

Purpose

Use this procedure to create an Annual Enrollment changing a previously enrolled plan .

Scenario

A Staff Member decides to change his current health enrollment plan and changes it for a new one.

Trigger

Perform this procedure when *to be completed*.

Prerequisites

- *To be completed*

Menu Path

Use the following menu path(s) to begin this transaction:

- ESS ➔ Benefits and Payments ➔ Annual Enrollment

Transaction Code

ESS

Helpful Hints

- The R/O/C columns in the Field Description tables in the procedure section, defines whether the field is **Required (R)**, **Optional (O)**, **Conditional (C)**.

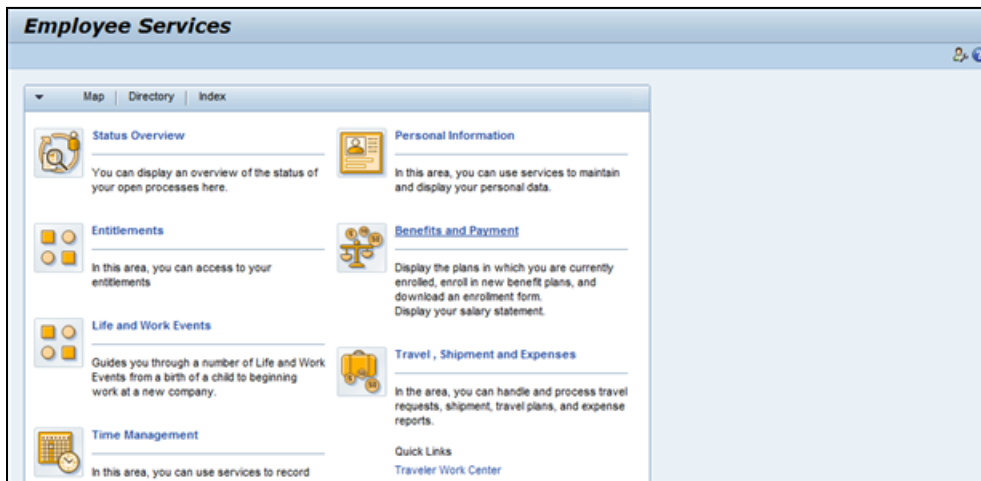
Role(s)

- Staff Member

Procedure

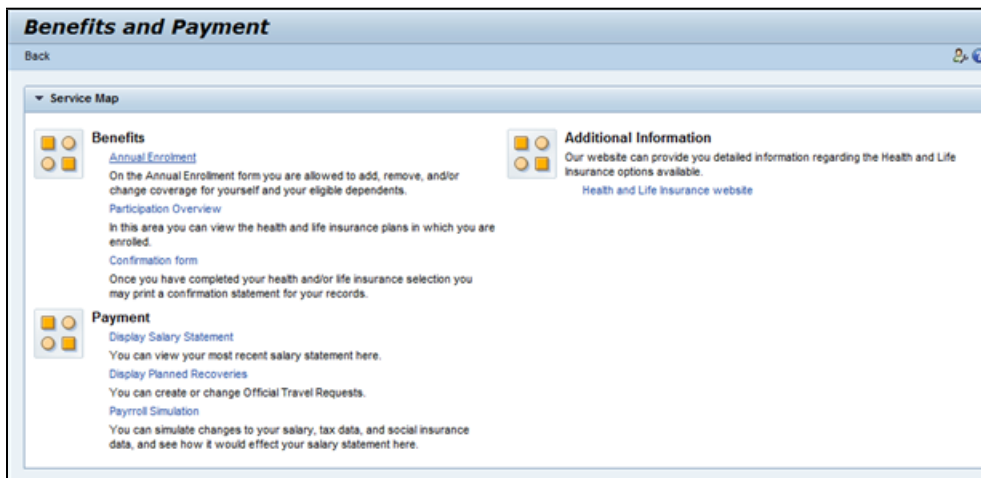
1. Login in Umoja using your user credentials.

Employee Services



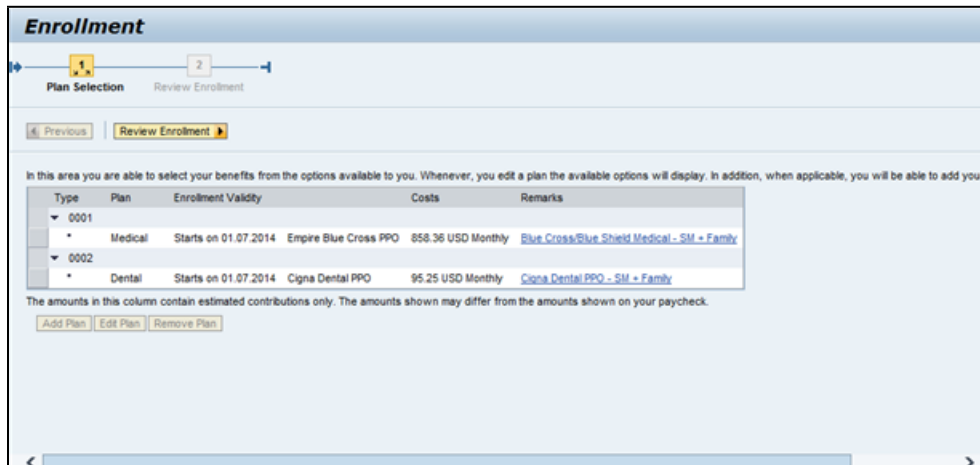
2. Click [Benefits and Payment](#).

Benefits and Payment



3. Click [Annual Enrolment](#).

Enrollment



Enrollment

1 Plan Selection 2 Review Enrollment

Previous Review Enrollment

In this area you are able to select your benefits from the options available to you. Whenever, you edit a plan the available options will display. In addition, when applicable, you will be able to add your c

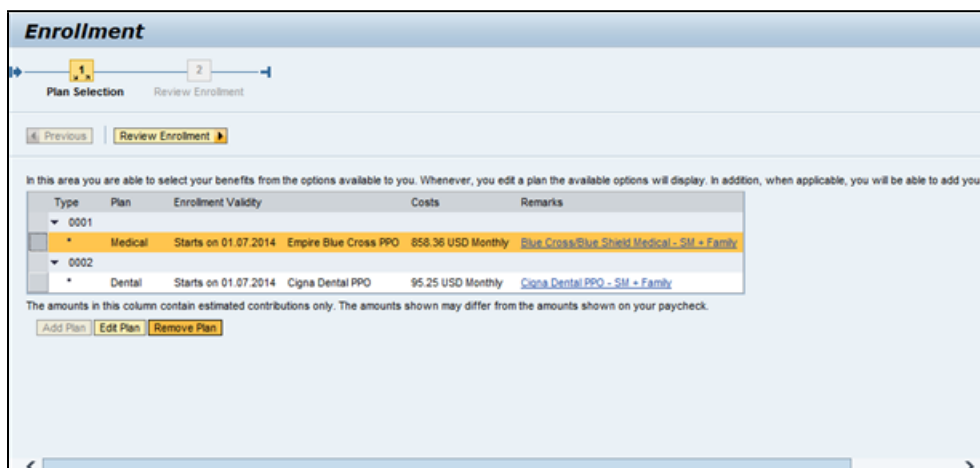
Type	Plan	Enrollment Validity	Costs	Remarks
0001	Medical	Starts on 01.07.2014	Empire Blue Cross PPO 858.36 USD Monthly	Blue Cross/Blue Shield Medical - SM - Family
0002	Dental	Starts on 01.07.2014	Cigna Dental PPO 95.25 USD Monthly	Cigna Dental PPO - SM - Family

The amounts in this column contain estimated contributions only. The amounts shown may differ from the amounts shown on your paycheck.

Add Plan Edit Plan Remove Plan

4. Click  to select the type of insurance.

Enrollment



Enrollment

1 Plan Selection 2 Review Enrollment


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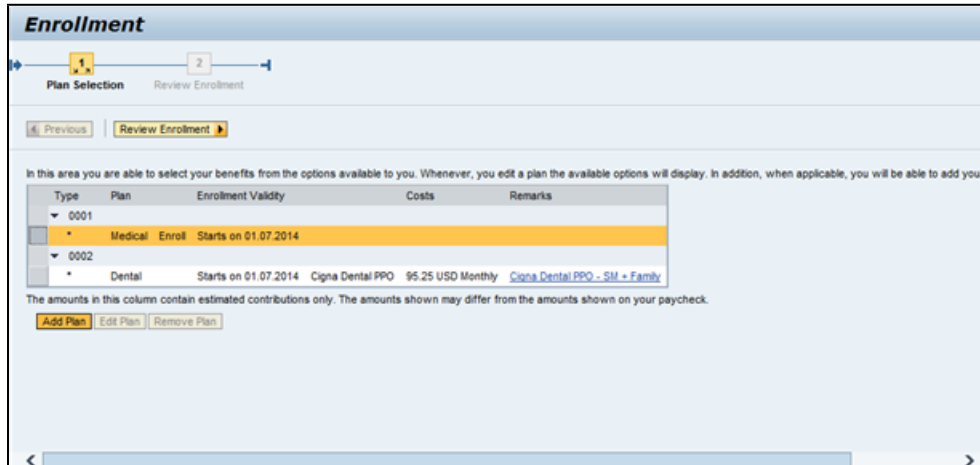
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Add Plan Edit Plan Remove Plan

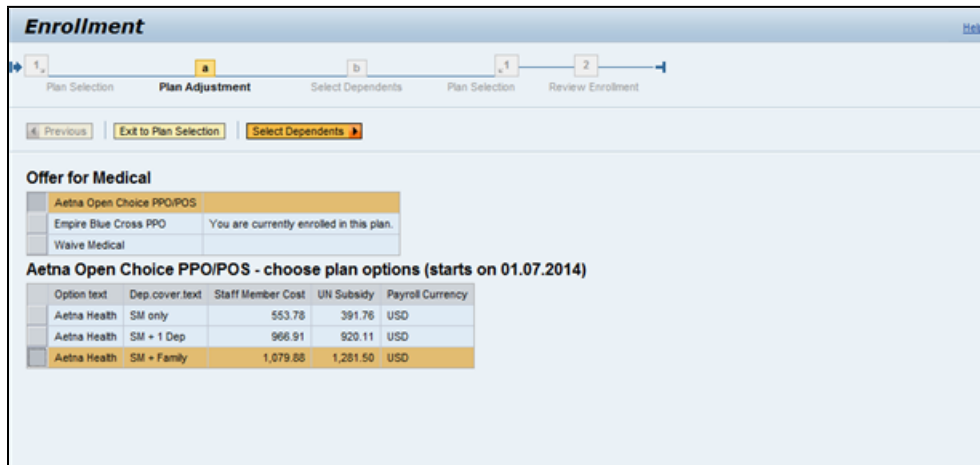
5. Click **Remove Plan** to remove an existing insurance plan.
6. Click  to select the insurance plan.

Enrollment



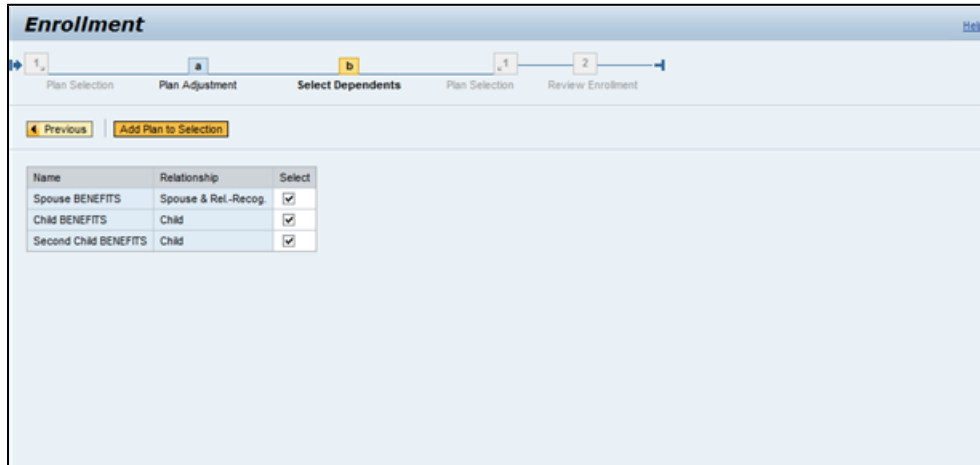
7. Click **Add Plan** to start the new enrollment process.
8. Click to select the new plan's options.

Enrollment



9. Click **Select Dependents** to select the appropriate dependants.
10. Check Spouse BENEFITS.
11. Check Child BENEFITS.
12. Check Second Child BENEFITS.

Enrollment



Enrollment [Help](#)

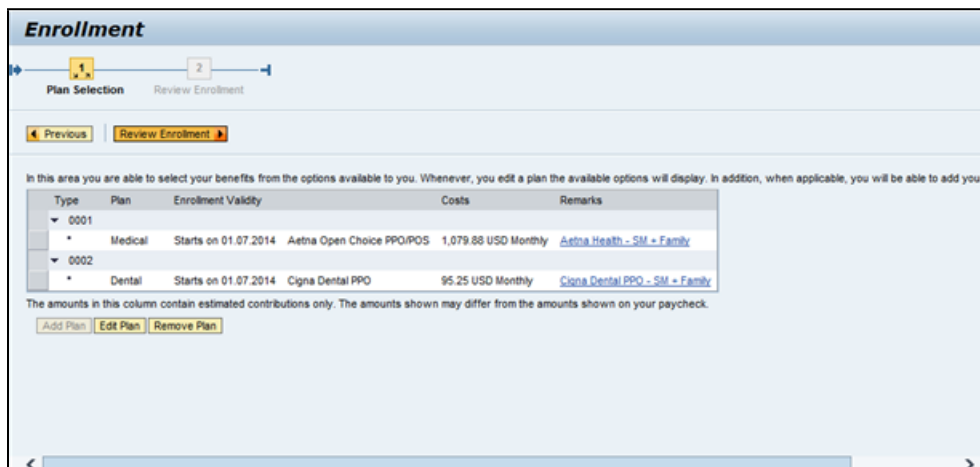
1. Plan Selection a. Plan Adjustment **b. Select Dependents** c. Plan Selection 2. Review Enrollment

◀ Previous Add Plan to Selection

Name	Relationship	Select
Spouse BENEFITS	Spouse & Rel.-Recog.	<input checked="" type="checkbox"/>
Child BENEFITS	Child	<input checked="" type="checkbox"/>
Second Child BENEFITS	Child	<input checked="" type="checkbox"/>

13. Click **Add Plan to Selection** to add the insurance plan.

Enrollment



Enrollment

1. Plan Selection 2. Review Enrollment

◀ Previous Review Enrollment ▶

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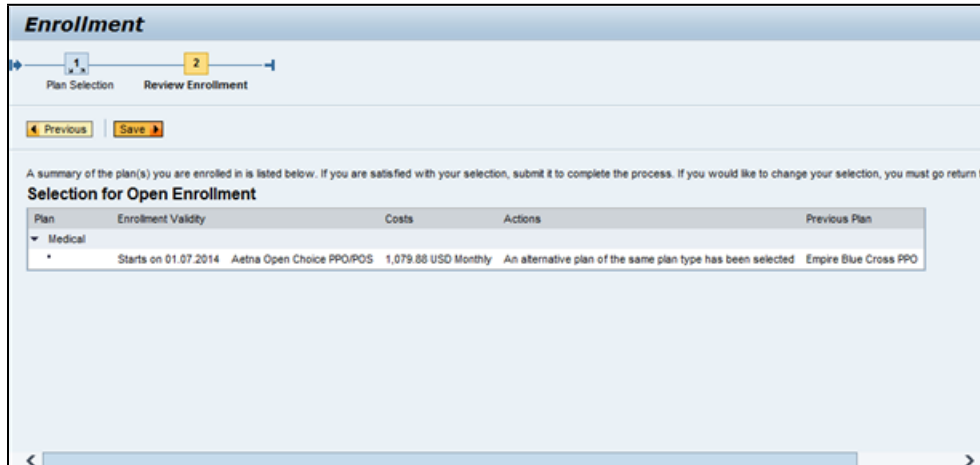
Type	Plan	Enrollment Validity	Costs	Remarks
0001	Medical	Starts on 01.07.2014	Aetna Open Choice PPO/PQS 1,079.88 USD Monthly	Aetna Health - SM - Family
0002	Dental	Starts on 01.07.2014	Cigna Dental PPO 95.25 USD Monthly	Cigna Dental PPO - SM - Family

The amounts in this column contain estimated contributions only. The amounts shown may differ from the amounts shown on your paycheck.

Add Plan Edit Plan Remove Plan

14. Click **Review Enrollment** to review the enrolled insurance plans.

Enrollment



Enrollment

1 Plan Selection 2 **Review Enrollment**

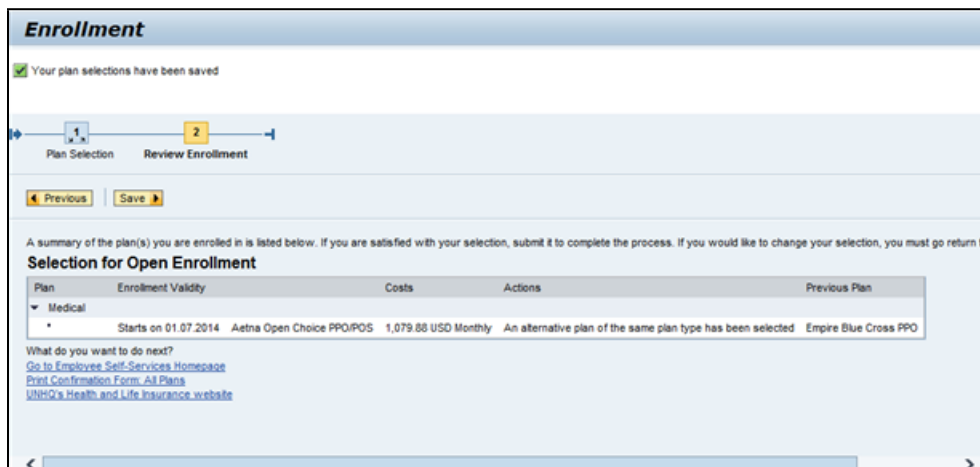
Previous Save

A summary of the plan(s) you are enrolled in is listed below. If you are satisfied with your selection, submit it to complete the process. If you would like to change your selection, you must go return to Selection for Open Enrollment

Plan	Enrollment Validity	Costs	Actions	Previous Plan
Medical	Starts on 01.07.2014	Aetna Open Choice PPO/POS 1,079.88 USD Monthly	An alternative plan of the same plan type has been selected	Empire Blue Cross PPO

- Click **Save** to submit the insurance plan enrollment.

Enrollment



Enrollment

Your plan selections have been saved

1 Plan Selection 2 **Review Enrollment**

Previous Save

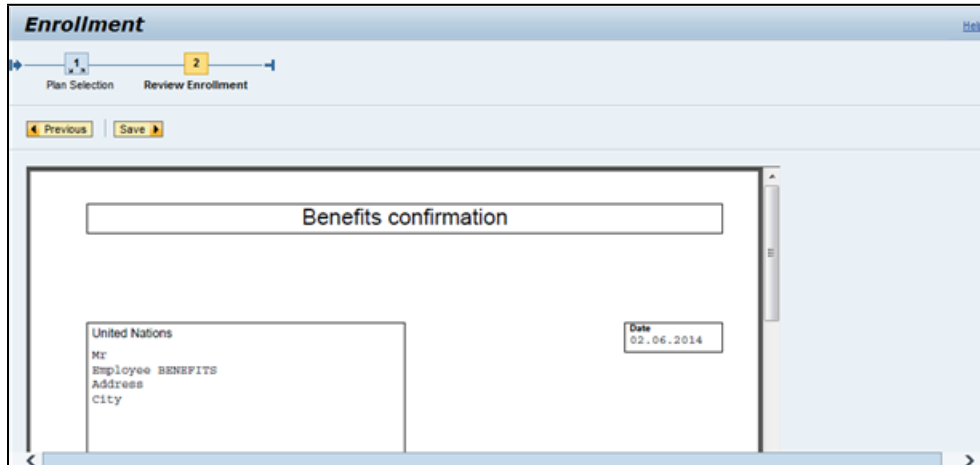
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What do you want to do next?
[Go to Employee Self-Services Homepage](#)
[Print Confirmation Form: All Plans](#)
[UNHC's Health and Life Insurance website](#)

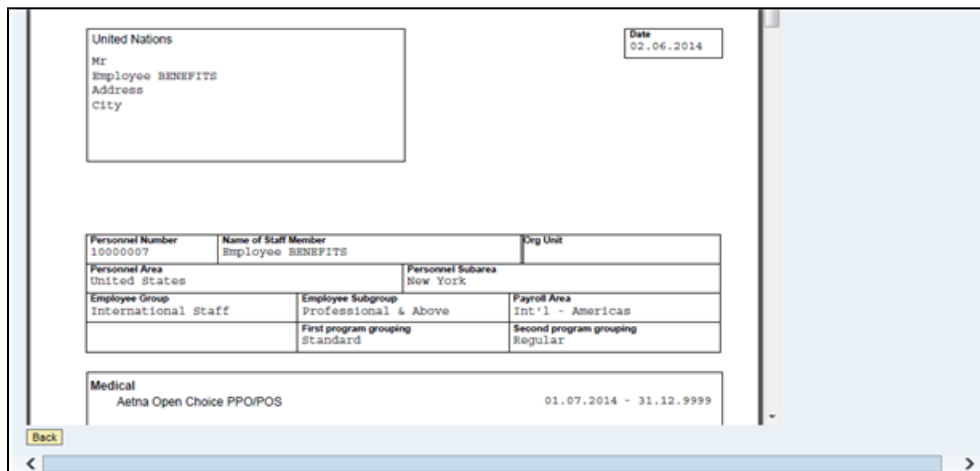
- Your plan selections have been saved.
- Click [Print Confirmation Form: All Plans](#) to print the insurance plans in a PDF file.

Enrollment



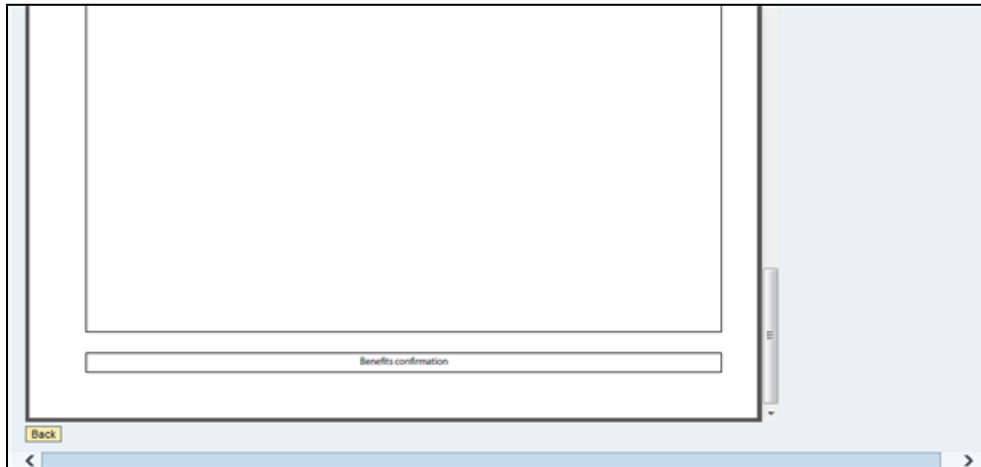
18. Click  to scroll down the ESS screen.

Enrollment



19. Click  to scroll down the PDF file and review all the details.

Enrollment



20. The PDF file has been entirely reviewed

Result

You have created an Annual Enrollment changing a previously enrolled plan.