

My Benefits: Enrollment



PAYCOM
UNIVERSITY





My Benefits: Enrollment

One of the biggest perks of working for a company are the benefits they offer. So when it's time to protect your most valuable assets, yourself and your family, it's important to know how to complete the benefit enrollment process, and how to find your coverage information afterward. In this training, we'll cover how to:

- elect or decline coverage (Page 3);
- view coverage information (Page 15); and
- add a qualifying event (Page 16).



Electing or Declining Coverage

During open enrollment, if you're eligible to enroll in benefits, you'll see the Benefit Enrollment option in the My Benefits section. Click on it to begin.

The screenshot displays the Paycom Self-Service portal. At the top, a header bar includes a 'Main Menu' on the left, a user profile for 'FRANK ADAMS' (Executive Sales Representative) in the center, and a 'Help and Settings' gear icon on the right. The 'Main Menu' is a vertical list of icons and labels: Time Management, Time-Off Requests, My Information, My Payroll, My Expenses, Documents and Tasks, My Benefits (highlighted with a dropdown arrow), 2017 Benefit Enrollment (highlighted with a red box), Qualifying Events, Dependents and Beneficiaries, My Current Benefits, My Historical Benefits, Benefit Forms and Links, My Performance, My Personnel Action Forms, Company Information, and My Learning. The main content area is titled 'Self-Service' and features a 3x3 grid of tiles. Each tile has an icon, a title, and a list of options with a dropdown arrow. The tiles are: Time Management (clock icon) with options 'Web Timesheet Read Only' and 'My Punch Change Requests'; Time-Off Requests (calendar icon) with options 'Request Time Off' and 'My Accruals'; My Information (person and document icon) with options 'Address and Contact Information' and 'HR Information'; My Payroll (stack of money icon) with options 'View Pay Stubs' and 'Pay Rates'; My Expenses (piggy bank icon) with options 'Expense Dashboard' and 'Add Expense(s)'; Documents and Tasks (stack of documents with a checkmark icon) with options 'My Documents' and 'Paycom University Courses'; My Benefits (green plus sign icon) with options '2017 Benefit Enrollment' (highlighted with a red box) and 'Qualifying Events'; My Performance (group of people icon) with options 'My Performance Reviews' and 'My Goals'; and My Personnel Action Forms (person and document icon) with option 'My Personnel Action Forms'.



The next screen gives you instructions. Use the Progress Box on the right-hand side to see the benefits you're eligible to enroll in. Later, it will help you keep track of where you're at in the enrollment process, as well as the plans that you've enrolled in or declined.

To begin, select "Start Enrollment."

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[Return to Main Menu](#)

Help and Settings

2017 Benefit Enrollment

You have 6 days to complete enrollment.

Hello Frank
Here are some tips for enrollment.

- 1 Make sure you have all dependent and beneficiary information necessary. If you have not entered dependents before, you will need their social security number and date of birth.
- 2 To get started, click Start Enrollment.
- 3 You also can choose an enrollment section in the progress bar to jump to that particular section.

START ENROLLMENT

Benefit Enrollment

\$0.00

Total Cost

Contact Information

Dependents and Beneficiaries

Employee Life	\$0.00
Spouse Life	\$0.00
Retirement	\$0.00
Medical	\$0.00
Short-Term Disability	\$0.00

[Review Enrollment](#)

If your employer allows it, you can edit your personal information here. When you're finished, select "Next."

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Help and Settings

Contact Information

Employee Name FRANK ADAMS

Birthdate 08/14/1985

Tobacco User? ☒ No ☐ Yes

Primary Phone 405 - 977 - 4456

Street Address 3319 ELLIS WAY

City, State, Zip OKLAHOMA CITY Oklahoma 55555 -

[Previous](#) [Next](#)



Now, you'll see information for any dependents you have on file. You can add new dependents by selecting "Add Dependent." You may also have the option to re-enroll in the benefit plans you had last year.

Family Member (Dependent) Setup

Pre-Enrollment Questions

Do you want to re-enroll in the same benefits you did last year?[?]

☐ Yes ☒ No

Please verify your family members on file.
To add a family member, simply click the 'Add Dependent' button.
You may also add them later once you have learned more about a particular benefit plan and enrolled.

First Name	Last Name	Social Security Number	Gender	Relationship	Birth Date	Documents	Edit	Delete
MARTHA	ADAMS	6544	Female	Spouse	08/14/1980	0		
MARY	ADAMS	1122	Female	Son or Daughter	01/27/2002	0		

Add Dependent

PreviousNext

If you didn't enroll in last year's plans, you'll see the Quick Enrollment screen next. Here, you can select the plans you want to include in the enrollment process and decline the plans you're not interested in. Just keep in mind that, later on, you'll only see the plans in the enrollment process that you chose to include. So if you declined a benefit here, you won't see it in a later step.

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2017 Quick Enrollment

Please make a selection on all plans.

Employee Life

☒ Enroll ☐ Decline

Spouse Life

☒ Enroll ☐ Decline

Retirement

☒ Enroll ☐ Decline

Medical

☒ Enroll ☐ Decline

Short-Term Disability

☒ Enroll ☐ Decline

Next

Benefit Enrollment

\$0.00

Total Cost

☒ Contact Information

☒ Dependents and Beneficiaries

Employee Life

\$0.00

Spouse Life

\$0.00

Retirement

\$0.00

Medical

\$0.00

Short-Term Disability

\$0.00

Review Enrollment



Next, you'll begin the enrollment process for each of the plans you selected to view. Let's walk through a couple of the benefit plans available, starting with a life plan.

For each plan, you can either accept or decline coverage. If you want to view additional plan information, like a form or a link, select "Plan Documents," if it's available.

2017 Benefit Enrollment: Life

☐ Employee Life [Plan Documents](#)

Coverage Amount
\$1,000,000.00
Guaranteed Amount: \$300,000.00

Does the insured use tobacco? ☒ No ☐ Yes

Cost per Pay Period: \$207.69

☐ Decline Coverage

[Previous](#) [Enroll](#)

Benefit Enrollment
\$0.00
Total Cost

✓ Contact Information
✓ Dependents and Beneficiaries

Employee Life	\$0.00
Spouse Life	\$0.00
Retirement	\$0.00
Medical	\$0.00
Short-Term Disability	\$0.00

[Review Enrollment](#)

You can enroll in a benefit by selecting it at the top of the screen. Then, depending on the plan, you may have the option to note if you are a tobacco user. Keep in mind that some plans, such as life insurance or 401(k), may require beneficiaries.

Your dependents automatically display to select as beneficiaries. Clicking "Add Beneficiary" Allows you to add information for someone who's not already listed.

2017 Benefit Enrollment: Life

☒ Employee Life [Plan Documents](#)

Coverage Amount
\$1,000,000.00
Guaranteed Amount: \$300,000.00

Does the insured use tobacco? ☒ No ☐ Yes

Cost per Pay Period: \$207.69

Beneficiaries

Beneficiary/Dependent	Relationship	Primary	Percentage	Secondary	Percentage
MARTHA ADAMS	Spouse	<input type="checkbox"/>	0.00 %	<input type="checkbox"/>	0.00 %
MARY ADAMS	Son or Daughter	<input type="checkbox"/>	0.00 %	<input type="checkbox"/>	0.00 %

[Add Beneficiary](#)

☐ Decline Coverage

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Benefit Enrollment
\$0.00
Total Cost

✓ Contact Information
✓ Dependents and Beneficiaries

Employee Life	\$0.00
Spouse Life	\$0.00
Retirement	\$0.00
Medical	\$0.00
Short-Term Disability	\$0.00

[Review Enrollment](#)



Simply enter their information and select “Add.”

Add Beneficiary

* Indicates Required Field

Relationship
Father or Mother

* First Name
John

Middle Name

* Last Name
ADAMS

SSN
454 - 31 - 3244

Same Address as Employee
☒

* Street
3319 ELLIS WAY

* City
OKLAHOMA CITY

* State
Oklahoma

* Zip Code
55555 -

Phone Number
405 - 852 - 0022

Email Address

Add

After doing so, you’ll choose your primary and secondary beneficiaries. The primary beneficiary is the person who would receive your benefits if something were to happen; while the secondary beneficiary is the person who would receive your benefits if the primary beneficiary died at the time the benefit is to be paid. Keep in mind that you can list the beneficiaries as primary or secondary, but not both.

While you’re making your selections, the Percentage column automatically recalculates to evenly distribute across the beneficiaries selected. You can manually update a percentage, but if you do, be sure the total equals 100 percent.

Beneficiaries					
Beneficiary/Dependent	Relationship	Primary	Percentage	Secondary	Percentage
MARTHA ADAMS	Spouse	<input checked="" type="checkbox"/>	100.00 %	<input type="checkbox"/>	0.00 %
MARY ADAMS	Son or Daughter	<input type="checkbox"/>	0.00 %	<input checked="" type="checkbox"/>	100.00 %
JOHN ADAMS	Father or Mother	<input type="checkbox"/>	0.00 %	<input type="checkbox"/>	0.00 %

When you’re finished, click “Enroll.”

☐ Decline Coverage

Previous

Enroll



If you decide during the enrollment process that you would no longer like to enroll in a plan, you easily can decline coverage, by checking the box next to “Decline Coverage” and then clicking “Decline.”

The screenshot shows the '2017 Benefit Enrollment: Life' page. At the top left is a user profile for Frank Adams, an Executive Sales Representative. To the right is a 'Help and Settings' gear icon. The main heading is '2017 Benefit Enrollment: Life'. Below it is a checkbox labeled 'Decline Coverage' which is checked. At the bottom are 'Previous' and 'Decline' buttons. On the right side, there is a 'Benefit Enrollment' summary box showing a total cost of \$19.01. This box includes a checklist of completed steps: Contact Information, Dependents and Beneficiaries, and Employee Life. A table lists the costs for various plans: Employee Life (\$19.01), Spouse Life (\$0.00), Retirement (\$0.00), Medical (\$0.00), and Short-Term Disability (\$0.00). A 'Review Enrollment' button is at the bottom of this summary box.

Benefit Enrollment	
\$19.01	
Total Cost	
✓ Contact Information	
✓ Dependents and Beneficiaries	
✓ Employee Life	\$19.01
Spouse Life	\$0.00
Retirement	\$0.00
Medical	\$0.00
Short-Term Disability	\$0.00
Review Enrollment	

At any time, you can exit and continue enrollment later and your progress will be saved. Once you’ve logged back in, simply select “Continue Enrollment.”

The screenshot shows the '2017 Benefit Enrollment' page. At the top left is the same user profile for Frank Adams. To the right is a 'Help and Settings' gear icon. The main heading is '2017 Benefit Enrollment'. Below it is a yellow warning banner that says 'You have 15 days to complete enrollment.' Below the banner, on the left, is a 'Hello Frank' greeting followed by 'Here are some tips for enrollment.' and a numbered list of three tips. On the right, there is a large green button with the text 'CONTINUE ENROLLMENT' and a right-pointing arrow.

2017 Benefit Enrollment

Warning: You have 15 days to complete enrollment.

Hello Frank


Here are some tips for enrollment.

- 1 Make sure you have all dependent and beneficiary information necessary. If you have not entered dependents before, you will need their social security number and date of birth.
- 2 To get started, click Continue Enrollment.
- 3 You also can choose an enrollment section in the progress bar to jump to that particular section.


CONTINUE ENROLLMENT ➔



After doing so, you'll pick up where you left off. Let's check out options for a retirement plan. First, check the box next to the plan name to enroll in or decline the plan, then enter the percentage or dollar amount you would like to contribute in the Per Pay Period Deduction Amount field. The "Percentage of Check" and "Employer Match" amounts will pre-populate automatically based on the number you enter.



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Help and Settings 

2017 Benefit Enrollment: Retirement

☒ Retirement Plan Documents


Per Pay Period Deduction Amount

Percentage of Check 2.84%

Employer Match \$0.00

After selecting or adding beneficiaries, click "Enroll."

Employer Match \$0.00

Beneficiaries 

Beneficiary/Dependent	Relationship	Primary	Percentage	Secondary	Percentage
MARTHA ADAMS	Spouse	<input checked="" type="checkbox"/>	<input type="text" value="100.00"/> %	<input type="checkbox"/>	<input type="text" value="0.00"/> %
MARY ADAMS	Son or Daughter	<input type="checkbox"/>	<input type="text" value="0.00"/> %	<input checked="" type="checkbox"/>	<input type="text" value="100.00"/> %
JOHN ADAMS	Father or Mother	<input type="checkbox"/>	<input type="text" value="0.00"/> %	<input type="checkbox"/>	<input type="text" value="0.00"/> %

Add Beneficiary

☐ Decline Coverage

Previous Enroll



Finally, let's check out your options with medical plans. If your employer allows, you may be able to compare plan details to help you decide which plan is best for you. Here, you can see the major benefits of the health plans on the right-hand side. If you want to see a side-by-side comparison, click "Compare All."

2017 Benefit Enrollment: Medical

Compare All

☐ HMO Medical Plan

☐ Compare

Plan Documents

Choose Your Coverage Level

<input checked="" type="radio"/> Employee Only	\$100.00	Attribute	In-Network	Out-of-Network
<input type="radio"/> Employee and Spouse	\$200.00	Major Services	2000.00	3000.00
<input type="radio"/> Employee and Children	\$300.00	Copayments	40.00	50.00
<input type="radio"/> Employee and Family	\$400.00	Emergency Room Services	700.00	800.00

☐ PPO Medical Plan

☐ Compare

Plan Documents

Choose Your Coverage Level

<input checked="" type="radio"/> Employee Only	\$100.00	Attribute	In-Network	Out-of-Network
<input type="radio"/> Employee and Spouse	\$150.00	Major Services	1000.00	2000.00
<input type="radio"/> Employee and Children	\$450.00	Copayments	20.00	40.00
<input type="radio"/> Employee and Family	\$500.00	Emergency Room Services	200.00	400.00

☐ Decline Coverage

Previous

Enroll

By doing so, you'll see a pop-up window with the information.

Compare Plans		
In-Network		
Attribute	HMO Medical Plan (HMO1)	PPO Medical Plan (PPO1)
Major Services	2000.00	1000.00
Copayments	40.00	20.00
Emergency Room Services	700.00	200.00
Out-of-Network		
Attribute	HMO Medical Plan (HMO1)	PPO Medical Plan (PPO1)
Major Services	3000.00	2000.00
Copayments	50.00	40.00
Emergency Room Services	800.00	400.00



If you have more than two options, and you've already narrowed your selection down, you can compare the specific plans by checking the "Compare" boxes next to the plans. Then, click "Compare Selected" on the top left-hand side of the screen. You'll be able to view the details of the plans you selected.

2017 Benefit Enrollment: Medical

Compare Selected

☐ HMO Medical Plan

☒ Compare

Plan Documents

Choose Your Coverage Level

		Attribute	In-Network	Out-of-Network
<input checked="" type="radio"/> Employee Only	\$100.00			
<input type="radio"/> Employee and Spouse	\$200.00	Major Services	2000.00	3000.00
<input type="radio"/> Employee and Children	\$300.00	Copayments	40.00	50.00
<input type="radio"/> Employee and Family	\$400.00	Emergency Room Services	700.00	800.00

☐ PPO Medical Plan

☒ Compare

Plan Documents

Choose Your Coverage Level

		Attribute	In-Network	Out-of-Network
<input checked="" type="radio"/> Employee Only	\$100.00			
<input type="radio"/> Employee and Spouse	\$150.00	Major Services	1000.00	2000.00
<input type="radio"/> Employee and Children	\$450.00	Copayments	20.00	40.00
<input type="radio"/> Employee and Family	\$500.00	Emergency Room Services	200.00	400.00



If you elect to enroll in a medical, dental or vision plan, or any other plan with coverage levels, you'll need to choose the specific coverage level you want. If you choose a coverage level with dependents, you'll see a screen similar to the one below. You'll need to check the boxes next to the dependents who will be covered by the plan. If you want to cover a dependent who is not listed here, you can add them from this screen by selecting the "Add dependent" button.

When you're finished, click "Enroll."

2017 Benefit Enrollment: Medical

[Compare All](#)

☒ **HMO Medical Plan** ☐ Compare [Plan Documents](#)

Choose Your Coverage Level

	Attribute	In-Network	Out-of-Network
<input type="radio"/> Employee Only			
	Major Services	2000.00	3000.00
	Copayments	40.00	50.00
	Emergency Room Services	700.00	800.00
<input checked="" type="radio"/> Employee and Spouse			
	Major Services	2000.00	3000.00
	Copayments	40.00	50.00
	Emergency Room Services	700.00	800.00
<input type="radio"/> Employee and Children			
	Major Services	2000.00	3000.00
	Copayments	40.00	50.00
	Emergency Room Services	700.00	800.00
<input type="radio"/> Employee and Family			
	Major Services	2000.00	3000.00
	Copayments	40.00	50.00
	Emergency Room Services	700.00	800.00

Dependents

Select	First Name	Last Name	Social Security Number	Gender	Relationship	Birth Date	Dependent Age on Coverage Start Date	Documents
<input type="checkbox"/>								
<input checked="" type="checkbox"/>	MARTHA	ADAMS	6544	Female	Spouse	08/14/1980	36	0

[Add Dependent](#)

☐ **PPO Medical Plan** ☐ Compare [Plan Documents](#)

Choose Your Coverage Level

	Attribute	In-Network	Out-of-Network
<input checked="" type="radio"/> Employee Only			
	Major Services	1000.00	2000.00
	Copayments	20.00	40.00
	Emergency Room Services	200.00	400.00
<input type="radio"/> Employee and Spouse			
	Major Services	1000.00	2000.00
	Copayments	20.00	40.00
	Emergency Room Services	200.00	400.00
<input type="radio"/> Employee and Children			
	Major Services	1000.00	2000.00
	Copayments	20.00	40.00
	Emergency Room Services	200.00	400.00
<input type="radio"/> Employee and Family			
	Major Services	1000.00	2000.00
	Copayments	20.00	40.00
	Emergency Room Services	200.00	400.00

☐ **Decline Coverage**

[Previous](#) [Enroll](#)



Continue through the enrollment process by choosing whether you would like to enroll or decline coverage for all the plans you've selected. Remember, you can keep track of which benefits you have elected or declined from the Progress Box. Green check marks mean you are enrolled, and you'll see the cost in the column to the right of the plan name. A red "X" means you declined the plan. You can edit a plan by clicking on its name.

Benefit Enrollment

\$269.01

Total Cost

✓ Contact Information

✓ Dependents and Beneficiaries

✓ Employee Life

\$19.01

✗ Spouse Life

\$0.00

✓ Retirement

\$50.00

✓ Medical

\$200.00

Short-Term Disability

\$0.00

Review Enrollment

When you're done, you'll arrive at the Benefit Plan Selection Review screen, where you'll see a summary of the plans you've enrolled in. If you need to make an adjustment, select the plan from the side bar. Otherwise, check "Finalize."

paycom

Client Login Log Out

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FRANK ADAMS

HR Manager

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Return to Main Menu

Help and Settings

Benefit Plan Selection Review

View Detailed Enrollment

Employee Selected Benefits

Medical Blue Cross Blue Shield

Employer Cost

\$54.82

Pre-Tax

Yes

Coverage

Employee & Children EE + 2

Effective Date

01/01/2018

Status

In Progress

\$24.24

Dental Plan

Employer Cost

\$178.92

Pre-Tax

Yes

Coverage

Employee and Children

Effective Date

01/01/2018

Status

In Progress

\$100.00

401K Retirement

Employer Cost

\$0.00

Pre-Tax

Yes

Effective Date

01/01/2018

Status

In Progress

\$3.00

Benefit Enrollment

\$127.24

Total Cost

✓ Contact Information

✓ Dependents and Beneficiaries

✓ Medical

\$24.24

✓ Dental

\$100.00

✓ Retirement

\$3.00

Review

Finalize

13



A pop-up window will ask you to confirm if you want to complete enrollment. *Note: All plans not enrolled in will be declined.* Click "Sign and Submit" to continue.

The screenshot shows the Paycom interface. A pop-up window titled "Enrollment Submission" is centered, asking the user to review their enrollment and press "sign and submit" to complete it. The background shows the "Benefit Plan Selection Review" page for Frank Adams. The page lists selected benefits: Medical Blue Cross Blue Shield and Dental Plan. A summary on the right shows a total cost of \$127.24 for Medical, Dental, and Retirement.

Benefit	Employer Cost	Pre-Tax	Effective Date	Status	Coverage	Employee & Children	Cost
Medical Blue Cross Blue Shield	\$54.82	Yes	01/01/2018	In Progress	Employee & Children	EE + 2	\$24.24
Dental Plan	\$176.92	Yes	01/01/2018	In Progress	Employee and Children		\$100.00

Benefit Enrollment Summary:
Total Cost: \$127.24
✓ Contact Information
✓ Dependents and Beneficiaries
✓ Medical: \$24.24
✓ Dental: \$100.00
✓ Retirement: \$3.00

When you click "Sign and Submit" you will be brought to the Benefit Confirmation screen. From here, you can print your selections in case you want to review them at a later date.

The screenshot shows the "Benefit Confirmation / Deduction Authorization" screen for Frank Adams. The page displays a congratulatory message and a recap of the enrollment. A "Print" button is visible. The page includes sections for Employee Information, Company Information, and Job Class.

Benefit Confirmation / Deduction Authorization - ADAMS, FRANK

Employee Information

Name	Date of Birth	Primary Phone	Secondary Phone	Address
ADAMS, FRANK	11/30/-0001	(000) 000 - 0000	(000) 000 - 0000	123 S. MAIN ST. OKLAHOMA CITY, OK 74018

Employee ID	Hire Date	Gender	E-mail Address
L009	07/08/2015	M	frank.adams@paycomonline.com

Company Name	Location(s)	Department Code	Reason(s) for Completing Form
ABC OF OKC	OK.CO	800	Open Enrollment

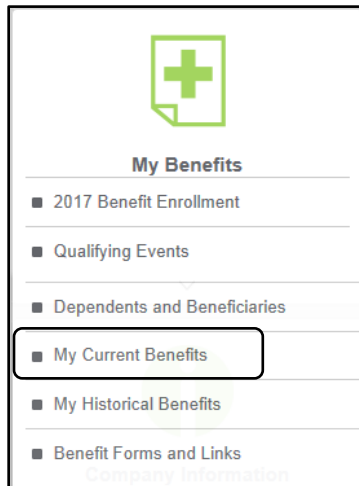
Job Class	Title
Full Time	HR Manager

Benefit Enrollment Summary:
Total Cost: \$127.24
✓ Contact Information
✓ Dependents and Beneficiaries
✓ Medical: \$24.24
✓ Dental: \$100.00
✓ Retirement: \$3.00
[Review](#)




Viewing Coverage Information


After you've enrolled in benefits, you can always access your plan information from the "My Current Benefits" section on the Main Menu.



Here, you can view and print your information.





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Help and Settings 

My Current Benefits

Current 2017 Benefits

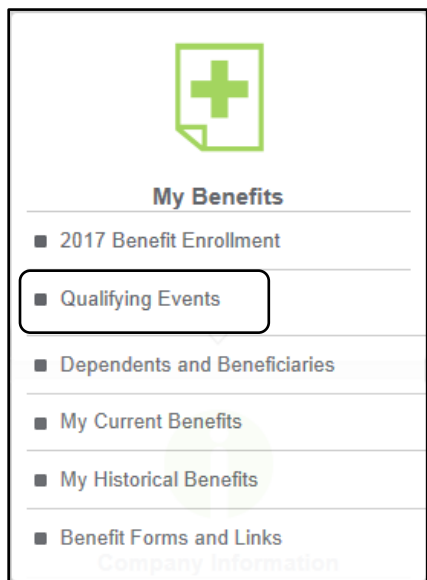
Employee Life	Employer Cost \$0 Pre-Tax Yes Effective Date 03/01/17 Status Requested	Coverage \$91520.00 \$19.01		Retirement	Employer Cost \$0 Pre-Tax Yes Effective Date 03/01/17 Status Requested	\$1300.00 Estimated Annual Contribution \$50.00	
HMO Medical Plan	Employer Cost \$0.00 Pre-Tax Yes Effective Date 03/01/17 Status Requested	Coverage Employee and Spouse \$200.00					

View/Print Confirmation



Adding a Qualifying Event

Change is inevitable. So if you experience a life change, like a recent marriage or birth of a baby, you are eligible to change your benefit plans by entering something called a qualifying event. To do this, you'll select "Qualifying Events" from the My Benefits section on the Main Menu.



Use the drop-down to select the qualifying event type. After that, enter the date and any details. You may also need to upload supporting documents, such as a marriage or birth certificate. When you're done, click "Update."

Add Qualifying Event

* Indicates Required Field

* Choose Qualifying Event Type ?

* Event Date ?

Event Note ?

Birth

01/01/2017

Documentation Information

Choose File(s) to Upload ?


Browse...

Files	Size	Remove
No Records Found		


Update



The event will display the information you entered, and you'll be able to see the last day that you can make changes to the plan.




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Help and Settings 

Qualifying Events

Add Qualifying Event

Qualifying Events							
Event Type ⌵	Date Entered	Created By	Event Date	Last Day for Changes	Status	View/Edit	Delete
Birth	02/23/2017	05683A016	01/01/2017	01/31/2017	Auto Approved		

In Conclusion

Now you know how to view, enroll in or decline benefits, as well as add qualifying events and view historical benefits. Be sure to earn your certification by watching the training video and answering quiz questions.