INSTRUCTIONS FOR OPEN ENROLLMENT (ENROLL OR MAKE CHANGES) THROUGH EMPLOYEE SELF-SERVICE (ESS)

- Connect to the PASSHE portal through the internet at the following link: https://portal.passhe.edu/irj/portal
- Sign in at the Self Service Portal screen.
- On the tabs across the top of your page, select Employee Self-Service.
- Select Benefits.
- Select Benefits Enrollment.
- At the top of the screen in the section "Enrollments as of Today", you will see your current enrollments. In the lower section of the screen "Enrollment Offers for Next Year," you will see that your current enrollments are automatically selected. In this section you will be able to change your plans, opt out of coverage by choosing the Waive Plan, add dependents to your current plans or drop dependents from your current plans.
- AT THIS POINT, PLEASE REFER TO THE DIRECTIONS THAT PERTAIN TO THE TYPE OF CHANGE YOU WANT TO PROCESS:
    - Continuing with the Same Plan, but:
        - Modify existing dependents' data
        - Add new dependents
        - Enroll or drop existing dependents
    - Completing Your Enrollment – Continuing with the Same Plan
    - Changing plans
        - Modify existing dependents' data
        - Add new dependents
        - Enroll or drop existing dependents
    - Completing Your Enrollment – Changing Plans
    - No changes to the enrollment – Complete an attestation for an already enrolled dependent age 19 - 26

Continuing in the Same Plan

1. Choose the box in front of the medical plan that is already selected (this is the plan where you are currently enrolled) to highlight the row.
2. Select the Change Enrollment icon
3. On the "Enrollment Offer for: Medical" screen, select the Dependent coverage that you require. A description of each level of coverage is detailed on the screen for your reference.
4. After you have selected your plan option, scroll down on the screen to review your dependents. If you have more than five dependents, you will need to select the down arrows to view the remaining dependents. Note – If "Single" coverage is selected, your dependent(s) will be dropped from the plan and their information will be hidden. You will still need to continue by selecting the Enroll in Plan icon (See Completing Your Enrollment Changes – Continuing with the Same Plan)

Continuing in the Same Plan

Modify Existing Dependents' Data:

a. To modify your dependent's information, select the Modify icon.
b. In the dependent's screen you can update most of their information as needed. If a change is needed for the disability indicator, you will need to contact your benefits coordinator.
    - For Dependent Validation – Documentation verifying the individual's relationship to the employee (e.g., birth certificate, marriage certificate, etc.) must be provided upon request.
    - For Dependent Attestation – Adult children between the ages of 19 and 26 are not eligible for PASSHE health plan coverage if they are eligible for coverage under their own employer's health plan (or, if married, under a plan of their spouse's employer). As a condition of enrollment, employees who enroll adult children between the ages of 19 and 26 will be required to complete an Attestation that their adult child is not eligible for health plan coverage with their own employer.
c. Scroll down and update the address if needed.
d. Select the Save Dependent information to record any changes.
e. See Completing Your Enrollment Changes – Continuing with the Same Plan if no further dependent changes are needed.

Continuing in the Same Plan

Add New Dependents:

a. To add a new dependent, select the Click Here to Add a New Dependent link.
b. Select the correct relationship such as "Spouse", "Child" or "Domestic Partner".
c. Enter the required information into "Family Member Data" section of the screen and select the Save New Dependent information icon. Note – If you do not have a social security number for your dependent, you must see your benefit coordinator to add the dependent.
   You will receive an error message if:
   - Not all required fields are completed
   - You enter a social security number that is already being used for another dependent
   - You have entered a dependent older than the maximum age for the coverage
d. Upon saving the dependent's information, the dependent will be automatically selected for enrollment into the plan. You will be sent an e-mail explaining the documentation needed to finalize the enrollment for the dependent's coverage, and the deadline to provide the documentation.

Note – You must provide the required information for the dependent by the due date or the dependent's information will not be sent to the administrator for coverage. You will need to wait until the next open enrollment period to enroll the dependent.

e. If the dependent is over 18, you will be prompted to complete an attestation form. Please read the text of the attestation form, fill in the dependent's employer, select the "I agree" box and select Save.
f. If you try to save the attestation without completing the dependent's employer, you will be prompted to enter "none" if the dependent is not employed.
g. See Completing Your Enrollment Changes – Continuing with the Same Plan if no further dependent changes are needed.

Continuing in the Same Plan

Enroll or drop existing dependents:

a. To enroll or drop existing dependents, you will choose the Select checkbox next to the dependent's name. Putting a check mark in the box will enroll the dependent. Removing a check mark will drop the dependent.
b. If you choose the Select All icon and you have more than one dependent over 18 that are being added to the plan, you will receive the following message – "You have two or more adult children between the ages of 19 – 26. Please check the "Select" box for each adult child you wish to enroll in the health plan, and follow the prompts to complete an employment attestation for each child as required for coverage. You must complete the attestation for that individual to receive health plan coverage." The system will select all dependents that are under 19, but you will need to select the over age 18 dependents individually.
c. When you choose the Select box next to a dependent that is over 18, you will receive the Dependent Attestation Form. Read the text, complete the dependent's employer, select the "I agree" check box and select Save.
d. If you try to save the attestation without completing the dependent's employer, you will be prompted to enter "None" if the dependent is not employed.
e. See Completing Your Enrollment Changes – Continuing with the Same Plan if no further dependent changes are needed.

Completing Your Enrollment Changes – Continuing with the Same Plan:

1. Once you are satisfied with the coverage option and dependents, select the Enroll in Plan icon.
   - Note – if your selection is invalid, the system will display an error message to direct you to correct the problem. (Example – if "Multi-party" is selected but no dependents are checked, an error message will show indicating "You must select at least 1 dependent(s) for the selected coverage option.")
   - Note – If you choose an HMO plan, under "Plan Options" you will see two required fields for the Primary Care Physician and Physician ID. These are only required for an HMO election. There is no editing on these fields so please make sure your data is correct by verifying the information directly with the Health Care Plan or through their website.
   - Note – If you select an HMO health plan, the system will automatically enroll you in the SSHE Highmark HMO Prescription plan for the same plan coverage and number of dependents.
2. Your elections will appear in the "Enrollment Offers for Next Year." Do not be confused – the highlighting will default to the top available plan, not the plan you just finished changing. Note – At this point, if you choose the Continue with Enrollment icon, and you have a different number of dependents in the medical plan vs. the dental/vision/hearing plans, the system will give you a warning where the dependent counts differ. This would need to be corrected by selecting and updating the deficient plans, or if this information is actually correct, you would select the Continue with Enrollment icon again.
3. To change the dental/vision/hearing benefits, highlight one of the three plans (Dental, vision or hearing).
4. Select the Change Enrollment icon.

3. Select the plan option and dependents as described previously. Note – Since the attestation forms were already completed as needed for the 19 – 26 age dependents during the medical enrollment, the select all icon will allow you to select all dependents.
4. Select the Enroll in Plan icon.
5. Your elections will appear in the "Enrollment Offers for Next Year." Note – if you make a change in one of the supplemental benefit plans (dental/vision/hearing), this will result in the same change for the remaining two supplemental benefit plans. All of the supplemental benefits must have the same level of coverage and the same number of dependents.
6. If you want to change your enrollment choices, highlight the plan, select "Change Enrollment" and repeat the process described above as necessary. When you have completed all enrollment selections, scroll down to the bottom of the screen and select "Continue with Enrollment".
7. After selecting "Continue with Enrollment," you will get a summary of your plan selections for a final review. If you are satisfied with your enrollment choices, select "Submit Enrollment". If you want to make further changes, select "Return to Enrollment Offers."
8. After you select "Submit Enrollment" your elections are stored in the PASSHE HR/Payroll system and you will have the opportunity to print a copy of your enrollment by selecting the "Printer Friendly Version." An e-mail will be sent if your e-mail address is stored in the HR/Payroll system.

Note: <u>It is imperative that you print and save the e-mail generated from your ESS enrollment activity</u>. In the event of any discrepancy in your final enrollment, you may be asked to provide a copy of your confirmation as evidence of your enrollment actions.

<u>Changing Plans:</u>

1. Choose the box in front of the new medical plan to highlight the row (there will not be a check mark in the Selected box since this is a new enrollment into the plan).
2. Select the Enroll in Plan icon.
3. On the "Enrollment Offer for: Medical" screen, select the Dependent Coverage option that you require. See the description of the coverage options directly above the Plan Options bar. Note – If you choose an HMO plan, under "Plan Options" you will see two required fields for the Primary Care Physician and Physician ID. These are only required for an HMO election. There is no editing on these fields so please make sure your data is correct by verifying the information directly with the Health Care Plan or through their website.
4. After you have selected your plan option, scroll down on the page to enroll your dependents. If you have more than five dependents, you will need to select the down arrow to view the remaining dependents. Note – If "Single" coverage is selected, your dependent(s) information will be hidden. You will still need to continue by selecting the Enroll in Plan icon. (See <u>Completing Your Enrollment – Changing Plans</u>)

<u>Changing Plans:</u>

<u>Modify Existing Dependents' Data:</u>

a. To modify your dependents information, select the Modify icon.
b. In the dependent's screen you can update most of their information as needed. If a change is needed for the disability indicator, you will need to contact your benefits coordinator.
   - For Dependent Validation – Documentation verifying the individual's relationship to the employee (e.g., birth certificate, marriage certificate, etc.) must be provided upon request.
   - For Dependent Attestation – Adult children between the ages of 19 and 26 are not eligible for PASSHE health plan coverage if they are eligible for coverage under their own employer's health plan (or, if married, under a plan of their spouse's employer). As a condition of enrollment, employees who enroll adult children between the ages of 19 and 26 will be required to complete an Attestation that their adult child is not eligible for health plan coverage with their own employer.
c. Scroll down and update the address if needed.
d. Select the Save Dependent information to record any changes.
e. See <u>Completing Your Enrollment Changes – Changing Plans</u> if no further dependent changes are needed.

<u>Changing Plans:</u>

<u>Add New Dependents:</u>

a. To add a new dependent, select the Click Here to Add a New Dependent link.
b. Select the correct Relationship such as "Spouse", "Child" or "Domestic partner".
c. Enter the required information into the "Family Member Data" section of the screen and select the Save New Dependent information icon. Note – If you do not have a social security number for your dependent, you must see your benefit coordinator to add the dependent.
   You will receive an error message if:
   - Not all required fields are completed

- You enter a social security number that is already being used for another dependent
- You have entered a dependent older than the maximum age for the coverage

d. Upon saving the dependent's information, the dependent will be automatically selected for enrollment into the plan. You will be sent an e-mail explaining the documentation needed to finalize the enrollment for the dependent's coverage, and the deadline to provide the documentation if required.

Note – You must provide the required information for the dependent by the due date or the dependent's information will not be sent to the administrator for coverage. You will need to wait until the next open enrollment period to enroll the dependent.

e. If the dependent is over 18, you will be prompted to complete an attestation form. Please read the text of the attestation form, fill in the dependent's employer, select the "I agree" box and select Save.

f. If you try to save the attestation without completing the dependent's employer, you will be prompted to enter "none" if the dependent is not employed.

g. See Completing Your Enrollment Changes – Changing Plans if no further dependent changes are needed.

Changing Plans:

Enroll Existing Dependents:

a. To enroll existing dependents, you will choose the Select checkbox next to the dependent's name. Putting a check makr in the box will enroll the dependent. When changing from one plan to another, the system views this as a "new" enrollment for the dependents. Therefore, you will need to complete an attestation for your 19 – 26 year old dependents even if they were previously enrolled in another plan.

b. If you choose the Select All icon and you have more than one dependent over 18 that are being added to the plan, you will receive the following message, "You have two or more adult children between the ages of 19 – 26. Please check the "Select" box for each adult child you wish to enroll in the health plan, and follow the prompts to complete an employment Attestation for each child as required for coverage. You must complete the Attestation for that individual to receive health plan coverage." The system will select all dependents that are under 19, but you will need to select the over age 18 dependents individually.

c. When you choose the Select box next to a dependent that is over 18, you will receive the Dependent Attestation form. Please read the text, fill in the dependent's employer, select the "I agree" check box and select Save.

d. If you try to save the attestation without completing the dependent's employer, you will be prompted to enter "None" if the dependent is not employed.

e. See Completing Your Enrollment Changes – Changing Plans if no further dependent changes are needed.

Completing Your Enrollments – Changing Plans:

1. Once you are satisfied with the coverage option and dependent(s), select the Enroll in Plan icon.
   - Note – if your selection is invalid, the system will display an error message to direct you to correct the problem. (Example – if "Multi-party" is selected but no dependents are checked, an error message will show indicating "You must select at least 1 dependent(s) for the selected coverage option.")
   - Note – If you choose an HMO plan, under "Plan Options" you will see two required fields for the Primary Care Physician and Physician ID. These are only required for an HMO election. There is no editing on these fields so please make sure your data is correct by verifying the information directly with the Health Care Plan or through their website.
   - Note – If you select an HMO health plan, the system will automatically enroll you in the SSHE Highmark HMO Prescription plan for the same plan coverage and number of dependents.

Completing Your Enrollments – Changing Plans:

2. Your elections will appear in the "Enrollment Offers for Next Year." Do not be confused – the highlighting will default to the top available plan, not the plan you just finished changing. Note – At this point, if you choose the Continue with Enrollment icon, and you have a different number of dependents in the medical plan vs. the dental/vision/hearing plans, the system will give you a warning where the dependent counts differ. This would need to be corrected by selecting and updating the deficient plans, or if this information is actually correct, you would select the Continue with Enrollment icon again.
5. To change the dental/vision/hearing benefits, highlight one of the three plans (Dental, vision or hearing).
6. Select the Change Enrollment icon.
9. Select the plan option and dependents as described previously. Note – Since the attestation forms were already completed as needed for the 19 – 26 age dependents during the medical enrollment, the select all icon will allow you to select all dependents.
10. Select the Enroll in Plan icon.
11. Your elections will appear in the "Enrollment Offers for Next Year." Note – if you make a change in one of the supplemental benefit plans (dental/vision/hearing), this will result in the same change for the remaining two supplemental benefit plans. All of the supplemental benefits must have the same level of coverage and the same number of dependents.

12. If you want to change your enrollment choices, highlight the plan, select "Change Enrollment" and repeat the process described above as necessary. When you have completed all enrollment selections, scroll down to the bottom of the screen and select "Continue with Enrollment".
13. After selecting "Continue with Enrollment," you will get a summary of your plan selections for a final review. If you are satisfied with your enrollment choices, select "Submit Enrollment". If you want to make further changes, select "Return to Enrollment Offers."
14. After you select "Submit Enrollment" your elections are stored in the PASSHE HR/Payroll system and you will have the opportunity to print a copy of your enrollment by selecting the "Printer Friendly Version." An e-mail will be sent if your e-mail address is stored in the HR/Payroll system.

Note: <u>It is imperative that you print and save the e-mail generated from your ESS enrollment activity</u>. In the event of any discrepancy in your final enrollment, you may be asked to provide a copy of your confirmation as evidence of your enrollment actions.

<u>No changes to the enrollment – Complete an attestation for an already enrolled dependent age 19 - 26</u>

1. Choose the box in front of the medical plan that is already selected (this is the plan where you are currently enrolled) to highlight the row.
2. Select the Change Enrollment icon.
3. On the Plan Options screen, scroll down until you see your list of dependents.
4. Select the checkbox in front of your dependent that is over age 18.
5. After the check mark is gone, re-select the dependent to trigger the attestation form.
6. Please read the text, fill in the dependent's employer, select the "I agree" check box and select Save.
7. If you try to save the attestation without completing the dependent's employer, you will be prompted to enter "None" if the dependent is not employed.
8. At this point, you can select Cancel and Return to Offer Screen. The attestation form is saved immediately in the system.
9. From the main screen you can Log Off the ESS

Note: This process assumes NO changes to your current enrollments. The only change that will be recorded is the completion of the attestation form. If you want to make changes to your enrollments, please use one of the following processes described earlier:

- **Continuing in the Same Plan**
- **Changing Plans**