BENEFITS OPEN ENROLLMENT JOB AID
Completing your BENEFITS ENROLLMENT in Fusion HR

This Job Aid provides instructions to access your benefits, manage your contacts, record life events, designate beneficiaries and complete pending action items. Includes options for temporary employees.

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessing Your Benefits</td>
<td>2</td>
</tr>
<tr>
<td>A. Managing Your Contacts</td>
<td></td>
</tr>
<tr>
<td>Editing Contacts</td>
<td>5</td>
</tr>
<tr>
<td>Creating Contacts</td>
<td>6</td>
</tr>
<tr>
<td>B. Open Enrollment</td>
<td>8</td>
</tr>
<tr>
<td>Medical</td>
<td>11</td>
</tr>
<tr>
<td>Health Savings Account/Flexible Spending Accounts: Health Care or Dependent Day Care</td>
<td>12</td>
</tr>
<tr>
<td>Dental</td>
<td>13</td>
</tr>
<tr>
<td>Vision</td>
<td>14</td>
</tr>
<tr>
<td>Life Insurance</td>
<td>15</td>
</tr>
<tr>
<td>Disability</td>
<td>16</td>
</tr>
<tr>
<td>Additional Benefits</td>
<td>17</td>
</tr>
<tr>
<td>Review</td>
<td>18</td>
</tr>
<tr>
<td>Benefits Confirmation</td>
<td>19</td>
</tr>
<tr>
<td>C. Pending Action Items</td>
<td>20</td>
</tr>
<tr>
<td>Uploading Benefits Related Documents</td>
<td>20</td>
</tr>
<tr>
<td>D. Designate Beneficiaries</td>
<td>24</td>
</tr>
<tr>
<td>Quick Tips</td>
<td>25</td>
</tr>
</tbody>
</table>
Accessing Your Benefits

Users can access their Benefits enrollment tools from three locations in Fusion HR:

A. Via the **My Portrait** tab
B. From the **Navigator** dropdown menu
C. By clicking on the **Enroll in US Benefits** button on the **Fusion Welcome** page (below).
Accessing Your Benefits

A. From the My Portrait Tab

1. Click on the My Portrait tab.
2. Click Benefits button in the card carousel at the top of the screen to be routed to the Benefits Enrollment screen.

![My Portrait Card Carousel](image)

B. From the Navigator Dropdown

1. Click on the Navigator dropdown icon.
   - The Navigator menu will appear.
2. Select Benefits from the My Information section to be routed to the Benefits Enrollment screen.

![Navigator Dropdown Menu](image)
Accessing Your Benefits (cont.)

In the **Benefits Overview Tab** you can view and update your:

A. **Contacts** – **NEW HIRES** **must** add their contacts before registering for benefits.
B. **Enrollment Alert** – where you complete **Open Enrollment**.
C. **Pending Action Items** – shows current outstanding items regarding your benefits.
D. **Beneficiary Organizations** – allows you to designate beneficiary organizations for your benefits.
E. **Current Benefits** – displays your current benefits enrollments. Also allows you to print a copy of your benefits report.
F. **Dependents** – Active dependents and which benefit plans they are enrolled in.
G. **Beneficiaries** – Identify your primary and contingent beneficiaries.

You can review your emergency contacts, dependents and beneficiaries on the overview page to ensure everyone is included.

**Benefits Overview Tab**

**TIP:** To enlarge the view of the **Benefits Overview** page, click on the **task pane** on the left to collapse the **Task pane**.
A. Managing Your Contacts

From the **Contacts** panel you can review the contacts that are listed in the system.

- **Contacts** can include family, friends or significant others.
- Any contact can be designated as an **Emergency Contact**.
- Eligible contacts may be designated as a **dependent** or **beneficiary**.
- Date of birth and gender are required for all dependents and beneficiaries to be linked to a benefit plan.

Let’s start working with the **Contacts** panel.

![Benefits Overview Tab](image)

**NOTE:** The Contacts list is the same list in your **Employee Portrait – Personal Information** card. Contacts added here will be viewable there and vice versa.
A. Managing Your Contacts (cont.)

Editing Contacts

1. To add date of birth and/or gender for a dependent or beneficiary, highlight the contact by clicking on their name and select the Edit button.
2. Review the information in the Edit Contact window. Required fields are denoted with an asterisk (*).
   - **Effective Start Date** – your hire date using the MM/DD/YYYY format
   - **Name** – please review/edit the **First** and **Last Name** fields
   - **Relationship** – select the relationship you have to this contact, i.e. family member, spouse, domestic partner
   - **Gender** – select Female or Male from the dropdown menu
   - **Date of Birth** – please note that the system will allow you to continue without entering the date of birth; however, you will not be able to add this person to your benefit plans or as your beneficiary.
3. Click OK once the record is completed to submit. You will return to the Benefits Overview page.

![Edit Contact Window](image-url)
A. Managing Your Contacts (cont.)

Creating Contacts

1. If additional contacts are required, then select the Create button to add a new emergency contact, dependent or beneficiary.
2. Enter information into the Create Contact window. Required fields are denoted with an asterisk (*).
   - **Effective start date** – your hire date using the MM/DD/YYYY format
   - **Name** – please review/edit the First and Last Name fields
   - **Relationship**- select the relationship you have to this contact, i.e. family member, spouse, domestic partner
   - **Gender** – select Female and Male from the dropdown menu
   - **Date of Birth** – please note that the system will allow you to continue without entering the date of birth; however, you will not be able to add this person to your insurance plans or as your beneficiary.
3. Click OK once the record is completed to submit. You will return to the Benefits Overview page.

![Create Contact Window](image-url)
B: Open Enrollment

During Open Enrollment, users can:

- Update/change their benefit options including:
  - Medical
  - Dental
  - Vision
  - Health Savings Account/Flexible Spending Accounts
  - Life Insurance
  - Disability
  - Additional Benefits
- Update/change Beneficiaries
- Temporary employees can now enroll in benefits

You can Change Benefit Elections in the Enrollment Alerts section of the Benefits Overview screen.

1. Click on the Change Benefits Elections button to begin the process. It will take the system a moment to process the request.
B: Open Enrollment (cont.)

2. You will receive a warning reminding you to add your dependents as a contact before enrolling. Click the Proceed to Enrollment button if dependents are listed as your contacts.

3. Please review the Authorization/Legal Disclaimer. You may print the page for your records. Click the Accept button when you are ready to move forward.
B: Open Enrollment (cont.)

In the **Edit Benefits** screen:

A. You will notice there are seven train stops dividing up benefit elections by Benefit type. You must make an election at every train stop. If you do not wish to enroll in a particular benefit, you are required to **waive** it.

B. Please be sure to follow through all of the train stops by clicking the **Next** button at in the upper right corner. You cannot skip ahead.
B: Open Enrollment (cont.)

Medical Insurance

1. In the **Plan and Options Section**, click on the [ ] to expand all the plan and coverage options. Select the plan and coverage option you wish to enroll in by checking the box to the right of the plan.
   - In the **Total Cost to You** box, the cost of your benefits will update.
   - Medical plan surcharges are available in this section also to:
     - Cover a working spouse or domestic partner with access to an employer provided plan
     - Cover a member who is a Tobacco User.
2. Highlight your selected coverage by clicking on the tier level (i.e. Employee + Family) and scroll to the bottom of the page to the **Dependents** section.
3. Select the dependents you wish to cover under the medical plan.
4. Click the **Next** button to advance to SA/FSA.

![Edit Benefits: Medical Screen](image-url)
B: Open Enrollment (cont.)

Health Savings Account and Flexible Spending Accounts

1. In the Plan and Options Section, click on the ▶️ to expand all the plan and coverage options.
2. Under the Plan and Option section, select the Elect box and enter annual goal amount in Coverage box to enroll in Health Savings Account (HSA), or Health Care FSA, and/or Dependent Day Care FSA.
   📝 In the Total Cost to You box, the cost of your benefits will update.
3. Click the Next button to advance to Dental Insurance.

NOTE: Minimum Coverage amount is $100 and maximum is $2,550 for Health Care, $5,000 for Dependent Day Care.
B: Open Enrollment (cont.)

Dental Insurance Benefits

1. In the **Plan and Options Section**, click on the ☐ to expand all the plan and coverage options. Select the plan and coverage option you wish to enroll in by checking the box to the right of the plan.
   - In the **Total Cost to You** box, the cost of your benefits will update.
2. Highlight your selected coverage by clicking on the tier level (i.e. Employee + Family) and scroll to the bottom of the page to the **Dependents** section.
3. Select the dependents you wish to cover under the Dental plan.
4. Click the **Next** button to advance to Vision Insurance.

![Edit Benefits: Dental Insurance Screen](image-url)
B: Open Enrollment (cont.)

Vision Insurance

1. In the **Plan and Options Section**, click on the [ ] to expand all the plan and coverage options. Select the plan and coverage option you wish to enroll in by checking the box to the right of the plan.

   ![Checkmark](image)

   In the **Total Cost to You** box, the cost of your benefits will update.

2. Highlight your selected coverage by clicking on the tier level (i.e. Employee + Family) and scroll to the bottom of the page to the **Dependents** section.

3. Select the dependents you wish to cover under the vision plan.

4. Click the **Next** button to advance to Life Insurance.

![Edit Benefits: Vision Insurance Screen](image)
B: Open Enrollment (cont.)

Life Insurance

1. In the **Plan and Options Section**, click on the to expand all the plan and coverage options. Select the plan and coverage option you wish to enroll in by checking the box to the right of the plan.
   - In the **Total Cost to You** box, the cost of your benefits will update.
   - **Note:** You are automatically enrolled in Company Paid Life and Accidental Death and Dismemberment (AD&D) coverage. You need to elect beneficiaries for this coverage.
2. Highlight the Coverage amount you wish to enroll in.
3. Highlight your selected coverage and scroll to the bottom of the page to **Beneficiaries** in order to assign beneficiaries.
   - If you do not designate a beneficiary, then you will receive a pop up warning. You may proceed to your enrollment but beneficiary designation will remain an open item to complete at a later time.
4. Enter the **Primary** and **Contingent Percentage** of the benefit offering.
5. Click the **Next** button to advance to Disability Insurance.
B: Open Enrollment (cont.)

Disability Insurance

1. In the **Plan and Options Section**, click on the ▼ to expand all the plan and coverage options. Select the plan and coverage option you wish to enroll in by checking the box to the right of the plan.
   - In the **Total Cost to You** box, the cost of your benefits will update.
   - **Note:** You are automatically enrolled in Core Short Term Disability and Long Term Disability plans.
2. To elect supplemental disability insurance, select the **Buy Up** plans.
3. Click the **Next** button to advance to Additional Benefits.

![Edit Benefits: Disability Insurance Screen](image-url)
B: Open Enrollment (cont.)

Additional Benefits

1. In the Plan and Options Section, click on the to expand all the plan and coverage options.
2. To enroll in voluntary MetLaw Legal services insurance select the Select box.
   ☑️ In the Total Cost to You box, the cost of your benefits will update.
3. Click the Next button to advance to the review tab.

Edit Benefits: Additional Benefits Screen

NOTE: You are automatically enrolled into the Employee Assistance Program and Business Travel Accident insurance, so no action is required in those respective sections.
B: Open Enrollment (cont.)

Review

1. Review all of your elections before you submit for processing. You may go back and make corrections.
2. Click the **Next** button to submit your enrollment to the Benefits Department.
B: Open Enrollment (cont.)

Benefits Confirmation

1. Review the **Benefit Confirmation section page**.
2. You may print your confirmation statement by selecting the **Printable Page button**.
3. Once you have reviewed your elections, click the **Done button**.

The **Benefits Confirmation** page will show you:

- A summary of the benefits plans and coverage level you have enrolled in
- A list of your current dependents
- Beneficiaries- primary and contingent

**Edit Benefits: Benefits Confirmation Screen**
C: Pending Action Items

1. Review the **Pending Action Items** section at the top of the screen.
2. For the plans that have ![image](image), please review the description field for information on the action necessary.
3. You may print your confirmation statement by selecting the **Printable Page** button.
4. Once you have reviewed your elections, click the **Done** button.

### Pending Action Items Panel

#### Uploading a Benefits Related Document

Some pending actions may require documentation be uploaded to Fusion HR. To upload a Benefits-Related Document/ Create a **Document Record**:

1. Click on **Navigator** in the top right corner.
2. Click on **My Portrait**.

### Navigator Dropdown
3. Click on the **Personal Information** card in **My Portrait**.
4. Scroll down to the **Documentation** section, and click on the **Create** button.

![My Portrait Tab](image)

*Image of the My Portrait tab in the Oracle application.*
C: Pending Action Items (cont.)

Uploading a Benefits Related Document (cont.)

5. The **Create Document Record** form will pop-up. Select the type of document from the drop down.

6. Under **Document Details** – complete **Document Name** field with the name of dependent on the document you are providing and **From Date** field with the date of birth or marriage.
C: Pending Action Items (cont.)

Uploading a Benefits Related Document (cont.)

7. Upload an attachment by clicking on the + button. The Attachments form will pop-up.
8. Click Browse and select the document from your files. Enter a title and description for the document.
9. Click on the OK button. The window will close and the new attachment will appear in the Create Document Record window.

10. Click on the OK button. The window will close and the new attachment will appear in the Documentation list.
D: Designate Beneficiaries

1. Click on the **Create** button to add a beneficiary. The **Create Beneficiaries** window will open.

![Beneficiary Organizations: Beneficiary, Trustee or Charitable Organization Panel](image1)

2. Select the **Beneficiary Type** dropdown.
3. Complete the fields for the beneficiary.
4. Click on the **Save** button. The window will close and the new beneficiary will appear in the **Beneficiary Organizations** list.

![Select and Add Beneficiary Designation](image2)
### Quick Tips

<table>
<thead>
<tr>
<th><strong>Help Button</strong></th>
<th>Click on the <a href="#">Question Mark</a> icon to open the Fusion Help tool, which includes helpful information on every screen.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expanded Views</strong></td>
<td>There are two ways to expand the view on your screen, and avoid unnecessary scrolling:</td>
</tr>
<tr>
<td></td>
<td>• Click the <a href="#">arrow</a> and <a href="#">arrow</a> arrows to collapse unwanted panes, upward and outward.</td>
</tr>
<tr>
<td></td>
<td>• Press <a href="#">F11</a> for full screen view</td>
</tr>
<tr>
<td><strong>Timing Out</strong></td>
<td>The Fusion system times out after 30 minutes of inactivity.</td>
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<tr>
<td></td>
<td>• Avoid extended idle time in the middle of an action</td>
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<tr>
<td></td>
<td>• When working in multiple windows, make sure to keep your original Fusion window active, otherwise it will time out even while you are working in secondary Fusion windows</td>
</tr>
<tr>
<td><strong>Browser Back Button</strong></td>
<td>Do not use your browser’s back button when you’re in the middle of a transaction.</td>
</tr>
<tr>
<td></td>
<td>• You will lose information and be forced to restart your work from the last <a href="#">Saved</a> point.</td>
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</tbody>
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