



## Administrator Guide

A complete guide for all Administrative processes in Employee Navigator.

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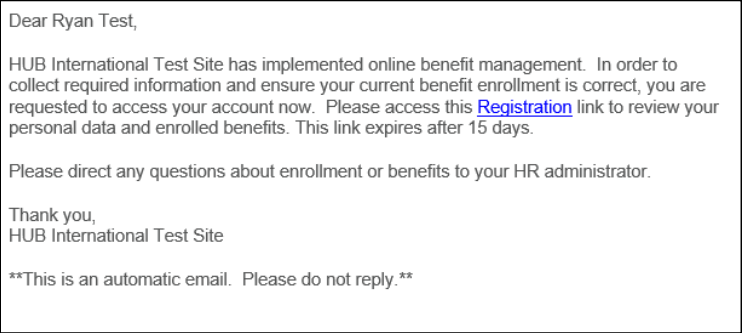
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# Admin Account Registration

As the HR Administrator you will receive access to the site before your employees. Registration will be initiated by a HUB Technology Team member. When ready they will let you know that they will be sending a registration email to you and give you your username.

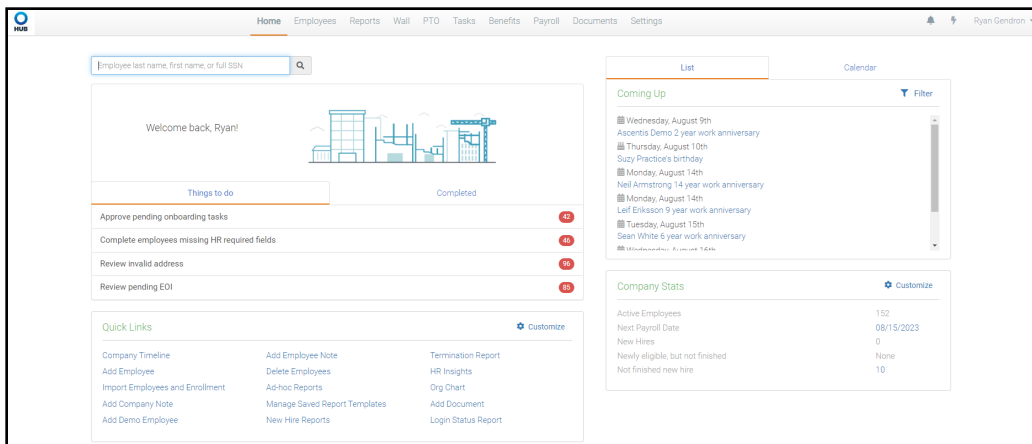
Here is an example of the email that you will receive from your HUB Technology Team member. Notice that a password has to be created within 24 hours. The link will expire and a new registration email will have to be sent. This is for security reasons and to protect your employees personal information.



The link will take you to the registration page. The Username that you see should match what the HUB Technology Team member sent you. To complete your registration create a password and click **'Change Password'**. You have now successfully registered your Admin Account.

## Accessing Employee Homepage

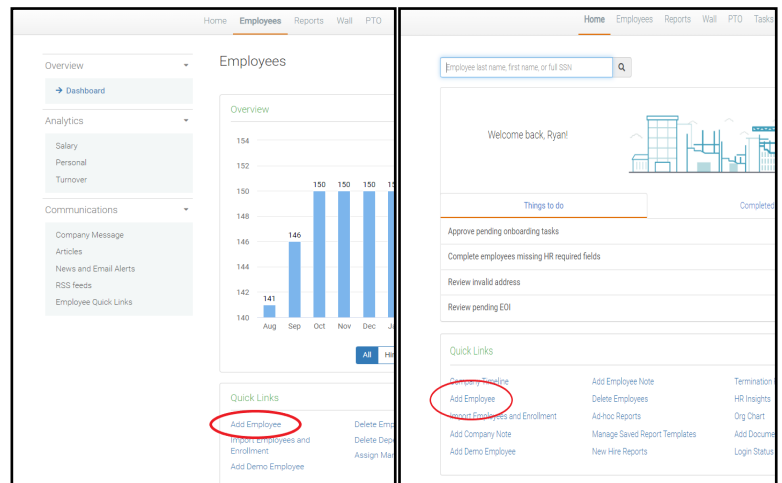
HR Administrators will be able to access their Employee Homepage and complete their Open Enrollment using their Admin accounts. The link to the your Employee Homepage can be accessed by clicking on **Employee Homepage** in blue next to Support Center and Add Notes on the top right of the page.



# Adding/Terminating Employees

## Adding an Employee

1. There are two different places where you can add an employee in Employee Navigator.
  - From the Admin Homepage—Under **Helpful Tools & Information** click **Add Employee**
  - Or from the **Employees** tab—Under **Employee Actions** click **Add Employee**



2. First you will need to add the Employee's Last Name, First Name and SSN
3. Following this step you will next add the Employee's Personal Information. Below are the required fields.
  - Sex
  - Date of Birth
  - State of Residence

We recommend that you enter a work and/or personal email as well.

The image shows a screenshot of the 'Add an Employee' form. The 'Personal Info' tab is selected. The form includes the following fields: SSN (124-78-9865), First Name (Ross), Middle Name, Last Name (Geller), Suffix (dropdown), Sex (radio buttons for Male and Female), Gender Identity (radio buttons for Male, Female, and Non-Binary), Date of Birth, State of Residence (dropdown), Payroll Work State (dropdown), Work Email, Personal Email, and Primary Email Type (dropdown). A 'Next' button is located at the bottom right.

# Adding/Terminating Employees

4. Click **Next** to move on to the Employment section. In this section you will be required to enter the following information.

- Hire Date
- Class
- Payroll Group
- Pay Basis (Hourly or Salary)
- Hourly Rate/Hours Per Week or Annual Base Salary

Again, we recommend that you fill in as much information as possible. Click Next when done.

5. The next section is called **Onboarding**. This is where you will select the onboarding tasks you want your employees to complete.
6. The **Email** section can be used to send a New Hire Registration Email to this employee. The email will contain the registration link that the employee can use to register their accounts and the company identifier.
7. After choosing whether or not to send the registration email the employee will be officially added to Employee Navigator. You can choose between three options on the following page.
  - Go To Profile—Selecting this will take you directly to the employees Profile
  - Go To Enrollment—This option will bring you to the employees enrollment view
  - Add Another Employee—This will restart the adding an employee process

The screenshot shows the 'Add an Employee' form with the 'Employment' tab selected. The form is titled 'Then add the employee information' and includes a note: 'The following data is required to establish a new employee record'. The form fields are as follows:

- SSN: 124-78-8865
- Hire Date: [Text Input]
- Job Title: [Text Input]
- Class: [Dropdown Menu]
- Payroll Group: [Dropdown Menu]
- Time Off Package: [Dropdown Menu]
- Manager: [Text Input with Search Icon] No manager
- Salary fields section:
  - Pay Basis: [Dropdown Menu]
  - Hourly Rate: [Text Input]
  - Hours Per Week: 40.00
  - Annual Base Salary: [Text Input]
  - Annual Benefit Salary: [Text Input]
- ACA / Statutory Classifications section:
  - ACA Classification: [Dropdown Menu]
  - Statutory Class: [Dropdown Menu]
  - Is Seasonal:  Yes  No
  - Subscriber Group(s):  Test

At the bottom of the form, there are 'Back' and 'Next' buttons.

If you would like to head back to the HR Homepage click your company logo at the top right of the page.

# Adding/Terminating Employees

## Terminating an Employee

The below instructions are a step-by-step guide on how to terminate employees in Employee Navigator. The termination date is restricted to no more than 24 months in the past and 90 days in the future, and cannot be more than 1 day prior to the hire date.

1. Using the Employee Search bar search for the employee that will be terminated by last name.
2. Once selected you will be taken to their Employee Management page.
3. On the right side of the Employee Management page you will see **Terminate Employee** under **ACTIONS**.
4. To begin the terminating process click Terminate Employee.
5. This will open the **Terminate Employee Tool**. The first step will be to validate the employees address. Once confirmed click Validate Address or Next at the bottom.
6. On the following page enter the **Termination Date** and select the reason why. After entering the date you will see the plans that will be terminated under Affected Plans on the left.
7. Click the **Next** button in green to terminate the employee from Employee Navigator.
8. A small window will appear confirming the termination. Click **Continue** when ready.
9. A termination will not remove the employee from the system. Instead it will read **'Employee has been terminated'** within their Employee Management page.
10. If you made a mistake and entered the wrong date of the termination you can edit this by clicking **Terminate Editor** under **ACTIONS** on the Employee Management page. This will allow you to edit the Termination Date and Reason.

CPC Test (demo) Add a note

Employee Management Profile Update Benefits Benefits Summary Documents Timeline

CPC Test (demo) Status  
Associates  
Tester  
test@test.com

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

MANAGE ENROLLMENTS

New Hire Enrollment Employee is not eligible for any new hire benefits.  
Modify Current Enrollments You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events.  
Open Enrollment Open enrollment window has expired.  
Newly Eligible Enrollment Employee is not eligible for any newly eligible benefits.

NOTES

TASKS

Incomplete 5  
Complete 6  
HR Pending 3

ACTIONS

Terminate Employment  
Manage COBRA  
Rehire  
Unlock Open or New Hire Enrollment

REVIEWS

Employee Home Page  
Employee Data Sheet  
Total Compensation Statement  
Employee Change Request History  
Change History

Terminate Employee Read Support Article Employee last name, first name, or full SSN

Ryan Test

Affected Plans

Ending Plans

COBRA Eligible Plans  
H&H Medical - 06/01/2020  
Dental 100/80/50 - 06/01/2020  
Vision - 06/01/2020

NON-COBRA Eligible Plans  
HSA - 02/01/2019  
Basic Life - 01/01/2019  
Short Term Disability - 04/01/2018  
Short Term Disability - 01/01/2019  
Long Term Disability - 04/01/2018  
Long Term Disability - 01/01/2019  
Voluntary Life - 02/01/2020  
Dependent Care Spending Account - 04/01/2018

Employee Information  
Dependent Information  
Validated Information

Termination Date  
08/10/2023

What is the Reason for Termination?

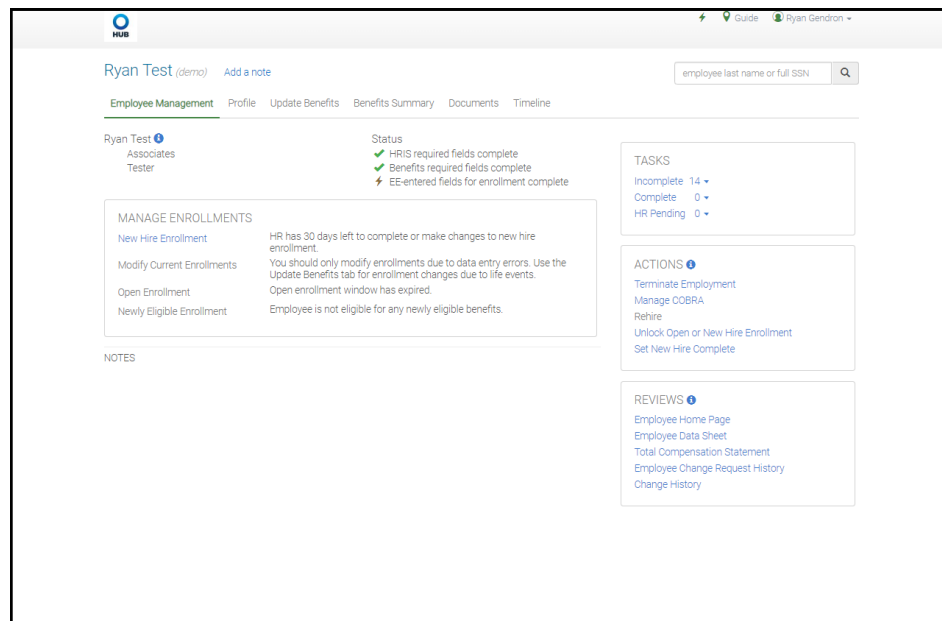
Voluntary Termination  
Involuntary Termination  
Reduction in Force  
Retirement  
Death of Employee  
Gross Misconduct

Next Cancel

# Managing Individual Employees

The HR Administrator has full access to the employees management page. To access this information search for the employee by last name in the search bar on the HR Home tab or the Employees tab. The following features can be accessed from this section.

- Employee Management
  - Reinststate/Rehire
  - Manage PTO/ COBRA
  - Unlock Open Enrollment or New Hire Enrollment
  - Set New Hire Complete
  - Impersonating Employee View
- Modifying Employee Enrollments
- Updating Employee Information
- Updating Salary Information
- Login Access/Resetting Password
- Benefit Summary
- Documents
- Timeline



# Employee Management

## Employee Management Overview

The Employee Overview can be found on the Employee Management tab. On this page administrators can view a snapshot of important employee details. Next to the employees name there is a blue icon. If you click on this icon a small window will appear. Within this window it will show all important employee information such as Job Title, Email, Class, Salary, Date of Birth etc.

There are three boxes on the right side of this page (TASKS, ACTIONS and REVIEWS).

Under the TASKS box administrators will be able to view Incomplete, Complete and HR Pending Tasks. If selected a drop down menu will appear with three options.

- Onboarding—Tasks that appear directly after the employee registers their accounts (i.e. Welcome Message, Electronic Signature and Consent etc.). Selecting this option will take you to the Employee’s view of all Required Tasks.
- Benefit Forms—Benefit Forms include PCP Information, Life Beneficiaries, Voluntary Life Beneficiaries etc.). Selecting this option will bring you to the Employee’s View as well. To access the Benefit Forms click the form on the left under Benefit Forms. A yellow minus sign next to the form means it is incomplete.
- HR Pending— These are tasks that have the Requiring HR Approval feature activated. Selecting this will take you to the Approve HR Pending Tasks page under the Tasks tab. (See page 29 to learn more about this feature)

Under the ACTIONS box administrators will find six different tools.

- Terminate Employment (see page 6)
- Reinstatement/Rehire
- Manage PTO/ COBRA
- Unlock Open Enrollment or New Hire Enrollment
- Set New Hire Complete
- Impersonating Employee View

The last box on the right is called REVIEWS. This tab has two options that will be used the most by administrators.

- Employee Home Page
- Employee Data Sheet

# Employee Management

## Reinstating a Terminated Employee (See page 6 to learn how to terminate employees)

To reinstate a terminated employee click on **Reinstate** under ACTIONS. This option will only appear for an employee has been terminated. This tool can also be used to undo an erroneous termination.

1. First select **Reinstate** under ACTIONS on the Employee Management page.
2. On this page it will describe the reinstatement process. The reinstatement process removes the employee termination date and reason and restore the benefits in effect at the time of the termination. There is also an option to reinstate PTO packages as well.
3. Click Reinstate in green when ready.
4. Next it is time to select any onboarding tasks that you would like the employee to complete. If the employee has already completed all on-boarding tasks you can skip this step. Click next when ready.
5. The next step is to add the employees email to send them a registration link. If the employee was already registered they will not need go through another registration. Their Username and Password will remain the same. You can select Not Now to move forward.
6. On the Finish Up section there are three different options. Regardless of what option you choose the employee is rehired/reinstated.

## Rehiring a Terminated Employee

The rehiring process is similar to the reinstatement process described above. The difference is when rehiring an employee they will need to complete their enrollment and onboarding process again.

1. First select **Rehire** under ACTIONS on the Employee Management page.
2. Next you will be asked to enter the Employee's Rehire Date. Once added click **Rehire** in green.
3. The next step is to select the on-boarding tasks the employee should complete. Once the tasks are selected click **Finish Up** in green
4. To send a New Hire Enrollment Registration email enter the employees email address and click **Send** in green. If this is something that you do not want to do at this time click **No, not now** in blue.

# Employee Management

## Managing PTO

Under ACTIONS you will see two separate options called Manage PTO and Manage COBRA. By selecting these links it will take you directly to the PTO and COBRA module. Each of these modules have their own dedicated sections.

- [PTO Module—page 43](#)

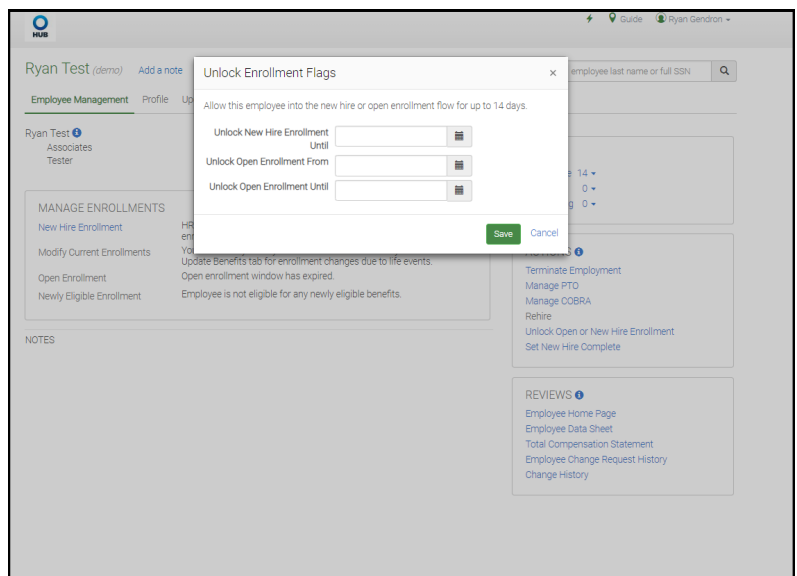
# Employee Management

## Unlock Open or New Hire Enrollment

Use the **Unlock Open or New Hire Enrollment** tool to extend enrollments for individual employees that may have missed their window.

To unlock an open or new hire enrollment window see below.

1. Select **Unlock Open or New Hire Enrollment** under ACTIONS
2. A window will appear with three options.
  - Unlock New Hire Enrollment Until—The New Hire Enrollment window will remain open until the selected date.
  - Unlock Open Enrollment From—The Open Enrollment window will open on the date chosen.
  - Unlock Open Enrollment Until—The Open Enrollment window will close on the date chosen.
3. If you are opening the open enrollment window for an employee a start and end date need to be selected.
4. Once the appropriate dates are selected click Save in green.

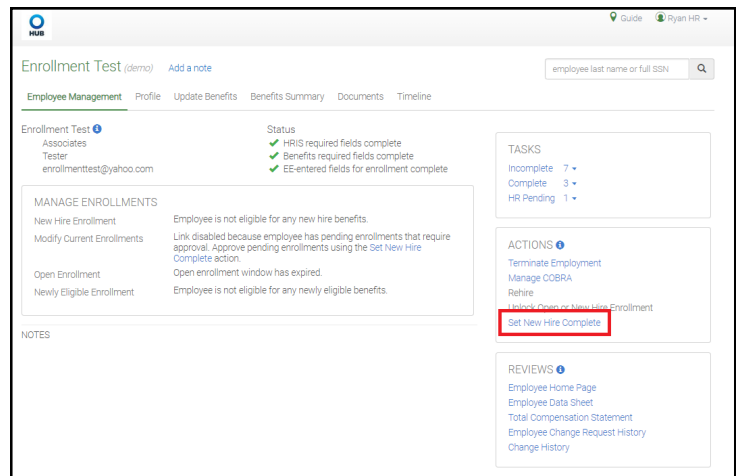


# Employee Management

## Set New Hire Complete

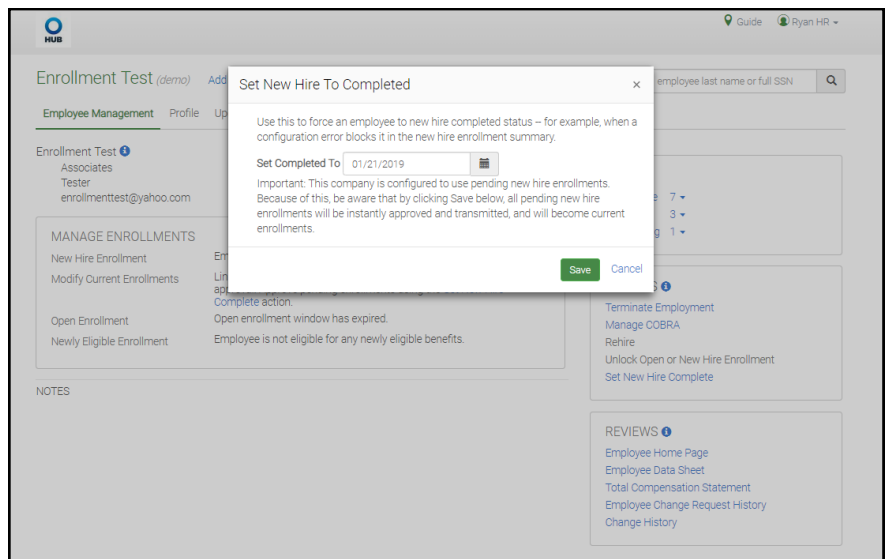
The Set New Hire Complete tool is used to force a New Hire's Enrollment to completed status. If the employee's new hire deadline has passed and the employee did not complete their enrollment you can use the **Set New Hire Complete** tool to complete the new hire's enrollment and finalize their elections.

For example, if a new hire did not fully complete their elections and did not sign the Enrollment summary at the end their elections will not finalize in Employee Navigator. A configuration error will block the employees elections from appearing under their Enrollment Summary. The **Set New Hire Complete** tool can be used to override this process and finalize their elections. This option will only appear under ACTIONS if the employee has not completed their New Hire Enrollment.



To set a new hire's enrollment to complete...

1. Select **Set New Hire Complete** under ACTIONS
2. A small window will appear asking for you to enter a date. This will be the date that will be logged in Employee Navigator as the day the enrollment was completed
3. Click **Save** in green once finished.



# Employee Management

## Impersonating Employee View

As an HR Administrator you will have the ability to impersonate each employee. By impersonating the employee you will be able to see what the employee sees making it a great tool for troubleshooting issues.

The screenshot shows the HUB Employee Management interface for an employee named Ryan Test. The interface includes a navigation bar with tabs for Employee Management, Profile, Update Benefits, Benefits Summary, Documents, and Timeline. The Employee Management tab is active. The main content area displays the employee's name, role (Tester), and status (Associates). A status section shows three items: HRIS required fields complete (green checkmark), Benefits required fields complete (green checkmark), and EE-entered fields for enrollment complete (lightning bolt icon). Below this is a MANAGE ENROLLMENTS section with four items: New Hire Enrollment, Modify Current Enrollments, Open Enrollment, and Newly Eligible Enrollment, each with a brief description. A NOTES section is also present. On the right side, there are three panels: TASKS (Incomplete: 14, Complete: 0, HR Pending: 0), ACTIONS (Terminate Employment, Manage PTO, Manage COBRA, Rehire, Unlock Open or New Hire Enrollment), and REVIEWS (Employee Home Page, Employee Data Sheet, Total Compensation Statement, Employee Change Request History, Change History). The 'Employee Home Page' link in the REVIEWS panel is highlighted with a red box.

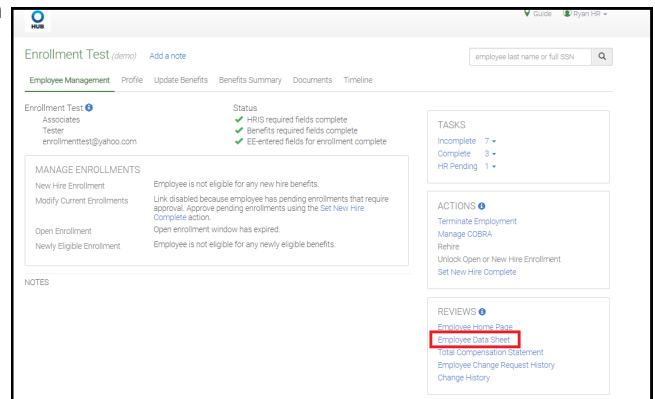
# Employee Management

## Employee Data Sheet

The **Employee Data Sheet** can be used to view prior coverage and/or an employees coverage history.

See below for a step by step guide on how to access the Employee Data Sheet.

1. Search for the employee you wish you wish to review and select
2. Under **REVIEWS** on the right side of the Employee Management page click **Employee Data Sheet**
3. Use this tool to review enrollments, details on how enrollments were created and last updated.



**\*NOTE\*** To view prior coverage simply select the **'Previous'** box under Enrollments

Emp ID	External ID	First Name	Middle	Last Name	Suffix	Address1	Address2	City	State	County	Zip	Client	Office	Job Title	Emp Status	Client Class	Class Changed	Client Division
266367	10029547	Ryan		Test		1 Test Test		Test	MA	Franklin County	13245	HUB International Test Site	Tester	Active	Associates			

Dep Id	Relationship	First Name	Middle	Last Name	Suffix	Address1	Address2	City	State	County	Zip	DOB	Age	SSN	Gender	Sequence	Tobacco	Tobacco Date	Disabled	Disabled Date
152824	Spouse	Spouse		Test		1 Test Test		Test	MA	Franklin County	13245	01/02/1990	29	***-**-0002	F	3	Unknown		No	
152630	Child	Child		Test		1 Test Test		Test	MA	Franklin County	13245	01/03/2012	7	***-**-0003	M	2	Unknown		No	

PE ID	Benefit Category	Plan Id	Plan Title	Type	On COBRA	Employee Cost	Client Cost	Plan Cost	Rider Cost	Total Employee Cost	Total Plan Cost	Employee Per Pay Cost	Client Per Pay Cost
2086461	Medical	16485	HDHP Medical	current		320.00	0.00	320.00	0.00			147.69	0.00
2082458	Consumer Directed Health	16760	HSA	current								100.00	0.00
2086460	Dental	16761	Delta Dental 100/80/50	current		120.00	0.00	120.00	0.00			55.38	0.00
2082460	Life	16491	Basic Life	current		0.00	5.50	5.50				0.00	2.54
2082461	Short-Term Disability	16492	Short Term Disability	current		0.00	11.92	11.92				0.00	5.50
2082462	Long-Term Disability	16493	Long Term Disability	current		0.00	41.33	41.33				0.00	19.08
2082463	Voluntary Life	16509	Voluntary Life	current		15.20	3.80	19.00		17.90	21.70	7.02	1.75
2082464	Flexible Spending Account	19830	Flexible Spending Account	current								0.00	0.00
2082465	Dependent Care Spending Account	24924	Dependent Care Spending Account	current								50.00	0.00

DPE ID	PE ID	Relationship	Dependent Name	Benefit Category	Active Enrollment	Plan Id	Plan Title	Type	Employee Cost	Client Cost	Plan Cost	Coverage_Level	Benefit Amount	Covg Start Date	Start P
668295	2086461	Spouse	Spouse Test	Medical	Yes	16485	HDHP Medical	current	320.00	0.00	320.00	Employee + Family		01/10/2019	Marria
668293	2086460	Spouse	Spouse Test	Dental	Yes	16761	Delta Dental 100/80/50	current	120.00	0.00	120.00	Employee + Family		01/10/2019	Marria
668296	2086461	Child	Child Test	Medical	Yes	16485	HDHP Medical	current	320.00	0.00	320.00	Employee + Family		01/10/2019	Marria

# Modifying Employee Enrollments

## Modifying Current Enrollments

The Modify Current Enrollments tool can be used to modify enrollments caused by data entry errors. This can also be used to adjust enrollments for employees that mistakenly enrolled themselves or a dependent in a plan after their enrollment window has closed.

To modify current enrollments first access the employees management page by searching by last name.

1. On the employee management click **Modify Current Enrollments** under MANAGE ENROLLMENTS.
2. Once selected you will be brought to the employees enrollment page. To view all benefit options click **View Steps** under the progress bar.
3. Select the benefit that you would like to modify and make the necessary changes.
4. Click **Save** once complete.

You have now successfully modified the employees enrollments. The changes will be reflected under their Benefit Summary.

The screenshot displays the HUB employee management interface for an employee named Ryan Test. The interface includes a search bar at the top right, a navigation menu with options like 'Employee Management', 'Profile', 'Update Benefits', 'Benefits Summary', 'Documents', and 'Timeline', and a main content area. The 'MANAGE ENROLLMENTS' section is visible, with 'Modify Current Enrollments' highlighted in a red box. The 'Status' section shows three green checkmarks indicating that HRIS required fields, Benefits required fields, and EE-entered fields for enrollment are complete. The 'TASKS' section shows 5 Incomplete, 9 Complete, and 3 HR Pending tasks. The 'ACTIONS' section includes options like 'Terminate Employment', 'Manage PTO', 'Manage COBRA', 'Rehire', and 'Unlock Open or New Hire Enrollment'. The 'REVIEWS' section includes options like 'Employee Home Page', 'Employee Data Sheet', 'Total Compensation Statement', 'Employee Change Request History', and 'Change History'.

# Updating Employee Information

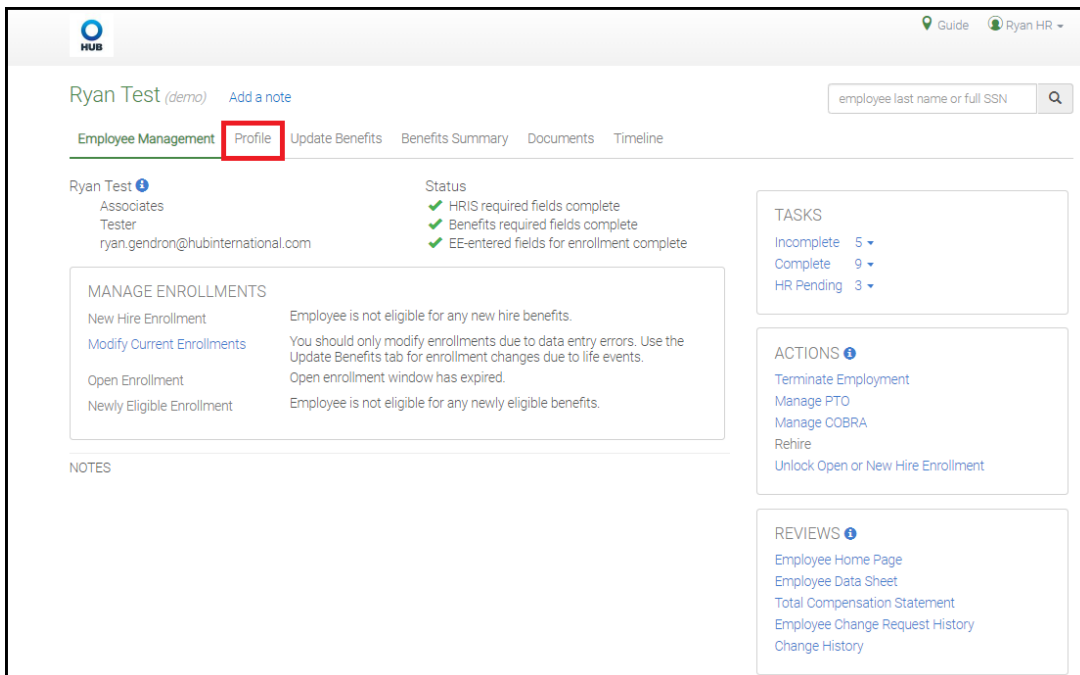
## Updating Profile Information

The HR Administrator has the ability to edit employee information. The employee profile tab can be used to update items like Benefit Class, Department, Business Unit, Job Title, Time Off, etc.

To access and edit the employees profile see below.

1. Search for the employee by last name and open their Employee Management page.
2. Select the **Profile** tab to the right of the Employee Management tab.
3. On the left is a drop down menu that can be used to navigate the employees profile.
4. To edit a specific field click on it. If the field requires you to manually enter information begin typing and click **Save** in green near the top when complete. If the field is a drop down menu, first click the field to access the menu and select the correct option. Click **Save** once complete.

\*\*\*If the employee has an address change it is recommended that the employee makes the change from their account. All Profile changes pend HR's approval and an event will be created in the system and found on the employees timeline once approved. Once approved it will be added to the employees timeline\*\*\*



The screenshot displays the HUB HR system interface for an employee named Ryan Test. The top navigation bar includes the HUB logo, a search bar with the text "employee last name or full SSN", and user information for "Ryan HR". The main content area features a tabbed interface with "Employee Management" and "Profile" (highlighted with a red box). Below the tabs, the employee's details are shown: Ryan Test (demo), Associates, Tester, and email ryan.gendron@hubinternational.com. A "Status" section lists three items: "HRIS required fields complete", "Benefits required fields complete", and "EE-entered fields for enrollment complete", each with a green checkmark. The "MANAGE ENROLLMENTS" section lists four options: "New Hire Enrollment" (Employee is not eligible for any new hire benefits), "Modify Current Enrollments" (You should only modify enrollments due to data entry errors. Use the Update Benefits tab for enrollment changes due to life events), "Open Enrollment" (Open enrollment window has expired), and "Newly Eligible Enrollment" (Employee is not eligible for any newly eligible benefits). The "NOTES" section is currently empty. On the right side, there are three panels: "TASKS" showing 5 Incomplete, 9 Complete, and 3 HR Pending items; "ACTIONS" with links for "Terminate Employment", "Manage PTO", "Manage COBRA", "Rehire", and "Unlock Open or New Hire Enrollment"; and "REVIEWS" with links for "Employee Home Page", "Employee Data Sheet", "Total Compensation Statement", "Employee Change Request History", and "Change History".

# Updating Salary Information

## Updating Salary Information

Each salary update that is made in Employee Navigator creates a log within an employee's account. This is used to track salary updates made throughout an employee's time at your company. The process below is to be used when updating a single employee's salary in Employee Navigator.

\*\*\*If you would like to update all employee salaries at once please reach out to your HUB Technology Team member and request a salary import\*\*\*

### Annual Base Salary Change

1. Log into Employee Navigator and search for the employee that you wish to update
2. Next select the **Profile** tab
3. On the left select **Compensation**. On this page you will see all compensation information for this employee.
4. To edit a salaried employee click the blue edit tool next to **Annual Base Salary**

The screenshot displays the 'Compensation' section for an employee named Ernie Test. The left sidebar shows the 'Compensation' tab selected. The main content area includes the following fields and options:

- Pay basis: Salary
- Salary effective date: 06/06/2019
- Annual base salary: \$50,000.00 (with a blue 'edit' link circled in red)
- Hourly rate
- Hours per week
- Annual benefit salary: (with a blue 'edit' link)
- Annual benefit salary effective date
- Reporting year W2 earnings: \$
- Salary review date: (calendar icon)
- Next salary review date: (calendar icon)
- Override pay frequency: Bi-Weekly (26 Periods)
- Ownership percentage
- Employee compensation billable:  Yes  No
- Employee post-tax deduction:  Yes  No

A green 'Save' button is located at the top right of the compensation section.

# Updating Salary Information

5. This will open a new window called **Change Compensation**. Within this window you will see four different fields and a Salary Change History at the bottom.

- Pay Basis—This should remain the same, unless the employee is moving to hourly
- Annual Base Salary—Enter the employees new Annual Base Salary
- Hire Date—This field can not be edited from this window
- Effective Date—The date the new salary goes into effect. NOTE: Future effective salaries will not be displayed on profile. It will update once the effective date arrives.

6. Click **Save** once all information is completed. If you click edit again next to Annual Base Salary the new update will appear under the Salary Change History.

The screenshot shows the 'Change compensation' window with the following details:

- Pay basis: Salary
- Annual base salary: \$ 60000.00
- Hire date: 04/01/2018
- Effective date: 01/01/2019

Effective	Pay basis	Compensation	Hours per week	Base salary	Delete
09/25/2018	Salary	\$50,000.00		\$50,000.00	
01/01/2019	Salary	\$60,000.00		\$60,000.00	

\* Future effective salaries will not be displayed on profile. Save Close

If a mistake was made and the wrong salary was entered you can delete the salary update from the Salary Change History.

1. Click edit next to Annual Base Salary to open the Change Compensation window
2. Click the Trash Can icon next to the salary you would like to remove and click Save. This will remove the salary from the change history and revert back to the employees previous salary.
3. Do not click Save when finished, but rather click **Close** to close the window

This screenshot is identical to the previous one, but the 'Delete' button (trash icon) for the 01/01/2019 salary update is highlighted with a red box.

# Updating Salary Information

## Hourly Rate Change

1. Log into Employee Navigator and search for the employee
2. Next select the **Profile** tab
3. On the left select **Compensation**. On this page you will see all compensation information for this employee.
4. To edit an employee with an hourly rate click the blue edit tool next to **Hourly Rate**
5. This will open a new window called **Change Compensation**. Within this window you will see four different fields and a Salary Change History at the bottom.

The screenshot shows the 'Profile' tab for 'Brian Tester'. The 'Compensation' section is active, displaying fields for Pay basis (Hourly), Salary effective date (06/27/2017), Annual base salary (\$37,440.00), Hourly rate (\$18.00), and Hours per week (40). A red box highlights the 'Hourly rate' field, which has a blue 'edit' icon next to it.

- Pay Basis—This should remain the same, unless the employee is moving to hourly
- Hourly Rate—Enter new hourly rate
- Hours per Week—Enter new hours per week if changed
- Hire Date—This field can not be edited from this window
- Effective Date—The date the new salary goes into effect. NOTE: Future effective salaries will not be displayed on profile. It will update once the effective date arrives.

6. Click **Save** once all information is completed. If you click edit again next to Annual Base Salary the new update will appear under the Salary Change History.

If a mistake was made and the wrong salary was entered you can delete the salary update from the Salary Change History.

1. Click edit next to Annual Base Salary to open the Change Compensation window
2. Click the Trash Can icon next to the salary you would like to remove and click Save. This will remove the salary from the change history and revert back to the employees previous salary.
3. Do not click Save when finished, but rather click **Close** to close the

The 'Change compensation' dialog box shows the following fields: Pay basis (Hourly), Hourly rate (\$ 22.00), Hours per week (40.00), Hire date (06/27/2017), and Effective date (01/01/2019). Below these fields is a 'Salary change history' table:

Effective	Pay basis	Compensation	Hours per week	Base salary	Delete
06/27/2017	Hourly	\$18.00	40	\$37,440.00	
01/01/2019	Hourly	\$22.00	40	\$45,760.00	

At the bottom, there is a note: '\* Future effective salaries will not be displayed on profile.' and buttons for 'Save' and 'Close'.

# Log In / Resetting Password

## Employee Log In Information

As HR Administrators you will be able to view employee log in information directly from their Profile tab. The only piece of information that you will not be able to view are employee passwords.

To view an employees Login Access first search for the employee and select the Profile tab. On the left select Login Access. On this page you will see the following information.

- Registration Status—This field will show the date when the user was sent their Welcome message
- User's Login Name—The username the employee created will appear here
- Primary Email—The employees primary email will appear here. This is the email that all Employee Navigator emails are sent to.
- Last Login—The date the employee last logged in

The screenshot displays the 'Employee Management' profile page for 'Ernie Test'. The page is divided into several sections: 'Employee Record' (left sidebar), 'Account Information' (middle), and 'Login Credentials' (right). The 'Employee Record' sidebar includes links for Profile, Employment, Leave Status, Addresses, Contact, Compensation, ACA, Scheduled Changes, and Personal. The 'Account Information' section shows fields for First Name (Ernie), Last Name (Test), and Email (Test@test.com). The 'Login Credentials' section shows the Username (ernie.test) and a checkbox for 'Require password change on next login'. A blue button labeled 'Send Password Reset Email' is circled in red. The 'Manage Login' link in the 'Employee Record' sidebar is also circled in red.

## Resetting Employee Password

If an employee has forgotten their password, the recommendation is to first have the employee use the password retrieval on Employee Navigator's login page. If that does not work you can send the employee a reset password email manually.

1. Search for the employee by last name and go to their Employee Management page
2. Next select the Profile tab and click Login Access on the left
3. Click Reset Password in blue to open a new window.
4. If password reset is in response to a phone call then we commend having the caller answer the series of questions that appear on the Reset Password email. Once the employee has answered the questions click Reset in green. If there are answers do not match what is in the system it will give an error message and not sent the email.
5. If you received an email from the employee asking for an password reset you can click Skip answers and reset in blue at the bottom of the window. The employee should receive an email shortly after clicking reset. The email contains instructions and a link for the employee to follow in order reset their password.

# Benefits Summary

## Benefits Summary

Each employee has a benefit summary that can be viewed from their Employee Management tab. The Benefit Summary shows the benefit elections for an employee including their dependents. This tab will be used to view elections for a specific employee if there are any questions throughout the year. The employee will have access to their own Benefit Summary from their Employee Homepage (More Details on page ...).

See below on how to access the Employee's Benefit Summary from the HR Administrator side.

1. Search for the employee by last name
2. Select the **Benefits Summary** tab at the top

The screenshot shows the Benefits Summary page for an employee named Ryan Test. The page includes a search bar, navigation tabs, and several sections: Enrolled Plans, Total Cost Per Pay Period, Dependents, Health Savings Account, Cafeteria Plans, and Declined Coverage. Annotations with arrows point to specific features: 'Employees enrollments will appear in this section.' points to the Enrolled Plans table; 'Dependent Enrollments' points to the Dependents section; 'Declines Elections with Reason' points to the Declined Coverage section; 'To change the period use this drop down menu. It will default to the current period.' points to the 'Current Period' dropdown menu; 'Total Cost Per Pay Period' points to the blue bar showing \$361.34; and 'HSA/HRA Elections and Cafeteria Plan elections will be found here' points to the Cafeteria Plans section.

**Employees enrollments will appear in this section.**

**Dependent Enrollments**

**Declines Elections with Reason**

**To change the period use this drop down menu. It will default to the current period.**

**Total Cost Per Pay Period**

**HSA/HRA Elections and Cafeteria Plan elections will be found here**

Plan Type	Carrier	Plan Name	Coverage	Effective	Cost Per Pay	Benefit
Medical	Highmark Blue Cross Blue Shield	HDHP Medical	Employee + Family	01/10/2019	\$147.69	
Consumer Directed Health	Benefit Strategies	HSA	Employee	05/01/2018	\$100	
Dental	Northeast Delta Dental	Delta Dental 100/80/50	Employee + Family	01/10/2019	\$55.38	
Life	UNUM	Basic Life	Employee	05/01/2018	\$0	\$50,000
Short-Term Disability	Sun Life Financial	Short Term Disability	Employee	04/01/2018	\$0	\$384.62
Long-Term Disability	Sun Life Financial	Long Term Disability	Employee	04/01/2018	\$0	\$2,500
Voluntary Life	Lincoln Financial Group	Voluntary Life	Employee	01/08/2019	\$7.02	\$100,000
Voluntary Life	Lincoln Financial Group	Voluntary Life	Child	01/08/2019	\$1.25	\$10,000
Dependent Care Spending Account		Dependent Care Spending Account	Employee	04/01/2018	\$50	

**Total Cost Per Pay Period**  
**\$361.34**

Name	Plan Types
Spouse Test (spouse)	Medical Dental HSA Employee Contribution
Child Test (child)	Medical Dental Voluntary Life HSA Employee Contribution

Plan Type	Estimated Per Pay	Yearly Contribution	Started	Ended
HSA Employee Contribution	\$100	\$4,400	05/01/2018	

Plan Name	Start Date	End Date	Per Pay Amount	Annual Election
Dependent Care Spending Account	04/01/2019		\$50	\$2,300

Plan Type	Plan Name	Reason
Flexible Spending Account	Flexible Spending Account	Ineligible for this plan

# Documents

## Employee Document Tab

The Document tab under the Employee's HR profile is used to view what plan documents that employee can view. Also, documents the employee has uploaded or any built in forms, such as the W-4, will appear within this tab.

To access the documents tab...

1. Search for the employee by last name and navigate to their Employee Management page
2. Select the Documents tab at the top

Selecting a document found in this section will cause it to download for you to view in more detail.

# Timeline

## Timeline Tool

The Timeline tool will track all changes that have occurred for a specific employee. All changes that occur effecting the employees account will be logged in the system and will show the following information.

- Event—Type of Event that occurred
- On—The date the event occurred on
- Description—A short description of the event
- Dependent—If a dependent was effected it will show the name of the dependent under this field
- By—The person who made the change

To access the Timeline first search for the employee by last name and access their Employee Management page. Once here select Timeline above.

Next to some events there will be three vertical blue dots on the far right. If you click on these dots a small window will appear that gives more information on the event. Use this to learn more about the event.

Event	On	Event Date	Description	Dependent	By
Employee completed withholding	01/17/2019 10:20 AM	01/17/2019 10:20 AM	Completed federal W4 form		Ryan Gendron
Workflow requirement completed	01/17/2019 10:20 AM	01/17/2019 10:20 AM			Ryan Gendron
Workflow requirement completed	01/15/2019 03:29 PM	01/15/2019 03:29 PM			Ryan Gendron
Pending Enrollments Approved	01/10/2019 03:25 PM	01/10/2019 03:25 PM	Pending Enrollments Approved		Ryan Gendron
Enrollment changed	01/10/2019 03:25 PM	01/10/2019 03:25 PM	Medical		Ryan Gendron
Enrollment changed	01/10/2019 03:25 PM	01/10/2019 03:25 PM	Medical		Ryan Gendron
Enrollment changed	01/10/2019 03:25 PM	01/10/2019 03:25 PM	Dental		Ryan Gendron
Enrollment changed	01/10/2019 03:25 PM	01/10/2019 03:25 PM	Dental		Ryan Gendron
Employee enrollment pending HR approval	01/10/2019 03:03 PM	01/10/2019 03:03 PM	Employee enrollment pending HR approval		Ryan Test
Add Coverage For New Spouse	01/10/2019 03:03 PM	01/10/2019 03:03 PM	Medical		Ryan Test
Add Coverage For New Spouse	01/10/2019 03:03 PM	01/10/2019 03:03 PM	Dental		Ryan Test
Add Coverage For New Spouse	01/10/2019 03:03 PM	01/10/2019 03:03 PM	Request for dependent coverage pending	Spouse Test	Ryan Test
Plan Cost/Benefit Recalculated	01/10/2019 03:03 PM	01/10/2019 03:03 PM	Medical		Ryan Gendron
Plan Cost/Benefit Recalculated	01/10/2019 03:03 PM	01/10/2019 03:03 PM	Dental		Ryan Gendron
Add Coverage For New Spouse	01/10/2019 03:02 PM	01/10/2019 03:02 PM	Medical		Ryan Test

# Pending HR Events

Some events that occur within Employee Navigator require HR's approval before being finalized. Whenever these events occur HR will receive notification of the event through email. If HR completes an event that would normally require HR's approval on their end it will skip this step. We recommend that employee's initiate and make all changes from their employee accounts. This will create an accurate log within Employee Navigator that you can refer back to.

## Profile Changes

All profile changes will require HR's approval. Profile changes include information like Address, Phone Number, Email etc. To approve Profile Changes see below.

1. On the Employee Homepage look on the right side of the screen for a box called **Pending HR Approval**.
2. Click Profile Changes. **\*\*\*Profile Changes will be in blue and you should see a number next to the orange box. The number shows how many profile changes need approval\*\*\***
3. On the Pending Profile Change Request screen, there are three fields.
  - Employee—Employee Name
  - Requested On—Date of event
  - Changes—The number of Profile Changes
4. Next click Review on the right to bring up the Demographic Change Requests. There are two separate sections on this page, Employee Changes and Dependent Changes.
5. Look over each request and select either the Approve or Decline box. Once you select an option you can then add a note under the Review Note section.
6. Once you are finished click Save. The change will go into effect immediately following this.

# Pending HR Events

## Enrollments / Life Events

All Life Events will require HR's Approval. A notification will be sent to you once a Life Event has been submitted. To approve life events see below.

1. On the HR Homepage select **Enrollments** under Pending HR Approval.
2. The following page will list all current life events that are pending HR approval. Only basic information will be found on this page. To see more information about the life event click **Review** on the right.
3. The next page will show a detailed summary of the event. At the top of the page you will see three options
  - Cancel This Enrollment Request—This will cancel the request and it will not show as a decline
  - HR Approve Pending Life Event Enrollments—This will approve the life event and update the benefit summary for the employee
  - HR Decline Pending HR Life Event Enrollments—Life event will be declined
4. Before selecting any of these options look below for the summary of the event. First section is called **Enrolled Plans**. This will show the plans that have been affected by the event whether an add or drop occurred. At the bottom you will see all dependents and their current enrollments.

\*\*\*Do not approve Life Events until sufficient evidence is provided. (i.e. Marriage license)\*\*\*

# Pending HR Events

## PTO Requests

The PTO module is discussed in further detail on page .... All PTO requests will require HR's approval if they did not assign managers to their employees. If managers are assigned to each employee, they will be able to approve PTO requests from their Employee Homepage. With managers assigned you can use this section as a way to track pending PTO requests and remind managers they need to approve requests.

To approve life events when managers are not setup see below.

1. On the Employee Homepage select **PTO Requests** under Pending HR Approval.
2. This will open the PTO Module Dashboard. On this page look under the chart to find Pending Requests
3. Here you will see all Pending PTO Requests and more information about the request. The basic information shown is as follows.
  - Date(s) - The dates the employee requested off
  - Employee—Name of the employee that sent the request
  - Manager—The name of the manager assigned to this employee
  - Type—Type of time off taken
  - Hours—Total number of hours requested
  - Status—The status of the request
  - Reason—The reason the employee entered when requesting time off
  - Actions—Three vertical dots will be found under this field. If you click these dots a drop down menu will appear
    - Details—When selected a small window will appear that gives a more in depth look at the request
    - Approve—Click this to approve the time off request
    - Cancel—Click this option to decline the request
    - Remind Manager—Clicking this option will send a reminder to the assigned manager

# Pending HR Events

## Onboarding

If you have Onboarding Tasks that require HR's Approval they will appear under the Pending HR Approval section on the HR Homepage. To view and approve these onboarding tasks see below.

1. On the HR Homepage select **Onboarding** under Pending HR Approval
2. This next page will show all HR Pending Tasks that are currently in the system with basic information about each one. Each Pending Task will show you the employee name, task name, version and date assigned
3. On right of each task there are three vertical dots. If you click on these a small drop down window will appear with four different options
  - Approve—Clicking approve will open a small window asking you to enter a date of Approval. Once the date is added and the green Approve button is selected the task will be approved and finalized in the Employee Navigator system.
  - Dismiss—Dismissing a task will make it so the employee no longer needs to complete it. When clicking the dismiss option a small window will open confirming if you would like to dismiss the task for this employee. Click dismiss in green to remove the task.
  - View Details—The view details option will give a more in depth look at the task
  - Add Note—If you would like to add a note to the task you can do so by clicking Add Note. A small window will open with an area to type a note. When finished click Save in green.

# Pending HR Events

## Pending EOI

If an employee's Voluntary election exceeds the Guaranteed Issue they will be required to complete an Evidence of Insurability form and their election will pend approval from the carrier. Once you hear back from the carrier on whether or not the employee is approved of the amount over the Guaranteed Issue you will need to approve the EOI in Employee Navigator. This will then update the employees election and their benefit summary.

To approve a Pending EOI see below.

1. From the HR Homepage select **Pending EOI** under Pending HR Approval
2. By default all pending insurability requests will be shown on the following page. You can change this option by clicking the drop down menu at the top under Status. You can also search for a specific employee by using the Search bar at the top
3. The information shown under the Pending EOI section is as follows.
  - Name—Name of the person pending approval
  - Relationship—If a dependent is pending approval, the name of the employee will be shown under this field and the relationship
  - Plan Title—Name of the Plan
  - Requested Date—The date the request was made
  - Approved—The benefit amount that is already approved
  - Requested—The requested benefit amount made by the employee
  - GI—The Guaranteed Issue
    - \* To figure out what the Pending amount is subtract the Requested amount from the GI amount

# Pending HR Events

4. To approve Pending amounts, click Pending in blue on the left. This will open small window.
5. Within this window it will give you the basic information for the request and a drop down menu next to Action. There are four options to choose from.
  - Approved—An amount over the GI was approved
  - Declined— The requested amount over the GI was declined
  - Rejected— The approved and requested amount were rejected
  - Withdrawn— Selecting this option will remove the election entirely
6. If approved, select this option from the drop down menu. Two additional fields will appear that will need to be completed.
  - First enter the approved amount
  - Enter the effective date
  - Click Save in green
7. If the Declined, Rejected or Withdrawn, select one of these options and click save.

As soon as a option is selected and saved it will immediately update the employees benefit summary and cost per pay period with the correct effective date. You can view Approved, Declined, Rejected and Withdrawn insurability requests by choosing one of these options from the Status drop down menu at the top.

# The Wall

## The Wall

The Wall was designed to help HR keep track of their employees by providing notifications on recent events, as well as offering tools to help manage any tasks that require action. Companies configure their own wall feeds based on the events they want to be notified of, and then event notification cards are written to the Wall tab when those events are triggered in the system.

**Note!** Only notifications for changes that occur outside of Open Enrollment (e.g. New Hire, Life Event, etc.) are written to the Wall. To capture OE changes, you will need to run OE reports.

Additionally, the Wall also stores a history of all employee and company notes created by HR users under the company. Broker created notes will also display here if the user elected to share the note with HR.

The screenshot displays the 'The Wall' interface within a web application. At the top, a navigation menu includes 'Home', 'Employees', 'Reports', 'Wall' (highlighted), 'PTO', 'Tasks', 'Benefits', 'Payroll', 'Documents', and 'Settings'. The user's name 'Ryan Gendron' is visible in the top right corner. The main content area is divided into two sections: 'Filter' on the left and 'Events' on the right. The 'Filter' sidebar contains several controls: a 'Feed' dropdown set to 'All Feeds', 'Checklists' with radio buttons for 'Incomplete', 'Complete', 'None', and 'All', 'Sort By' options for 'Newest First' and 'Oldest First', 'Date' pickers for 'From' and 'To', and a 'Number of Results' field set to '250'. At the bottom of the filter are 'Apply' and 'Clear' buttons, and a 'Show Less' link. The 'Events' section displays a list of notifications, each with a date and time, an event type (e.g., 'Employee Hired: New Employee Record Created'), and a 'View Details' link. The events listed include 'Employee Hired' notifications from 08/07/17, 09/08/17, and 09/18/17, and 'New Hire Enrollment Completed' and 'Enrollment changed' notifications from 09/20/17.

# The Wall

There are two separate tabs on the Wall – Events and Notes. When users navigate to the page, all events with incomplete checklist items are displayed by default, and event cards are sorted oldest to newest. This makes it easy for users to identify tasks that still need to be completed. Users can change their view by adjusting the filters and sort options on the left side of the page. To view notes, users can simply click the Note tab.

## Filter/Sort Options

**Feed:** Defaulted to display events for all feeds. To view events for a specific feed, select that feed from the drop-down list. (Events only)

**Note Type:** Defaulted to display all note types. To view specific note types, select that note type from the drop-down list. (Notes only)

To see additional filter/sort options, click Show More. Use the Apply button to apply filter/sort changes. To reset the page view back to default, click Clear. **Note!** Feed and Note Type drop-down selections will not be defaulted back to All when cleared. This must be done manually.

**Checklists:** Incomplete will display all events/notes with incomplete checklist items. Once all checklist items have been completed for an event, the card will drop from the Incomplete list. To view cards with completed items, select Complete. To view cards with no checklist items, select None. To view all cards, regardless of checklist statuses, select All.

**Following:** When checked, only notes the user is following will be displayed. (Notes only)

**Sort By:** Reorder cards to display newest first (on top) or oldest first.

**Date:** Filter results to only show events that occurred or notes that were created between a specified timeframe by inputting dates in the From and To fields.

**Number of Results:** Limit the number of events/notes to display on screen by only showing the most recent X number of cards. The maximum number allowed is 250. **Note!** To view more events/notes on the Wall, scroll to the bottom of the page and click Show More under the last visible card. Regardless of dates and total number of events/notes, cards will never drop off the Wall.

## Checklist

Optional checklist/to-do items requiring action when certain events occur can be added to feeds. When viewing the Wall, all event that have checklist items requiring action will reflect a clipboard icon on the bottom right of the card.

Users can view the checklists for each event and check off items as they complete them. For historical tracking purposes, all completed items will reflect the user who completed it and the date/time it was completed. Checklists make it easy for users to identify tasks that require action for specific events.

*Example checklist: HR needs to complete several tasks when an employee is terminated. A feed could be configured so that notifications would be triggered when an employee is terminated, and the following checklist items could be added:*

1. *Inactive email account*
2. *Send notification of exiting employee*
3. *Complete exit interview*

Any time an employee is terminated, users will be able to keep track of those to-do items and cross them off once completed.

## Event Notification Cards

Event notification cards display both the company and employee name in the top left of the card. These are clickable links that allow quick navigation directly to the company home tab or employee record. Basic event change info, such as *New Hire Enrollment Completed*, is displayed in the middle of the card. The bottom left of the card reflects the event date/time stamp and the feed name.

If a comment was posted to an event, a comment icon with the number of comments posted will be displayed on the bottom right of the card. Likewise, if the event has checklist items attached to it, a small clipboard/check icon will display in the bottom right of the card, along with the number of items completed (first number) out of the total number of items. *Example: 0/2 = 0 out of 2 checklist items completed.* To access the checklist and/or to post a comment, click on the card to pop it open. To view Completed By and Completed Date details for checklist items, hover mouse over grey person icon next to specific checklist item.

All enrollment change events display a *View Details* link in the top right of the card, which displays specific details about the employee and event that occurred. The purpose of the event details page is to present users with all employee data they need to update the carrier portals. The left side displays employee and dependent demographic information, and the right side displays enrollment information. Each section and/or line of coverage can be expanded or collapsed, which provides users with an easy way to isolate specific information at any given time. The event details page can also be printed, and users can pick and choose which sections to include on the printed version by using the expand/collapse tool. **Note!** Collapsed sections will not be included when printing.

## Notes

By default, all notes are displayed on the Notes page and sorted by newest to oldest. Notes also display the company and employee name in the top left of the card for quick navigation. The body of the note displays in the middle of the card, and the note creation date/time stamp and author are listed on the bottom left. Like event cards, if a note has comments or checklists, those icons will display on the bottom right of the card. Users can also follow notes by clicking *Follow* in the upper right of the card. All followed notes can be easily identified by using the **Only Following** filter.

With notes, users can add checklist items on the fly. To access the checklist tool or to post a comment, click on the card to pop it open. To add checklist items, click the *Checklist* button under the Actions menu on the right. To add additional tasks, click *+Add*.

*Example checklist: An employee note was posted regarding a request for a new medical ID card. HR could add tasks for processing the request with the carrier and then confirming that the employee has received his new ID card. This allows HR to track progress of items still requiring action.*

Below the Actions menu is the Share settings for a note, which allows users to change who the note is shared with, even after it's been posted. If a note's author is an HR user, all users under that company have the ability to edit the share settings. The same is also true for broker users under the same agency.

**Note!** Notes created by HR users are visible to all other HR users under that company. Likewise, notes created by agency users are visible to all other users under that agency.

## Task Dashboard

The tasks dashboard is an overview of all tasks assigned to employees. The first item on this page is a pie chart, which shows the percentage of completed tasks. Next to this chart are two blue buttons called Incomplete and HR Pending. Clicking the Incomplete button will direct you to the Send Reminders / List Incomplete option that can be found on the left under tools (See Below). The HR Pending button will direct you to Pending HR Approval → Onboarding page ( See page 29 for more information on this section).

## Send Reminders

The send reminders and list incomplete tool is used to send email reminders to employees reminding them to complete specific tasks. This tool is useful to send reminders to employees that may not have completed tasks during their Open or New Hire Enrollment.

To Send Reminders to employees see below.

1. Select the Send Reminders / List Incomplete tool on the left under TOOLS
2. Next select the Category you would like to send the reminder for. Next to each Category there is a grey number in parentheses. This is the number of incomplete tasks within this specific category.
3. On the right you will see a drop down menu called Assigned and Incomplete. Choose an option within this drop down menu to filter what employees will receive this reminder.
4. Next add a Subject for your reminder email and begin typing your message.
5. Once complete click Send in green. An email will then be sent to all employees that have yet to complete the task

## Approve Tasks

The Approve Tasks tool is another way to approve HR pending tasks that are awaiting approval. See page 29 for more information on this section and how to approve each task type.

## Manage Employee

The Manage Employee tool is used to manage an employees tasks and send reminder emails at an individual level. To search for an employee search by last name and select the employee to bring up their page. On this page you will see all Tasks that the employee his either assigned or could be assigned based on the task setup. You will also see the date assigned and the date completed. There are three vertical dots at the end of each tasks that when selected opens a drop down menu.

- Dismiss—Use this to dismiss the task from the employee’s onboarding. This tool is usually used to remove tasks that were accidentally assigned to an employee.
- Mark Completed—Use this option to complete the task for the employee. This tool is used when the employee completed the task outside of Employee Navigator.
- Reassign—This option will reassign the task to the employee. If the employee completed the task incorrectly you can use this tool to require the employee to resubmit it correctly.
- View Details—Shows more details about the task
- Add Note—Add a note if more information is needed

## Assigning Tasks—Individually

If an employee was never assigned a task you can assign it from this page. (i.e. A new hire wasn’t assigned a specific task when Adding an Employee to Employee Navigator) When viewing the tasks of a specific employee all tasks that employee is eligible for will appear. If the employee was not assigned the task you will see **Assign** option in blue under the Assigned field. If you click this it will immediately assign the employee that task. The next time the employee logs into Employee Navigator they will be immediately prompted to complete the task. To send an email to the employee see below.

## Send Reminders—Individually

At the top right of this page you will see a blue **Send Reminder** button. If you click this it will open a small window that looks similar to the **Send Reminders**. First enter the Subject of the email and then add the message you would like to send to the employee. Once complete click **Send** in green.

## Bulk Assign

Using the Bulk Assign tool, users can assign **Active** Versions of Tasks to multiple employees at once. This tool will be used most often when a new Task/Version is created and needs to be assigned to all existing employees. The Bulk Assign page can be accessed using one of the following paths:

1. Tasks > TOOLS > **Bulk Assign** > Select a Task > Select a Version
2. Tasks > Select a Category > Select a Task > Use the action menu next to the Version > **Assign** > You will be directed to the Bulk Assigning page for the Task and Version

On the Bulk Assign page, use the selector to chose from the following options:

- **All Employees:** Selecting this option will display all employees who meet the “Applies to” conditions on the version. Note that this will include employees who have not been assigned; employees who have been assigned, but not completed; and employees who have already completed the Task.

If the version has already been assigned to the employee, another Assignment Record will be created. This could result in the employee being required to complete multiple duplicate Tasks, so users should confirm that this is the desired result prior to assigning to All Employees.

- **Employees Not Assigned:** Selecting this option will display all employees who meet the “Applies to” conditions on the Version and who do not have a previous Assignment Record. Employee who were assigned, but the assignment was Dismiss will also display.

The screenshot shows the 'Bulk Assign' interface. At the top, there's a navigation bar with 'Home', 'Employees', 'Reports', 'Wall', 'PTO', 'Tasks', 'Benefits', 'Payroll', 'Documents', and 'Settings'. The 'Tasks' section is active. On the left, there's a 'TOOLS' sidebar with options like 'Dashboard', 'Send Reminders / List Incomplete', 'Approve Tasks', 'Manage Employee', 'Bulk Assign', and 'Task Report'. Below that are 'ONBOARDING CATEGORIES' and 'CUSTOM CATEGORIES'. The main area is titled 'Bulk Assign' and contains a 'Task' dropdown (set to 'Electronic Signature and Consent') and a 'Version' dropdown (set to '1'). There are two search boxes: 'All employees' and 'search employees'. A list of 81 employees is shown, each with a checkbox and a name. A green 'Assign' button is located at the top right of the employee list.

## Task Report

The Task Report tool can be used to view a report that contains the status of tasks for all employees. On the report are the following fields.

- Employee Last Name
- Employee First Name
- Employment Status
- Employee Email
- Task Name
- Task Version Label
- Assigned Date
- Performed Date
- Completed Date
- Completed By
- Dismissed Date

A report can be pulled for an individual task or a Full Company Task report can be downloaded.

### Individual Task Report

To pull a report for a individual task first click Task Report under TOOLS. There is a drop down menu located near the top of the page, select this and choose a task. All Active and Inactive versions of the task will appear. You can select Download Full Task Report in green to download a report with all versions or you can select a specific version to view that report specifically for that version. You can download or print this report by selecting the appropriate option at the top right. Click **Back to Versions** to head back to the previous screen.

### Full Company Report

At the top right of the Task Report screen you will see **Download Full Company Report** in blue. If you click this report it will download a report containing all tasks and versions that have been assigned to employees. You can then filter the report to meet your needs.

## Adding/ Editing Documents

The HUB Technology Team will add/update all documents for you during the initial build and prior to Open Enrollment. Any documents that you would like to add mid year will need to be uploaded by the HR Admin. Adding and Editing documents within Employee Navigator is quick and easy to do.

### Adding a New Document

1. Select the Documents tab
2. Click the blue **Add Document** button at the top right
3. Next either Drag and Drop the file into the appropriate section or click the blue box to add the file
4. Once added, type a description of the document (This is what the employee will see)
5. Next select the drop down menu under **Who can see this document?** and select the appropriate group

#### FOR HR-RELATED DOCUMENTS

- If a compliance document check the box under compliance. You can add specific categories that will appear under HR Documents under the employee documents section. Use the drop down menu to select a HR Category, if you would like to add a category select **Add Category** in blue and type category.

#### FOR PLAN-RELATED DOCUMENTS

- If the plan is associated with a specific plan use this Plan-Related Documents section. Select the boxes under Options that are associated with the document. Once the options are selected then check the plan that the document should be connected to. With the HUB Technology team adding all plan documents during builds and open enrollments you shouldn't have to add many plan documents throughout the year.
6. Click Save in green when finished

### Editing a Old Document

To edit a document previously added first select the Documents tab. A list of all documents that in Employee Navigator will appear on the next page. You can search for specific documents by using the CATEGORIES section on the left. Select the document to edit and click save when complete

# Reporting

Employee Navigator has an extensive selection of pre-built reports that you can choose from. Each report is broken down into a subcategory. To access a pre-built report simply click the report you would like to view. Each report varies on what needs to be done before generation and each report can be downloaded to excel or printed.

## Ad-Hoc Reports

All reports under the Ad-Hoc section give you the ability to customize what fields are on the report. These reports can be downloaded and saved.

### Row-Based and Column-Based Reports

These two reports are fully customizable the only difference is the format. To create a column-based or row-based report first click what format you would like to use.

1. Once format is selected you can begin customizing the report
2. There are three important sections of the Row and Column based report.
  - Fields—Add employee and Enrollment columns to the report
  - Reorder Selected Fields—Change the column order
  - Options—Refine the data (rows) returned in the report
3. First select the employee fields that you would like to have on the report. Once the employee fields are selected use the drop down menu under **Fields** and select **Enrollment**.
4. The selectable fields will update to show enrollment options. Select the fields that you would like to appear on the report.
5. Use the **Reorder Selected Fields** to change the order of the fields. To change the order hover your cursor over the field click and move. To head back to the fields section click **View and Select** in blue.

# Reporting

6. Next go to the options box and select the fields that you would like to include or exclude on the report.
  - **Include Dependents:** pulls dependent information in to report along with Relationship
  - **Exclude Declined enrollments:** will not pull employees who have declined the benefit onto the report
  - **Exclude Ended Enrollments:** will not pull employees who were previously enrolled in a benefit, but their coverage has ended on the report
  - **Exclude Not Enrolled:** will not pull employees who are not enrolled in the selected benefit on to the report
  - **Type of Enrollment**
    - \* **Current:** will pull current enrollments that have not been replaced with a new enrollment record
    - \* **Open:** will pull Open enrollment records only
  - **Limit Enrollments Based on Dates:** Limits the dates of the enrollments displayed on the report
  - **Column Filters:** allows you to filter any field with a "filter" icon and only display selected options.
7. Once all fields are selected click **View** on the left. This will give you a glimpse of how the report will look. Click **Download** in blue to download the report to excel
8. If you would like to save this report for future use click **Save** on the left. Next name the report and Description and click Save.
9. The saved report will appear under the **My Reports** section on the Reports screen. Saving a report will save all fields that you selected making it easy to access for the future.

## Note

- Any reporting field with a filter icon next to it can be filtered. Once this field is selected you should see Custom Filter appear under Options. If you select **Show** next to the field a drop down will appear with all options that will appear on the report. The items filtered will appear on the report.
- The Payroll Deductions report, Voluntary Life Report, HSA Report, Cafeteria Report and Retirement Report have similar customizability. Each report has slightly different fields to choose from, but the process remains the same.

# Paid Time Off

## Dashboard

The PTO Dashboard is the first screen you see when selecting the PTO tab. The Dashboard is a summary of the PTO for the entire company. On this page you will find a line graph that will show the Total Leave Hours by Month for the current year as well as a more detailed summary on the right. Pending Requests and Upcoming Time Off will appear at the bottom of the screen (See page 28 and 71 to learn how to approve PTO requests).

## Balances Report

At any point a report can be pulled to view balances reports for all employees. Use the drop down menu to select a specific package to view. Once selected the report will show on the screen along with a option to select a specific date. You can download this report to Excel by clicking Excel in blue on the right.

## Manage Employees Paid Time Off

From the PTO Dashboard you can search and manage employees Paid Time Off. At the top right there is a search bar that can be used to access specific employees PTO Management page. To search for employees click and search by last name.

On the Manage Employee page you will see all PTO information for that specific employee. At the top of the page you will see the employee name, their current Time Off package and their hire date. If you select **Go To Employee Timeline** it will take you to the employees Timeline within their Employee Management page.

Under **Policies** it will show all policies within the PTO package the employee has been assigned. Along with the policy name it will show the total number of hours for that policy, the number of accrued hours, the number of hours taken, the employees current balance and the hours remaining for the current years policy. If you click **View Employee Time Off Overview** it will give more information about the policy.

Below the Policy information is Upcoming Time Off, Time Off Taken and any Balance Adjustments that may have occurred.

# Paid Time Off

## Recording Time Off—HR

As HR you can record time off for a specific employee. This would be used if an employee can't access their Employee Navigator account.

1. Select the PTO tab and search for the employee by last name in the search bar at the top right
2. Click **Record Time Off** in green on the right side of the screen
3. On the next screen use the drop down menu to select the type of leave
4. Next select the From and To dates and a Reason at the bottom (If a partial day click the Partial Day? box once the dates are selected)
5. Click **Record Time Off** once complete

When HR records time off it skips over the approval step and an email is sent to the employee confirming their time off. Their time off record should also appear under **Upcoming Time Off**.

## Adjust Time Off Balance

If you need to adjust the PTO balance for an employee you can use the **Adjust Balance** option in green under Record Time Off

1. Click **Adjust Balance** and a small window will appear
2. First select the Policy that needs to be adjusted
3. Next select the number of hours to add or subtract from their policy. To subtract hours add a minus sign before the amount
4. Add a Reason and then click **Save** in green

The balance adjustment should appear under **Balance Adjustments** at the bottom along with their Policy total under Policies.

## End Time Off/Change Package

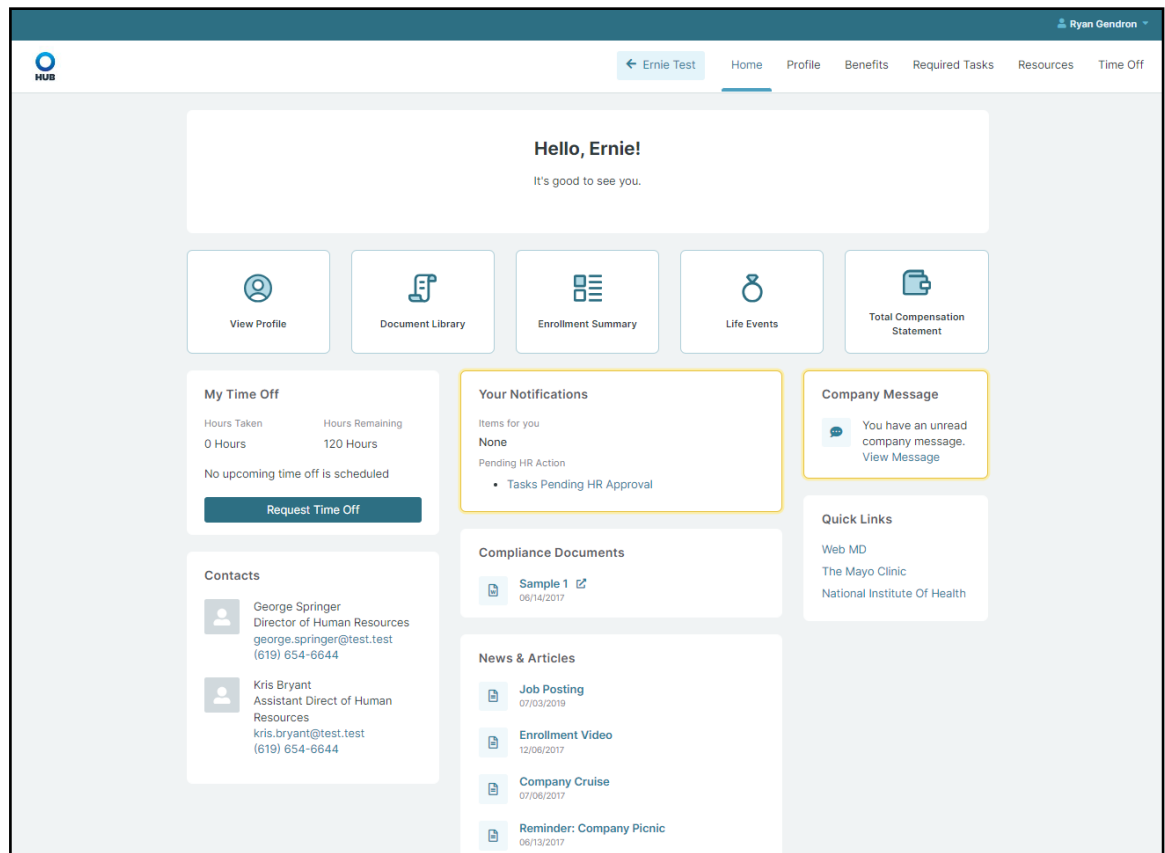
To end time off for an employee click **End Time Off** in blue. A window will appear confirming that you want to end the time off package.

To change an employees time off package click **Change Package** in blue and a small window will appear. Use the drop down menu to select a the new time off package and click **Change Time Off Package** in green.

# The Employee View

In this next section we will focus on the Employee view of Employee Navigator. As employees begin using the system they may have issues or questions on the topics below. You can use this section of the guide to help answer or resolve some of the issues your employees may be having.

- Employee Registration
- Employee Registration Troubleshooting
- Onboarding
- Employee Homepage
- Employee Enrollment
- Life Events
- Requesting Time Off



# The Employee View

## Employee Registration

Once the Employee Navigator benefit platform is active employees can begin registering their accounts. The registration process will require the employee to enter the following information.

- First Name
- Last Name
- Company Identifier
- PIN (Last 4 Digits of SSN)
- Date of Birth (MM/DD/YYYY)

The Company Identifier is company specific and selected by you. The Company Identifier is case sensitive and must look exactly like it does in the system.

This page can be access through the following link...  
<https://employeenavigator.com/benefits/Account/Register>

### Create Your Account

First, let's find your company record

First Name

Last Name

Company Identifier  
(provided by HR)

PIN  
(Last 4 Digits of SSN / ID)

Birth Date  
(mm/dd/yyyy)

### Create Your Account

Then register a username and password

Username  
(company email is recommended)

Password  
(minimum length of 6, number and symbol required)

[show it](#)

I agree with the [terms of use](#)

Once the employee enters their information and clicks next they will be asked to create a username and password. We recommend that employees use their work emails as their username. The employee will also have to click a box agreeing to Employee Navigator’s terms of use.

Now that the employee has completed their registration process they can begin onboarding/enrollment

The employee can use the following link to log into their Employee Navigator account.

<https://employeenavigator.com/benefits/Account/Login>

# The Employee View

## Employee Registration Troubleshooting

There are a few different error messages an employee may receive when registering their account.

**Error Message 1:** *We cannot locate your records. Please revise your answers or contact your Administrator for help.*

If an employee receives this it means that either the employee entered their information wrong, their data is wrong in the census that you sent to the HUB Technology Team or the employee was not added in Employee Navigator.

### Troubleshooting Steps

1. First have the employee send you a screenshot of the registration page with it completely filled out.
2. Log into your Admin account and pull up the employee by searching for their last name first in the search bar.
3. Select the employee and click the **Profile** tab. (If the employee does not appear when searching this means the employee has to be added to Employee Navigator. View the **Adding/Terminating an Employee** section to find instructions on how to do this)
4. Now confirm that the last 4 digits of their SSN is correct as well as their First Name and Last Name
5. Click **Personal** on the left to view their Date of Birth
6. If any of this information is wrong, update it and click **Save**. If you do not click save the information will not save.
7. If all data looks correct look back at the screenshot and confirm that the Company Identifier is correct.

The most common reason for this error is usually due to the Company Identifier.

**Error Message 2:** *You are already registered*

If an employee receives this message it means that they have already registered their account and need to use this link to log in.

<https://employeenavigator.com/benefits/Account/Login>

# The Employee View

## Onboarding

Prior to your Employee Navigator website going live we will setup and activate any Tasks that you would like you employees to complete. There are two different types of tasks that can be setup. The first will appear and require complete after the employee registers their accounts and the other type of task will need to be completed following their initial registration.

There is only one onboarding task that we require and that is the Electronic Signature and Consent. All other tasks if activated will have clear on screen instructions for the employee to follow. For those tasks that are activated outside of the onboarding they can be accessed by clicking the **Required Tasks** tab or following their New or Open Enrollment. Once their sign their enrollment summary and finalize their elections they will be prompted to complete these tasks.

During setup your HUB Technology Team member will go over all possible tasks that are pre-built in the Employee Navigator system as well as options for custom tasks. During the testing phase you will get the opportunity to see these tasks live and make any changes that you would like.

Follow completion of the onboarding process the employee will asked if they would like to **Begin their Enrollment or Skip for now**. Selecting the begin their enrollment option will take the employee directly to their enrollment.

The screenshot displays the 'Electronic Signature and Consent' task interface. At the top right, the user's name 'Ryan Test' is visible. The HUB logo is in the top left. A progress bar shows the current task is active. The main content area contains the following text:

**Electronic Signature and Consent** Pending signature

I agree that by using the e-signature feature on this website I am applying my electronic signature which is the legally binding equivalent to my handwritten signature. Whenever I execute an electronic signature, it has the same validity and meaning as my handwritten signature. I also agree that no certification authority or other third party verification is necessary to validate my e-signature.

I also agree to receive electronic disclosures of all health and welfare benefits Notices including Summary Plan Descriptions (SPDs) and any Notice a similarly situated employee would consider to be related to employee benefits. For the purpose of this agreement, a Notice is any document, disclosure, policy, procedure, form or other written material required to comply with federal, state, or a governmental safety or regulatory body and any disclosure provided by my company to comply with any of the aforementioned requirements or to communicate company or employment specific information to me. I confirm I have the necessary equipment to view and print these materials and understand that if I cannot access these materials, I may ask for them to be printed for me by my employer. I authorize my employer to send notices electronically and agree to accept the delivery of notices via email as well as the requirements to view notices on this portal.

Please click the 'Sign Document' button to confirm that you have reviewed and completed this task.

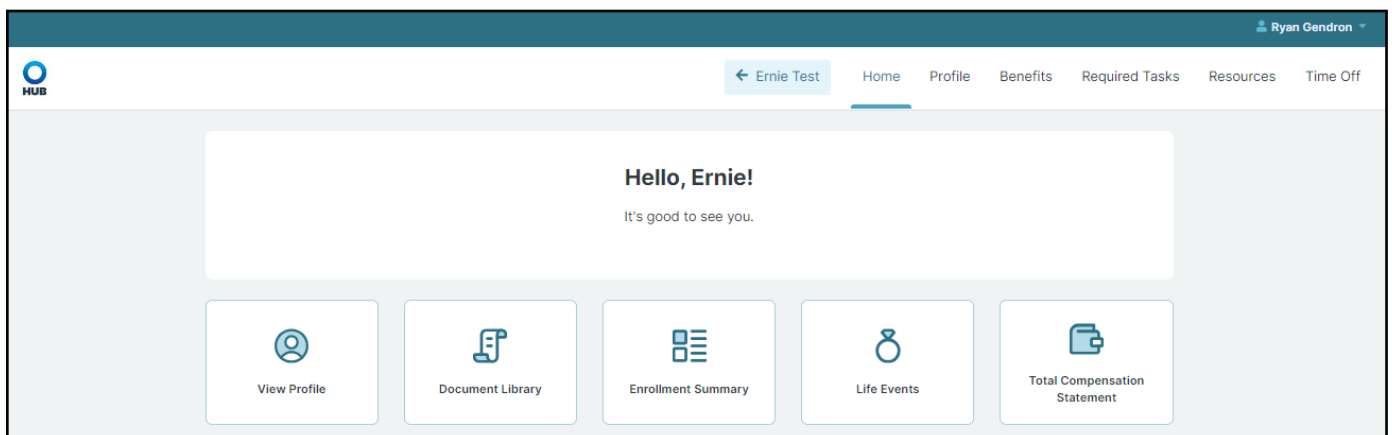
# The Employee View

## Employee Homepage

Using the Employee Homepage the employee will be able to navigate the entire site. There are a different tabs located at the top of the employee homepage similar how administrator navigates the HR portal. There are also **Shortcuts** that can be used as well as other useful information/links.

### Employee Homepage Tabs

- **Home**—The Home tab is used to navigate back to the Employee Homepage
- **Profile**—The profile tab can be used to edit/view employee information. All profile changes will pend HR's approval.
- **Benefits**—The Benefits tab is used to view the employee's benefit summary, plan overviews, beneficiary information, enter a life event and view benefit forms (PCP Information, Beneficiary Forms etc.).
- **Required Task**— The required tasks tab is used to view all Pending, Complete and Incomplete tasks.
- **Resources**—The resources tab is used to access the Employee Directory (if active), Organizational Chart (if active), News, Articles and all Documents that have been uploaded to Employee Navigator.
- **Time Off**—If the Time Off feature is active then the tab will appear on the Employee Homepage. Employees can use this tab to view their Time Off Policy, Company Calendar and submit PTO Requests.



# The Employee View

## Employee Homepage Shortcuts

Below the greeting there are a few different Company Shortcuts that will show.

- **View Profile**—This shortcut will take the employee to their profile tab
- **Document Library**—This shortcut will take the employee directly to their Document Library under the Resources tab
- **Enrollment Summary**—Selecting this shortcut will take the employee directly to their Benefits Summary under the Benefits tab
- **Company Calendar**—If active, this shortcut will appear for employees to view. It will take them directly to the Company Calendar under the Time Off tab
- **Employee Directory**—If active, this shortcut will take the employee directly to the Company Directory under the Resources tab.

The screenshot displays the Employee Homepage interface. At the top, a white banner contains the greeting "Hello, Ernie!" and the subtext "It's good to see you." Below this, a row of five blue-bordered shortcut cards is shown: "View Profile" (person icon), "Document Library" (book icon), "Enrollment Summary" (grid icon), "Life Events" (ring icon), and "Total Compensation Statement" (document icon). Below the shortcuts, three white-bordered panels are visible: "My Time Off" (showing 0 Hours Taken and 120 Hours Remaining), "Your Notifications" (showing None items for you), and "Company Message" (showing an unread company message).

# The Employee View

## Employee Homepage

### My Time Off

If the PTO module is active this section will appear on the Employee Homepage. The employee can use the blue Request Time Off button to navigate to the Request Time Off section under the Time Off tab.

### Your Notifications

Any tasks or actions that need to be completed will be found in this section under **Items for You**. If there are any tasks that are pending HR approval there will be a link that will bring you to the **Required Tasks** tab.

### Quick Links

During the build the HR Technology Team will add any Quick Links that you would like to add to the Employee Homepage. These links will open in a new window for the employee to view.

### Compliance Documents

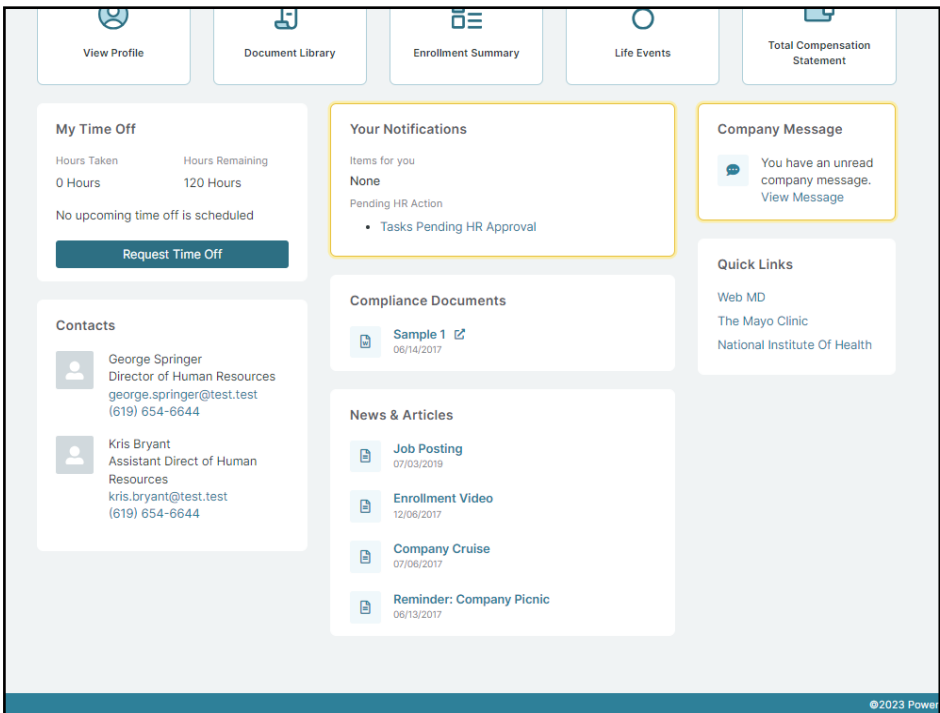
During the initial build the HUB Technology Team will add any compliance documents to this section. Additional documents can be added throughout the year to this section. Clicking the document will download the document for the employee to view.

### News & Articles

News & Articles can be added to this section for the employees to view. Clicking the News or Article will bring the employee directly to the news/article under the Resources tab.

### Contacts

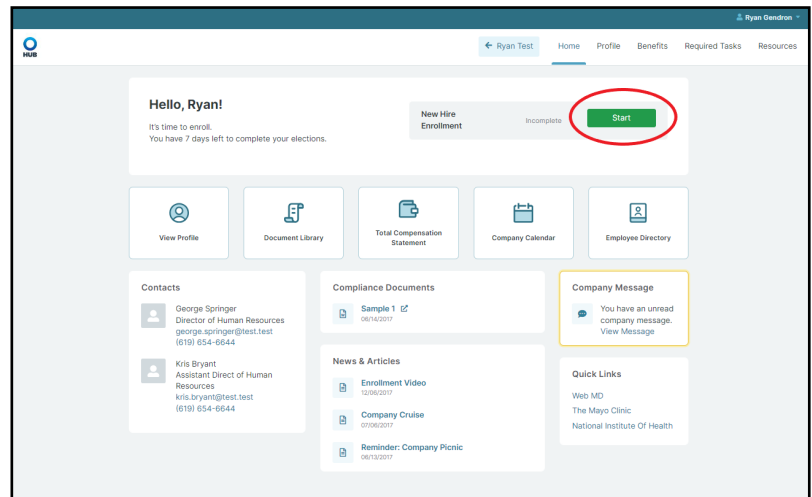
During the build the HR Technology Team will add any HR contacts to the Employee Homepage. The employees can use the contact information if they have any questions.



# Employee Enrollment

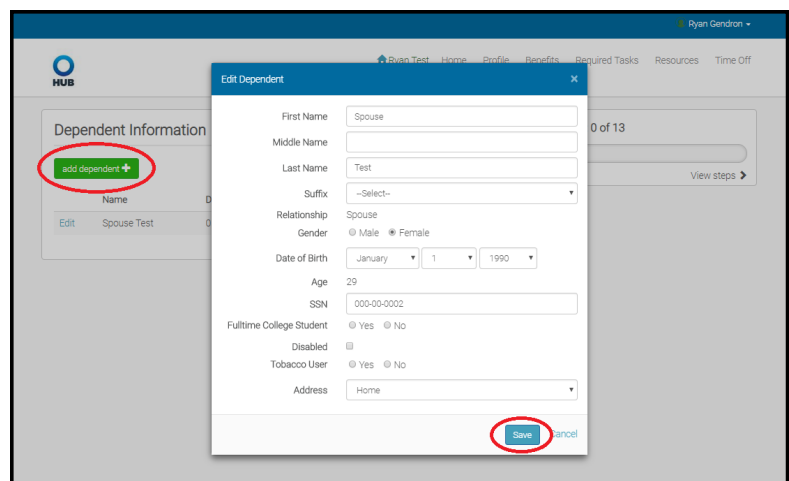
## Employee Enrollment

1. To start your Open or New Hire enrollment from click **Start Enrollment** in green. (This step will be skipped if you select begin your enrollment following the onboarding process).
2. The next screen that appears will give more information about the enrollment and the steps the employee has to complete
  - Verifying your personal and dependents' demographic information
  - Electing your benefits and completing any related forms
  - Signing your enrollment summary



## Personal Information/Dependent Information

1. The next two steps are used to verify/add personal information that may have not been imported into Employee Navigator. (Prior to activating your site the HUB Technology Team will verify what fields you would like to make required)
2. The employee will not be able to move on until all required fields are completed. A red box will appear saying *Please fix all errors before saving* and those fields will be identified for the employee.
3. Once all personal information is verified or added the employee must click save and continue to move forward.
4. Next the employees will verify or add any dependents they would like to add. If dependents were imported employees will have to verify the information is correct. If they are adding them for the first time they must click **Add Dependent** in green at the top of the screen
5. A small window will appear for the employee to enter their dependents information. Similar to the Personal Information section the employee will not be able to save until all required fields are completed.
6. Once all dependents are added the employee can click **Save and Continue** to move forward.



# Employee Enrollment

## Benefit Enrollment

Following the dependent information section is the start of the benefit enrollment. The setup of the page will vary depending on what kind of plan is being offered. For example, a core benefit page will look different to that of an employee paid disability or life plan.

### Medical, Dental, Vision Enrollment

This text can be customized.

Select the dependents that you would like to enroll by clicking the circle next to their names

All plans will appear here. Following this page there is a more information on this section

This shows the where the employee is in the enrollment process

Previous election will appear here

Plan documents and other helpful resources will show here. Click to download and view the document

Click Save when finished or click 'Don't want this benefit?' to decline

# Employee Enrollment

## Medical, Dental, Vision Enrollment

The cost per pay will be located here.  
This amount will change immediately  
after a dependent is selected and the  
tier has changed

Name of the plan will appear at the top  
of each selection

Which plan do I want?

Plan Name	Cost per pay period	Effective Date
HMO NE Deductible \$25 Copay	\$133.85	02/01/19
HDHP Medical	\$110.77	02/20/19

The date the plan will become effective

Click the select button to choose the plan or click anywhere within the plans box to select

The Compare option will compare all plans side by side. The details option will give the employee more details about the plan.

# Employee Enrollment

## Primary Care Physician Form

If you offer a medical plan that requires a Primary Care Physician the employee will be required to add this information on the following page. The PCP page is activated as soon as the employee selects the plan option requiring a PCP. During the build the HUB Technology Team will add a PCP link for the employee to use.

To add a Primary Care Physician see below.

1. Click **Edit** next to each eligible participants name.
2. A small window will appear. Enter the information on this window and click **Save**
3. All information should be found using the PCP link that will be located at the top of the page.

The screenshot shows the HUB system interface. At the top, there is a navigation bar with the HUB logo and links for Ryan Test, Home, Profile, Benefits, Required Tasks, Resources, and Time Off. The main content area is titled "Primary Care Physician" and includes instructions: "Use the links below to add or update PCP dependents." Below this is a table with columns for "Name" and "Update". The table contains three rows: "Ryan Test", "Spouse Test", and "Child Test". A modal window titled "Primary Care Physician" is open in the center, containing the following fields: "Type" (Medical), "PCP ID" (12345), "First and/or Last Name" (Test), "City" (Boston), "State" (Massachusetts), and "Current Patient?" (checked). The modal has "Save" and "Cancel" buttons at the bottom right. A "Continue" button is visible at the bottom center of the page.

# Employee Enrollment

## Healthcare Savings Account

The setup for the HSA/HRA plans are the same. If the employee can contribute to the plan they will have the option to do so.

The screenshot shows a web form for enrolling in a Healthcare Savings Account. The form is divided into several sections, each highlighted with a red border. Annotations with blue arrows point to specific parts of the form:

- Type of Account:** Points to the "Healthcare Savings Account" header.
- Additional Plan information is located here:** Points to the "Review The Plan Information" section.
- Under this section the employee can view their Eligible Yearly Contribution and elect their Employee Per Pay Election. If the employee elects over the minimum or maximum it will give them an error message:** Points to the "Choose Your Contribution" section.
- Click Save & Continue when ready:** Points to the "Save & Continue" button.

Review The Plan Information	
IRS Contribution Limit	\$7,000
Employer Annual Contribution	\$2,700
Effective Date	02/01/2019

Choose Your Contribution	
Eligible Yearly Contribution	\$4,300
Employee Per Pay Election	<input type="text" value="\$ 50.00"/>

Review Your Selection  
Your projected deferral through 12/31/2019 is \$3,900.00

[Save & Continue](#)

Under this section the employee can view their Eligible Yearly Contribution and elect their Employee Per Pay Election. If the employee elects over the minimum or maximum it will give them an error message

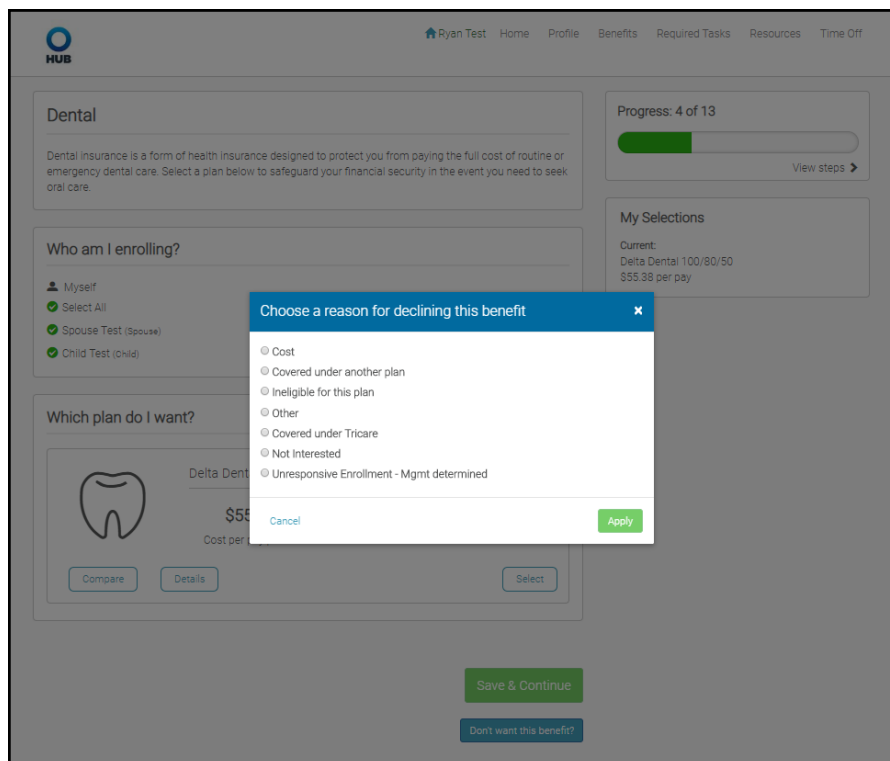
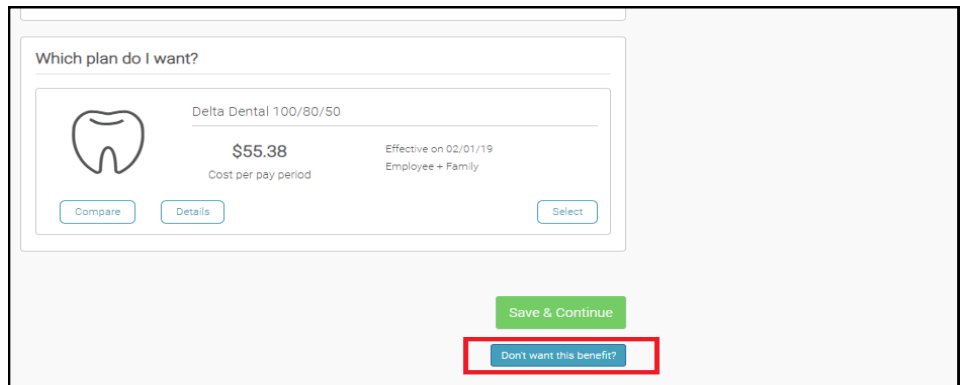
Click Save & Continue when ready

# Employee Enrollment

## Waiving Benefits

If the employee is not interested in enrolling in a specific benefit they will have the option to waive the benefit. See below for more information on waiving benefits.

1. At the bottom of the enrollment screen there is a blue button labeled **Don't Want This Benefit?**. If not interested in the benefit click this button
2. A small window will then appear with multiple options for waive reasons
3. Select a waive reason and then click **Apply** . This will then automatically direct you to the next benefit.



# Employee Enrollment

## Employee Paid Benefit

The plan setup for employer paid benefits is different than previous plans shown. See below for more information on the setup.

Plan description will be located at the top. This text can be customized during the build phase

This section will show the name of the plan, the employee life insurance amount and the effective date

The employee's cost per pay period will be shown here

The screenshot shows the HUB Employee Enrollment interface. At the top, there is a navigation bar with the HUB logo and links for Ryan Test, Home, Profile, Benefits, Required Tasks, Resources, and Time Off. The main content area is divided into several sections:

- Life:** A section containing the plan name and a description: "HUB International Test Site is concerned about your financial security and we offer Benefit Plans designed to protect our employee. Below is the summary for our Basic Life."
- Review Your Benefit:** A section containing the plan name, insurance amount, and effective date:
  - Plan: UNUM Basic Life
  - Your Life insurance amount: \$150,000.00
  - Effective on: 03/01/2019
- Your cost per pay period:** A section containing the cost amount: \$0.

On the right side, there is a progress indicator showing "Progress: 4 of 13" and a "View steps" link. Below that is a "My Selections" section showing "Current: No election yet". At the bottom, there is a "backdate the election?" link and a "Save & Continue" button.

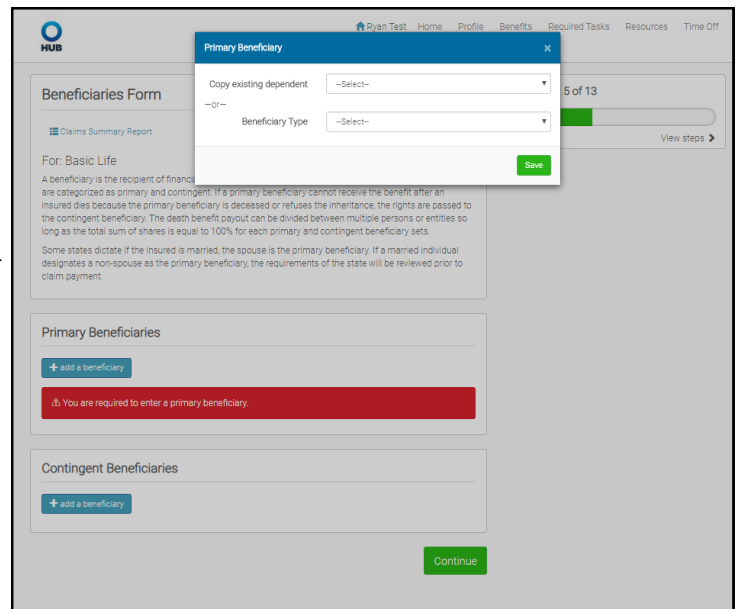
Click Save & Continue to move forward

# Employee Enrollment

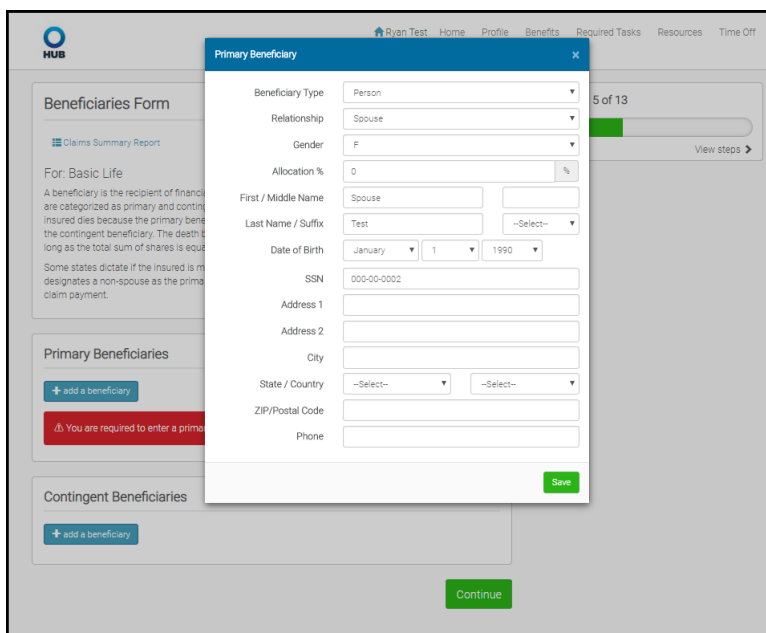
## Beneficiaries Form

If a Life Beneficiary is required it will appear following the Life enrollment section. To add a Life Beneficiary see below.

1. In order to add a life beneficiary first select **Add Beneficiary** under Primary Beneficiaries
2. A small window will appear with two options for the employee to choose from
  - **Copy Existing Dependent**—This option will allow the employee to elect a dependent that has been added to the system. This will populate all information that has been previously added into the next window
  - **Beneficiary Type** - The drop down menu that appears after selecting will have two options, Person or Entity. Once an option is selected the employee will need to fill in all required information on the next screen.



The screenshot shows the 'Beneficiaries Form' interface. A modal window titled 'Primary Beneficiary' is open, displaying two options: 'Copy existing dependent' (with a dropdown menu) and 'Beneficiary Type' (with a dropdown menu). The background form shows a red error message: 'You are required to enter a primary beneficiary.' The 'Continue' button is visible at the bottom right of the main form.



The screenshot shows the 'Beneficiaries Form' interface with the 'Primary Beneficiary' modal window open. The modal window contains the following fields: Beneficiary Type (Person), Relationship (Spouse), Gender (F), Allocation % (0), First / Middle Name (Spouse), Last Name / Suffix (Test), Date of Birth (January 1, 1990), SSN (000-00-0002), Address 1, Address 2, City, State / Country, ZIP/Postal Code, and Phone. A 'Save' button is located at the bottom right of the modal. The background form shows a red error message: 'You are required to enter a primary beneficiary.' The 'Continue' button is visible at the bottom right of the main form.

3. The image on the right is the window that will appear once an beneficiary option is selected. Fill in all required fields and click save

**\*\*\*The allocation percentage must equal 100% between all Primary or Contingent Beneficiaries added into Employee Navigator\*\*\***

4. Once finished click Save and add additional beneficiaries if needed.

5. After all beneficiaries have been added click **Continue** in green at the bottom of the screen

# Employee Enrollment

## Voluntary Benefits

The setup of Voluntary benefits are setup so employees can easily and quickly select their benefit amounts. See below to learn more about the process.

Name and description of the plan.  
This text can be customized.

Click the blue **Buy Guaranteed Issue** button to have the system automatically elect the Guaranteed Issue for each dependent.

Click the white circle and slide to elect a benefit amount

Home Profile Benefits Required Tasks Resources Time Off

**Voluntary Life**

A Voluntary Life insurance policy is designed as a financial protection plan in the event that the policyholder passes away. Select a plan below to secure your loved ones with a cash benefit after death.

Progress: 11 of 12

View steps >

**My Selections**

Current:

- Employee \$100,000.00 at \$7.02 per pay
- Spouse \$30,000.00 at \$2.63 per pay
- Children \$10,000.00 at \$1.25 per pay

**Who am I enrolling?**

**Buy Guaranteed Issue**

**Myself**

\$150,000

Slide to select →

Requested benefit	\$150,000
Requested per pay cost	\$11.40
Guaranteed Issue	\$100,000
Approved benefit	\$100,000
Approved per pay cost	\$7.02
Pending review of health history	\$50,000

**My Spouse**

\$60,000

Slide to select →

Requested benefit	\$60,000
Requested per pay cost	\$5.26
Guaranteed Issue	\$30,000
Approved benefit	\$30,000
Approved per pay cost	\$2.63
Pending review of health history	\$30,000

**My Children (child)**

\$10,000

Slide to select →

More information of your election will be found here. If employee elects over Guaranteed Issue a new line will appear saying **Pending Review of Health History** with the amount that was elected over the GI.

# Employee Enrollment

## Flexible Spending Account/Dependent Care Spending Account

The setup of the Flexible Spending Account and Dependent Care Spending Account are the same. See below for a description of the setup of these type of plans.

Name and description of the plan.

This text can be customized.

Additional plan information is located here: Plan year, minimum and maximum amounts and the number of pay periods

The employee has three options to choose from when electing an amount to defer. They can click the Defer Maximum \$ in blue on the right. They can also select a custom amount in the box on the left. Above this box are two different deferral options. If the employee wants to enter an annual amount they can do so. If they would like to enter a per pay amount they must first select that option and then enter their amount.

Dependent Care Spending Account

HUB International Test Site is concerned about your financial security and we offer benefit plans designed to protect our employees. Below is the summary for our Dependent Care Spending Account.

Progress: 9 of 13

View steps >

My Selections

Current:  
No election yet

Choose your election

Plan year:  
01/21/2019 to 12/31/2019

Available annual amounts:  
\$100 to \$2,403.85

Number of pay periods:  
25 remaining

How much do you want to defer?

By annual amount      - OR -      Defer Maximum \$  
 By per pay amount

\$

Save & Continue

Don't want this benefit?

Click Save & Continue once complete or select Don't want this benefit? if the employee would like to waive

# Employee Enrollment

## Enrollment Summary

Once the employee has completed the Personal and Dependent sections and their enrollment section they will have to sign off on their enrollment summary. Once the employee signs the enrollment summary it will complete their enrollment. If they do not sign this they will be listed as In Process in enrollment reports. It is required that all employees sign.

The enrollment summary is broken down into a few different sections.

- **Enrollment Summary Signature**—At the top of the enrollment summary the employee will find the acknowledgement and an option to sign below. Once the employee has reviewed their elections they can sign to complete their enrollment.
- **Enrolled Plans**—Below the Acknowledgement the employee will be able to view all of their elections. Each election will have a small summary of the plan. At the bottom of this section the employee will see their Total Cost Per Pay Period in a blue box
- **Dependents**—The next section will show all dependents and their elections
- **HSA/HRA and Cafeteria Plans**—If offered and elected they will appear under these sections
- **Declined Coverage**—All declined benefit plans will show under this section

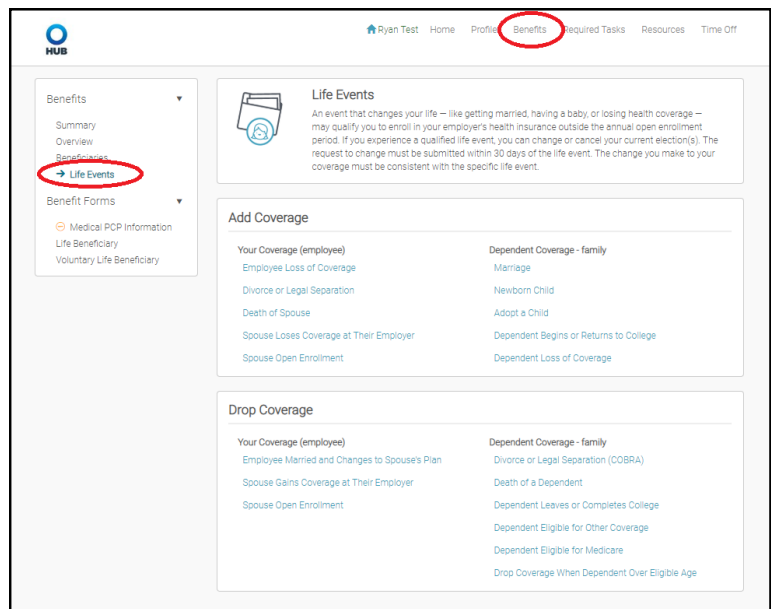
The screenshot displays the 'Enrollment Summary' page. At the top right, there is a progress indicator showing 'Progress: 11 of 12' with a green progress bar and a 'View steps >' link. The main content area features a yellow warning box with a triangle icon and the text 'Signature required' and 'You've elected all your benefits but we still require a signature before advancing.' Below this, there is a section titled 'Please review the acknowledgment below' containing a paragraph of text: 'As an eligible employee, I acknowledge that I understand the benefits, rights, and obligations available to me under the plan. I certify the facts contained in this summary are true and complete to the best of my knowledge. I understand that deductions can be made on a pre-tax or post-tax basis. Furthermore, I understand that elections for plans that are deducted on a pre-tax basis cannot be changed during the plan year unless I experience a Qualified Life Event.' At the bottom, there is a blue bar with a pencil icon and the text 'Sign to complete enrollment', and a green button labeled 'Click to Sign'.

# Employee Life Event

## Life Event Submittal Process

The process of submitting a life event is as follows.

1. First the Employee must log into their Employee Navigator account.
2. From the Employee Homepage click the **Benefits** tab on the top right of the page.
3. This will take the employee to their **Benefits Summary** page. To access the Life Event section the employee can click Life Events on the left side of the page.
4. Now the employee will select a type of Life Event. There are both Add Coverage and Drop Coverage Life Events. If you offer a Health Savings Account the employee can use this section to a Adjust or End Coverage.
5. After selecting the Type of Event following the employee then can follow the onscreen instructions to complete the Life Event. (See Below for information on event date rules for each life event)



# Employee Life Event

## Types of Life Events

Throughout the year, an employee can submit a Life Event using Employee Navigator. The only time employees can't complete a life event is during Open Enrollment or during a New Hire Enrollment. Below is a list of Life Events that can be selected in Employee Navigator.

### Add Coverage

#### Your Coverage (Employee)

- Employee Loss of Coverage
- Divorce of Legal Separation
- Death of Spouse
- Spouse Loses Coverage at Their Employer
- Spouse Open Enrollment
- Dissolution of Domestic Partnership
- Death of Domestic Partner
- Increase in Hours (Needs Activation)
- Return From Leave of Absence (Needs Activation)

#### Dependent Coverage—Family

- Marriage
- Newborn Child
- Adopt a Child
- Dependent Begins or Returns to College
- Dependent Loss of Coverage
- Add Domestic Partner
- Court Ordered Dependent Coverage (Needs Activation)
- Temporary Legal Guardianship Begins (Needs Activation)

### Drop Coverage

#### Your Coverage (Employee)

- Employee Married and Changes to Spouse's Plan
- Spouse Gains Coverage at Their Employer
- Spouse Open Enrollment
- Reduction in Hours (COBRA)
- No Longer Eligible for Benefits (COBRA)
- Military Leave (COBRA)

#### Dependent Coverage—Family

- Divorce or Legal Separation (COBRA)
- Death of Dependent
- Dependent Leaves or Completes College
- Dependent Eligible for Other Coverage
- Dependent Eligible for Medicare
- Drop Coverage When Dependent Over Eligible Age
- Unauthorized Employee Change (Needs Activation)
- Court Order Dependent Coverage (Needs Activation)
- Temporary Legal Guardianship Ends (Needs Activation)

### Adjust/End Coverage

- Change FSA
- Change LFSA
- Change Parking
- Change Transit
- Change Daycare
- Change HSA
- Change Private Insurance

# Employee Life Event

## Life Event Coverage Rules

### Add Employee Coverage

Employee add coverage events are slightly different in that the employee is put back into the enrollment process to complete their requested changes. The first step is still selecting the event triggering the ability to add coverage, followed by entering the date of the event. As in the example given previously, event date is going to be the date that is triggering the event. Generally speaking, this date will equal the first day the employee would be without coverage. The system is using this date to determine the start date of the newly added plan. The system will also request information about the date the previous coverage ended. If there was no previous coverage, the default would be to enter a date one day prior to the requested effective date.

Once the information about the dates of the event have been recorded, the employee is then placed into the enrollment process where benefits can be elected. Employees may complete one or more enrollment pages based on eligibility.

#### Example:

*Coverage being added due to loss of coverage under another plan would require the user to enter the first day of loss of coverage under the old plan. If the last day the employee was covered was 7/31, then the date entered would be 8/1. The previous coverage end date would be entered as 7/31.*

**IMPORTANT: Employees will need to select “Submit Pending Life Event for HR Approval” on the Life Event Summary Page. Once selected, the HR will get the proper notifications to approve the life event change. If the employee does NOT complete this last step, the enrollment change request will NOT be submitted for HR approval.**

### Add Dependent Coverage

When adding dependent coverage, the first step is still selecting the event triggering the ability to add coverage, followed by entering the date of the event. The next step is to then select the dependent to be added. This can either be an existing dependent on the employee record or there will be a selection to allow for a new dependent record to be created. Once the dependent is selected, the next step is to select benefits for the dependent to be enrolled under as a result of the event.

**NOTE: Dependents can only be added to existing coverage. In the event that the life event is triggering the need to add new coverage, this will have to be processed as an EMPLOYEE life event to first add the coverage to the employee record.**

If more than one dependent needs to be added because of the event, once the first event is recorded there will be an option to “Add Another” and the steps are repeated to select the dependent and coverage to be added.

# Employee Life Event

## Life Event Coverage Rules

### Drop Employee Coverage

When dropping coverage, the first step is to enter the date of the event. The date entered is used to determine the effective date of the drop of coverage. The system is designed to use this date in combination with the termination rules for each enrolled plan to properly end benefits. The date should be equal to the actual date the event occurred or the last day of expected coverage.

Once the date has been entered for the event, the next step will be to select the benefits to be dropped as a result of the event. When an employee is dropped from benefits, any enrolled dependents automatically are dropped from coverage as well.

### Example

*Coverage being dropped due to eligibility under a new plan. If the new plan starts as of 8/1 then the date of the event would be 7/31 as that is the expected last date of coverage for the member. In the event of a drop due to a divorce or any other similar event, it would be expected that the date of the event is entered. A divorce awarded on 8/2 would have an event date of 8/2. If the rules of the plan indicate coverage was to extend through the "end of month", the system will automatically adjust to reflect a drop coverage date of 8/31.*

### Drop Dependent Coverage

In the case of the drop of dependent coverage, the process remains the same in that the first step is to enter the date of the event. The date expected for entry is the date of the loss of coverage or the date of the actual event just as in the example above.

The next step will be to select the dependent the event will be applied to, followed by selecting the benefits to be dropped. If more than one dependent needs to be dropped because of the event, once the first event is recorded there will be an option to "Remove Another" and the steps are repeated to select the dependent and coverage to be dropped.

# Paid Time Off Employee View

## PTO Module Overview — Employee

The PTO Module in Employee Navigator will display all information pertaining to your Paid Time Off. After logging into your Employee Navigator account click Time Off at the top right and you will be brought to your PTO Dashboard. On the left you will see a drop down menu with other options to choose from. See below for a detailed description about each option.

- **Dashboard:** The Dashboard displays a quick overview of your PTO package, Upcoming Requests, Taken Time Off and 2019 Holidays. If you would like to quickly view this information the Dashboard is the perfect place to look.
- **Calendar:** The Calendar, when selected, will give you a full view of the current month. On the calendar you will see Approved Requests in blue, Requests Pending in Yellow and Holiday's in pink.
- **Company Holidays:** The Company Holidays option will show you all holidays for the current year. This is the same view that can be seen on the Dashboard.
- **Policy Summary:** The Policy Summary option will give you a breakdown of your PTO package. If you would like to find more information about your package you can use this to learn more about it.
- **Timeline:** The Timeline option will show all changes that have been made throughout the year. It will show previous time taken as well as accruals.

The screenshot displays the PTO Employee View dashboard. At the top right, the user's name 'Ryan Test' is visible. The dashboard includes a navigation menu on the left with options: Dashboard, Calendar, Time Off Requests, Company Holidays, Policy Summary, and Timeline. The main content area features a 'Time Off Policy Overview' section with a green circle and a 'Request Time Off' button. Below this are sections for 'Upcoming Requests' and 'Taken Time Off', both showing 'There are no time off requests to show.' To the right is a '2019 Holidays' table.

Date	Holiday
01/01/2019	New Year's Day
01/21/2019	Martin Luther King, Jr Day
02/18/2019	Washington's Birthday
05/27/2019	Memorial Day
07/04/2019	Independence Day
09/02/2019	Labor Day
10/14/2019	Columbus Day
11/11/2019	Veterans Day
11/28/2019	Thanksgiving Day
12/25/2019	Christmas Day

# Paid Time Off Employee View

## Requesting Time Off—Employee

If the Paid Time Off module is active employees will be able to view and request time off from their Employee Navigator accounts. This tool will only appear if the PTO module is active.

1. On the Employee Homepage you will see a My Time Off section below the Shortcuts.
2. You can request time off by clicking the blue Request Time Off button
3. Use the drop down menu on this page to select a leave type.
4. Once selected you will need to enter the From and To dates. It will automatically default to a full 8 hour day. If taking a partial day select the Partial Day? box and enter the start time and end time.
5. Next enter a reason for your request in the Reason/Notes section and click Submit Time Off Request.
6. The employee will receive notification once approved/declined.

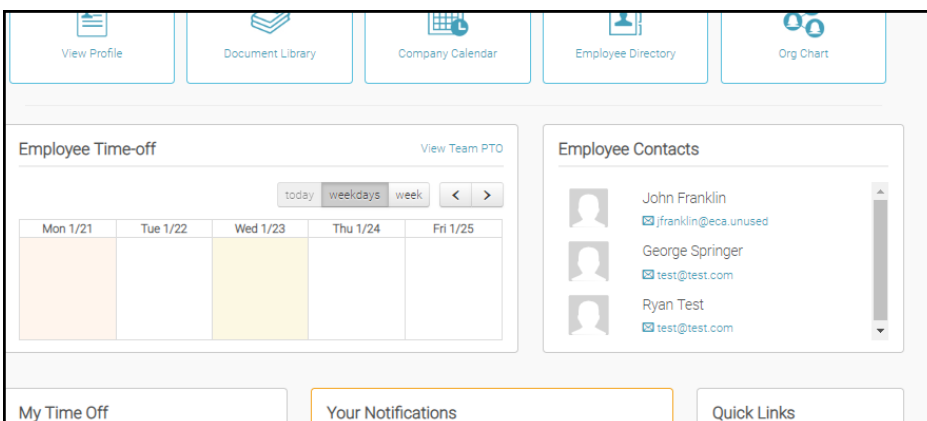
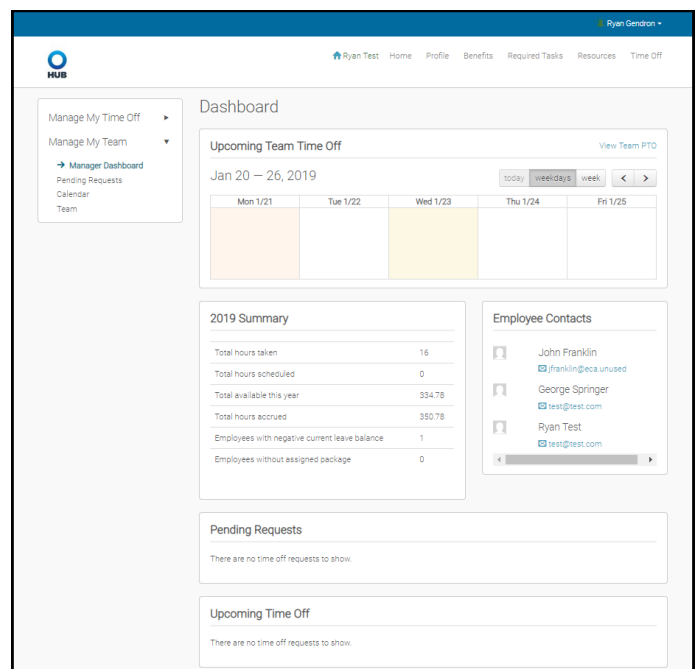
The screenshot shows the 'Request Time Off' form in the Employee Navigator system. The form is titled 'Request Time Off' and includes a 'Manage My Time Off' sidebar with options like Dashboard, Calendar, Time Off Requests, Company Holidays, Policy Summary, and Timeline. The main form area has a 'Select Leave Type' dropdown menu set to 'Vacation', with a note 'Sick, Vacation/Personal, Funeral/Bereavement' and 'Available hours: 144'. Below this are 'From' and 'To' date pickers, both set to '01/03/2019'. The 'Request Details' section shows a table with columns for Date, Hours, and a checkbox for 'Partial Day?'. The current entry is for 'Thu, Jan 3' with '0.000' hours and the 'Partial Day?' checkbox checked. There are also 'Start' and 'End' time pickers. Below the table is a 'Reason/Notes' text area and a 'Submit Time Off Request' button.

# Paid Time Off Employee View

## PTO Module Overview—Managers

As a manager you will have an additional drop down menu within the PTO module. After selecting the Time Off tab you will see a drop down called Manage My Time Off and Manage My Team. The Manage My Team section is where you will be able to view pending requests, team calendar and a team roster.

- **Manager Dashboard:** The Manager Dashboard is a quick view of all team related PTO items. There is a Upcoming Team Time Off calendar that can be used to view the weeks activity that includes Holiday's and Team Time Off. Also, on the dashboard is a 2019 Summary of all time taken off within your team, Employee Contact Information, Pending Requests and Upcoming Time Off.
- **Pending Requests:** The Pending Requests option will show all Pending Requests by employees within your team. Here is where you will be able to approve or decline Time Off Requests.
- **Calendar:** The Calendar option shows a full calendar. Here you will see Approved Requests in blue, Requests Pending Approval in yellow and Holiday's in pink.
- **Team:** The Team option will display a full list of your team and their contact information. If you click View next to each employee it will display the employees PTO Dashboard.

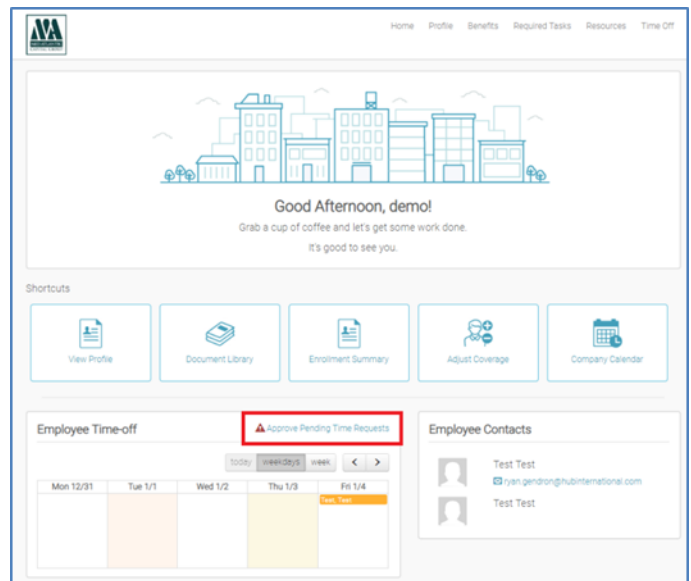


Managers will have this section added to their Employee Homepage

# Paid Time Off Employee View

## Approving Pending Requests—Managers

1. Once an employee submits a PTO Request you will receive a notification.
2. On the Employee Homepage you will see an Employee Time Off weekday calendar. At the top of this calendar you will see Approve Pending Time Requests in blue with a red triangle with an exclamation point next to it.
3. Click on this and it will take you directly to the Pending Requests section under Manage My Team.
4. To approve the request click the green Approve button. To decline the request click Deny in red.
5. There are two other options that you can choose from when it comes to a Pending Request. At the far right of the request you will see three vertical dots.
6. Click these dots to open a small drop down window. The first option, Details, will give you more details about the request. The second option, Cancel Request, can be used to cancel the request from ever occurring. This can be used if the employee made a mistake when entering their time off.
7. Once Approved the employee will receive an email letting them know their PTO request has been approved and the request will move down to the Upcoming Time Off section on the Manager Dashboard.



Date(s)	Employee	Type	Hours	Reason	Other Actions
01/04/2019	Test, Test	Vacation	8	Test	<span>Approve</span> <span>Deny</span> <span>⋮</span>