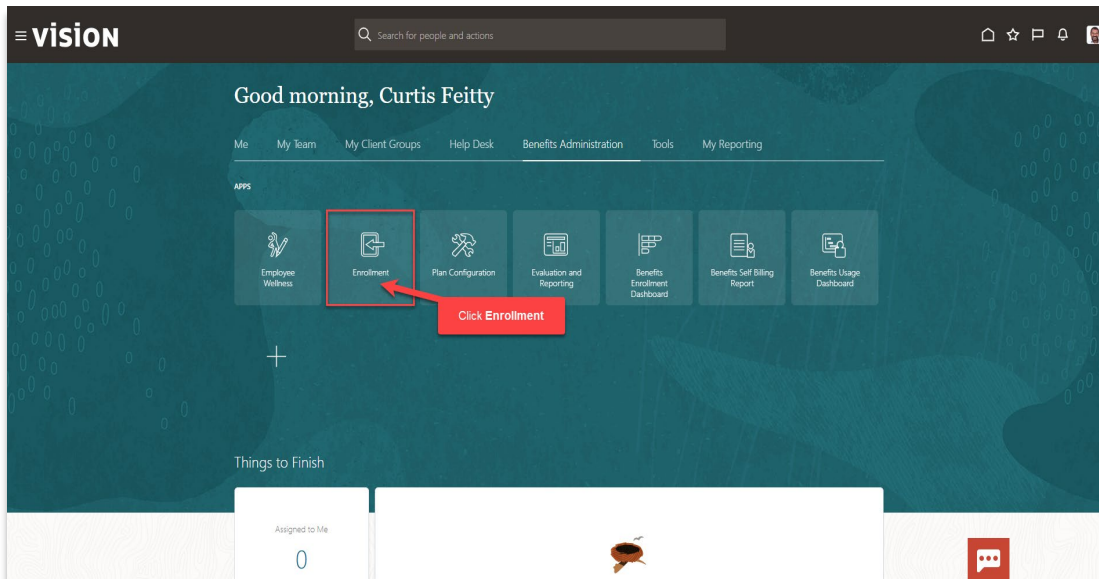
Override Benefit Elements From Benefits Administration

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Override Enrollment>Update Information>Save and Close

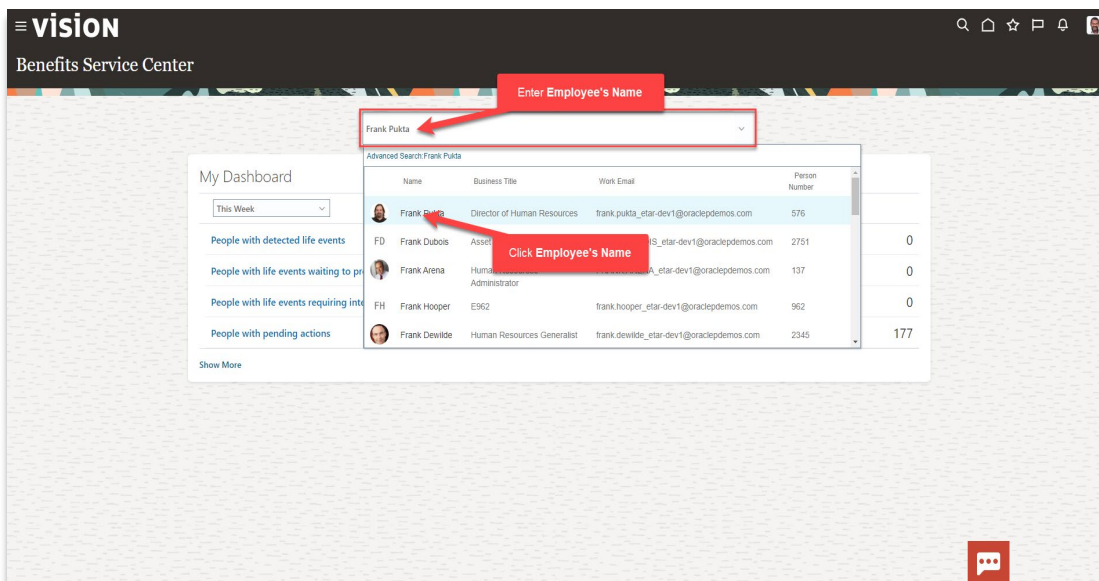
From the home screen, click **Benefits Administration**



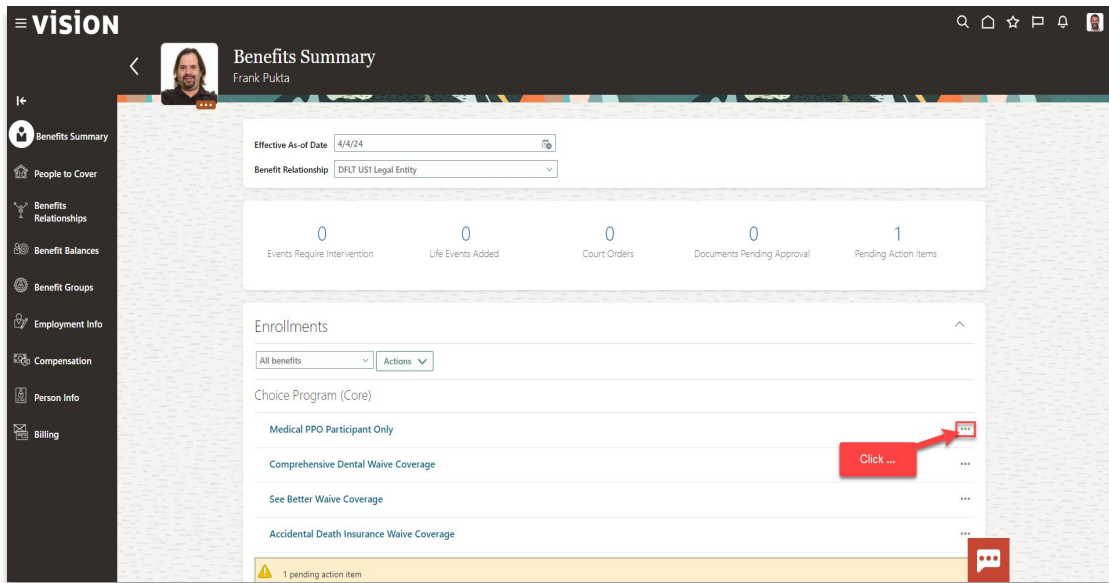
Next, click **Enrollment**



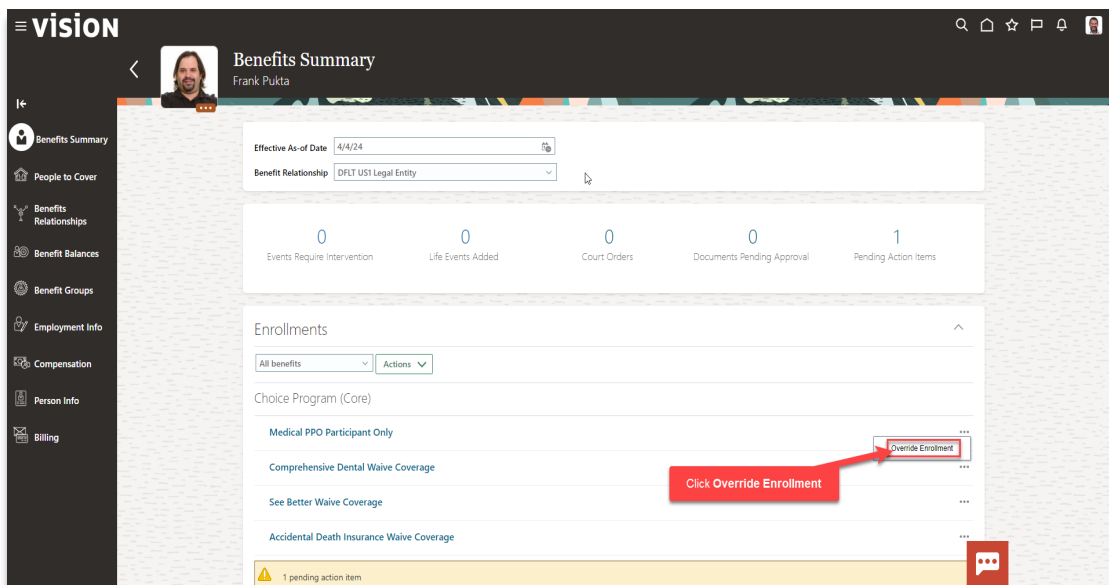
After clicking **Enrollment**, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to override the rates. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. Across from the Plan in which we wish to override the rates, click ...



Click Override Enrollment



To override the Employee rate, for example, across from the employee rate, click **Edit**

Override Enrollment: Medical PPO Participant Only Save and Close Cancel

Frank Pukta

Details

Plan and Option
Medical PPO Participant Only

Plan Type
Medical

Started Life Event
Marriage

*Coverage Start Date
4/3/24

Coverage End Date
M/d/yy

Original Enrollment Date
1/1/18

Earliest Disenroll Date
M/d/yy

Benefit Amount

— Interim enrollment
— Suspend enrollment
— Overridden

Override Through Date
M/d/yy

Rates

Medical PPO EE Only - Employee	Rate started on 4/3/24	<div>Click Edit</div>
Defined Amount 268	Communicated Amount 268	
Annual Amount 3216	Activity Type Employee payroll contribution	
Medical PPO EE Only - Employer	Rate started on 4/3/24	<div>Click Edit</div>
Defined Amount 579	Communicated Amount 579	

Update the Communicated Amount and update the Override Through Date then click **OK**

Override Enrollment: Medical PPO Participant Only Save and Close Cancel

Frank Pukta

*Coverage Start Date
4/3/24

Coverage End Date
M/d/yy

Original Enrollment Date
1/1/18

— Interim enrollment
— Suspend enrollment
— Overridden

Override Through Date
M/d/yy

Rates

Rate Name Medical PPO EE Only - Employee	*Defined Amount 268	<div>Click OK</div> <div>OK</div> <div>Cancel</div>
*Rate Start Date 4/3/24	Annual Amount 3216	
Rate End Date M/d/yy	Communicated Amount 0	<div>Update Communicated Amount</div>
Activity Type Employee payroll contribution	Override Through Date 12/31/12	
Calculation Method Flat amount		
Medical PPO EE Only - Employer	Rate started on 4/3/24	
Defined Amount 579	Communicated Amount 579	

Click **Save and Close**

Override Enrollment: Medical PPO Participant Only
Frank Pukta

Coverage Start Date: 4/3/24
Coverage End Date: M/d/yy
Original Enrollment Date: 1/1/18
Override Through Date: M/d/yy

Interim enrollment
Suspend enrollment
Overridden

Rates

Plan Name	Rate started on	Override through	Communicated Amount	Activity Type
Medical PPO EE Only - Employee	4/3/24	12/31/12	0	Employee payroll contribution
Medical PPO EE Only - Employer	4/3/24		579	Employer payroll contribution

Dependents

Click Save and Close

The rate for this plan has been overridden until the end date.

Benefits Summary
Frank Pukta

Effective As-of Date: 4/4/24
Benefit Relationship: DFLT US1 Legal Entity

Events Require Intervention: 0
Life Events Added: 0
Court Orders: 0
Documents Pending Approval: 0
Pending Action Items: 1

Enrollments

Choice Program (Core)

Program Name	Action
Medical PPO Participant Only	Override
Comprehensive Dental Waive Coverage	...
See Better Waive Coverage	...
Accidental Death Insurance Waive Coverage	...

1 pending action item

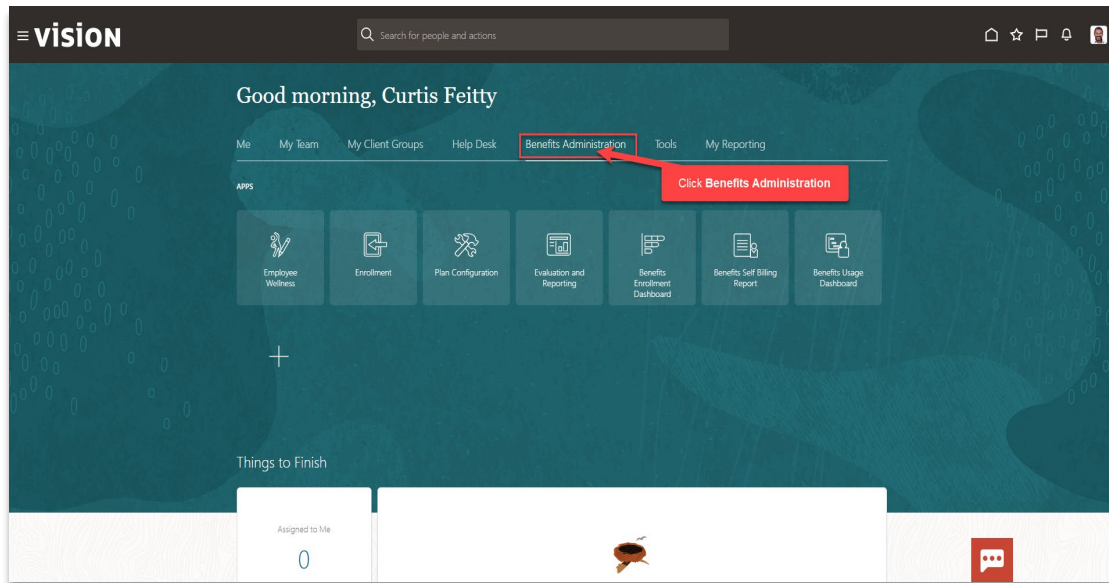
Basic Life \$50,000

Click Save and Close

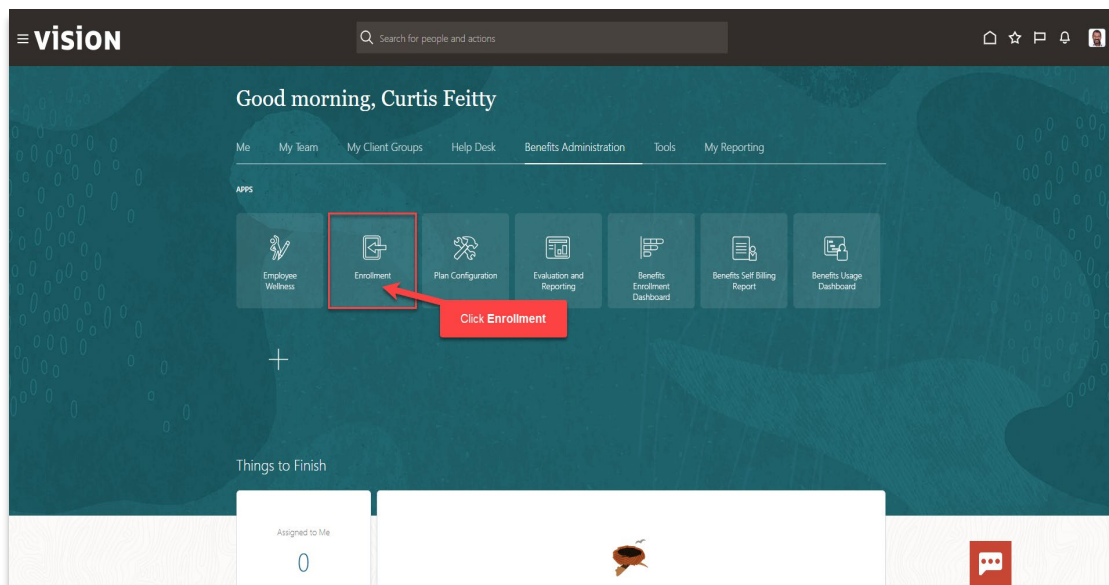
Delete Voiced Life Events

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefits Summary>Show Backed Out and Voiced Life Events>Delete All

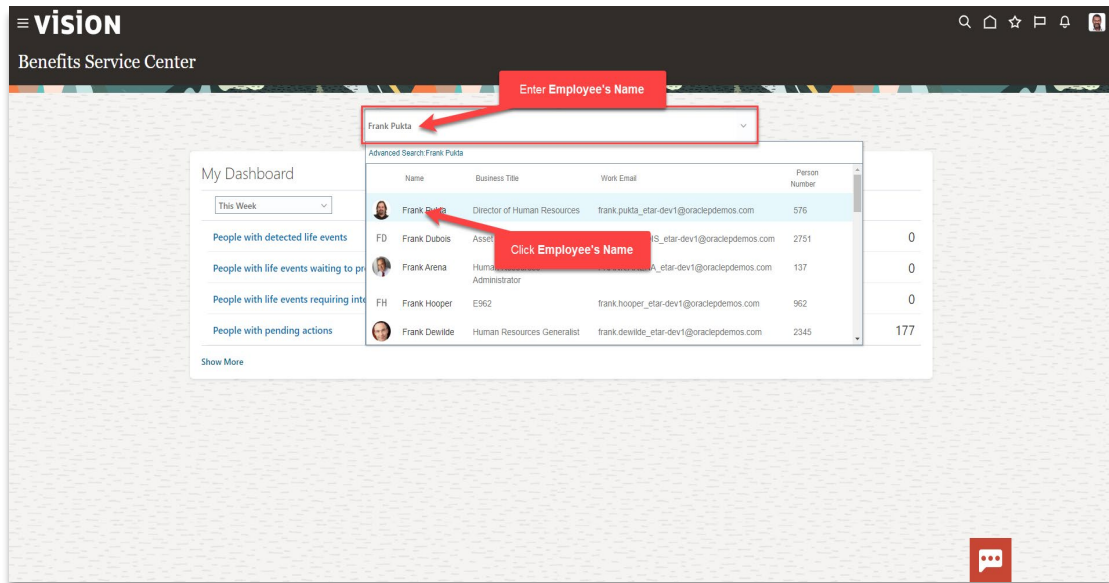
From the home screen, click **Benefits Administration**



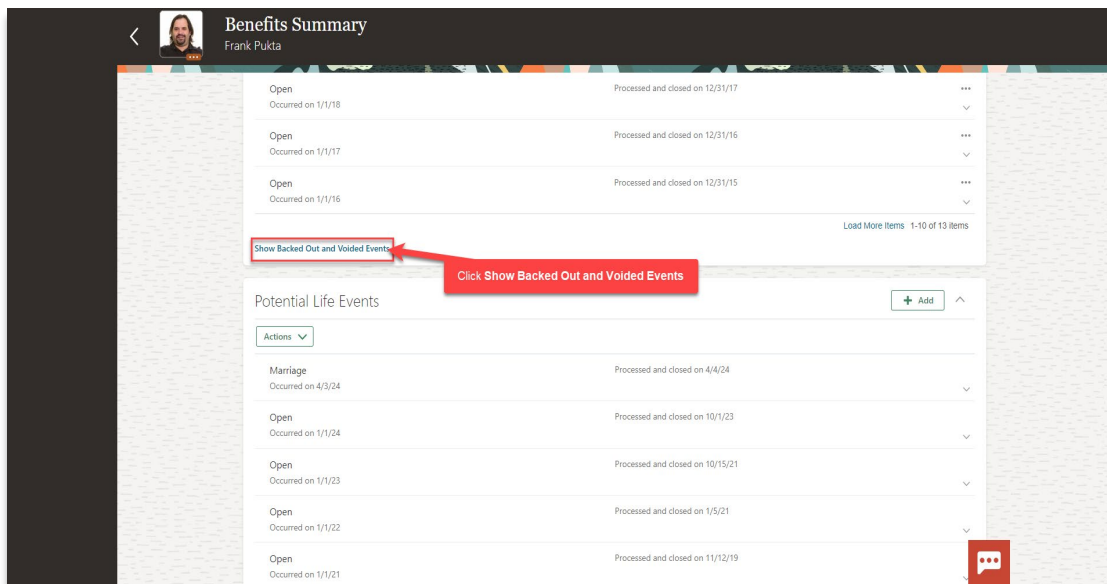
Next, click **Enrollment**



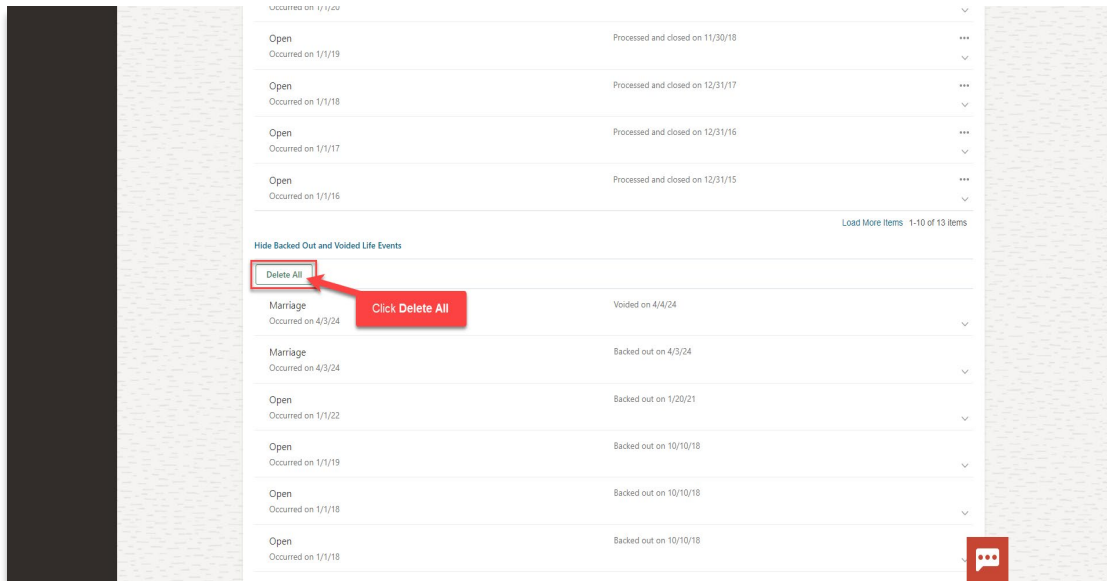
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



We are now viewing the Benefits Summary Page. Scroll down and under **Evaluated Life Events**, click **Show Backed Out and Voiced Events**



Click **Delete All**

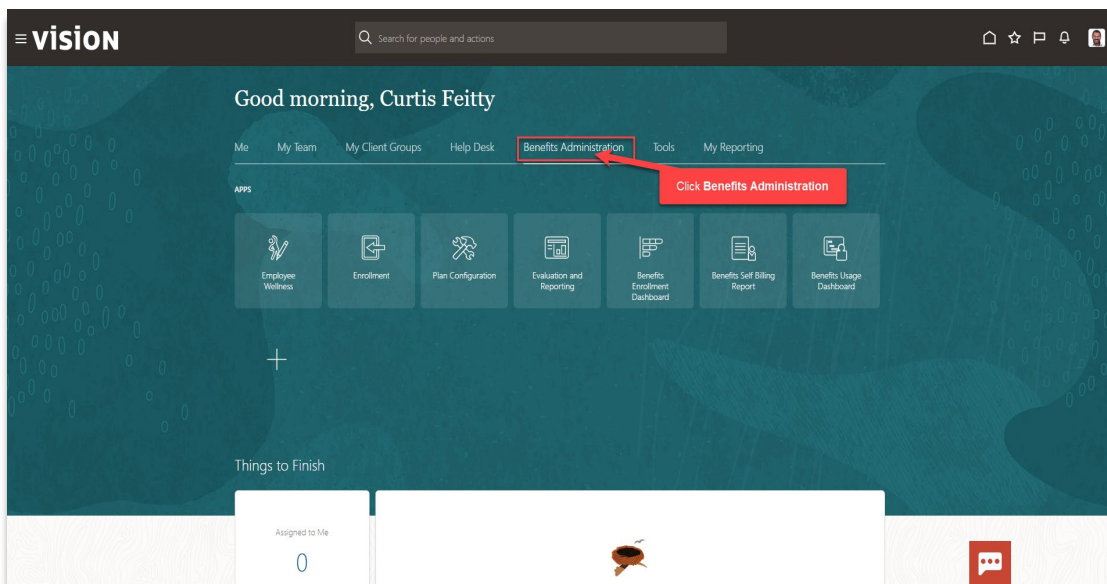


The Life Events have been deleted

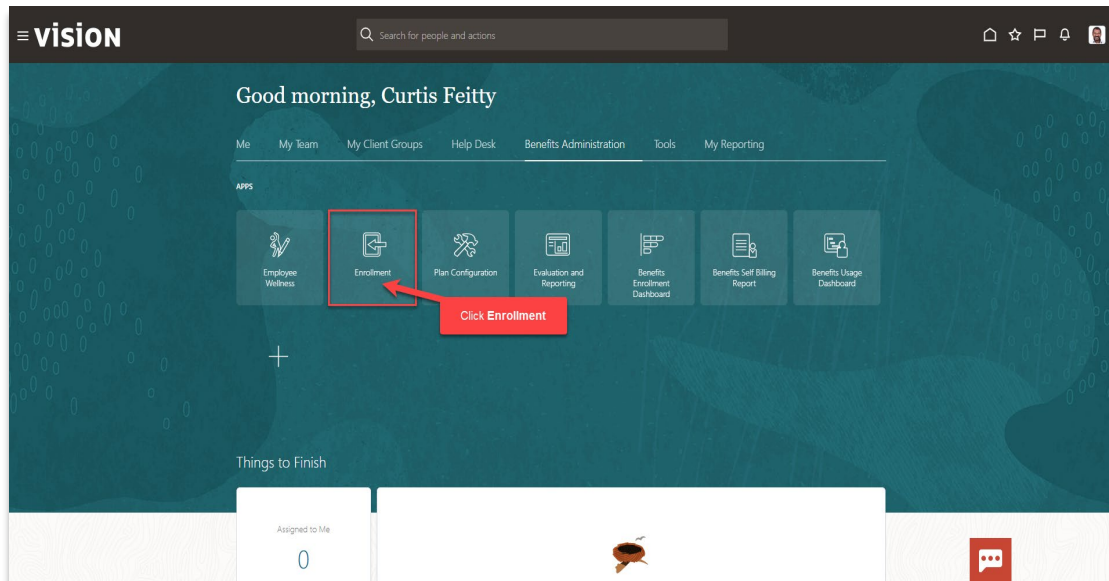
Assign A Benefit Group To An Employee

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Benefit Groups>Add>Save

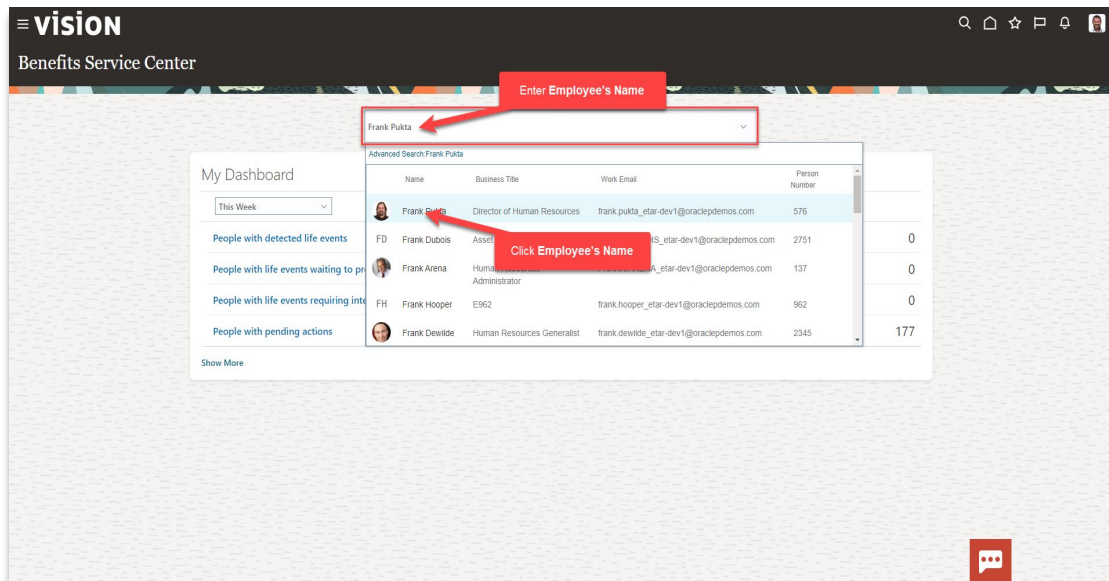
From the home screen, click **Benefits Administration**



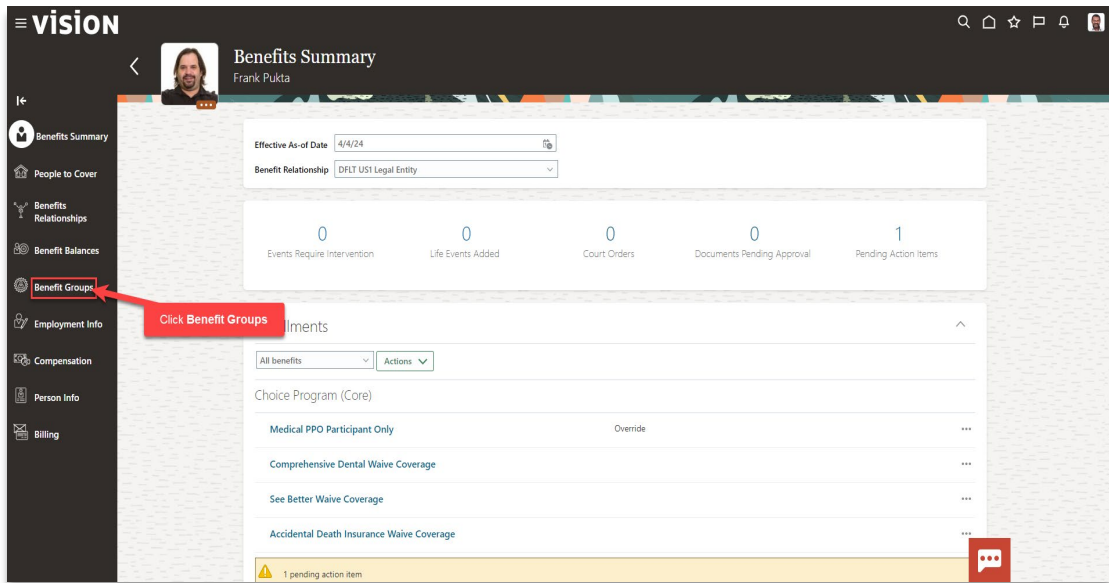
Next, click **Enrollment**



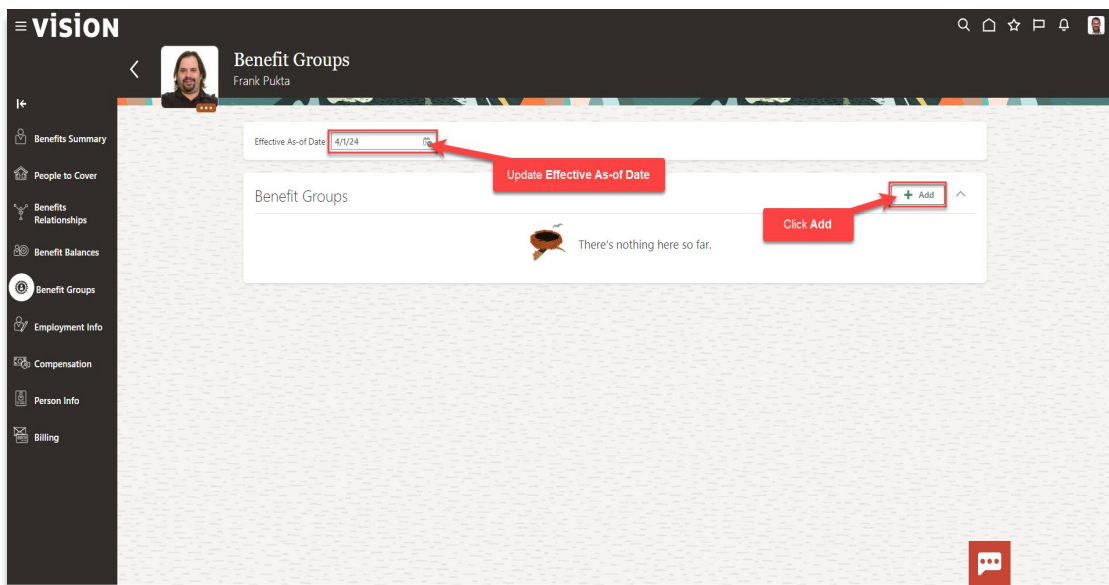
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their enrollments. Once the employee's name is visible, click on the employee's name.



Next, click **Benefit Groups**



Update the **Effective As-of Date** and click **Add**



Select the **Benefit Group** from the drop down and click **Save**

Benefit Groups

Effective As-of Date 4/1/24

Benefit Groups

Name DC Pension Plan

When does this benefit group change start? 4/1/24

Click Save

Save Cancel

Select Benefit Group

The Benefit Group has been added

Benefit Groups

Effective As-of Date 4/1/24

Benefit Groups

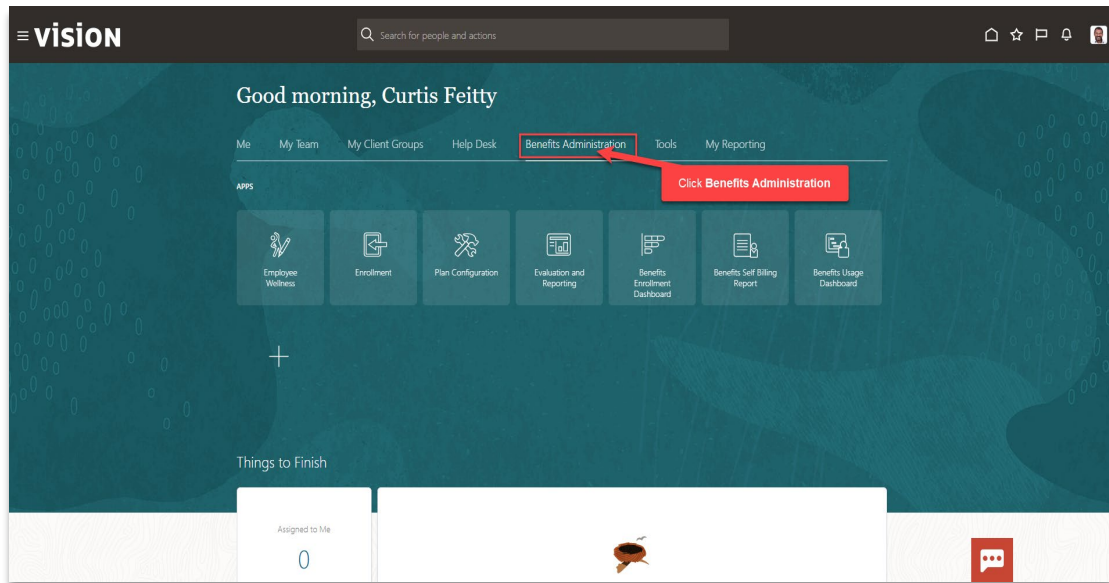
+ Add

DC Pension Plan	Effective 4/1/24 to ongoing
-----------------	-----------------------------

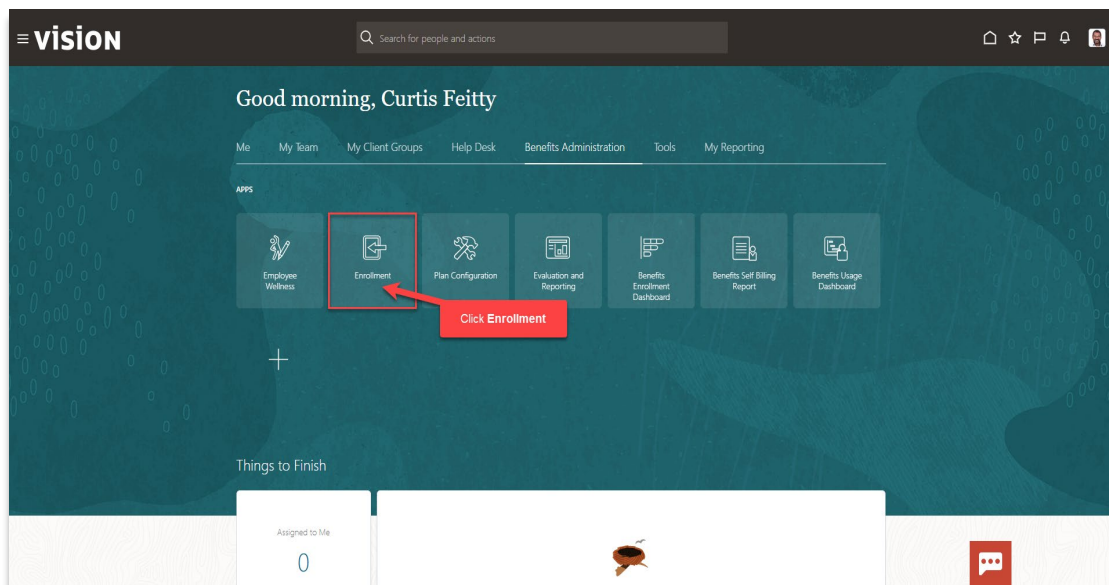
View Employment Info

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Employment Info

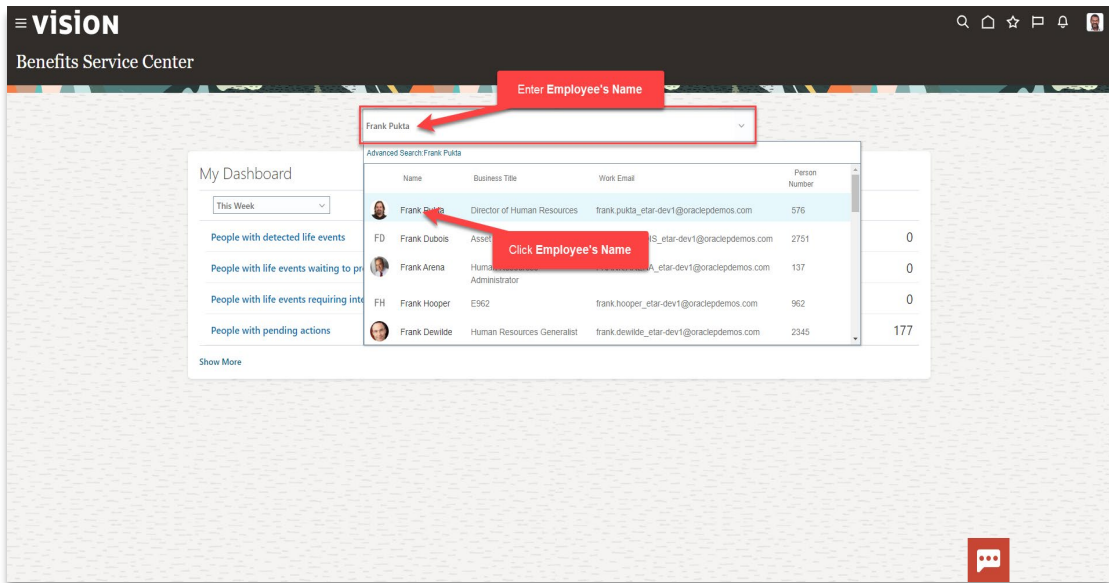
From the home screen, click **Benefits Administration**



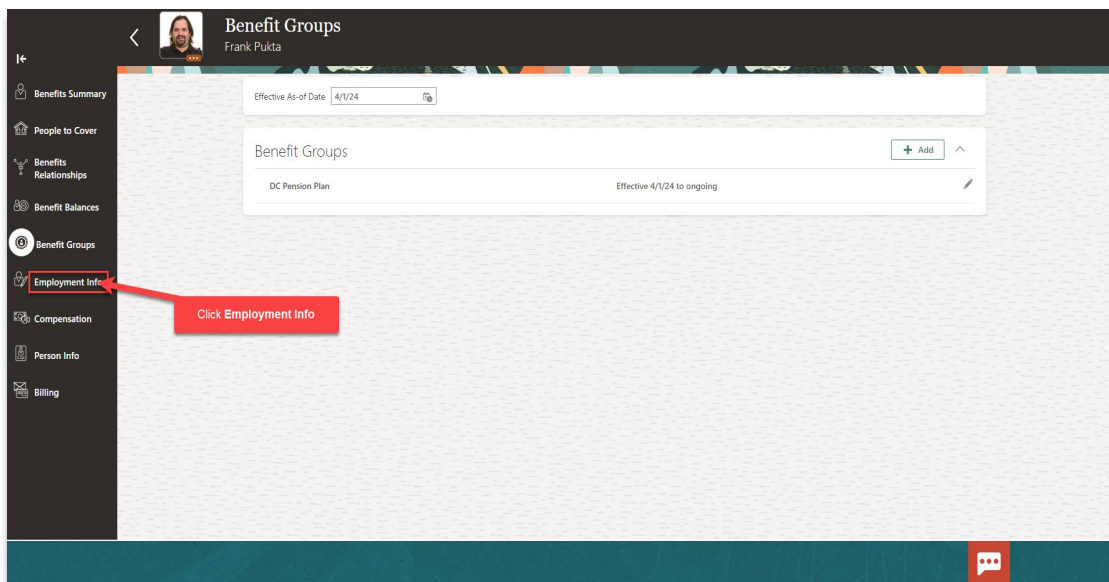
Next, click **Enrollment**



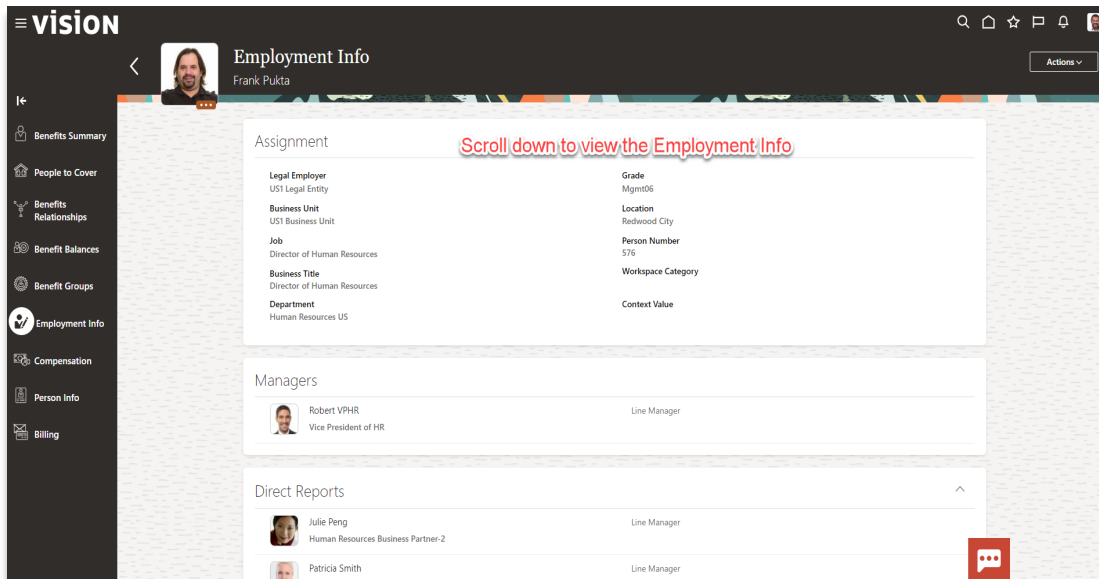
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their Employment Info. Once the employee's name is visible, click on the employee's name.



Next, click **Employment Info**



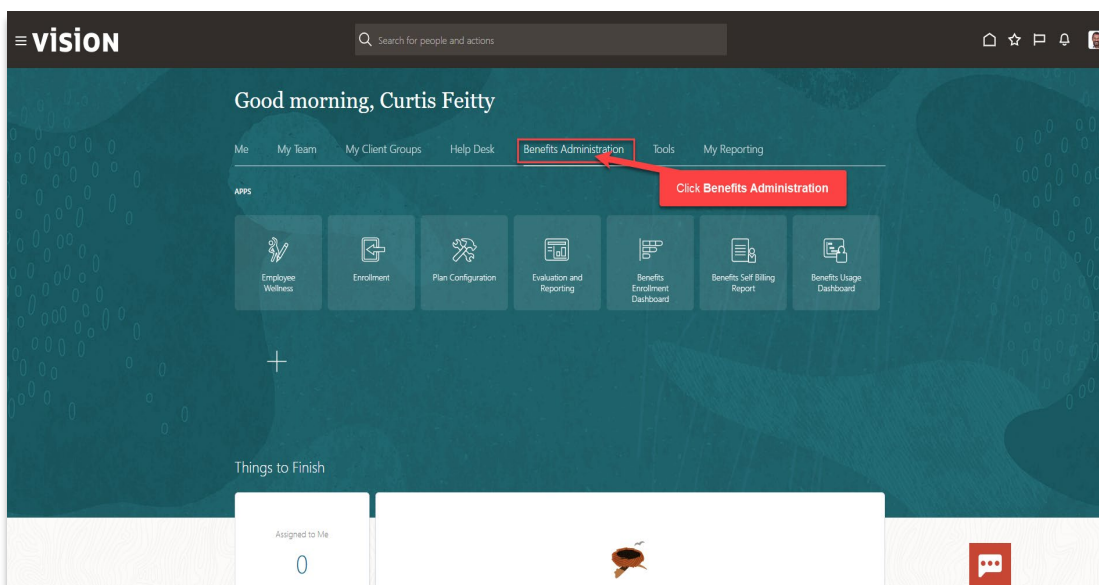
We can expand the sections and view the Employment Info for this employee



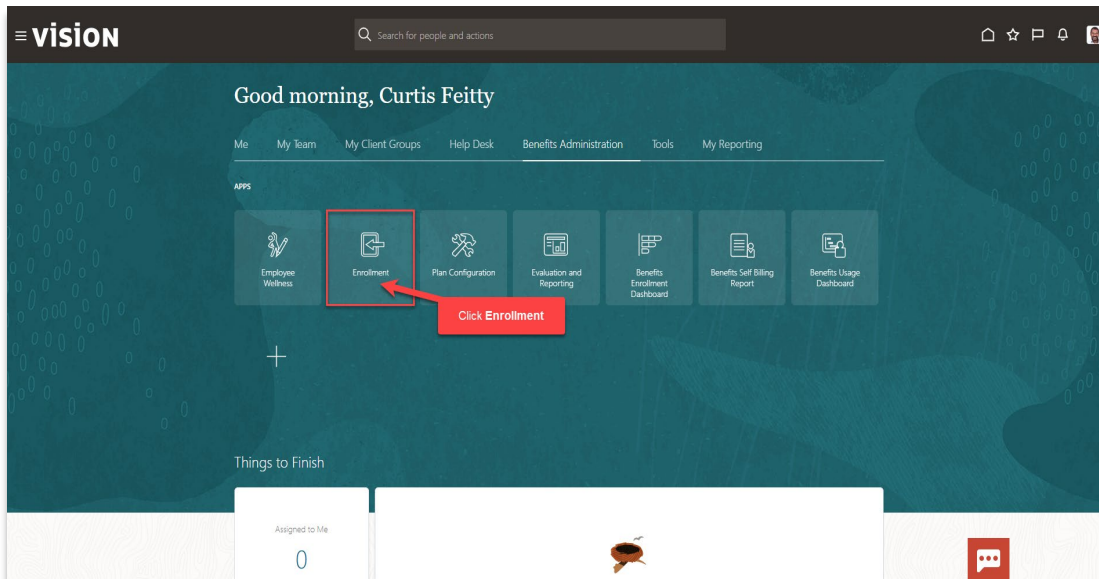
View Compensation Info

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>Compensation

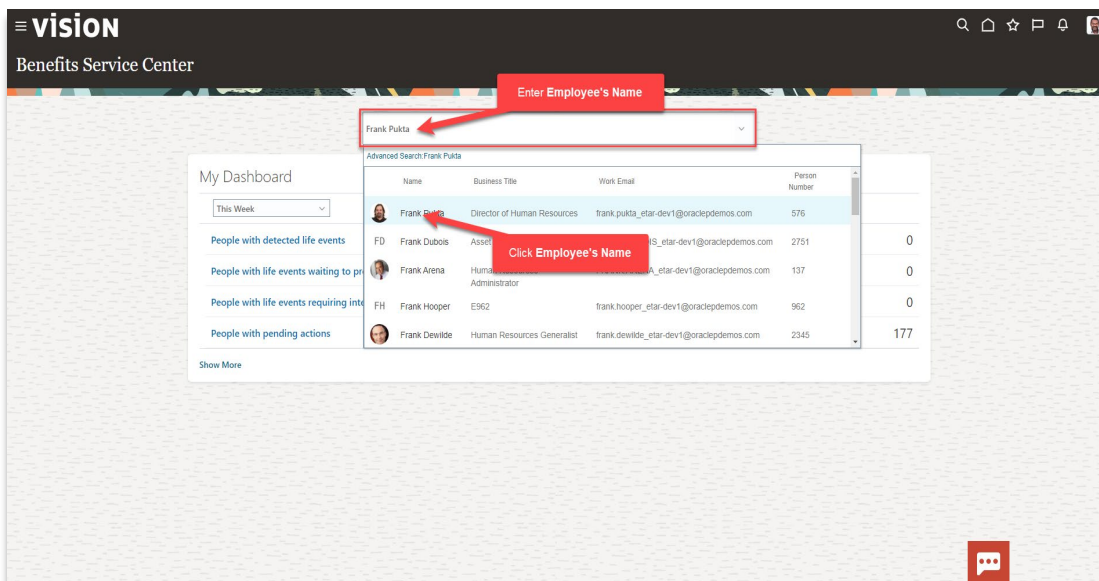
From the home screen, click **Benefits Administration**



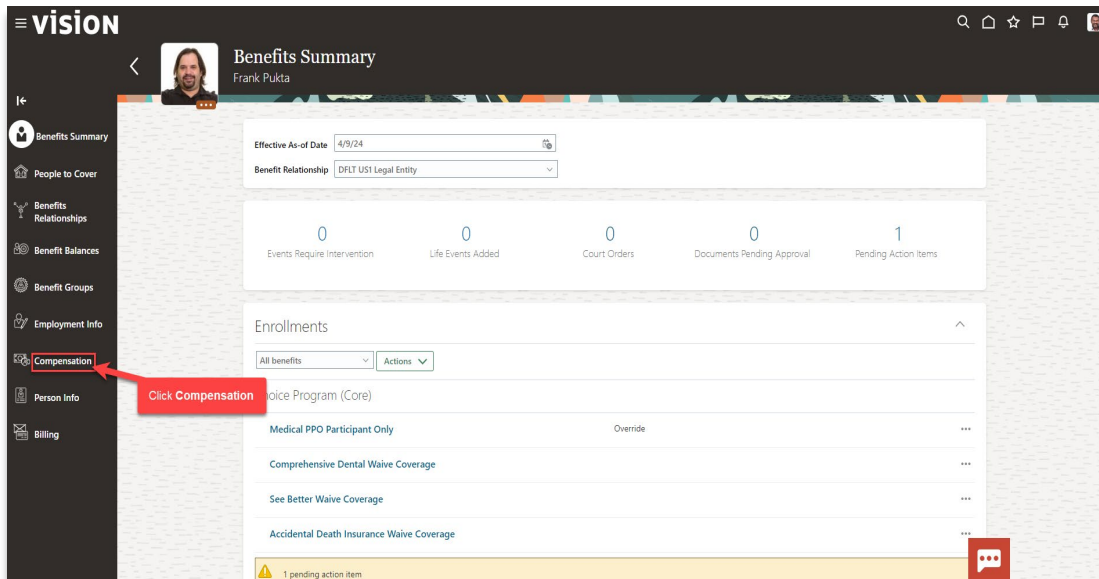
Next, click **Enrollment**



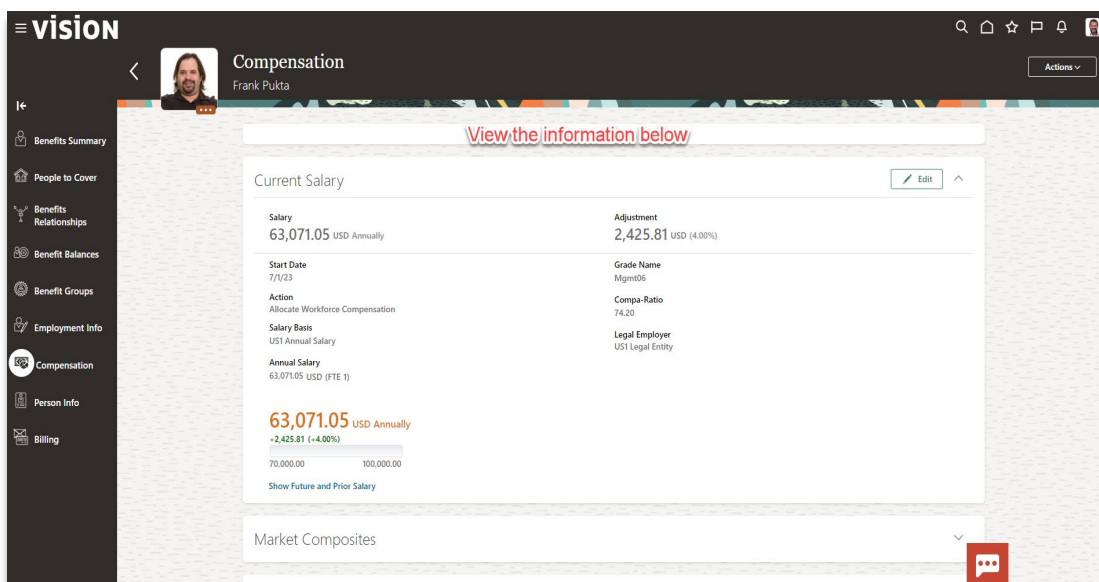
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their Employment Info. Once the employee's name is visible, click on the employee's name.



Next, click **Compensation**



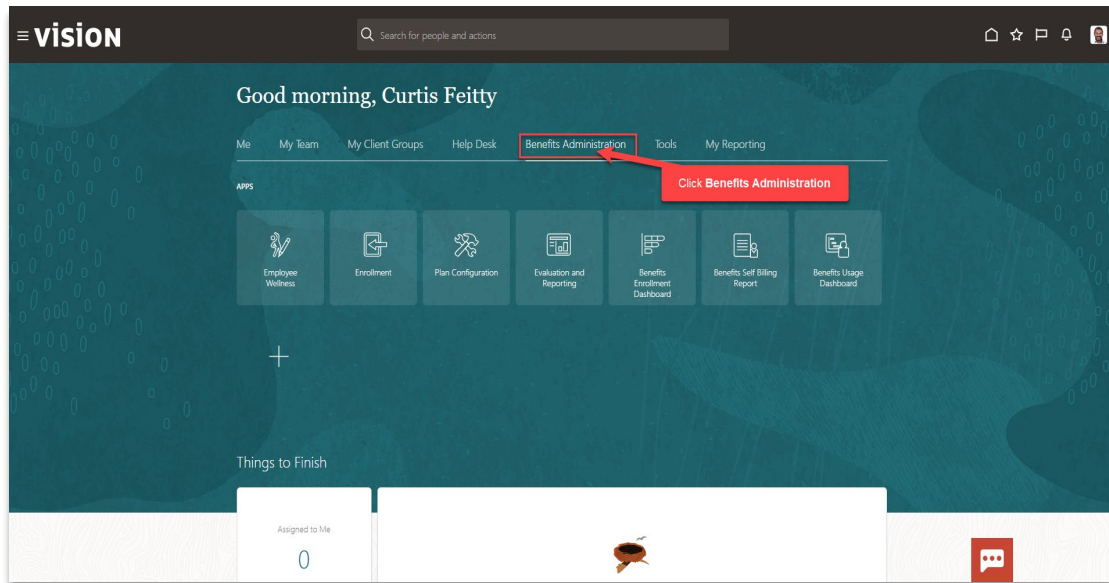
Here we view Compensation information for this employee



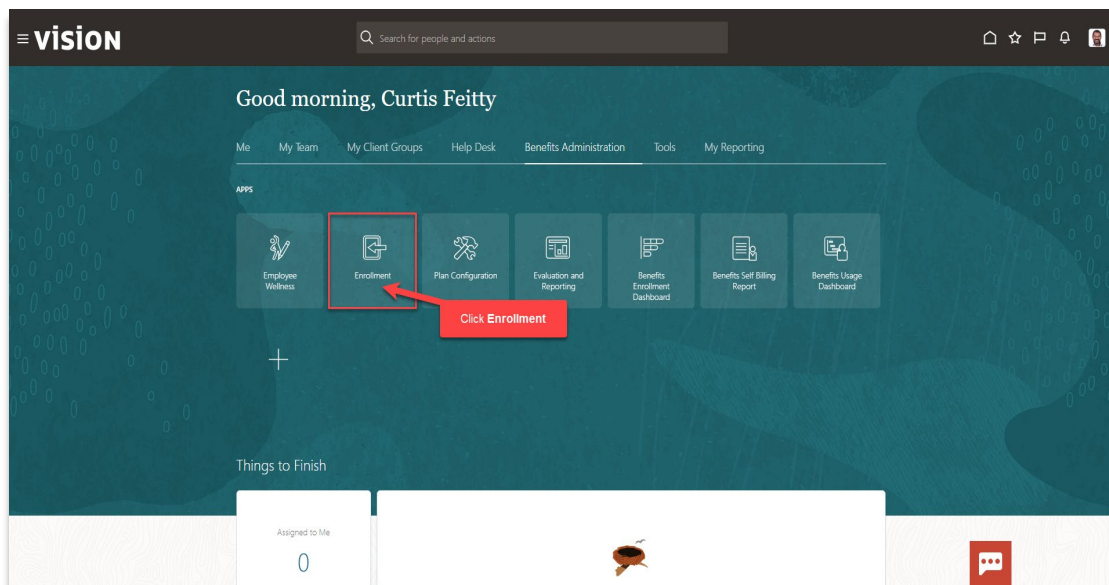
Update Dependents or Beneficiaries

Navigation: Home>Benefits Administration>Enrollment>Search for the Employee>People to Cover>Update>Submit

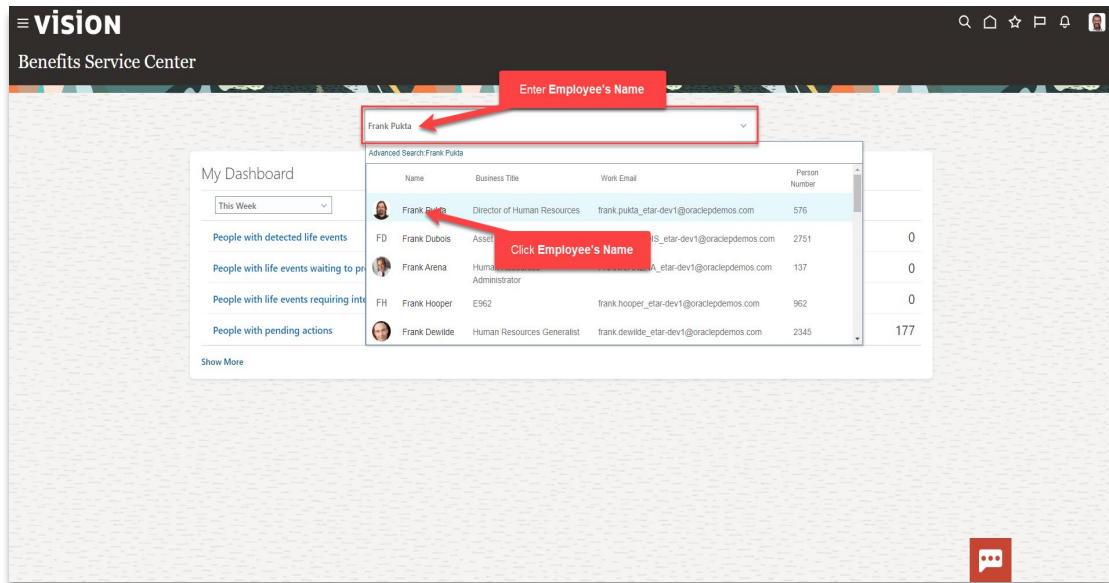
From the home screen, click **Benefits Administration**



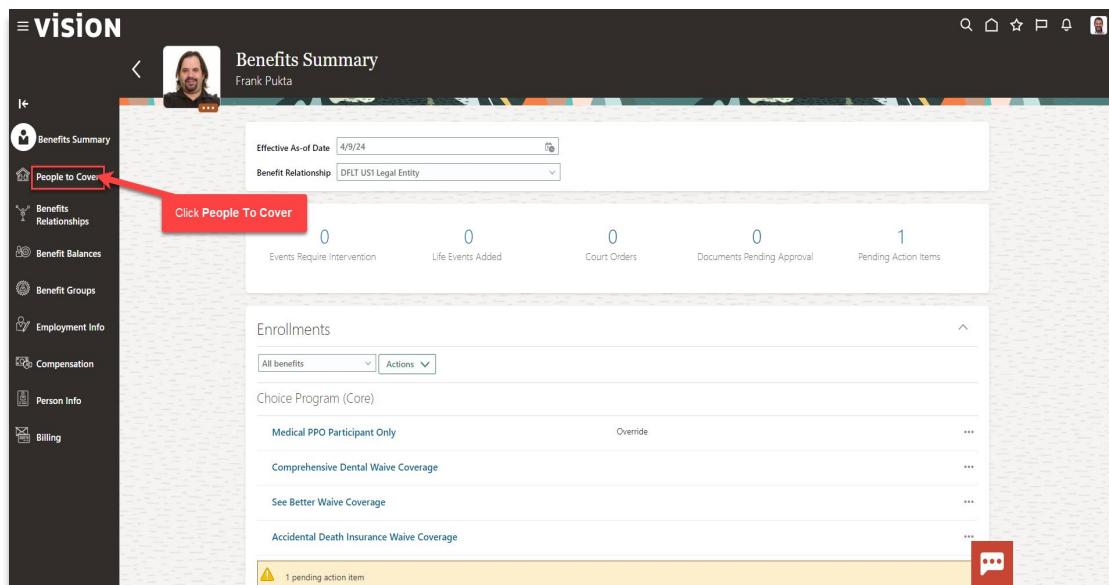
Next, click **Enrollment**



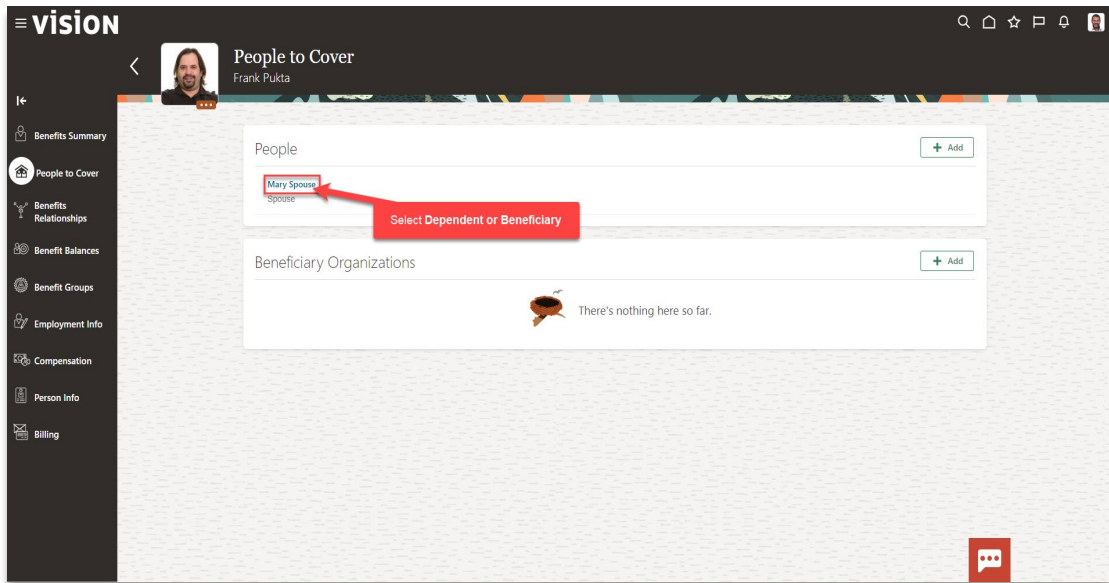
After clicking the **Enrollment** app, the Benefits Service Center Page is displayed. Search for the employee for whom we wish to view or manage their Employment Info. Once the employee's name is visible, click on the employee's name.



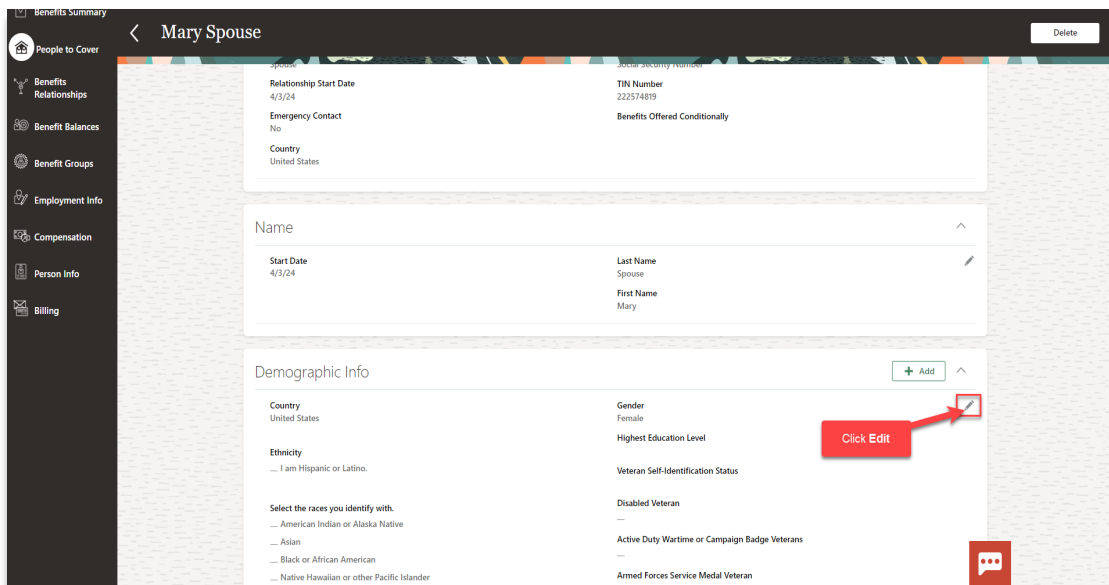
We are now viewing the Benefits Summary Page. Click **People to Cover**



Next, select the **Dependent or Beneficiary** we wish to edit



Next, click the **Pencil** to update the applicable details



Next, update the information and click **Submit**

Benefit Groups < Mary Spouse Delete

Employment Info

Compensation

Person Info

Billing

Name

Start Date
4/3/24

Last Name
Spouse

First Name
Mary

Demographic Info

Country
United States

Highest Education Level
Master Degree

Veteran Self-Identification Status

Disabled Veteran
☐

Active Duty Wartime or Campaign Badge Veterans
☐

Armed Forces Service Medal Veteran
☐

Recently Separated Veteran
☐

Newly Separated Veteran Discharge Date
m/d/yyyy

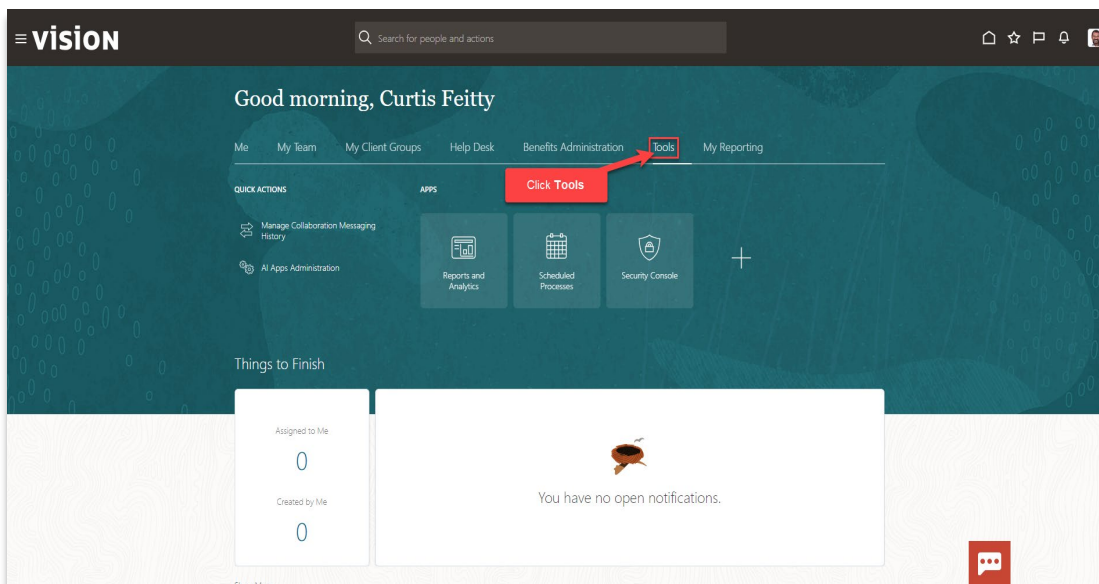
Update the applicable information

Click Submit

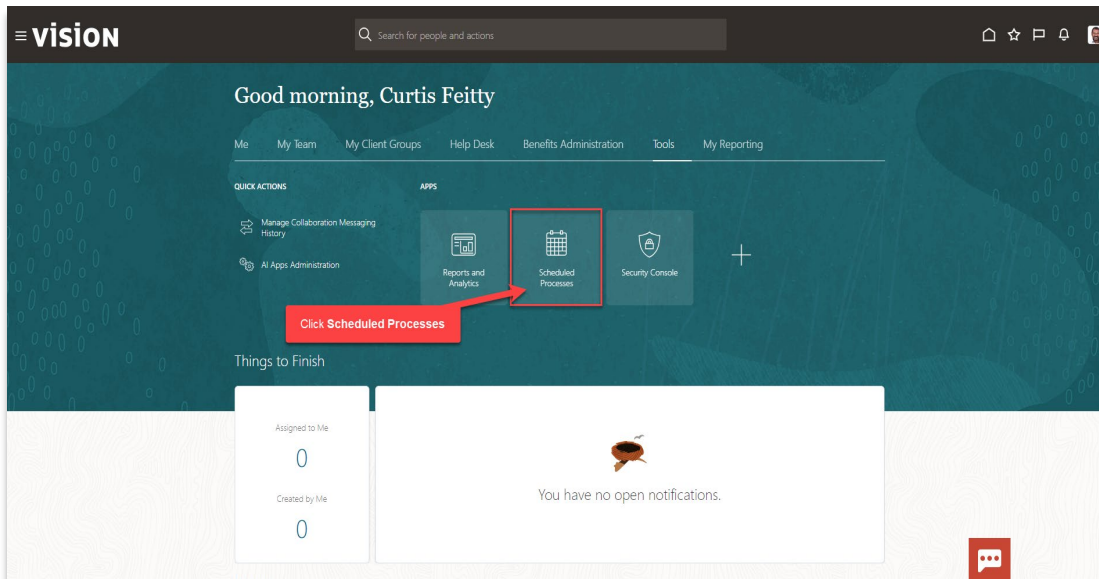
View Scheduled Processes

Navigation: Home>Tools>Scheduled Processes

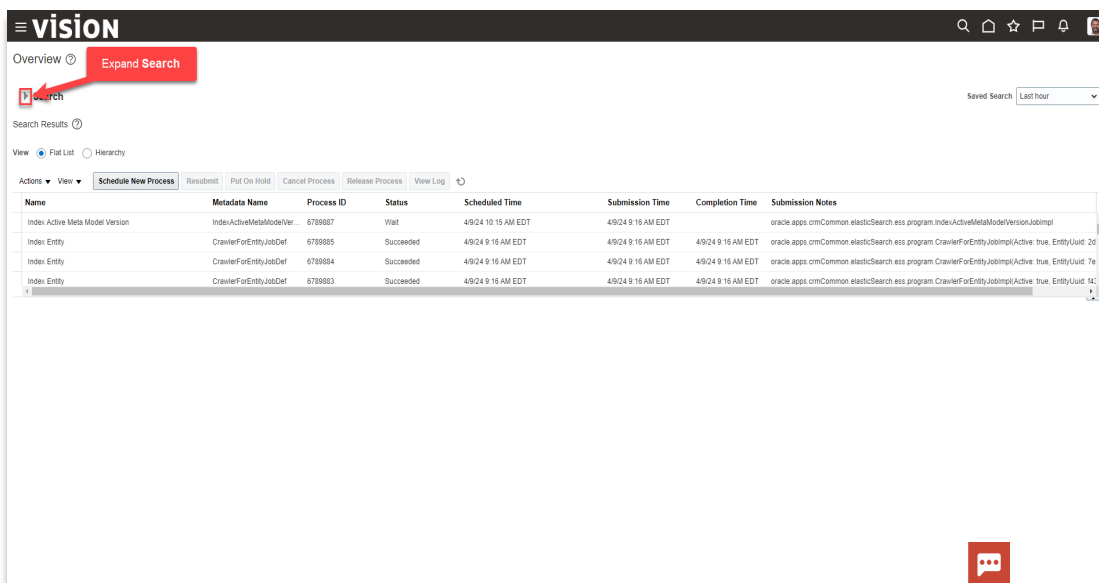
From the home screen, click **Tools**



Next, click **Scheduled Processes**



Here we can view the Scheduled Processes. We can expand **Search** to search for specific processes



Enter the process **Name** and click **Search**

vision

Overview

Search

Name: Enter Name

Process ID:

Status:

Submission Time: After 4/9/24 8:24 AM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes: Contains

Submitted By:

Search Results

View: ☒ Flat List ☐ Hierarchy

Actions: View

Name	Metadata Name	Process ID	Status	Scheduled Time	Submission Time	Completion Time	Submission Notes
Resubmit Undelivered Signals	ResubmitUndeliveredSign...	6789894	Wait	4/9/24 9:33 AM EDT	4/9/24 9:23 AM EDT		Resubmit Undelivered Signals
Index Active Meta Model Version	IndexActiveMetaModelVer...	6789887	Wait	4/9/24 10:15 AM EDT	4/9/24 9:16 AM EDT		oracle.apps.ccmCommon.elasticSearch.ess.program.IndexActiveMetaModelVersionJobImpl
Index Entity	CrawlerForEntityJobDef	6789885	Succeeded	4/9/24 9:16 AM EDT	4/9/24 9:16 AM EDT	4/9/24 9:16 AM EDT	oracle.apps.ccmCommon.elasticSearch.ess.program.CrawlerForEntityJobImplActive: true, EntityUsed: 2d
Index Entity	CrawlerForEntityJobDef	6789884	Succeeded	4/9/24 9:16 AM EDT	4/9/24 9:16 AM EDT	4/9/24 9:16 AM EDT	oracle.apps.ccmCommon.elasticSearch.ess.program.CrawlerForEntityJobImplActive: true, EntityUsed: 7e

Click Search Search Reset Download Results

Here we can view the process information

vision

Overview

Search

Name:

Process ID:

Status:

Submission Time: After 4/9/24 8:24 AM (UTC-05:00) New York - Eastern Time (ET)

Submission Notes: Contains

Submitted By:

Search Results

View: ☒ Flat List ☐ Hierarchy

Actions: View

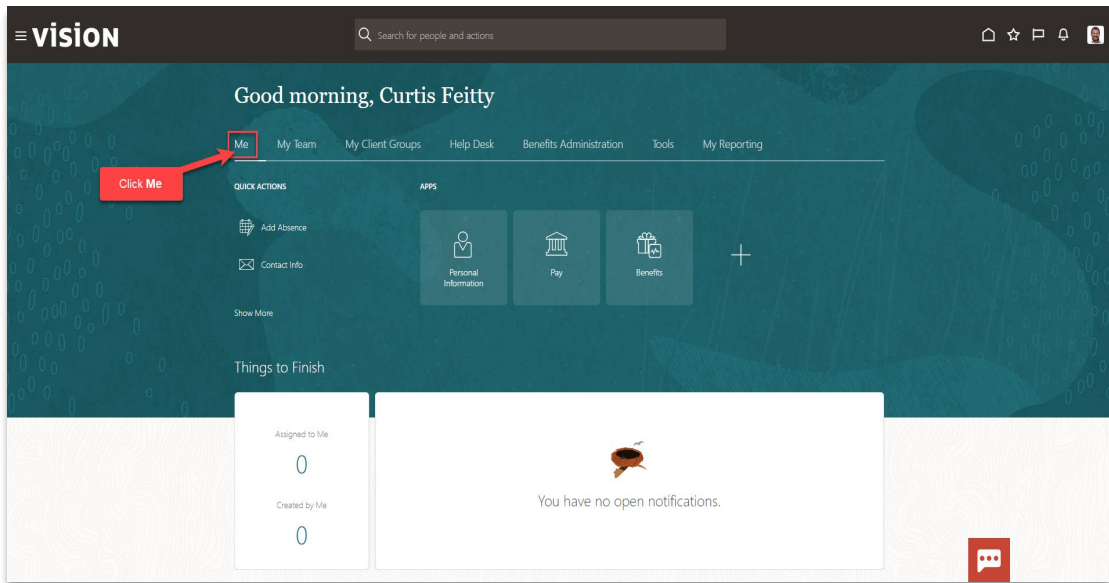
Name	Metadata Name	Process ID	Status	Scheduled Time	Submission Time	Completion Time	Submission Notes
Close Enrollment Action Items: Subprocess	BENCLNRSUBPROC	6789897	Succeeded	4/9/24 9:24 AM EDT	4/9/24 9:24 AM EDT	4/9/24 9:24 AM EDT	BENCLNRSUBPROC
Close Enrollment Action Items: Subprocess	BENCLNRSUBPROC	6789896	Succeeded	4/9/24 9:24 AM EDT	4/9/24 9:24 AM EDT	4/9/24 9:24 AM EDT	BENCLNRSUBPROC
Close Enrollment	BENCLNRSUBPROC	6789895	Succeeded	4/9/24 9:24 AM EDT	4/9/24 9:24 AM EDT	4/9/24 9:24 AM EDT	BENCLNRSUBPROC

We can view the information below Search Reset Download Results

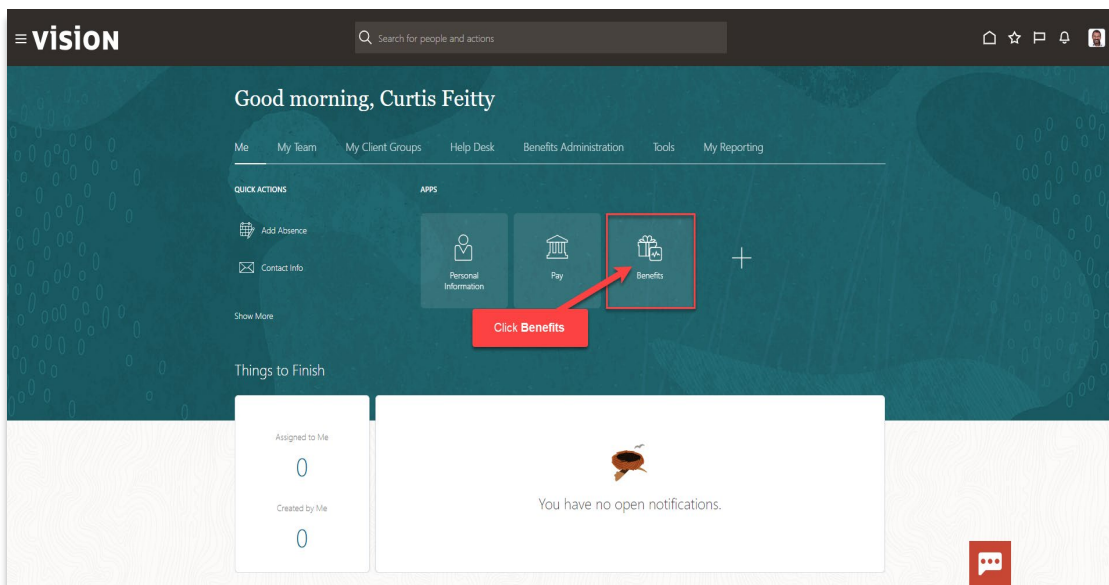
ESS Make Benefit Elections

Navigation: Home>Me>Benefits>Enroll>Submit

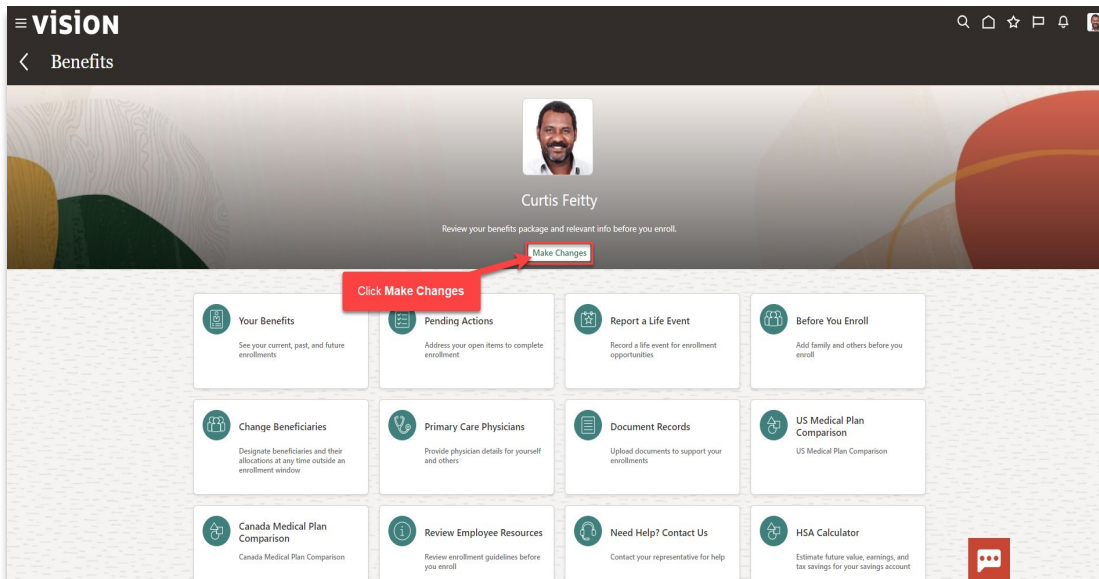
From the home screen, click **Me**



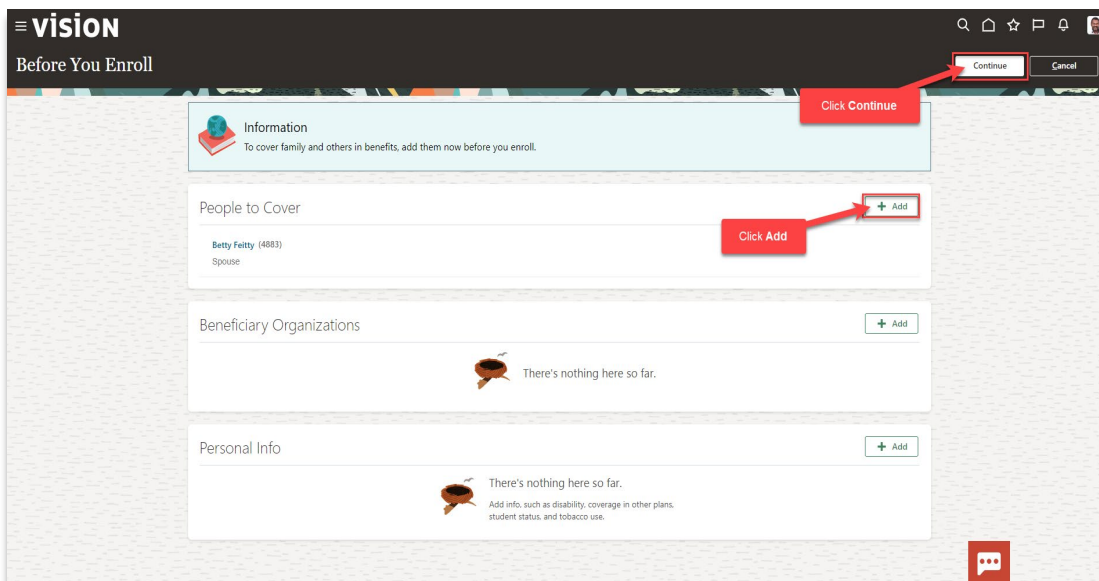
Click Benefits



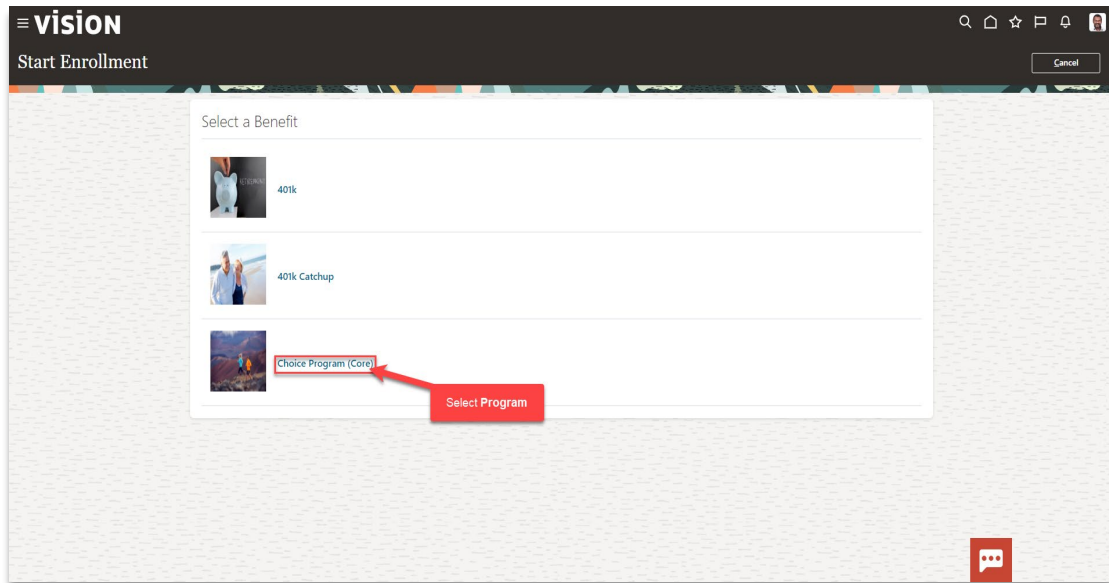
Click Make Changes



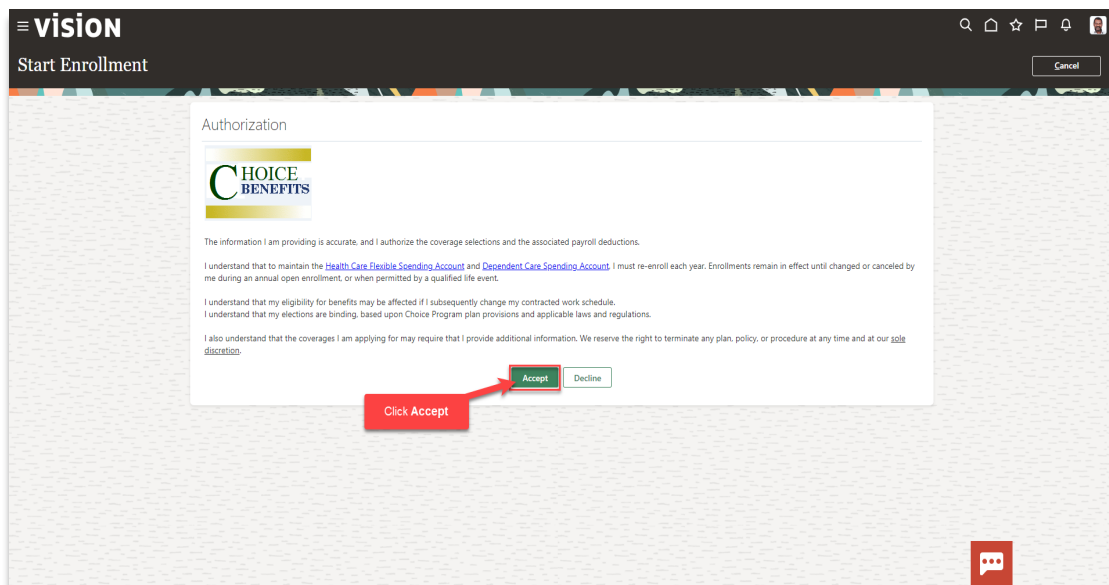
Before you enroll, review your contacts. You can add new contacts (as covered dependents or beneficiaries), Beneficiary Organizations, and Personal Info. You can add this information in each section by clicking **Add**. Click **Continue**



Select the **Program**



If your organization requires an authorization acceptance, click **Accept**



Click **Edit** across from the Medical plan to enroll

vision
Choice Program (Core)
Marriage

Currency in USD
Your Total Cost
328.00
Per Pay Period

Medical

Medical
Medical PPO
Participant Only
268.00

Dental and Vision

Dental
Preventive Dental
Participant Only
37.00

Vision
See Better
Participant Only
23.00

Click Edit

Edit

Select the plan and the tier of coverage. If the tier selected covers dependents, select the dependent you wish to cover. Click **OK**

Medical

The key features and provisions of the medical plans are available [here](#).
[Click here to compare plans](#)

Please visit [Vision Benefits](#) website where you can learn more about our benefits.

Medical

Medical PPO

☒ Participant Only
3,216.00 Annually
268.00
Employee Rate

Employer Rate
579.00

Medical PPO Participant Plus One

Annual Amount
4,296.00
358.00
Employee Rate

Employer Rate
732.00

Who do you want to cover?

☒ Betty Felty (Spouse)

☐ Employee Plus Spouse_No Surcharge

Select Plan

Select Dependent

Click OK

OK

Cancel

Click **Continue**

Medical

The key features and provisions of the medical plans are available [here](#).
[Click here to compare plans](#)

Please visit [Vision Benefits](#) website where you can learn more about our benefits.

Medical

Medical PPO

<input type="checkbox"/>	Participant Only 3,216.00 Annually	268.00 Employee Rate
<input checked="" type="checkbox"/>	Participant Plus One 4,296.00 Annually	358.00 Employee Rate
	Employer Rate 732.00	
	Who's covered? You, Betty Felty	
<input type="checkbox"/>	Employee Plus Spouse_No Surcharge	
<input type="checkbox"/>	Employee Plus Spouse_Surcharge	

You can now view the benefit election for medical. To update the election, click **Edit**. If no updates are needed, proceed with the Dental and Vision election. Across from Dental and Vision, click **Edit**

Choice Program (Core)

Marriage

Currency in USD

Your Total Cost: 418.00
Per Pay Period

Medical

Medical

Medical PPO
Participant Plus One
Who's covered?
You, Betty Felty

358.00

Dental and Vision

Dental

Preventive Dental
Participant Only

37.00

Vision

See Better
Participant Only

23.00

Follow this same process to enroll in each benefit plan. Once elections are made, review your elections, and click **Submit**

Choice Program (Core)
Marriage

Click Submit

Submit Cancel

Currency in USD

Your Total Cost 418.00
Per Pay Period

Medical Edit

Medical

Medical PPO
Participant Plus One 358.00
Who's covered?
You, Betty Feitty

Dental and Vision Edit

Dental

Preventive Dental
Participant Only 37.00

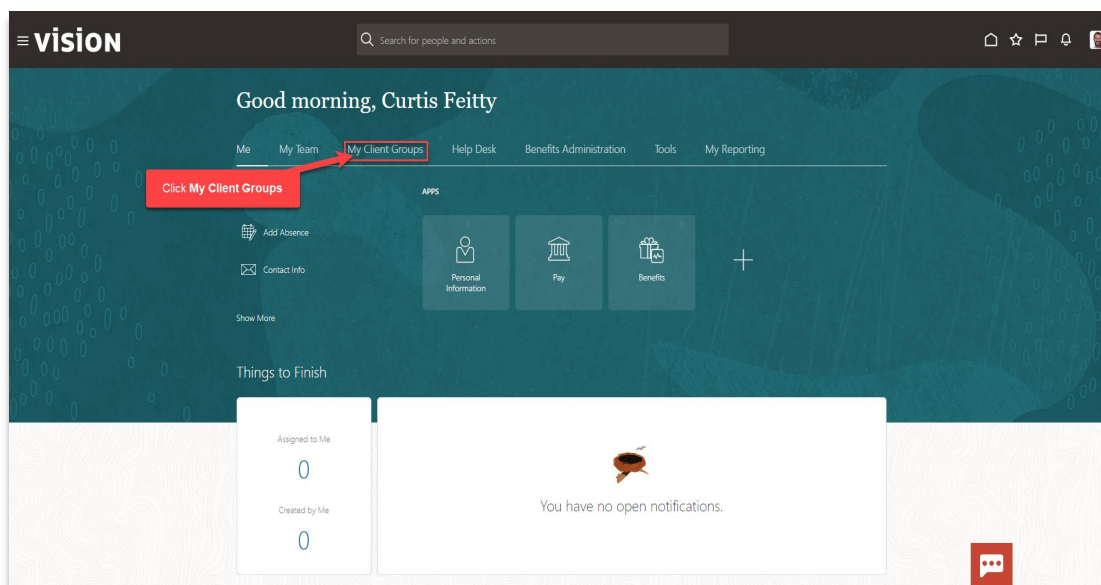
Vision

See Better
Participant Only 23.00

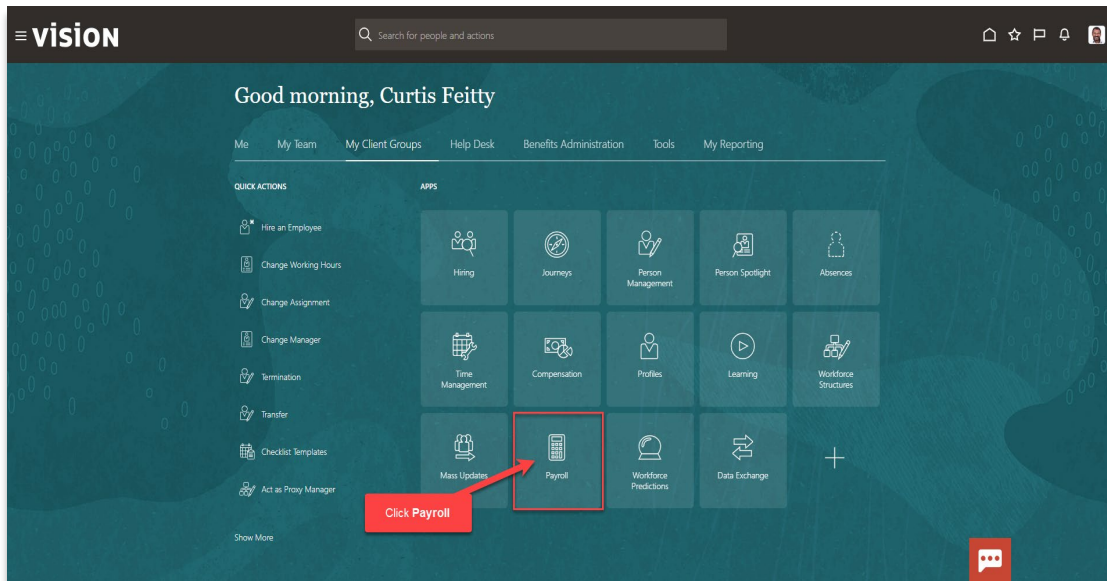
Override Benefit Elements From Payroll

Navigation: Home>My Client Groups>Payroll>Element Entries>Search for the Employee>Add Element>Override>End Date>Submit

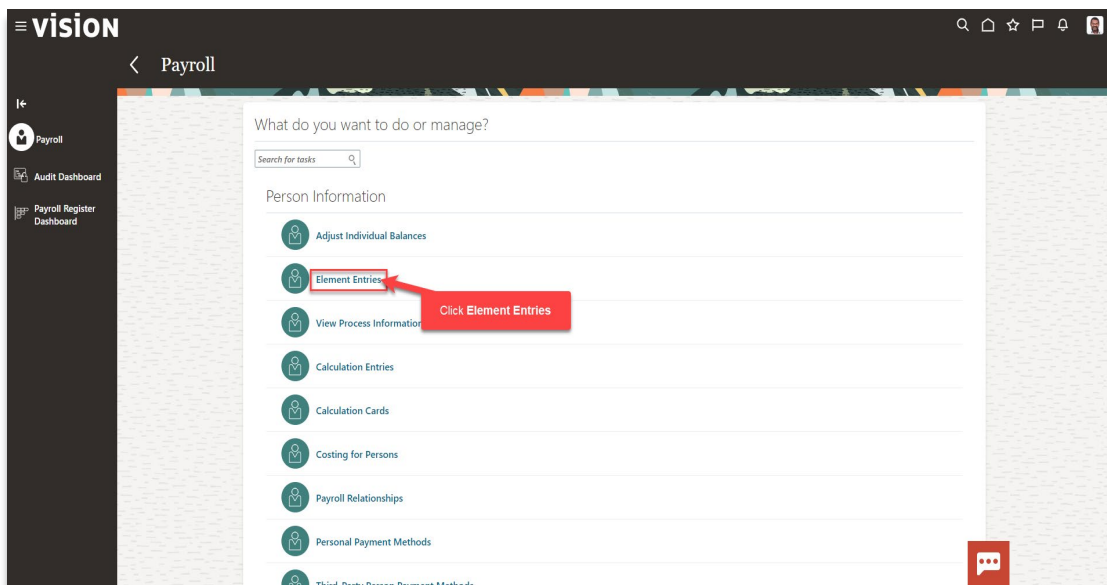
From the home screen, click **My Client Groups**



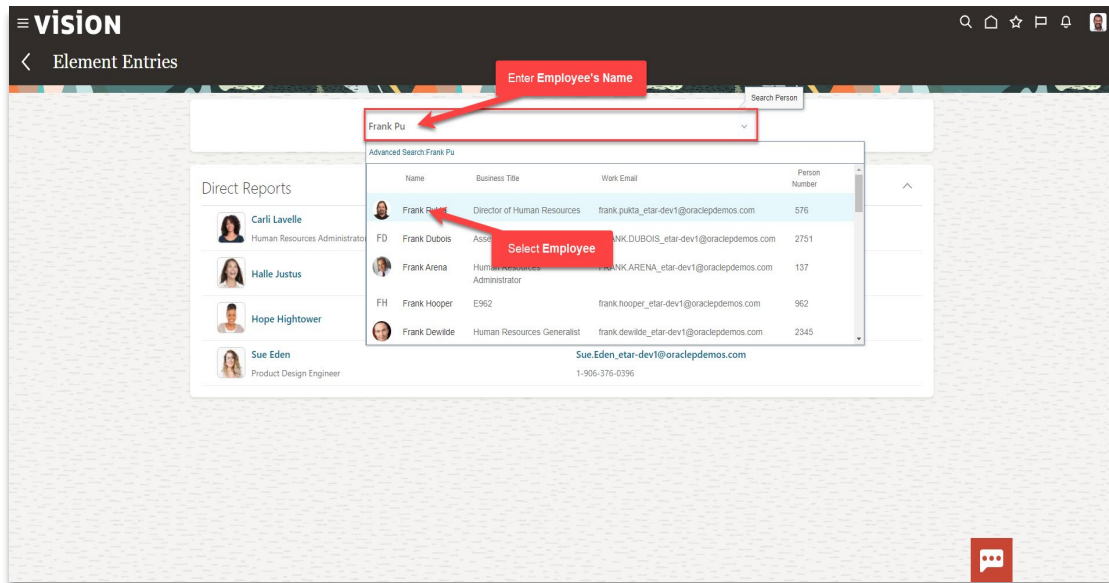
Next, click **Payroll**



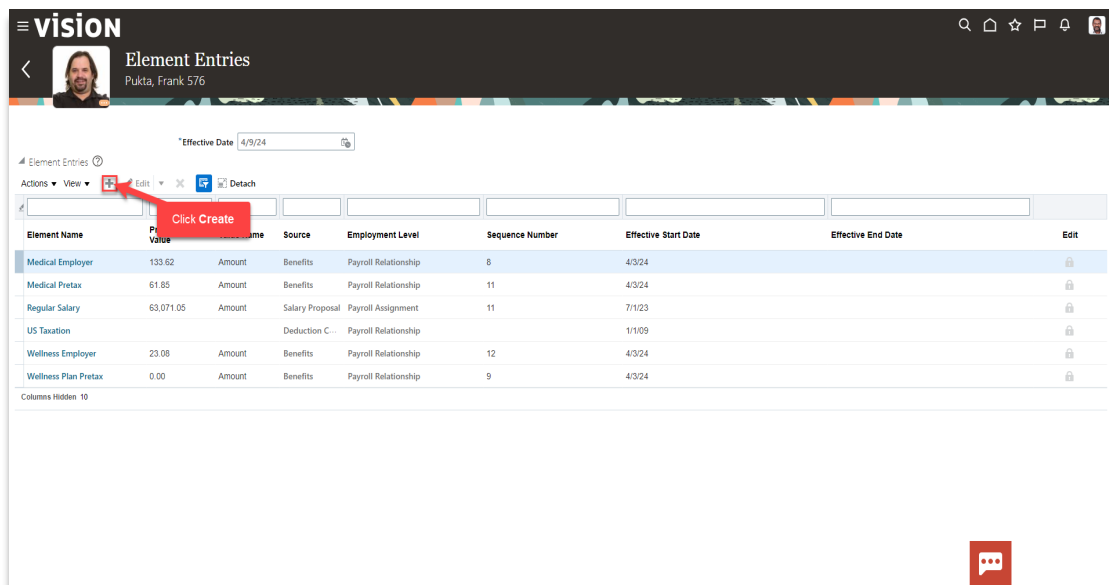
Click Element Entries



Search for the employee for whom we wish to override an element entry. Once the employee's name is visible, click on the employee's name.



To create the override element, Click **Create**



Enter the **Effective Date**, **Element Name**, and **Select Override Entry**. Click **Continue**

Element Entries
Pukta, Frank 576

Effective Date: 4/9/24

Actions: View, Edit, Detach

Element Name	Primary Entry Value	Value Name	Source	Employment Level	Sequence Number	Effective Start Date	Effective End Date	Edit
Medical Employer	133.62	Amount	Benefits	Payroll Relationship				
Medical Pretax	61.85	Amount	Benefits	Payroll Relationship				
Regular Salary	63,071.05	Amount	Salary Proposal	Payroll Assignment				
US Taxation			Deduction C...	Payroll Relationship				
Wellness Employer	23.08	Amount	Benefits	Payroll Relationship				
Wellness Plan Pretax	0.00	Amount	Benefits	Payroll Relationship				

Columns Hidden: 10

Create Element Entry

* Effective Date: 4/9/24

* Element Name: Medical Pretax

* Payroll Relationship: 576

Override Entry: ☒

Buttons: Continue, Cancel

Click Continue

Enter the Override Amount. If applicable, enter the costing and click **Submit**

Element Entries
Pukta, Frank 576

Effective As-of Date: 4/9/24

Entry Details

Element: Medical Pretax

Element Classification Name: Pretax Deductions

Entry Type: Override

Subpriority:

Payroll Relationship Number: 576

Element Processing Type: Recurring

Buttons: Submit, Cancel

Click Submit

General Information

Costing: Enter Costing

General Information

Effective Start Date: 4/9/24

Effective End Date:

Creator Type: Element Entry Page

Processed:

Retroactive Entry:

Automatic entry: No

Sequence Number:

Reason:

Entry Values

Pay Value:

Amount: 72.50 Enter Amount

Period Type: Periodically

Extra Details

Context Segment:

Clear Arrears: Yes

Deduction Start:

Partial Flag: Yes

As of the effective date of the override element, you will see two elements. The override element will have a source of Element Entry Page. The final step is to end date the override entry. Click the override element entry **Name**

Element Entries
Pukta, Frank 576

Effective Date 4/9/24

Element Entries

Actions View Edit Detach

Element Name	Primary Entry Value	Value Name	Source	Employment Level	Sequence Number	Effective Start Date	Effective End Date	Edit
Medical Employer	133.62	Amount	Benefits	Payroll Relationship	8	4/3/24		
Medical Pretax	72.50	Amount	Element Entr...	Payroll Relationship	1	4/9/24		
Medical Pretax				Payroll Relationship	11	4/3/24		
Regular Salary				Payroll Assignment	11	7/1/23		
US Taxation			Deduction C...	Payroll Relationship		1/1/09		
Wellness Employer	23.08	Amount	Benefits	Payroll Relationship	12	4/3/24		
Wellness Plan Pretax	0.00	Amount	Benefits	Payroll Relationship	9	4/3/24		

Columns Hidden 10

Update the **Effective As-of Date** to end date the override element entry. Click **Edit**

Element Entries
Pukta, Frank 576

Effective As-of Date 4/30/24

Update Effective As-of Date

Entry Details

Element Medical Pretax
Element Classification Name Pretax Deductions

Entry Type Override
Subpriority
Payroll Relationship Number 576

Element Processing Type Recurring

General Information Costing

General Information

Effective Start Date 4/9/24
Effective End Date
Creator Type Element Entry Page

Processed —
Retroactive Entry —
Automatic entry No

Sequence Number 1
Reason

Entry Values

Pay Value
Amount 72.50
Period Type Periodically

Clear Arrears Yes
Deduction Start
Partial Flag Yes

Extra Details
Context Segment

Click Edit

History Edit

Click **End Date**

Element Entries
Pukta, Frank 576

Effective As-of Date: 4/30/24

Entry Details: Element Medical Pretax, Pretax Deductions; Entry Type Override; Subpriority Payroll Relationship Number 576; Element Processing Type Recurring

General Information: General information, Effective Start Date 4/9/24, Effective End Date, Creator Type Element Entry Page, Processed, Retroactive Entry, Automatic entry No, Sequence Number Reason 1

Entry Values: Pay Value Amount 72.50, Clear Arrears Yes, Deduction Start, Partial Flag Yes, Period Type Periodically

Extra Details: Context Segment

History: Update, Correct, **End Date**, Delete Record

Click End Date

Click Continue

Element Entries
Pukta, Frank 576

Effective As-of Date: 4/30/24

Entry Details: Element Medical Pretax, Pretax Deductions; Entry Type Override; Subpriority Payroll Relationship Number 576; Element Processing Type Recurring

General Information: General information, Effective Start Date 4/9/24, Effective End Date, Creator Type Element Entry Page, Processed, Retroactive Entry, Automatic entry No, Sequence Number Reason 1

Entry Values: Pay Value Amount 72.50, Clear Arrears Yes, Deduction Start, Partial Flag Yes, Period Type Periodically

Extra Details: Context Segment

Warning: The selected Element Entries will have its effective end date set to 4/30/24. Future changes after this date will be deleted. Do you want to continue? (HRC-1035198)

Continue Cancel

Click Continue

The element entry override is in place for the duration specified. Once the end date approaches, the element entry override value will not be withheld; the original element entry value will be withheld.

Element Entries

Pukta, Frank 576

Effective Date

4/9/24

Element Entries

Actions

View

Edit

Detach

Element Name	Primary Entry Value	Value Name	Source	Employment Level	Sequence Number	Effective Start Date	Effective End Date	Edit
Medical Employer	133.62	Amount	Benefits	Payroll Relationship	8	4/3/24		
Medical Pretax	72.50	Amount	Element Entr...	Payroll Relationship	1	4/9/24	4/30/24	
Medical Pretax	61.85	Amount	Benefits	Payroll Relationship	11	4/3/24		
Regular Salary	63,071.05	Amount	Salary Proposal	Payroll Assignment	11	7/1/23		
US Taxation			Deduction C...	Payroll Relationship		1/1/09		
Wellness Employer	23.06	Amount	Benefits	Payroll Relationship	12	4/3/24		
Wellness Plan Pretax	0.00	Amount	Benefits	Payroll Relationship	9	4/3/24		

Columns Hidden 10

Thank you for reviewing and using our guide; we hope you have found it helpful. If you have any questions on the content included in this guide, please contact our Training & Learning team at learn@camptratech.com

Version History	Revision Date	Author	Changes
Version 1.0		Megan Ketter	Initial Version
Version 2.0	4/9/2024	Megan Ketter	Updated Screenshot and Tasks