

Employee Change Non-QLE Benefits

The procedure to make mid-year changes to benefits that do not require a qualifying life event. Employees are able to change some benefits at any time during the year. These benefits include, HSA, parking, transit, etc. If your company offers benefits that may be changed mid-year, those benefits will be listed and accessible to you when you request to change your benefits.

Notes

Reminder: Employees do not have access to support.

Purpose: While this solution is from the employee's point of view and contains images from an employee login, do not copy the material or the browser address. Use this information to (a) provide assistance to an employee or (b) download and provide .pdf version (see FILE ATTACHMENT below) and/or if available, YouTube link (see VIDEO below) to an employee so they may use them.

Instructions

The following Plan Types do not require a QLE: 401K, Roth 401K, 401K Contribution, 403b, 529, Benefit 1, Benefit 2, Cost, Discount Program, Financial Well-Being, Fitness, Health Savings Account (HSA), Identity Theft, Identity Theft Assist, Legal, Parking, Pet, Phone, Pre-paid Legal, Retirement, Simple IRA/408p, Transit, Travel Assistance, and Vacation Buy Back.

If the benefit requires a qualifying life event, see Employee Add Qualifying Life Event.

From Dashboard > Benefits

The screenshot shows the 'ease' portal interface. On the left is a sidebar with navigation links: Dashboard, Profile, Benefits (highlighted), Documents, Time Off, Calendar, and Directory. The main content area is titled 'Benefits Information' and displays a table of benefits. A modal window titled 'Change My Benefits' is open in the center. The modal has a 'Close' button in the top right. Inside the modal, there is a section 'I would like to *' with a dropdown menu. The dropdown menu is open, showing three options: 'Select', 'Change Coverage' (highlighted in orange), and 'Change Beneficiaries'.

Benefits Information		Cost Details
Plan		
Medical		\$0.00
SBC		
Health Savings Account	Waived: Jeremy Morgan - 3/1/2020	\$0.00
Dental	Terminated: Jeremy Morgan - 3/1/2020 Kelly Morgan - 3/1/2020 Previous Employee Cost: \$25.00, Pre-Tax	\$0.00
Life/AD&D	Enrolled: Jeremy Morgan - 3/1/2020 - \$10,000.00 (Requested: \$50,000.00) Beneficiaries: Lucy Morgan - Primary - 100% Kelly Morgan - Secondary - 100%	\$0.00

1. Click **Change My Benefits**.
2. From *I would like to*, choose **Change Coverage**.

The screenshot shows the 'ease' portal interface. The 'Change My Benefits' modal is still open. The dropdown menu now shows 'Change Coverage' selected. Below this, there is a section 'Did you have a Qualifying Life Event? *' with a dropdown menu showing 'No' selected. At the bottom of the modal, there is a 'Continue' button. A note states: 'Note: Changes you make will be Effective on 4/1/2020'.

Benefits Information		Cost Details
Plan		
Medical		\$0.00
SBC		
Health Savings Account		\$0.00
Dental	Jeremy Morgan - 3/1/2020 Kelly Morgan - 3/1/2020 Previous Employee Cost: \$25.00, Pre-Tax	\$0.00
Life/AD&D	Enrolled: Jeremy Morgan - 3/1/2020 - \$10,000.00 (Requested: \$50,000.00) Beneficiaries: Lucy Morgan - Primary - 100% Kelly Morgan - Secondary - 100%	\$0.00

3. For *Did you have a qualifying event?*, choose **No**.
4. Note date that changes you make will take effect.
5. Click **Continue**.

- 1 Profile
- 2 Dependents
- 3 Medicare
- 4 **Benefits**
- Health Savings Account
- 5 Beneficiaries
- 6 Summary
- 7 Sign Forms
- 8 Marketplace
- 9 Finish

Health Savings Account Plan

Specify your coverage

Select Enrolled ✓ or Waived ✕ for each eligible member below.

Jeremy Morgan
Employee

Enrolled ✓ ✕

Annual Contribution Details

Your Contribution *

\$500.00

Your annual contribution cannot exceed \$3,500.00. Deductions will be based off of 24 deduction periods.

Benefits Summary

Employee Cost Per Pay Period
(Semi-Monthly)

Health Savings Account	\$20.83
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Total **\$20.83**
Per Pay Period (Semi-Monthly)

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6. From left navigation, choose **Benefits**.
7. Note those listed in left navigation.
 - These are the benefits available which you can change at any time during the year.
8. Make changes and click **Continue** until you have completed all changes.
9. If benefit being changed requires **Beneficiary**, review/update as needed.
10. **Sign Forms** and **Finish**.
 - For more information about enrollment, see Employee Enrollment Experience.