

NEOGOV

Benefits Enrollment Guide for HR Administrators

Last revised: 6/13/2023

Table of Contents

Preface	3
Overview	4
Employees	5
Maintain Employee Profiles	6
Manage Employee Benefits	8
Adding Plans	9
Editing Plans	12
Benefits Field Descriptions	15
Define Benefit Event Types	16
Managing Event Types	16
Managing Enrollments	20
Dashboard Sections	21
Creating a Mass Open Enrollment	24
Editing Event Details	27
Settings Tab	28
Description Tab	30
Plans Tab	31
Editing an Open Enrollment Period	33
Processing Enrollments	35
Processing Mass Open Enrollment	39
Managing Life/Work Events	44
Creating an Event	44
Editing Event Details	46
Removing an Event	49
Processing an Event	51
Appendix	54

Preface

Any modifications to this document, as the document exists within NEOGOV's body of documentation, are the sole responsibility of the entity modifying the document. By making any change to this document, you agree that modifications and unchanged portions of the document are your sole responsibility, comply with legal and regulatory requirements, comply with the terms of the Service Agreement between you and NEOGOV, and you further agree to update the document as product changes are released reflecting the author of the changes.

Overview

This document describes how HR Administrators (HR admins) complete these enrollment tasks for employees in NEOGOV.

- Maintain and manage employee benefits.
- Define benefits event types.
- Record life or work events.
- Process enrollments.
- Manage Open Enrollments.



Important: Use the [Mass Open Enrollment](#) process to create an Open Enrollment.

Employees

The **Employees (IPEPDL)** screen allows HR admins to view and edit an employee's details.

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status
10		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active
12		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active
13		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active

Click **Employees** from the **Benefits Dashboard** to access the screen, or search for **Page Code IPEPDL**.

Open Enrollment Summary [Create Open Enrollment](#)

Active Open Enrollments

Annual Fall Open Enrollment
4 Total Employees
 Election Close: April 28th, 2023 | Time Remaining: 16 days

0 Processed | 1 Submitted | 0 In Progress | 3 Not Started

[View Event](#) | [Edit Event Details](#)

[View All Open Enrollment Events](#)

Maintain Employee Profiles

To add or edit personal information for the employee, do the following.

1. Search for an employee using filters.
 - Results display as you enter the search criteria.
 - You may filter your search results by **Active**, **Inactive**, and **All** employees.
 - You may also scroll through the list.
2. Select the employee and click the pencil icon (**Edit record**).

Employees

Filter by: Active

Employee #	Employee Name	Position	Department	Unit	Group	Work Rule	Status
10		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active
12		101 - Executive Assistant	ADMIN - Administration	NON_UNION	FULL TIME	CH FT	Active

3. From the **Contacts** tab, click the **Add** or **Edit** links in the **Emergency Contact(s)**, **Beneficiaries**, **Dependents**, or **Other** tiles.

← Back To Employee list

Executive Assistant
Administration

Personal Assignments **Contacts** Pay History Time Off Direct Deposit Tax Withholdings

Emergency Contact(s)

Emergency Contact(s) + Add

You have not added an Emergency Contact.

+ Add Emergency Contact

4. Complete the information for each field then click **Save**.

Add Other Contact

Relationship

PERSONAL DETAILS

First Name *

Last Name *

Gender

Date of Birth

S.S.N. Student Disabled

CONTACT INFORMATION

Address 1

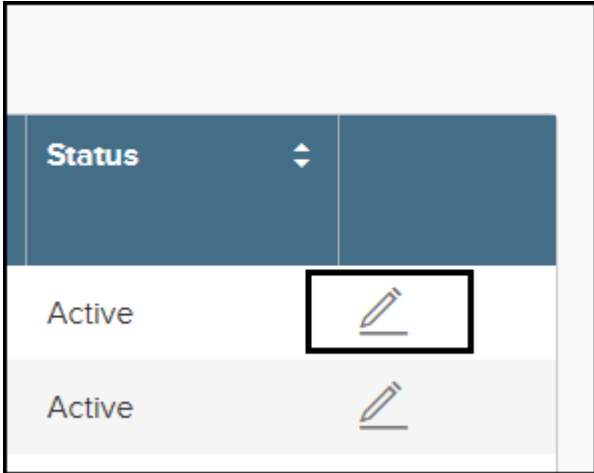
Address 2

City State Country Zip Code

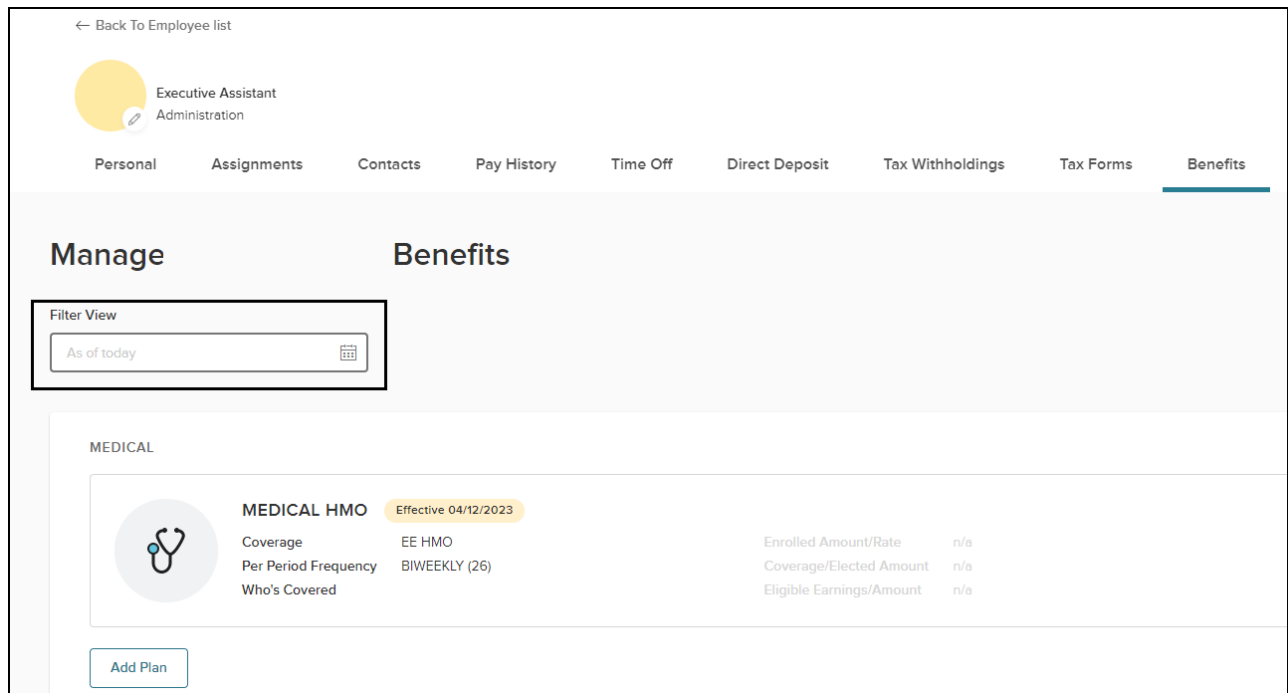
Manage Employee Benefits

HR admins can view and update an employee’s benefits elections any time outside an enrollment window on the **Employees (IPEPDL)** screen.

1. Locate the desired employee and click the pencil icon (**Edit record**).



2. Under the **Benefits** tab, locate the desired plan.
 - Use Filter **View** to locate plans by date.
 - If the employee is currently enrolled in benefit elections, NEOGOV displays all election information.



NEOGOV uses the coverage modal to add or edit plan information. Some fields on this modal automatically update based on earning or deduction setup (see [Benefits Field Descriptions](#)).

Add Dental Plan
Cancel Save

<p>*Plan</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="Q DENTAL"/>	<p>*Coverage</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="EE DENTAL"/>	<p>*Coverage Effective Date</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="04/12/2023"/>
<p>*Status</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="Enrolled"/>	<p>*Frequency</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="Q BIWEEKLY (26)"/>	<p>Calculation Rule</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text"/>
<p>Eligibility Start</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="10/01/2022"/>	<p>Premium Start</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="04/12/2023"/>	<p>Flat Amount / Rate</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text"/>
<p>Eligibility End</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="12/31/3999"/>	<p>Premium End</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text" value="12/31/3999"/>	<p>Coverage/Elected Amount</p> <input style="width: 90%; border: 1px solid #ccc; padding: 2px 5px;" type="text"/>

Adding Plans

NEOGOV will display any plan that an employee is currently enrolled in.

MEDICAL

MEDICAL HMO Effective 04/12/2023

Coverage	EE HMO	Enrolled Amount/Rate	n/a
Per Period Frequency	BIWEEKLY (26)	Coverage/Elected Amount	n/a
Who's Covered	Person Human	Eligible Earnings/Amount	n/a

[View Details](#)


ER Contribution	EE Deduction
\$160.19	\$0.00
Per Pay Period	Per Pay Period

Add Plan

If the employee is not enrolled in a plan, NEOGOV displays this message.

DENTAL

No elections have been made. Please [add coverage](#) for




You can add more than one plan for each type of coverage.

To add a plan, follow these steps.

1. Click **Add Plan** or **add coverage**. The **Add Plan** modal appears.
2. Select the **Plan** and **Coverage**. NEOGOV automatically populates other fields based on your selection.

Add Dental Plan
Cancel

*Plan <input type="text" value="Q DENTAL"/>	*Coverage <input style="border-bottom: 1px solid gray;" type="text" value="EE DENTAL"/>	*Coverage Effective Date <input style="border-bottom: 1px solid gray;" type="text" value="04/12/2023"/>
*Status <input style="border-bottom: 1px solid gray;" type="text" value="Enrolled"/>	*Frequency <input type="text" value="Q BIWEEKLY (26)"/>	Calculation Rule <input style="border-bottom: 1px solid gray;" type="text" value=""/>
Eligibility Start <input style="border-bottom: 1px solid gray;" type="text" value="10/01/2022"/>	Premium Start <input style="border-bottom: 1px solid gray;" type="text" value="04/12/2023"/>	Flat Amount / Rate <input style="border-bottom: 1px solid gray;" type="text" value=""/>
Eligibility End <input style="border-bottom: 1px solid gray;" type="text" value="12/31/3999"/>	Premium End <input style="border-bottom: 1px solid gray;" type="text" value="12/31/3999"/>	Coverage/Elected Amount <input style="border-bottom: 1px solid gray;" type="text" value=""/>



Use **EC PPO** for a single dependent, **ES PPO** for an employee and spouse, or **FAM PPO** for more than two people. Additional fields appear depending on your selection.

3. Adjust any active fields as needed, then click **Save**. The **Confirm Plan** dialog appears.

Basis MO	Contribution Amount 16.15	Deduction Amount 0.00
Eligible Wages	Per Period Contribution 7.45	Per Period Deduction 0.00
<input type="checkbox"/> Catch-up Election		
Who's Covered		
PERSON HUMAN AND SPOUSE	CHILDREN AND OTHER DEPENDENTS	
Please select one or more.	Please select one or more dependents.	
<input checked="" type="checkbox"/>		

4. Click **Confirm**.

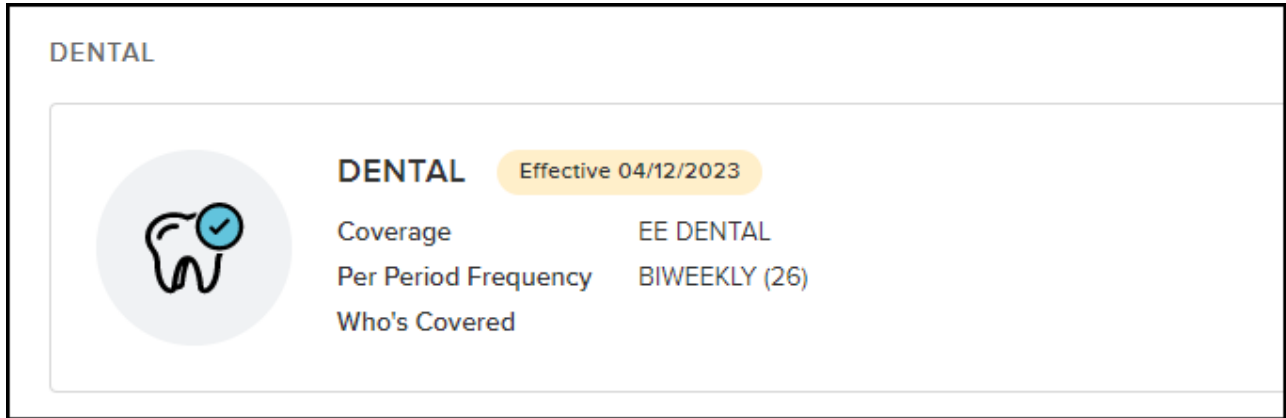
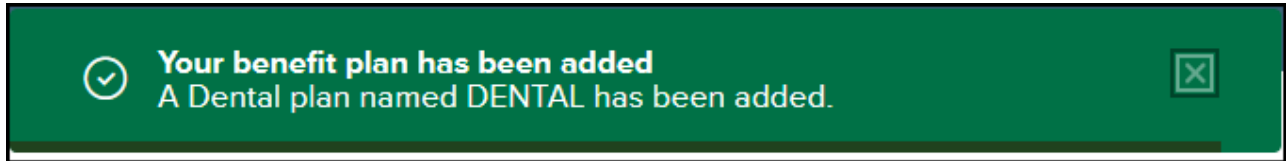
Confirm Add of Dental Plan ✕

You are adding a new Dental plan for

Confirm effective as of **04/12/2023**.

Cancel

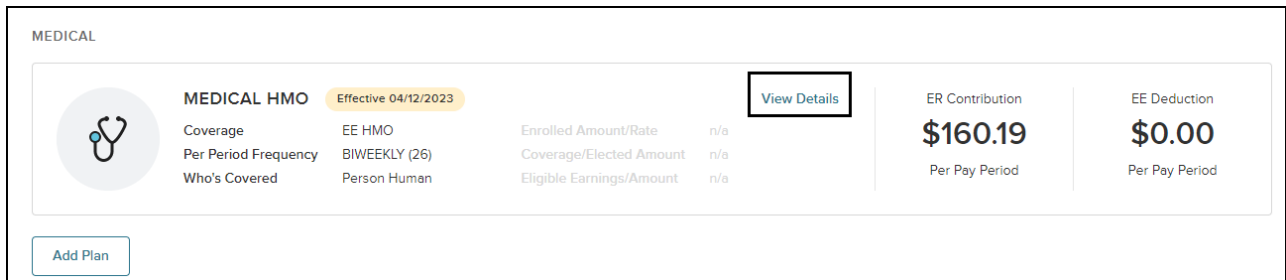
NEOGOV displays a confirmation message then displays the elected coverage with the date the plan is effective.



Editing Plans

You can adjust any enrolled plan, before the enrollment closes, directly from the plan tile.

1. On the desired plan, click View Details. The **Coverage Details** modal appears with the current effective record.



2. (Optional) select an **effective record** date if you need to edit an older record.
3. Click **Edit**. The **Edit Coverage** dialog appears.



4. Select what you would like to edit, then click **Continue**. The coverage modal is active.

Edit Medical coverage
✕

You are editing the effective record of 04/12/2023.


What would you like to edit?

Edit the coverage details of this record

Edit the effective date range of this record

Create a new effective record

Cancel
Continue



Depending on your selection, additional details will display in the dialog.

5. Adjust any active fields as needed, then click **Save**. For this example, **Frequency** changed from **BIWEEKLY (24)** to **BIWEEKLY (26)**.

Edit Medical Coverage Details

Cancel
Save

Editing the effective record of 04/12/2023.

Record 2 of 2


***Plan**

***Coverage**

***Status**

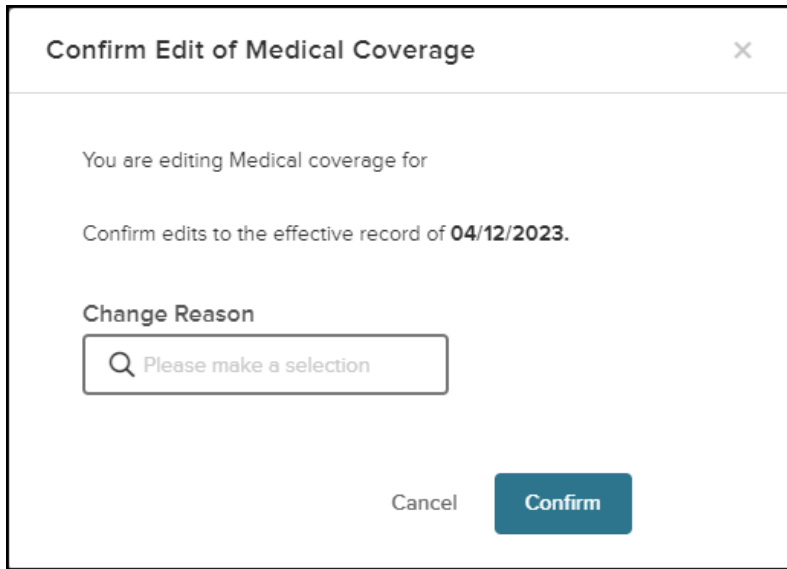
***Frequency**

Calculation Rule



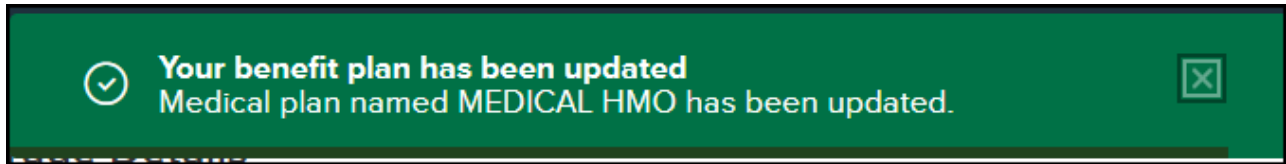
Depending on your selections, additional details will display in the modal.

After saving, the **Confirm Edit** dialog appears.



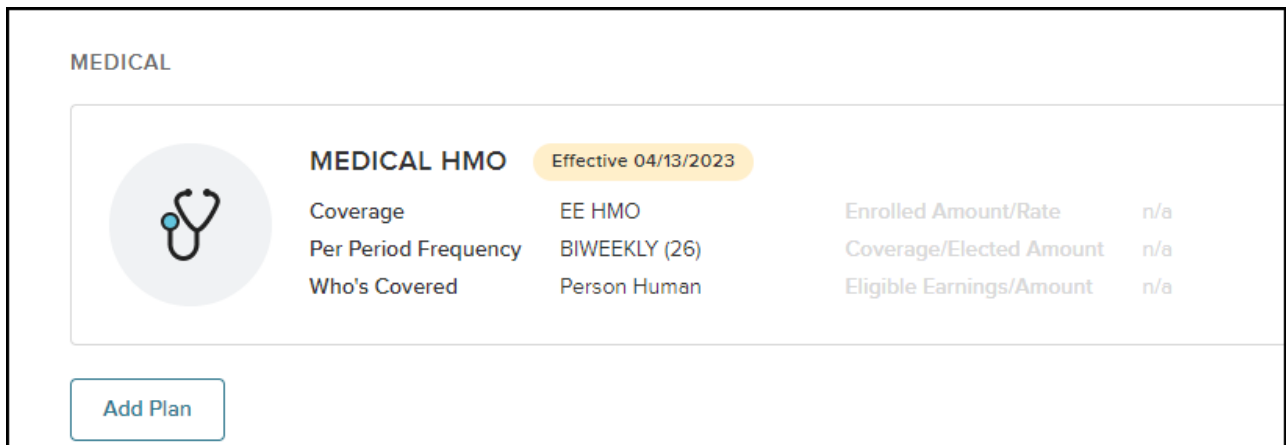
6. (Optional) Select a **Change Reason**.
7. Click **Confirm**.

NEOGOV displays a confirmation message.



8. Click **Close** on the coverage modal.

NEOGOV displays the updated information for the plan. For this example, the **Effective** date changed from **04/12/2023** to **04/13/2023**.



Benefits Field Descriptions

The following lists the **Coverage Details** fields and descriptions:

Field	Description
Calculation Rule	Shows the default logic of the coverage.
Rate Basis	Represents the cost basis for the deduction and contribution amounts. NEOGOV converts this rate to a pay period amount by annualizing it and dividing it by the number of annual deductions.
Deduction Amount	NEOGOVS displays an alert when entering an override amount. To remove an override, zero out the value and save. NEOGOV will revert to the original plan deduction amount.
Contribution Amount	NEOGOVS displays an alert when entering an override amount. To remove an override, zero out the value and save. NEOGOV will revert to the original plan deduction amount.
Catchup Election	Available for applicable plan types. When selected, the annual limits will include the appropriate catch-up amount.

Define Benefit Event Types

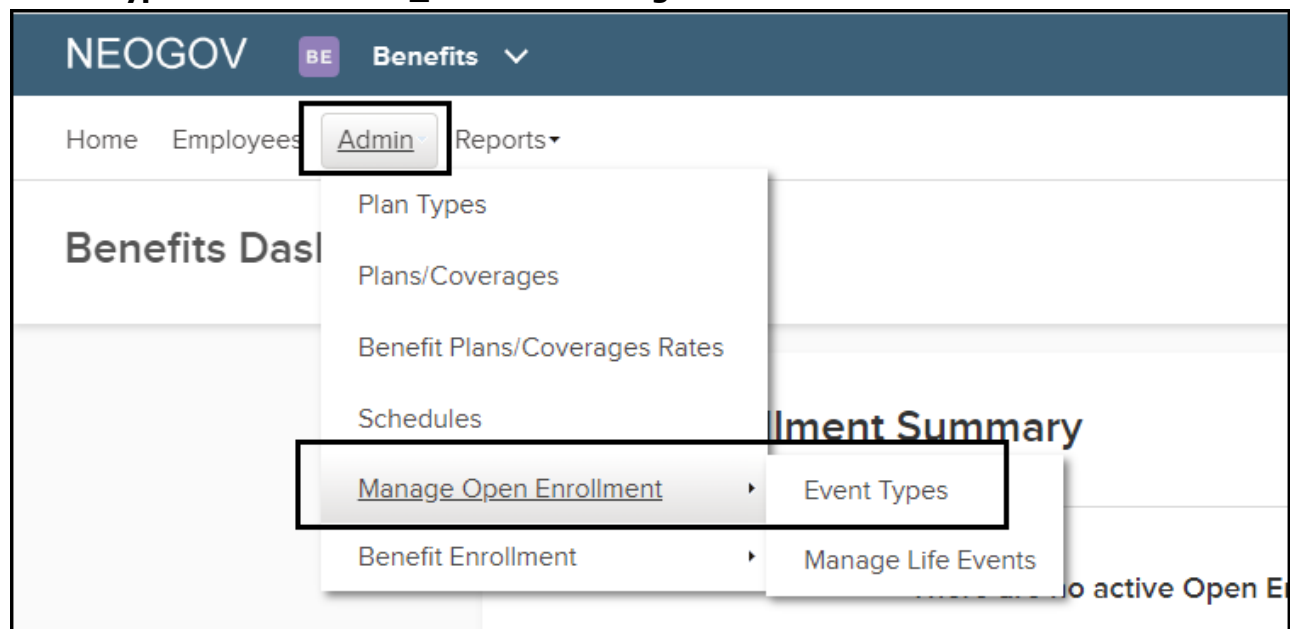
Use the **Benefit Event Types** screen to view and edit the type of event, the text description, and affected plans.

Event Type Title	Description	Active	Open Enroll Type	
Q Search	Q Search	Q Search	Q Search	
BIRTH OF CHILD	Birth of Child	Active	Life/Work Event	
CHG OF STATUS SP	Spouse change of Status	Active	Life/Work Event	
DIVORCE	Divorce	Active	Life/Work Event	
DOMESTIC PARTNERSHIP	Domestic Partnership	Active	Life/Work Event	
FALL		Active	Mass Open Enrollment	

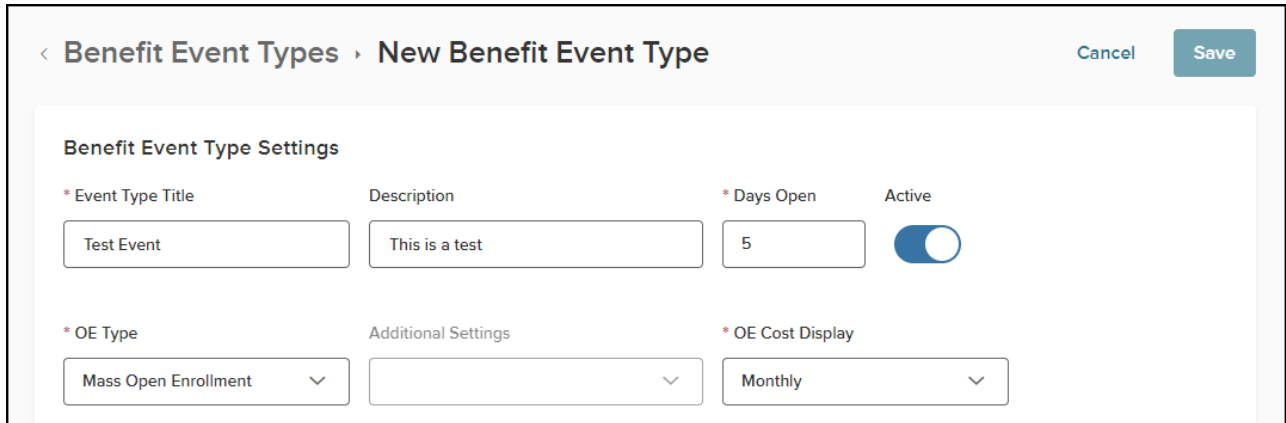
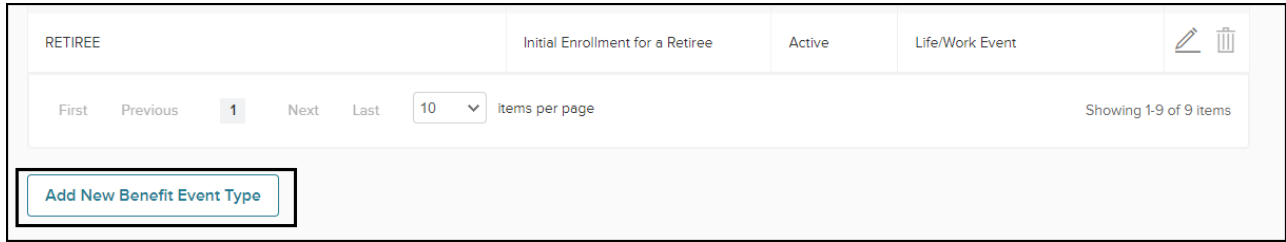
To edit a plan, click the pencil icon (**Edit Event Type**). To remove a plan, click the trash can icon (**Delete Event Type**).

Managing Event Types

1. From the **Benefits Dashboard**, click **Admin > Manage Open Enrollment > Event Types** or enter **EVENT_TYPES** in the **Page Code** field.



2. Click **Add New Benefit Event Type** at the bottom of the table. The **New Benefit Event Type** screen appears.



3. Enter and select the following.

Field	Description
Event Type Title	Enter the name of the event.
Description	Brief, meaningful description of the event. For example, a RETIREE event might use Initial Enrollment for a Retiree .
Days Open	The number of days the enrollment window is open for activity. NEOGOV uses this to calculate the Open Enrollment end date for life/work events.
Active	<ul style="list-style-type: none"> ON: Employees can see the event in NEOGOV. Use this for events that are currently taking place. OFF: Employees cannot see the event in NEOGOV.
OE Type	The specific type of event that determines how NEOGOV manages the event. <ul style="list-style-type: none"> Mass Open Enrollment – All eligible employees can enroll during the Open Enrollment window. Life/Work Event – Specific to an eligible enrollment event such as marriage or birth.

Field	Description
Additional Settings	<p>Only available when you select Life/Work Event.</p> <ul style="list-style-type: none"> • Allow Auto Open Enrollment: NEOGOV automatically generates an open enrollment period when an employee enters a life/work event. • Proof Required: The employee must provide other documentation in support of the event, such as the birth of a child.
OE Cost Display	Select how NEOGOV displays the cost (Per Pay Period, Monthly, or Annual).

4. Under the **Plans** tab, click **+ Add Plan**.

The screenshot shows the 'Plans' tab in the NEOGOV interface. At the top, there is a 'Plans' header. Below it is a table with three columns: 'Plan Election Set', 'Plan', and 'Election Required'. Each column has a search box with a magnifying glass icon and the word 'Search'. The table is currently empty, with the message 'No plans have been added to this benefit event type.' centered below the table. At the bottom left of the table area, there is a button labeled '+ Add Plan' which is highlighted with a red box. To its right is a button labeled 'Remove Selected'.

5. Select the following and click **Save**.

Field	Description
Plan Election Set	(Optional) Select the set of plans offered with the event. This creates a group of plans and does not require entering them individually.
Plan	(Optional) If not grouping plans, select the specific plan to offer with the event. Add a new line for each specific plan to offer.
Election Required	If the plan has an election requirement, NEOGOV automatically populates this field. You can override this selection.

Plans

<input type="checkbox"/>	Plan Election Set	Plan	Election Required	
	<input type="text" value="Search"/>	<input type="text" value="Search"/>		
<input type="checkbox"/>		BASIC LIFE	<input type="checkbox"/>	

You must select either the **Plan Election Set** OR the **Plan**. You CANNOT select both at the same time, which makes the election invalid.

6. If there may be multiple plans affected by the event type, repeat the process for each affected plan.

Managing Enrollments

After notification of the completed enrollment, the HR admin validates and processes the employees' elections from the **Benefits Dashboard**.

The screenshot shows the NEOGOV Benefits Dashboard. The top navigation bar includes 'NEOGOV', 'BE Benefits', and 'Page Code'. The sidebar has 'Home', 'Employees', 'Admin', and 'Reports'. The main content area is titled 'Benefits Dashboard' and features an 'Open Enrollment Summary' card. This card includes a 'Create Open Enrollment' button and a section for 'Active Open Enrollments'. The current enrollment is 'Annual Fall Open Enrollment' with '4 Total Employees'. It shows a progress bar with four segments: 'Processed' (0), 'Submitted' (1), 'In Progress' (0), and 'Not Started' (3). Additional details include 'Election Close: April 28th, 2023' and 'Time Remaining: 15 days'. Buttons for 'View Event' and 'Edit Event Details' are present, along with a link to 'View All Open Enrollment Events'.

On the **Dashboard**, the HR admin can do these tasks.

- Process or remove an employee from elections.
- Change or validate employee elections.
- Cancel or re-open Open Enrollment.
- Create and manage life and work events.

Using the **Dashboard**, admins can review employee elections before processing and make elections for the employee. See [Processing Enrollments](#) for more details.

Dashboard Sections

The **Benefits Dashboard** has a section to create or manage enrollments and a section that displays the status of life/work events (see [Creating a Mass Open Enrollment](#) and [Managing Life/Work Events](#)).

On the **Open Enrollment Summary** section, HR admins can create or view Open Enrollments, edit the event details, and process a single or multiple events.

The section displays the status of the event including how many employees are in the event and how many days remain until the event closes. You can have multiple active enrollments, but only three will display as quick actions on the Unified Self Service **Dashboard**.

To see a list of all your open events, click **View All Open Enrollment Events**. The table displays all your current events that are open and Active or Inactive. After you close an event, it will also appear in this table.

In the **Life & Work Events** section you can create, view, and manage all employee life and work events. Events that require action will display a status.

- **Pending Proof:** Required proof has not been received.
- **Pending Approval:** Proof has been uploaded and is awaiting Admin approval.

Life & Work Events
Create Life/Work Event

Pending Event Approvals

<p>Birth of Child</p> <p style="background-color: #0070c0; color: white; border-radius: 10px; padding: 2px 5px; display: inline-block;">Pending Approval</p>	<p>Annual Test Event</p> <p>0 Open Events</p>	<p>Divorce</p> <p>0 Open Events</p>	<p>Domestic Partnership</p> <p>0 Open Events</p>
View Event	View Event	View Event	View Event

<p>Initial Enrollment for a Retiree</p> <p>0 Open Events</p>	<p>Marriage</p> <p>0 Open Events</p>	<p>New Employee</p> <p>0 Open Events</p>	<p>Spouse change of Status</p> <p>0 Open Events</p>
View Event	View Event	View Event	View Event

[View All Open Life & Work Events](#)

View Event links you to the **Benefit Events** screen, which allows you to process your Open Enrollments and Life/Work Events.

< Back To Dashboard

Benefit Events

Open Enrollment Records

0	0	0	0
Processed	Submitted	In Progress	Not Started

Life & Work Events

1	0
Pending Approval	Pending Proof

⊙ Viewing Birth of Child

Filter By: Active

Add Employee
Process

✓	Event Type	Person	Status	Documents	Event Date	Progress
<input type="checkbox"/>	Birth of Child	Search	Search		Search	
<input checked="" type="checkbox"/>	Life/Work Event Birth of Child	11001 / PD	Pending Approval	View Proof	05/30/2023	

First Previous 1 Next Last 10 items per page
Showing 1-1 of 1 items

If a **Life/Work Event** allows automatic open enrollment, it dynamically creates an Open Enrollment event and will not show as **Active** in the table. Select **Inactive** to see the event.

Filter By: Inactive

Event Type	Person	Status	Documents
Life/Work Event Test Event	11005 / PW	Pending OE	Upload
Mass Open Enrollment Annual Fall Open Enrollment	11006 / PW	Closed	

First Previous 1 Next Last 10 items per page

If you click **View Event** from the **Benefits Dashboard**, the **Life/Work Event** appears as **Active** in the table.

Benefits Dashboard

Open Enrollment Summary

Create Open Enrollment

Active Open Enrollments

Test Event

1 Total Employees

Election Close: June 4th, 2023 Time Remaining: 5 days

0 Processed 0 Submitted 0 In Progress 1 Not Started

View Event Edit Event Details

View All Open Enrollment Events

Benefit Events

Open Enrollment Records: 0 Processed, 0 Submitted, 0 In Progress, 1 Not Started

Life & Work Events: 0 Pending Approval, 0 Pending Proof

Viewing Test Event

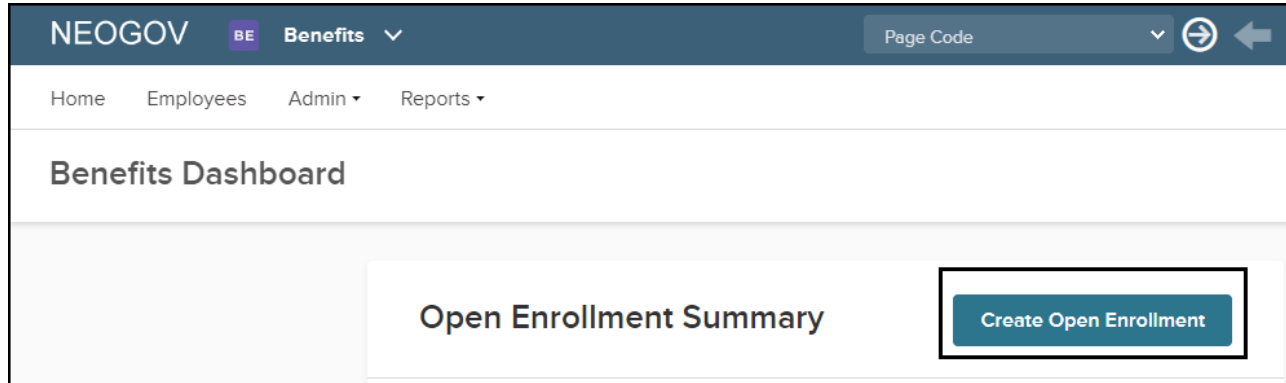
Filter By: Active

Event Type	Person	Status	Documents	Event Date
Life/Work Event Test Event	11005 / PW	Not Started		05/30/2023

First Previous 1 Next Last 10 items per page

Creating a Mass Open Enrollment

1. From the **Benefits Dashboard**, click **Create Open Enrollment**. The **Create Event** modal appears.



2. Under **EVENT SETTINGS**, enter these fields.

The 'Create Event' modal is shown with a 'Cancel' and 'Create' button. It instructs the user to use the settings below to create a new Open Enrollment Event. Under the 'EVENT SETTINGS' section, the following fields are populated: 'Description' is 'Test Open Enrollment', '*Event Type' is 'Q MASS ENROLLMENT', '*Election Open' is '04/13/2023', and '*Election Close' is '04/14/2023'.

Field	Description
Description	Enter a brief statement describing the enrollment.
Event Type	Select MASS ENROLLMENT . NEOGOV uses the default value from IBET .
Election Open	Select the date the event begins.
Election Close	Select the date the event ends.

3. Under **ENROLLMENT DATES**, enter these fields.

ENROLLMENT DATES

***Coverage Effective**

05/01/2023

Eligibility Effective

04/03/2023

Premium Effective

04/03/2023

Field	Description
Coverage Effective	Select the date that coverage begins.
Eligibility Effective	(Optional) Selecting a date in this field overrides the effective date calculated by the benefit enrollment records.
Premium Effective	(Optional) Selecting a date in this field overrides the effective date calculated by the benefit enrollment records.

4. Under **EMPLOYEES**, select **Include All Active & Eligible Employees**.

EMPLOYEES

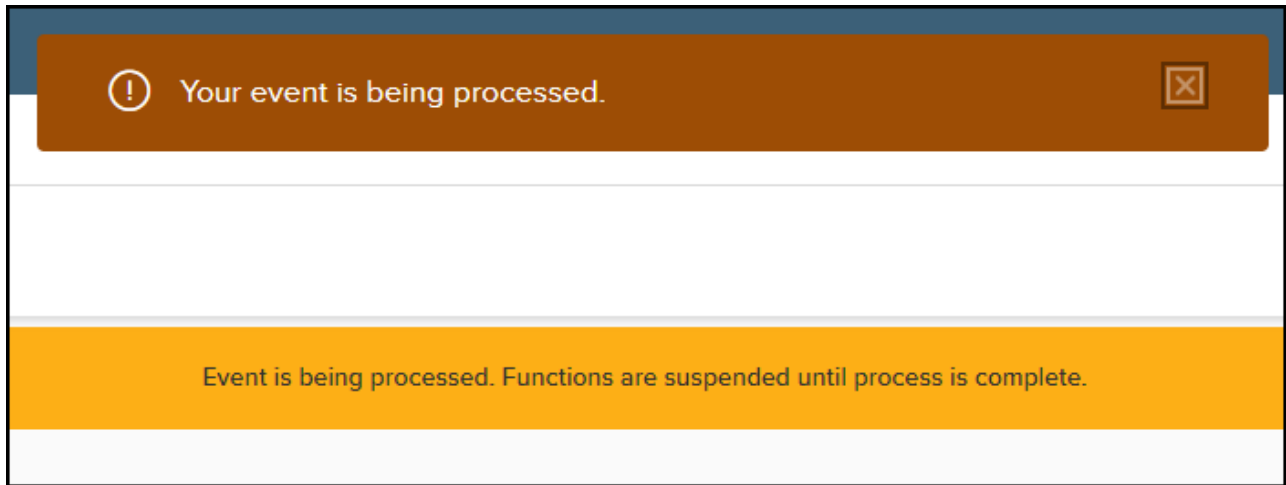
Include All Active & Eligible Employees

5. Click **Create**.

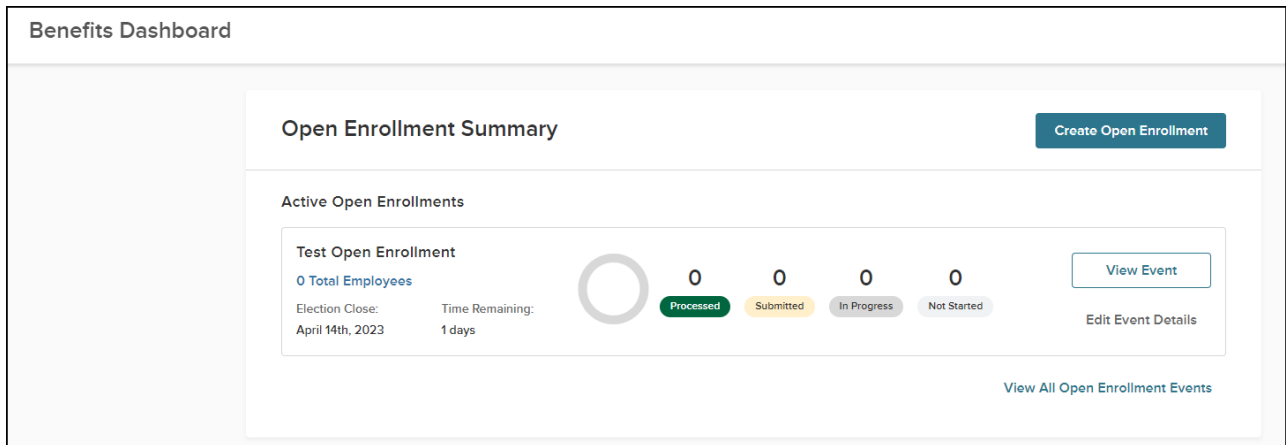
Create Event
Cancel

Create

NEOGOV displays a confirmation.

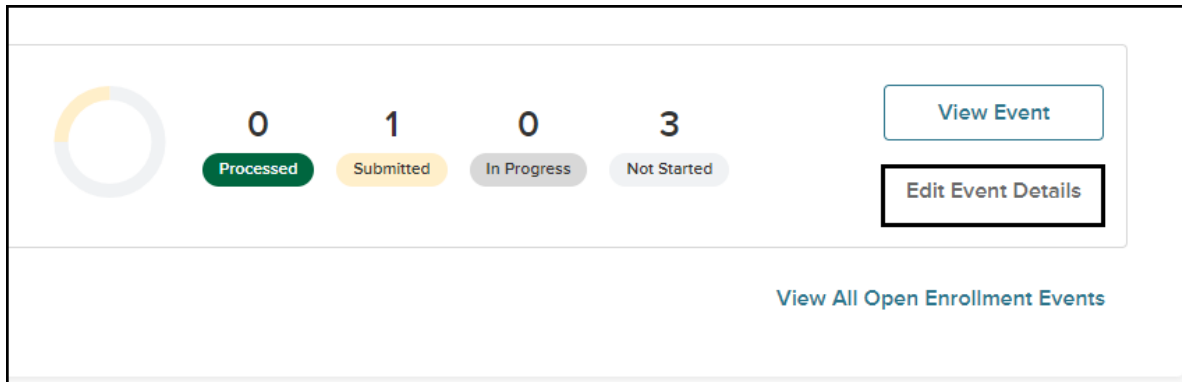


When you return to the **Benefits Dashboard**, NEOGOV displays your Open Enrollment event.



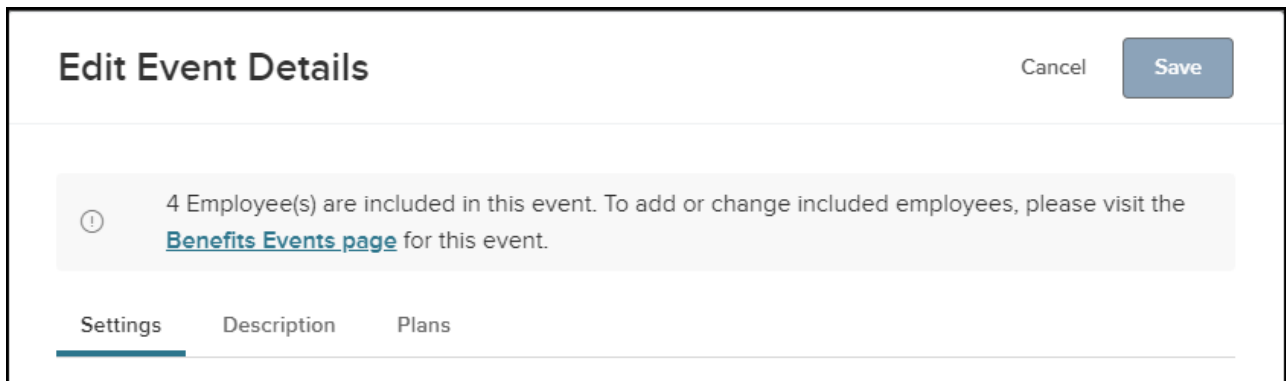
Editing Event Details

Use **Edit Event Details** from the **Benefits Dashboard** to adjust the items of an active event.



The **Edit Event Details** modal contains the **Settings**, **Description**, and **Plans** tabs. Use these tabs to change the event details. Depending on the type of event, some fields may be read-only.

After changing the details, click **Save** to close the modal and commit the changes.



Settings Tab

This tab contains all the information for defining the enrollment type, eligibility, and start/end dates.

Settings
Description
Plans

EVENT SETTINGS

Title

***Event Type**

***Election Opened**

***Election Closed**

***Event Status**

***Open Enroll Type**

ENROLLMENT DATES

***Coverage Effective**

Coverage Expiry

Eligibility Effective

Eligibility Expiry

Premium Effective

Premium Expiry

Field	Description
Title	The description of the default event from IBET for the event selected.
Event Type	Displays the type of event used to generate the Open Enrollment. NEOGOV uses the default value from IBET .
Election Opened	The start date of the enrollment period. Employees cannot access the Open Enrollment before this date.

Field	Description
Election Closed	The last day of the enrollment period. Employees cannot change their elections after this date.
Event Status	Status of the event. <ul style="list-style-type: none"> ● Open – The event is still active. ● Suspended – The event was stopped or paused. ● Closed – The event closed (expired or manually closed).
Open Enrollment Type	The specific event types. <ul style="list-style-type: none"> ● Life/Work Event. ● Mass Open Enrollment. ● Ad Hoc. ● Always Open.
Coverage Effective	The date that coverage begins.
Coverage Expiry	Enter a coverage end date.
Eligibility Effective	Entering a date overrides the Election Opened date.
Eligibility Expiry	Enter a date that overrides the Election Closed date.
Premium Effective	Entering a date overrides the Premium Start date.
Premium Expiry	Entering a date overrides the Premium End date.

Description Tab

This tab contains the text box to enter the description of the event.

Settings **Description** Plans

Open Enrollment Description

B *i* U A: ≡ ≡ ≡ ¶: ↻ 🖼️ 📄 ↶ ↷ <>

Please update the appropriate plans and/or coverages to ensure you have the required coverage.

Characters : 94

Plans Tab

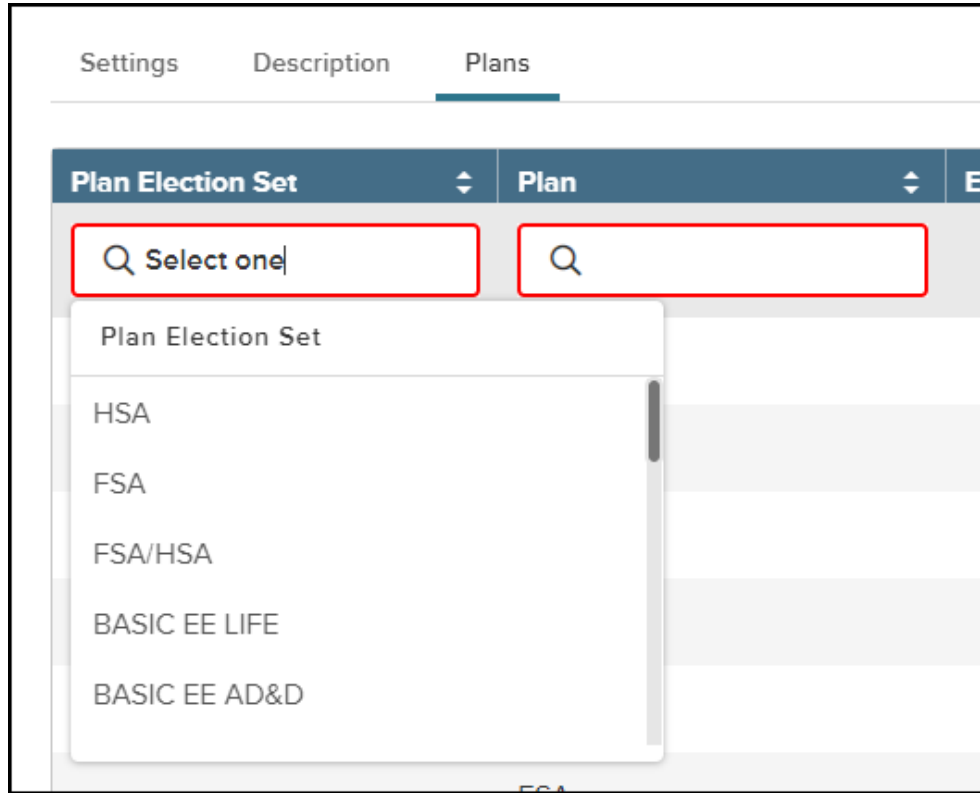
This tab displays a list of all plans included in the enrollment event. You can delete plans using the trash can icon (**Delete Plan**) or add plans using **Add Eligible Plan**.

Settings
Description
Plans

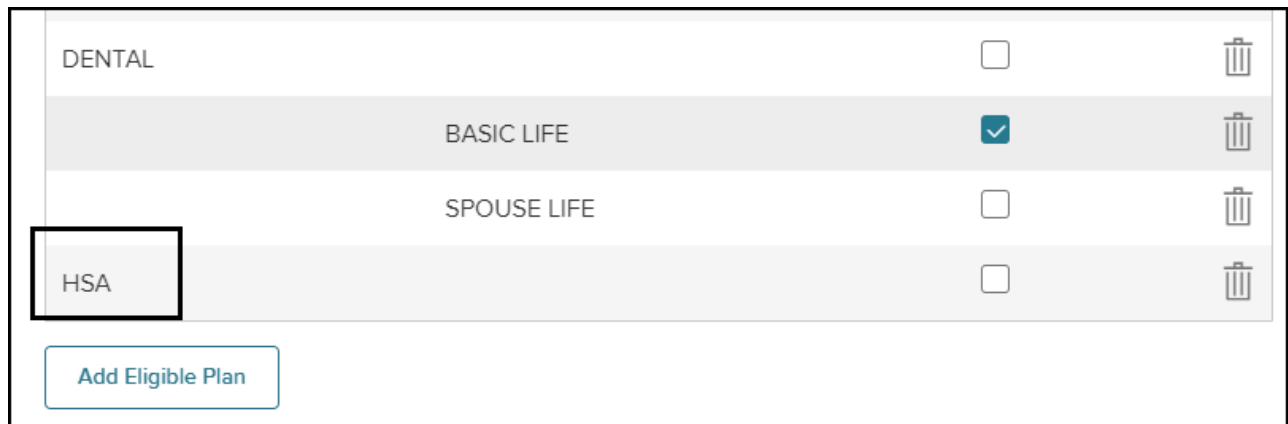
Plan Election Set	Plan	Election Required	
MEDICAL		<input type="checkbox"/>	
	HSA	<input type="checkbox"/>	
	AD&D	<input checked="" type="checkbox"/>	
Dental Plans		<input type="checkbox"/>	
DCFSA		<input type="checkbox"/>	
	FSA	<input type="checkbox"/>	
	LTD	<input checked="" type="checkbox"/>	
	STD	<input checked="" type="checkbox"/>	
VISION		<input type="checkbox"/>	
	DCFSA	<input type="checkbox"/>	
DENTAL		<input type="checkbox"/>	
	BASIC LIFE	<input checked="" type="checkbox"/>	
	SPOUSE LIFE	<input type="checkbox"/>	

Add Eligible Plan

When you add a plan, select the desired **Plan Election Set** or the **Plan**, and select the **Election Required** checkbox (if needed).



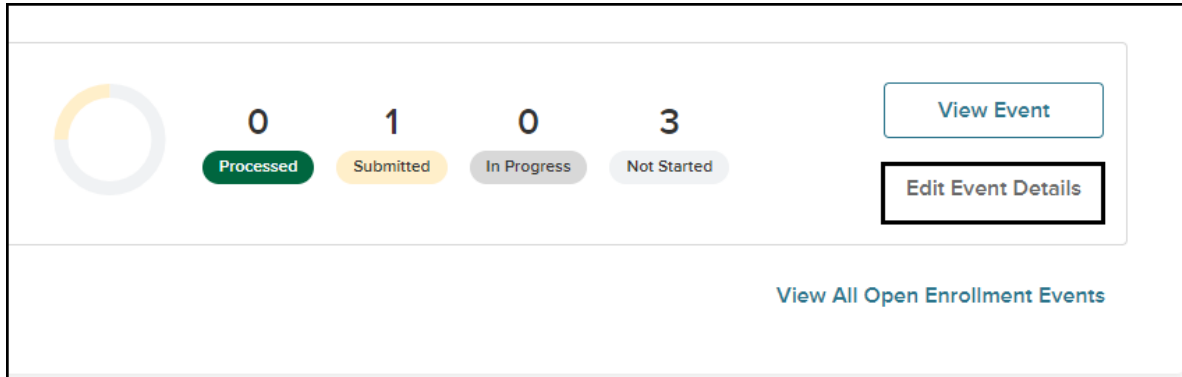
NEOGOV will display your selection at the bottom of the list. This example used the **HSA Plan Election Set**.



Editing an Open Enrollment Period

If your organization needs to extend the open enrollment period, you can edit the event details from the **Benefits Dashboard**.

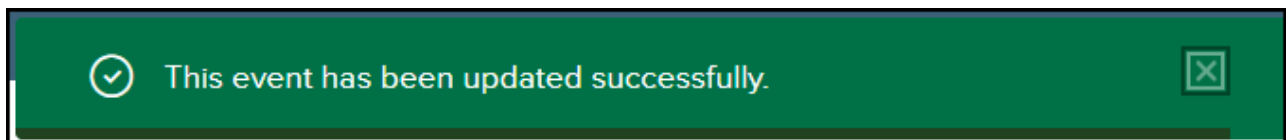
1. Click **Edit Event Details** on the active enrollment. The **Edit Event Details** modal appears.



2. Change the **Election Closed** field to the desired date. In this example, the date changed from **04/28/2023** to **04/14/2023**.

The 'Edit Event Details' modal has a title bar with 'Cancel' and 'Save' buttons. Below the title is a notification: '4 Employee(s) are included in this event. To add or change included employees, please visit the [Benefits Events page](#) for this event.' There are three tabs: 'Settings', 'Description', and 'Plans', with 'Settings' selected. Under 'EVENT SETTINGS', there are several fields: 'Title' (Annual Fall Open Enrollment), '*Event Type' (MASS ENROLLMENT), '*Election Opened' (03/30/2023), '*Election Closed' (04/14/2023, highlighted with a black border), '*Event Status' (Open), and '*Open Enroll Type' (Mass Open Enrollment).

3. Click **Save**. A confirmation displays.



NEOGOV displays the new **Election Close** date and **Time Remaining** on the active enrollment.

Active Open Enrollments

Annual Fall Open Enrollment

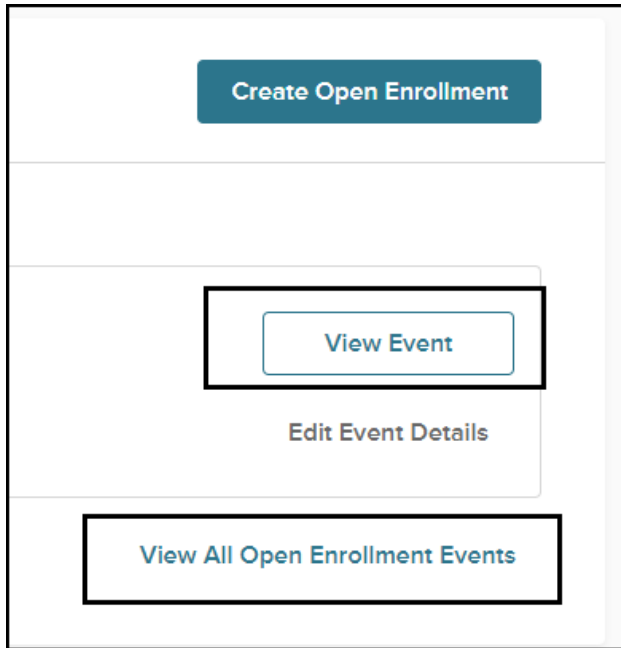
4 Total Employees

Election Close:	Time Remaining:
April 14th, 2023	1 days

Processing Enrollments

Use the **Benefits Dashboard** to process single or multiple enrollment events.

When processing a single event, click **View Event**. When selecting multiple events, click **View All Open Enrollment Events**.



When you process a single event, the table displays all employees who are in that event and their status.

Event Type	Person	Status	Proof Required	Event Date	Progress
Mass Open Enrollment Annual Fall Open Enrollment	10 / ADMIN	Not Started		03/30/2023	4/11
Mass Open Enrollment Annual Fall Open Enrollment	11000 / COURT	Not Started		03/30/2023	5/11
Mass Open Enrollment Annual Fall Open Enrollment	11005 / PW	Not Started		03/30/2023	4/11
Mass Open Enrollment Annual Fall Open Enrollment	11006 / PW	Submitted		03/30/2023	11/11

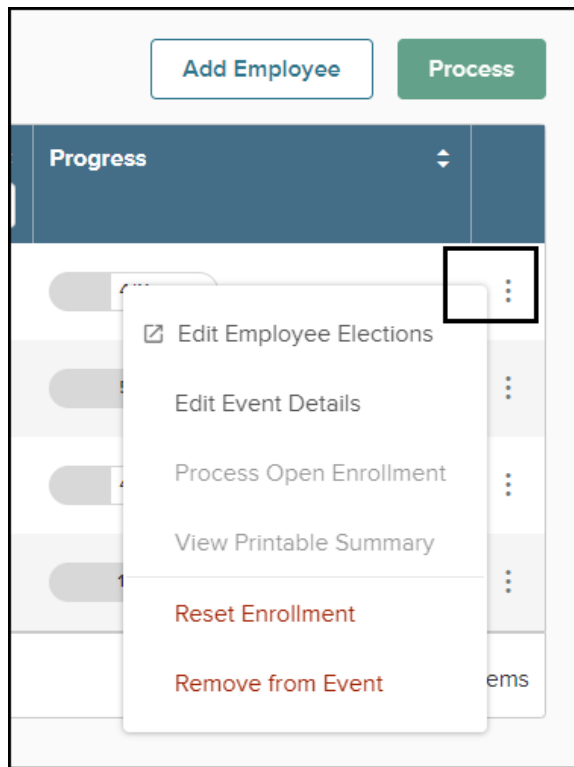
Filter By: Active | Add Employee | Process

10 Items per page | Showing 1 - 4 of 4 Items

The table displays these fields.

Field	Description
Event Type	The type of event the employee is in. This value is defined on IBET .
Person	The name of the employee, their employee number, and their role.
Status	Displays whether the employee has started or submitted their elections.
Proof Required	Indicates whether proof is required for the event.
Event Date	Displays the date the event started.
Progress	Displays which step the employee is currently on.

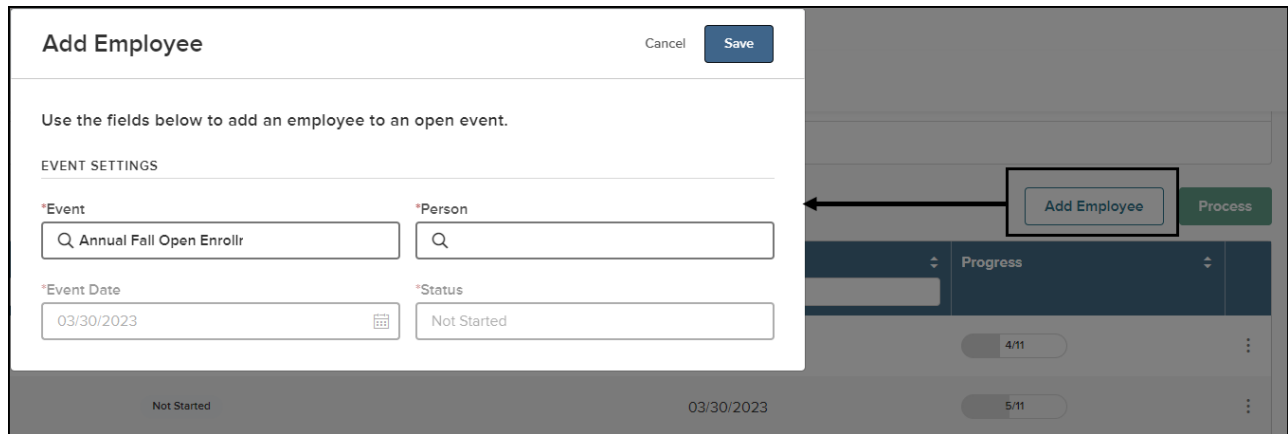
The ellipses button at the end of each row contains the actions you can perform for each employee depending on their event status.




These are the actions you can take for each employee.




Field	Description
Edit Employee Elections	Change the benefits elections for a specific employee.
Edit Event Details	Edit the details of the enrollment for a specific employee.
Process Open Enrollment	Process the Open Enrollment for an individual employee.
View Printable Summary	Provides a summary of a specific employee’s elections.
Reset Enrollment	Resets the enrollment for a specific employee.
Remove from Event	Remove a specific employee from the event.

You can also add an employee to the event.



When you process multiple events, the table displays all event types and the employees in those events. You have the actions as when you process a single event.

Filter By: Active 

<input type="checkbox"/>	Event Type 	Person 	Status 
<input type="checkbox"/>	<input type="text" value="TEST EVENT - OE"/>	<input type="text" value="11003 / PD"/>	Submitted
<input type="checkbox"/>	Life/Work Event New Employee	11006 / PW	Not Started
<input type="checkbox"/>	Life/Work Event Birth of Child	11006 / PW	Not Started

Processing Mass Open Enrollment

1. From the **Benefits Dashboard**, click **View Event** for the active enrollment.

Open Enrollment Summary Create Open Enrollment

Active Open Enrollments

Annual Fall Open Enrollment

1 Total Employees

Election Close: April 13th, 2023 Time Remaining: 0 days

0

Processed

1

Submitted

0

In Progress

0

Not Started

View Event

[Edit Event Details](#)

[View All Open Enrollment Events](#)

NEOGOV will display the **Benefit Events** screen listing all employees in the event. This example uses one employee.

Benefit Events

Open Enrollment Records

0

Processed

1

Submitted

0

In Progress

0

Not Started

Viewing Annual Fall Open Enrollment

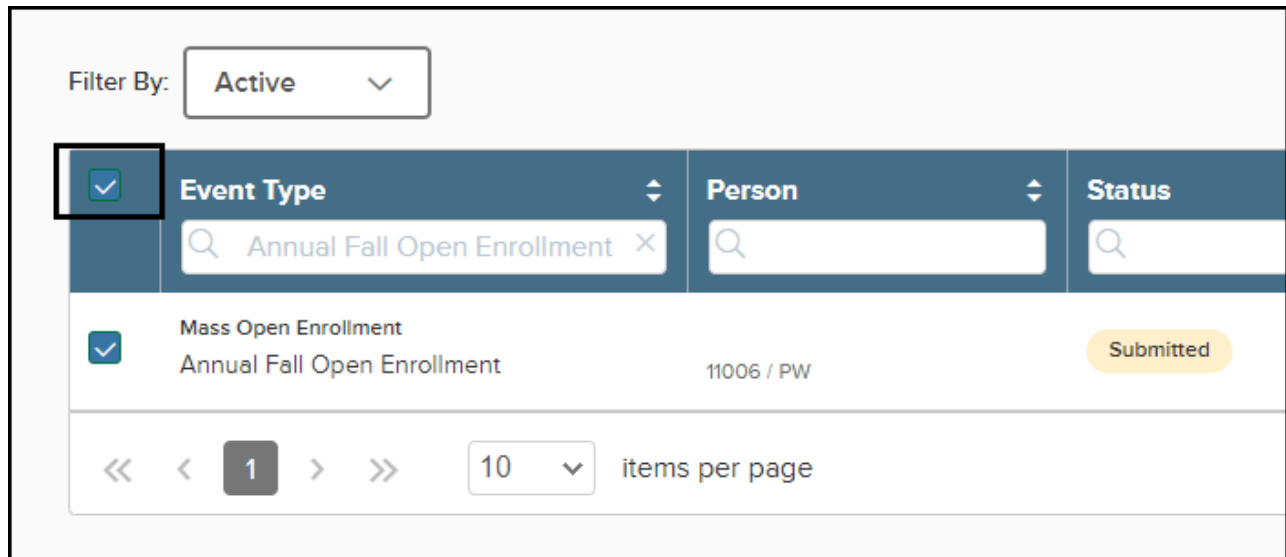
Filter By: Active [Add Employee](#) Process

Event Type	Person	Status	Proof Required	Event Date	Progress
<input type="checkbox"/> <div style="font-size: x-small;"> Mass Open Enrollment Annual Fall Open Enrollment </div>	Mahmoud Marczyk <small>11006 / PW</small>	Submitted		03/30/2023	11/11

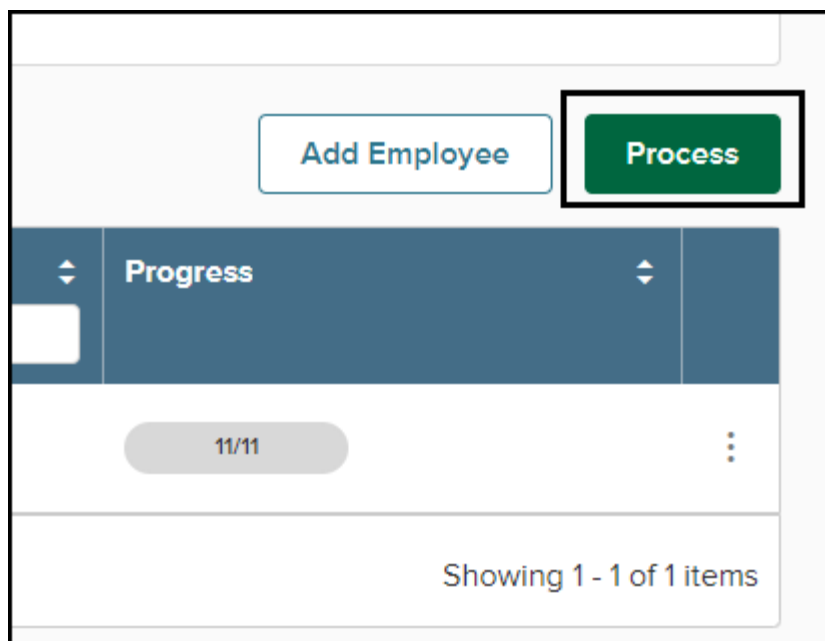
1
10
Items per page
Showing 1 - 1 of 1 Items

The **Process** button is inactive until you select an employee.

2. Select the checkbox at the top of the table. This will include all employees when NEOGOV processes the event.



3. Click **Process**. The **Process Event** modal appears.



4. Select **Include All Eligible Employee Elections**. NEOGOV hides table in the modal.

Process Event Cancel Process

Use the settings below to process employee elections.

EVENT SETTINGS

Title

*Event Type

ENROLLMENT DATES

*Enrollment Open

*Enrollment Close

EMPLOYEES

Include All Eligible Employee Elections

<input checked="" type="checkbox"/>	Employee #	Employee Name	Unit	Group	Dept.
<input checked="" type="checkbox"/>	11006	Mahmoud Marczyk	NON_UNI...	FULL TIME	PW

<< < 1 > >>

10 items per page

Showing 1 - 1 of 1 items

5. Click **Process**. NEOGOV displays a confirmation.

Process Event

Cancel **Process**

Use the settings below to process employee elections.

EVENT SETTINGS



Title: Annual Fall Open Enrollment *Event Type: MASS ENROLLMENT

ENROLLMENT DATES

*Enrollment Open: 03/30/2023 *Enrollment Close: 04/13/2023

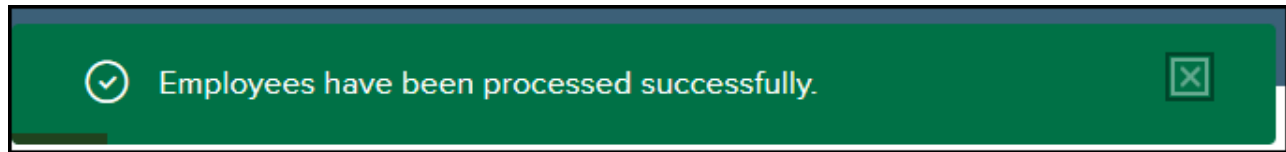
EMPLOYEES

Include All Eligible Employee Elections

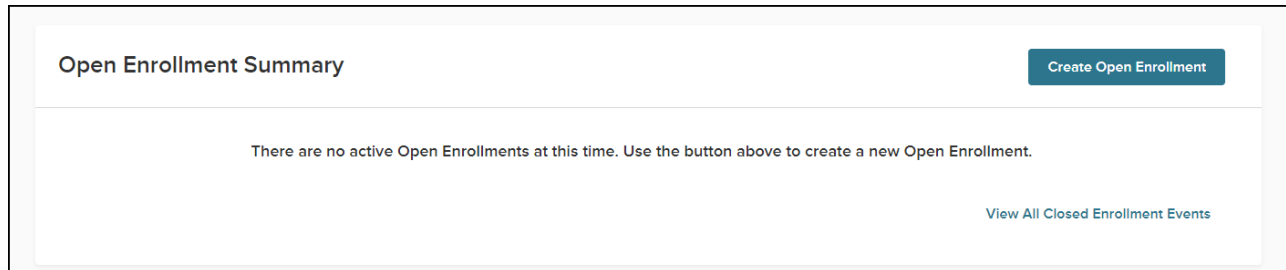
 Employees are being processed. 

Employees are being processed. Functions are suspended until process is complete.

After processing, NEOGOV displays a confirmation.



The **Benefits Dashboard** indicates that there are no active Open Enrollment events.



If you want to see a history of your active and inactive events that were closed, click **View All Closed Enrollment Events**.

Managing Life/Work Events

Use the **Life & Work Events** section of the **Benefits Dashboard** to create and manage these event types.

Creating an Event

1. Click **Create Life/Work Event**. The **Create Event** modal appears.



2. Select the required values for **EVENT SETTINGS**.




NEOGOV locks the **Status** field for event types that require proof. As the admin, you can upload the proof when you create the event, or after you have received it. After receiving proof, you must create the open enrollment for the event.

- 3. (Optional) If you have received proof, attach the documentation, and select **Proof Revived**.

PROOF OF EVENT

Proof Required



Drag and drop file here, or [click here to upload](#)

Supported file types are jpg, htm, xlsx, wmv, datamp3, data, rtf, gif, csv, png, docx, txt, mp3, pdf, xml, doc, html, xls

The maximum allowed file size is 10MB.

Proof Received

- 4. (Optional) Enter any desired Comments.

Comments

This is an example comment.

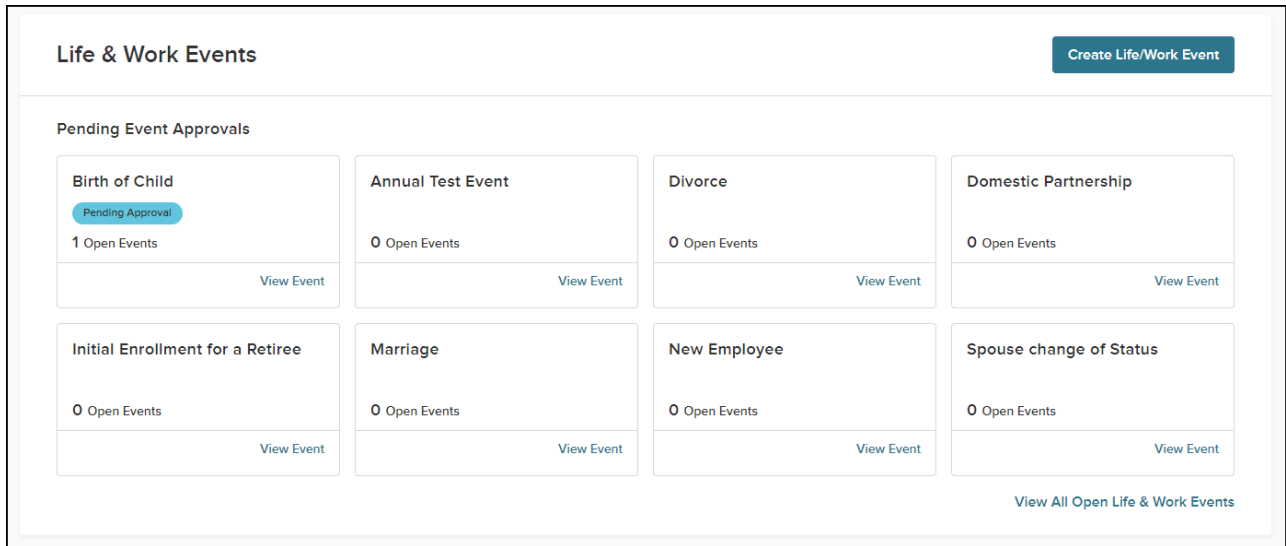
Characters: 27/4000

5. Click **Create**.



NEOGOV displays the event and the status.

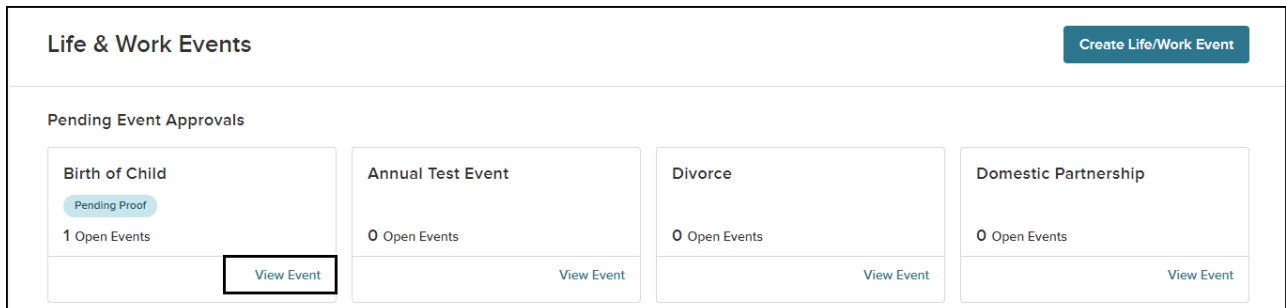
- **Pending Proof:** Required proof has not been received.
- **Pending Approval:** Proof has been uploaded and is awaiting Admin approval.



Editing Event Details

You can modify the details of an event after you have created the event. This example describes uploading proof of the event after the event was created.

1. Click **View Event** for the desired event. The **Benefit Events** screen appears.




2. Click **Upload** or use the contextual menu to open the **Edit Event Details** modal.

<input type="checkbox"/>	Event Type	Person	Status	Documents	Event Date	Progress	
<input type="checkbox"/>	Birth of Child	Search	Search		Search		
<input type="checkbox"/>	Life/Work Event Birth of Child	11001 / PD	Pending Proof	Upload	05/30/2023		

3. Attach the documentation and select **Proof Received**.

PROOF OF EVENT

Proof Required



Drag and drop file here, or [click here to upload](#)

Supported file types are jpg, htm, xlsx, wmv, datamp3, data, rtf, gif, csv, png, docx, txt, mp3, pdf, xml, doc, html, xls

The maximum allowed file size is 10MB.

Proof Received

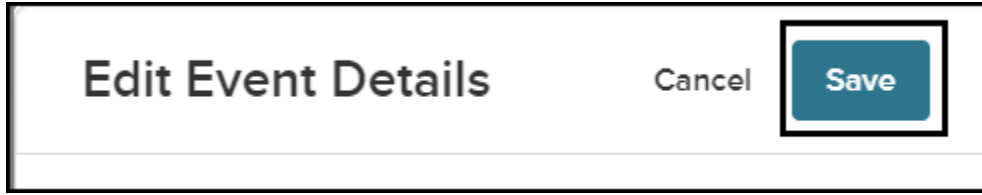
4. (Optional) Enter any desired comments.

Comments

This is an example comment.

Characters: 27/4000

5. Click **Save**.



NEOGOV updates the event status on the **Benefit Events** screen and the **Benefits Dashboard**.

Benefit Events

Open Enrollment Records

0 Processed 0 Submitted 0 In Progress 0 Not Started

Life & Work Events

1 Pending Approval 0 Pending Proof

Viewing Birth of Child

Filter By: Active

Event Type	Person	Status	Documents	Event Date
Birth of Child	Search	Search		Search
Life/Work Event Birth of Child	11001 / PD	Pending Approval	View Proof	05/30/2023

10 items per page

Life & Work Events

Pending Event Approvals

Birth of Child

Pending Approval

1 Open Events

[View Event](#)

Annual Test Event

0 Open Events

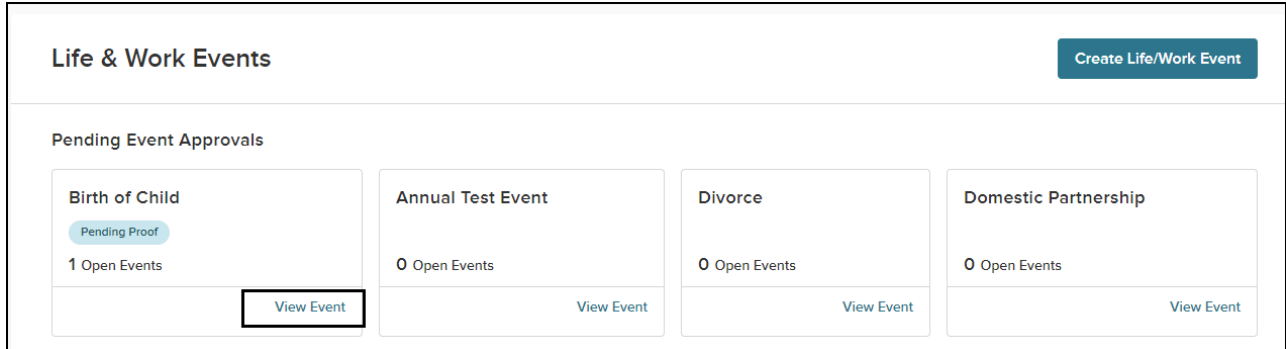
[View Event](#)

If the employee provided proof at the time they enrolled in the event, click **View Proof** to review the documentation.

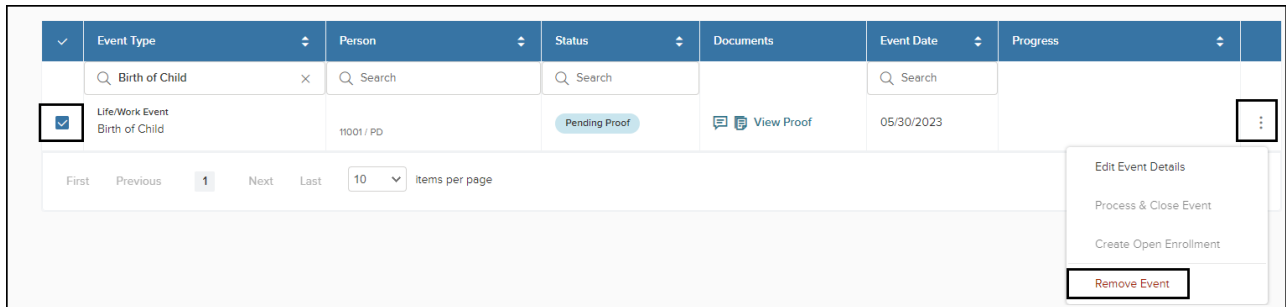
Removing an Event

If needed, you can remove an event.

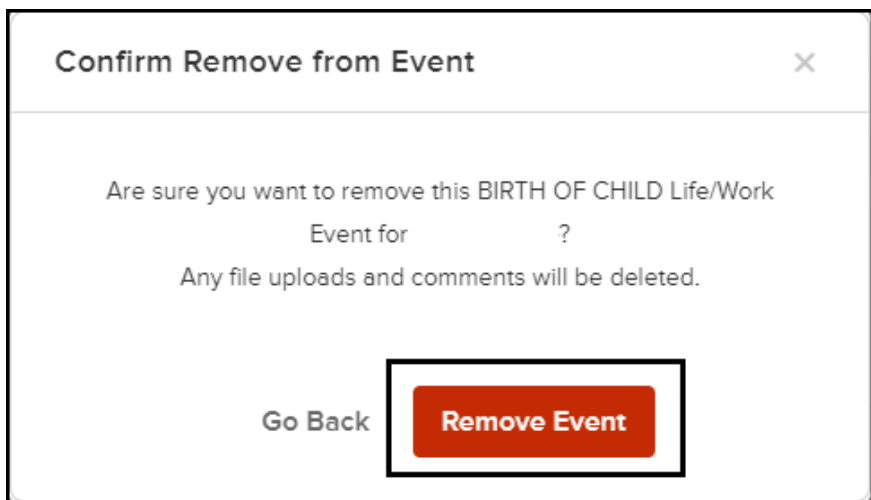
1. Click **View Event** for the desired event. The **Benefit Events** screen appears.



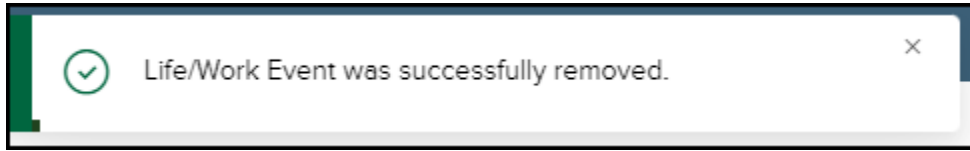
2. Select **Remove Event** from the contextual menu. A dialog box appears.



3. Click **Remove Event**.



NEOGOV displays a confirmation and removes the event from the **Benefits Events** screen and the **Benefits Dashboard**.



Benefit Events

Open Enrollment Records

0
Processed

0
Submitted

0
In Progress

0
Not Started

Life & Work Events

0
Pending Approval

0
Pending Proof

Viewing Birth of Child

Filter By: Active

Event Type	Person	Status	Documents	Event Date
Q Birth of Child	Q Search	Q Search		Q Search

No results found.

Life & Work Events

Pending Event Approvals

Annual Test Event

0 Open Events

[View Event](#)

Birth of Child

0 Open Events

[View Event](#)

Processing an Event

1. Click **View Event** for the desired event. The **Benefit Events** screen appears.

The screenshot shows the 'Life & Work Events' interface. At the top right is a 'Create Life/Work Event' button. Below is a section titled 'Pending Event Approvals' containing four event categories: 'Birth of Child' (1 Open Events), 'Annual Test Event' (0 Open Events), 'Divorce' (0 Open Events), and 'Domestic Partnership' (0 Open Events). Each category has a 'View Event' button. The 'View Event' button for the 'Birth of Child' category is highlighted with a red box.

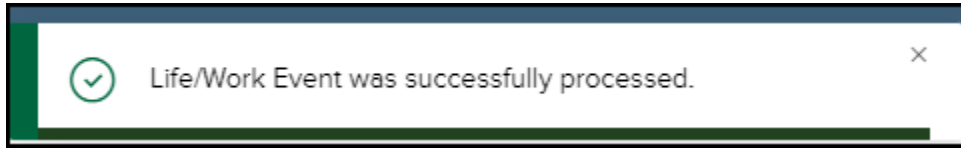
2. For the desired event, click **Process & Close Event** from the contextual menu. A dialog box appears.

The screenshot shows a table of events with columns: Event Type, Person, Status, Documents, Event Date, and Progress. The first row is selected, and a contextual menu is open over it. The menu options are: 'Edit Event Details', 'Process & Close Event' (highlighted with a red box), 'Create Open Enrollment', and 'Remove Event'. The table also includes a filter dropdown set to 'Active', an 'Add Employee' dropdown, and a 'Process' button.

3. Click **Confirm**.

The screenshot shows a 'Confirm Process & Close' dialog box. The text inside reads: 'Are sure you want to Process & Close this BIRTH OF CHILD Life/Work Event for ? No further action can be taken on this event once it is processed and closed.' At the bottom, there are two buttons: 'Cancel' and 'Confirm' (highlighted with a red box).

NEOGOV displays a confirmation and removes the event from the **Benefits Events** screen and the **Benefits Dashboard**.



Benefit Events

Open Enrollment Records

0
Processed

0
Submitted

0
In Progress

0
Not Started

Life & Work Events

0
Pending Approval

0
Pending Proof

○ Viewing Birth of Child

Filter By: Active Add Employee Process

Event Type	Person	Status	Documents	Event Date	Progress
Q Birth of Child	X	Q Search	Q Search	Q Search	

No results found.

Life & Work Events

[Create Life/Work Event](#)

Pending Event Approvals

<p>Annual Test Event</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>	<p>Birth of Child</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>	<p>Divorce</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>	<p>Domestic Partnership</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>
<p>Initial Enrollment for a Retiree</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>	<p>Marriage</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>	<p>New Employee</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>	<p>Spouse change of Status</p> <p>0 Open Events</p> <p style="text-align: right;">View Event</p>

[View All Closed Life & Work Events](#)

NEOGOV labels the event as **Inactive**. Click **View All Closed Life & Work Events** to see the closed event.

Filter By: Inactive			
Event Type	Person	Status	Documents
<input type="checkbox"/> Life/Work Event Birth of Child	11001 / PD	Processed	View Proof
<input type="checkbox"/> Life/Work Event Test Event	11005 / PW	Pending OE	Upload

First Previous **1** Next Last 10 items per page

Appendix

Revision History

Version Number	Change	Date
5	<ul style="list-style-type: none"> Content updates. Updated Define Benefit Event Types. 	6/13/23
4	<ul style="list-style-type: none"> Screenshot updates. Updated Dashboard Sections. Added Managing Life/Work Events section. 	5/30/23
3	Content update.	5/11/23
2	<ul style="list-style-type: none"> Screenshot updates (global). Added Adding Plans and Editing Plans. Rewrote Open Enrollment content to reflect using Benefits Dashboard; content is now in Managing Enrollments. Added Proof of Event and Auto Enroll to the Create Events section. 	4/18/23
1	Updated the following: <ul style="list-style-type: none"> Added Benefits Dashboard info. Manage Employee Benefits. New screenshots. Added Deductions and Earnings tab. 	12/8/22