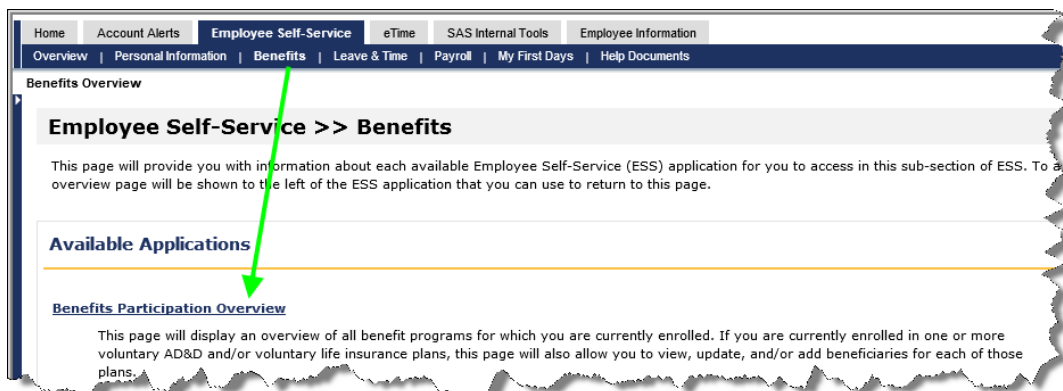


## ESS – Benefits – Benefits Participation Overview

1. **Benefits Participation Overview** – Displays the current benefit programs for which an employee is currently enrolled. Information displayed will vary from employee to employee based on enrollments. In the *Benefits Participation Overview*, employees are able to do the following:

- View a listing of currently enrolled benefit programs along with the plan descriptions, employee and employer contributions, and other options that apply to each specific program.
- For most benefit plans, a link is available that will take the employee to the benefit provider's website for additional information as well as a link to the benefit plan's description.
- For savings and retirement plans, view the name of the provider, the flat rate contribution made to that provider or the percent of salary being contributed to that provider.
- View Flexible Spending Account annual contributions and reimbursements received.
- View information related to dependents covered under enrolled health plans.
- View, update, and/or add beneficiaries associated with voluntary AD&D and/or voluntary life insurance plans.

1.1. Select the *Benefits Participation Overview* link from the *Benefits* menu in ESS.



1.2. The *Plan Participation Overview* screen will appear as shown below.

Controlled in one or more voluntary AD&D and/or voluntary insurance plans and would like to view beneficiaries to any of those plans, simply click on the link of the corresponding plan.

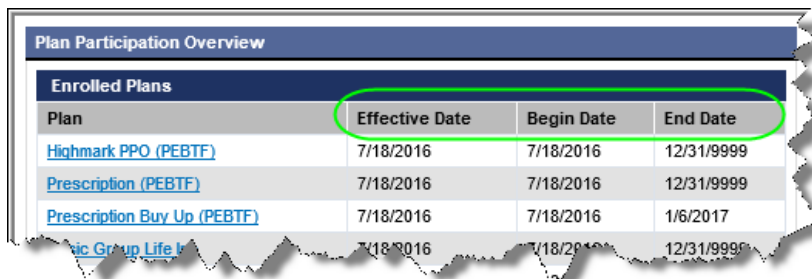
Plan Participation Overview			
Enrolled Plans			
Plan	Effective Date	Begin Date	End Date
<a href="#">Highmark PPO (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Prescription (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Prescription Buy Up (PEBTF)</a>	7/18/2016	7/18/2016	1/6/2017
<a href="#">Basic Group Life Ins</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Long Term Disability</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Vol AD&amp;D Employee</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol AD&amp;D Spouse</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol AD&amp;D Child</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol Life Employee</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol Life Spouse</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol Life Child</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">403bTSA</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">SERS Class A3 = 6.25%</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Get Healthy Non Par (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">State System EE's Assist Prog</a>	7/18/2016	7/18/2016	12/31/9999

1.2.1. The date column descriptions are defined as follows:

**Effective Date:** This is the earliest date the employee was enrolled in the related plan.

**Begin Date:** This date may be different than the *Effective Date* to reflect any modifications made to the plan since the earliest *Effective Date*. For example if dependents were added or dropped from a plan, a new *Begin Date* is created.

**End Date:** If the date is equal to 12/31/9999, it means the plan is not scheduled to end. If the *End Date* does not equal 12/31/9999, the plan will end on the date displayed.



Plan Participation Overview			
Enrolled Plans			
Plan	Effective Date	Begin Date	End Date
<a href="#">Highmark PPO (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Prescription (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Prescription Buy Up (PEBTF)</a>	7/18/2016	7/18/2016	1/6/2017
<a href="#">Public Group Life Insurance</a>	7/18/2016	7/18/2016	12/31/9999

NOTE: Only benefit plans that pertain to the employee in context will be displayed. For the purposes of this document, a SCUPA employee is being used as an example. The *Enrolled Plans* displayed will vary depending on the employee.

NOTE (cont.): For any plan not described in this document, simply click on the plan from the *Plan Participation Overview* to drill deeper for more information.

1.3. Click on the desired plan from the *Enrolled Plans* listing under *Plan Participation Overview* to drill deeper for more information about that particular plan. In the example used here, *Highmark PPO (PEBTF)* was selected. The *Plan Details* screen shown below will appear with the following information/options available:

- 1.3.1. The *Plan* will display the full name of the plan being viewed. In this case, *Highmark PPO (PEBTF)* is the plan in context. The *Plan Type* tells users the type of benefit plan that is being viewed. In this case, the plan type is *Medical*.
- 1.3.2. The *Provider* link takes users to the website for the plan provider. In this case, users will be taken to PEBTF's website. The *Plan Description* link takes users to an internal PASSHE website where more information is provided on the specific plans available. In this case, more information is provided on the medical plans available.
- 1.3.3. The *Plan Options* section describes the specific *Health Plan Option* and *Coverage Type*. *Highmark PPO (PEBTF)* is the health plan option shown here with a coverage type of *Multi-Party*.

- 1.3.4. The *Costs Bi-weekly* section displays how much money the *Employee* and the *Employer* contribute to the plan.
- 1.3.5. The *Enrolled Dependents* section simply displays the dependents of the employee who are attached to the particular plan in context.

NOTE: Click the *Back to Plan Overview* button to return to the *Plan Participation Overview*.

**Highmark PPO (PEBTF)**

**Plan Details**

Back to Plan Overview

Plan: Highmark PPO (PEBTF) [Provider](#)  
[Plan Description](#)

Plan Type: Medical

---

**Plan Options**

Health Plan Option: Highmark PPO (PEBTF)

Coverage Type: Multi-Party

---

**Costs Bi-weekly**

Employee	\$37.66
Additional Post-Tax Cost	\$0.00
Imputed Income	\$0.00
Employer	\$455.00

Dependent enrollment requires verification with PEBTF records.

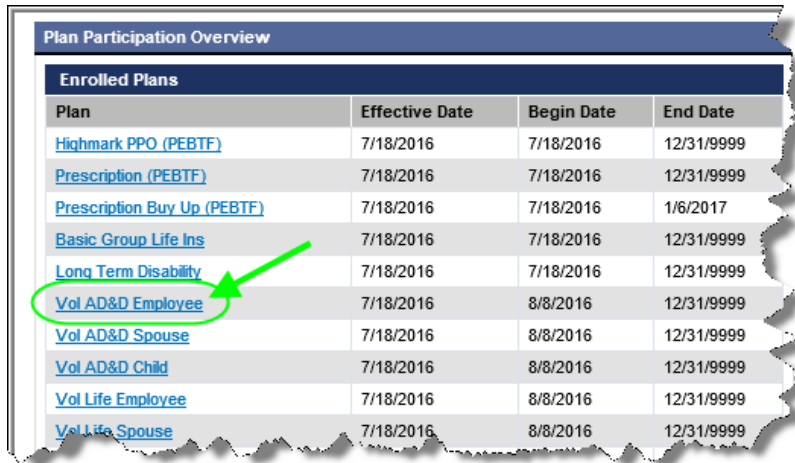
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**Enrolled Dependents**

Name	Relation	SSN	Birth Date
Wife SCUPA	Spouse	*****8888	1/1/1980
Child SCUPA	Child	*****1111	1/1/2015

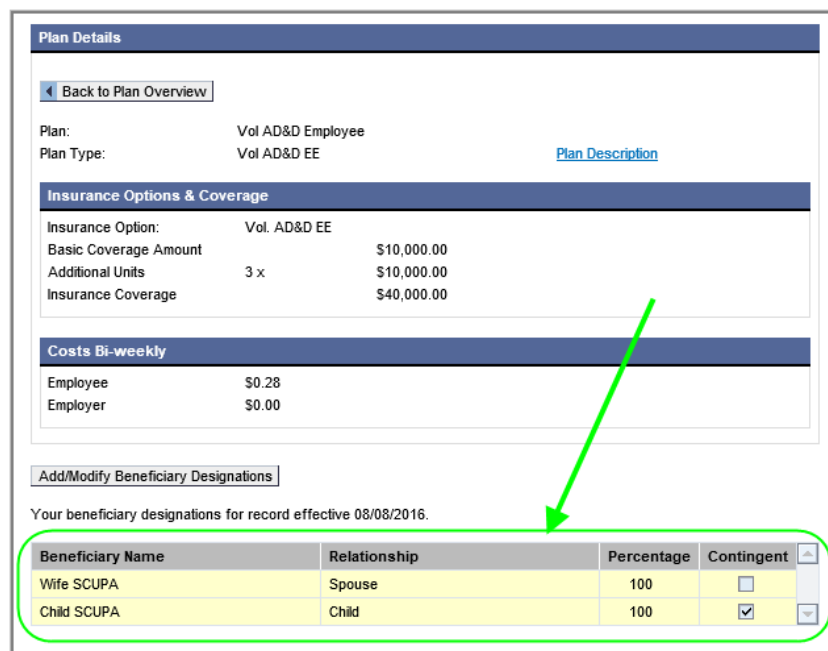
If enrolled in one or more voluntary AD&D and/or voluntary life insurance plans, employees can view, update, and or/add beneficiaries to any of those plans. (Note: This process only allows for beneficiary changes. No adjustments may be made to coverage amounts.)

- Select the desired voluntary insurance plan from the *Plan Participation Overview* screen. In the example here, the voluntary AD&D employee plan is selected.



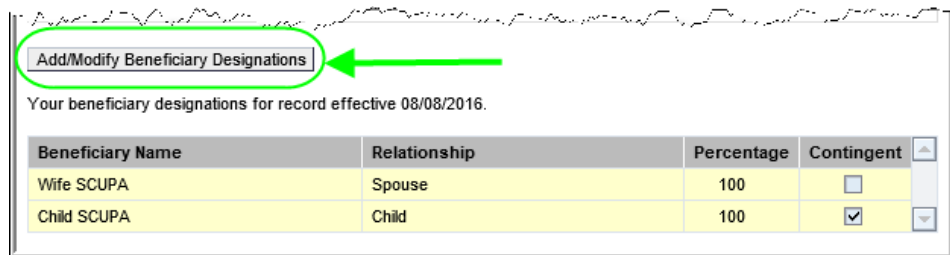
Plan Participation Overview			
Enrolled Plans			
Plan	Effective Date	Begin Date	End Date
<a href="#">Highmark PPO (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Prescription (PEBTF)</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Prescription Buy Up (PEBTF)</a>	7/18/2016	7/18/2016	1/6/2017
<a href="#">Basic Group Life Ins</a>	7/18/2016	7/18/2016	12/31/9999
<a href="#">Long Term Disability</a>	7/18/2016	7/18/2016	12/31/9999
<b><a href="#">Vol AD&amp;D Employee</a></b>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol AD&amp;D Spouse</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol AD&amp;D Child</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol Life Employee</a>	7/18/2016	8/8/2016	12/31/9999
<a href="#">Vol Life Spouse</a>	7/18/2016	8/8/2016	12/31/9999

- An overview of the voluntary plan selected will display. At the bottom of the screen, both primary and contingent beneficiaries designated for the plan will be displayed.

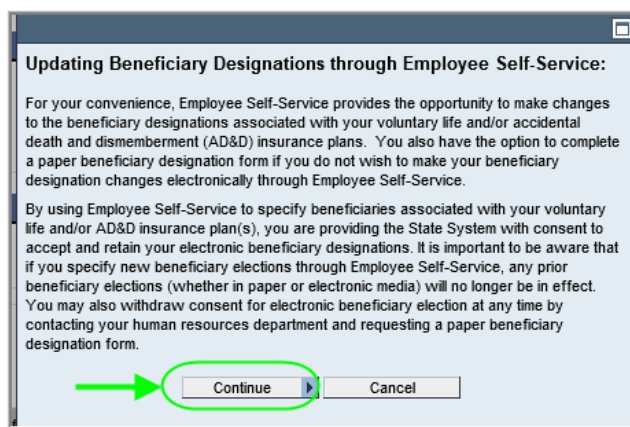


Plan Details			
<a href="#">Back to Plan Overview</a>			
Plan:	Vol AD&D Employee		
Plan Type:	Vol AD&D EE	<a href="#">Plan Description</a>	
Insurance Options & Coverage			
Insurance Option:	Vol. AD&D EE		
Basic Coverage Amount		\$10,000.00	
Additional Units	3 x	\$10,000.00	
Insurance Coverage		\$40,000.00	
Costs Bi-weekly			
Employee	\$0.28		
Employer	\$0.00		
<a href="#">Add/Modify Beneficiary Designations</a>			
Your beneficiary designations for record effective 08/08/2016.			
Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	100	<input type="checkbox"/>
Child SCUPA	Child	100	<input checked="" type="checkbox"/>

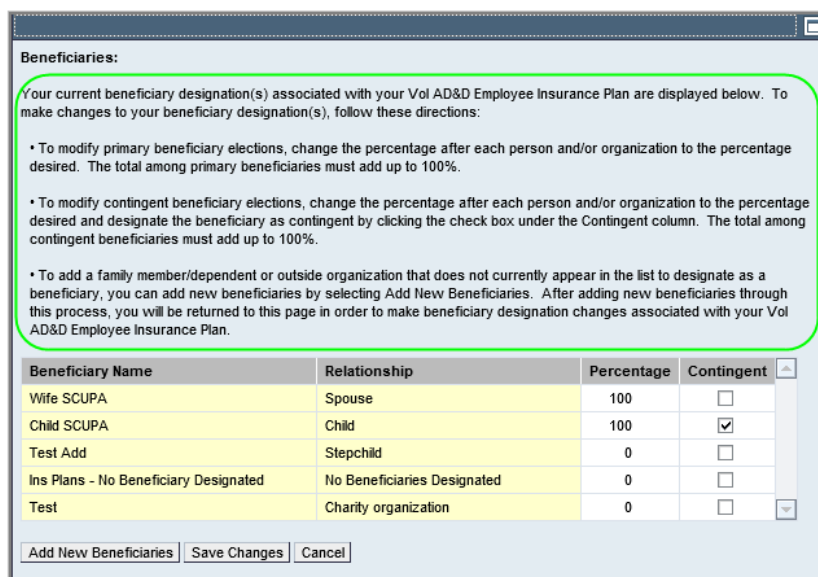
- 2.3.1. To make changes to beneficiary designations, select the *Add/Modify Beneficiary Designations* button.



- 2.3.2. The following pop-up window will appear. Select the *Continue* button to begin making modifications or *Cancel* to abort the process.



- 2.3.3. The *Beneficiaries* window will appear. The text at the top of the window provides directions for making desired changes. The next steps will illustrate these directions.



- 2.3.4.** To modify primary beneficiary elections, change the percentage after each person and/or organization to the percentage desired. The total among primary beneficiaries must add up to 100%. (NOTE: A primary beneficiary will never have a checkmark in the *Contingent* column.)

Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	34	<input type="checkbox"/>
Child SCUPA	Child	33	<input type="checkbox"/>
Test Add	Stepchild	33	<input type="checkbox"/>
Ins Plans - No Beneficiary Designated	No Beneficiaries Designated	0	<input type="checkbox"/>
Test	Charity organization	0	<input type="checkbox"/>

Add New Beneficiaries Save Changes Cancel

- 2.3.5.** To modify contingent beneficiary elections, change the percentage after each person and/or organization to the percentage desired and designate the beneficiary as contingent by clicking the check box under the Contingent column. The total among contingent beneficiaries must add up to 100%. (NOTE: Contingent beneficiaries are not required.)

Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	34	<input type="checkbox"/>
Child SCUPA	Child	33	<input type="checkbox"/>
Test Add	Stepchild	33	<input type="checkbox"/>
Ins Plans - No Beneficiary Designated	No Beneficiaries Designated	0	<input type="checkbox"/>
Test	Charity organization	100	<input checked="" type="checkbox"/>

Add New Beneficiaries Save Changes Cancel

- 2.3.6.** When finished making modifications, select the Save Changes button.

Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	34	<input type="checkbox"/>
Child SCUPA	Child	33	<input type="checkbox"/>
Test Add	Stepchild	33	<input type="checkbox"/>
Ins Plans - No Beneficiary Designated	No Beneficiaries Designated	0	<input type="checkbox"/>
Test	Charity organization	100	<input checked="" type="checkbox"/>

Add New Beneficiaries Save Changes Cancel

2.3.7. A message will be displayed that changes have been saved successfully.

**Add/Modify Beneficiary Designations**

Your beneficiary designations for record effective 08/12/2016.

Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	34	<input type="checkbox"/>
Child SCUPA	Child	33	<input type="checkbox"/>
Test Add	Stepchild	33	<input type="checkbox"/>
Test	Charity organization	100	<input checked="" type="checkbox"/>

Your beneficiary designation changes have been saved successfully!

2.3.8. To add a family member/dependent or outside organization that does not currently appear in the list to designate as a beneficiary, new beneficiaries can be added by selecting *Add New Beneficiaries*.

• To add a family member/dependent or outside organization that does not currently appear in the list to designate as a beneficiary, you can add new beneficiaries by selecting Add New Beneficiaries. After adding new beneficiaries through this process, you will be returned to this page in order to make beneficiary designation changes associated with your Vol AD&D Employee Insurance Plan.

Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	34	<input type="checkbox"/>
Child SCUPA	Child	33	<input type="checkbox"/>
Test Add	Stepchild	33	<input type="checkbox"/>
Test	Charity organization	100	<input checked="" type="checkbox"/>
Ins Plans - No Beneficiary Designated	No Beneficiaries Designated	0	<input type="checkbox"/>

**Add New Beneficiaries** Save Changes Cancel

2.3.9. The *Family Member/Dependent/Beneficiary Information* window will appear. To add new beneficiaries, select *Add Another Dependent*. (NOTE: If skipping this step is desired, select *Save Information and/or Continue*.)

**Family Member / Dependent / Beneficiary Information**

To add a new individual to be designated as a beneficiary, select the Add Another Dependent button and follow the steps. If you do not wish to add a new individual to be designated as a beneficiary, simply select the Save Information and/or Continue button.

Stored Family Members / Dependents / Beneficiaries				
Relationship	No.	Full Name	Birth Date	Social Security Number
Spouse		SCUPA, Wife	1/1/1980	***-**-8888
Child	01	SCUPA, Child	1/1/2015	***-**-1111
Stepchild	01	Add, Test	1/1/2013	***-**-5555

**Add Another Dependent**

Save Information and/or Continue ▶



**2.3.10.** Complete the information as required. When finished, select *Save Dependent Information*.

**Family Member / Dependent Input Form**

Relationship: \*  Marital Status: \*

First Name: \*  Middle Initial:

Last Name: \*  Suffix:

Gender:  Tax Status:  Non Taxab

Birth Date: \*  Smoker:

Physician Name:  Social Security Number: \*

Physician Number:

Current Patient:  Physician info is only required if you plan on enrolling in a HMO health plan.

**Dependent Validation**  
Original Documentation verifying the individual's relationship to the employee (e.g. birth certificate, marriage certificate, DP tax status, etc.) must be provided.

If the address of this family member / dependent is the same as your permanent address, leave these fields blank.

Street:

City:

State:

Postal Code:

**2.3.11.** A message will be displayed confirming the family member/dependent information has been saved. Repeat steps 2.3.9 – 2.3.10 as many times as necessary. When finished, select *Save Information and/or Continue*.

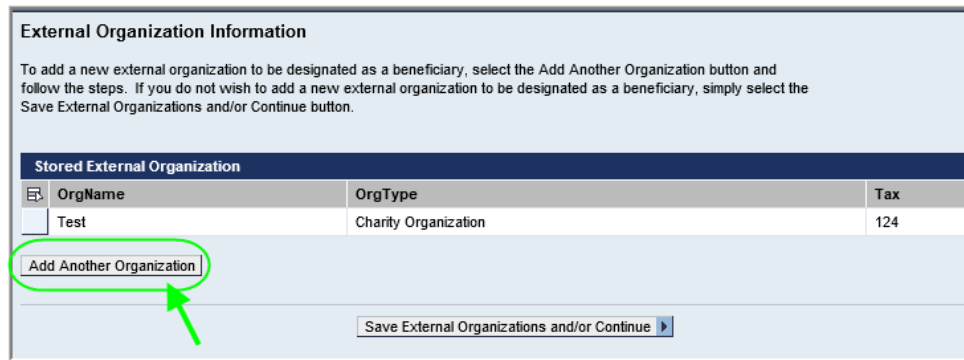
**Family Member / Dependent / Beneficiary Information**

To add a new individual to be designated as a beneficiary, select the Add Another Dependent button and follow the steps.  
If you do not wish to add a new individual to be designated as a beneficiary, simply select the Save Information and/or Continue button.

Stored Family Members / Dependents / Beneficiaries				
Relationship	No.	Full Name	Birth Date	Social Security Number
Spouse		SCUPA, Wife	1/1/1980	***-**-8888
Child	01	SCUPA, Child	1/1/2015	***-**-1111
Child	02	SCUPA, Newbown	8/1/2016	***-**-5555
Stepchild	01	Add, Test	1/1/2013	***-**-5555

Your family member / dependent information has been updated.

- 2.3.12.** The *External Organization Information* window will appear. To add a new external organization to be assigned as a beneficiary, select *Add Another Organization*. (NOTE: If skipping this step is desired, select *Save External Organizations and/or Continue*.)



**External Organization Information**

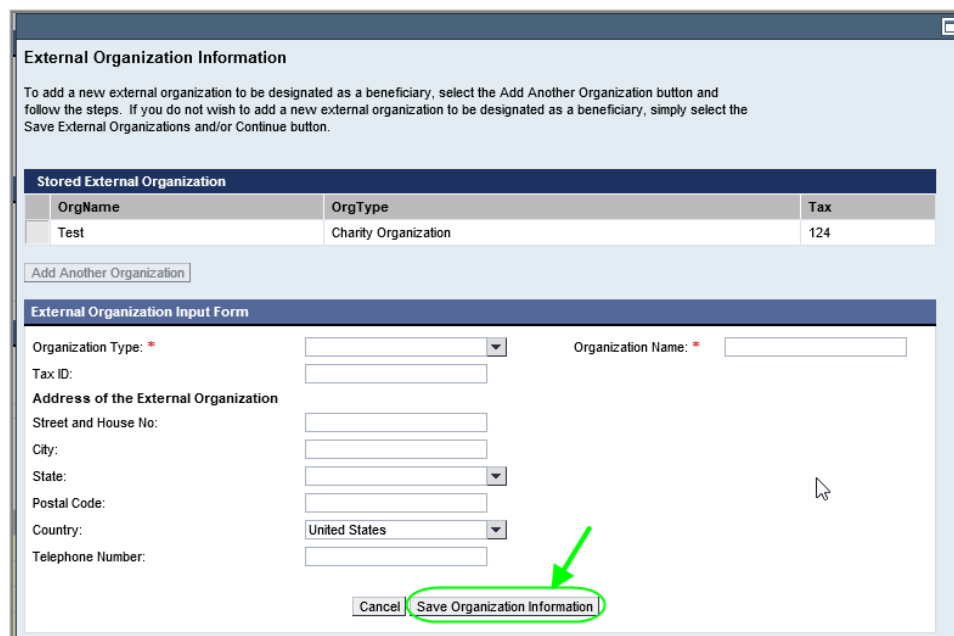
To add a new external organization to be designated as a beneficiary, select the Add Another Organization button and follow the steps. If you do not wish to add a new external organization to be designated as a beneficiary, simply select the Save External Organizations and/or Continue button.

Stored External Organization		
OrgName	OrgType	Tax
Test	Charity Organization	124

**Add Another Organization**

Save External Organizations and/or Continue

- 2.3.13.** Complete the information as required. When finished, select *Save Organization Information*.



**External Organization Information**

To add a new external organization to be designated as a beneficiary, select the Add Another Organization button and follow the steps. If you do not wish to add a new external organization to be designated as a beneficiary, simply select the Save External Organizations and/or Continue button.

Stored External Organization		
OrgName	OrgType	Tax
Test	Charity Organization	124

Add Another Organization

**External Organization Input Form**

Organization Type: \* [dropdown] Organization Name: \* [text box]

Tax ID: [text box]

**Address of the External Organization**

Street and House No: [text box]

City: [text box]

State: [dropdown]

Postal Code: [text box]

Country: [dropdown] United States

Telephone Number: [text box]

Cancel **Save Organization Information**

- 2.3.14.** A message will be displayed confirming the outside organization information has been saved. Repeat steps 2.3.12 – 2.3.13 as many times as necessary. When finished, select *Save External Organizations and/or Continue*.

**External Organization Information**

To add a new external organization to be designated as a beneficiary, select the Add Another Organization button and follow the steps. If you do not wish to add a new external organization to be designated as a beneficiary, simply select the Save External Organizations and/or Continue button.

Stored External Organization		
OrgName	OrgType	Tax
<input type="checkbox"/> Test	Charity Organization	124
<input type="checkbox"/> Trust test	Trust Fund	

External Organization successfully added.

- 2.3.15.** You will then be returned to the *Beneficiary* window where designation changes can be made. The new family member(s)/outside organization(s) that were newly added to the system now appear for beneficiary designation. Refer to steps 2.3.1 -2.3.7 for designation instructions.

This process, you will be returned to this page in order to make beneficiary designation changes associated with your Vol AD&D Employee Insurance Plan.

Beneficiary Name	Relationship	Percentage	Contingent
Wife SCUPA	Spouse	34	<input type="checkbox"/>
Child SCUPA	Child	33	<input type="checkbox"/>
Test Add	Stepchild	33	<input type="checkbox"/>
Test	Charity organization	100	<input checked="" type="checkbox"/>
Newborn SCUPA	Child	0	<input type="checkbox"/>
Ins Plans - No Beneficiary Designated	No Beneficiaries Designated	0	<input type="checkbox"/>
Trust test	Trust Fund	0	<input type="checkbox"/>