



# Self Service Guide to Updating Benefit Plans

# Guide to Updating Benefit Plans

# **Objectives**

The purpose of this module is to teach employees how to update their own benefit plans once they have been Hired, Rehired, or had a recent Qualifying Life Event (i.e. Marriage, Birth, Divorce).

## **Before You Begin**

You must have the following:

- ✓ PeopleSoft URL
- ✓ Self Service User ID and Password
- ✓ Added Dependent and Beneficiaries in PeopleSoft (if applicable)
- ✓ Your Qualifying Life Event has been documented in PeopleSoft by the HR Office

### When to Use

- ✓ When reviewing or updating benefit plans:
  - Health plans <u>section a</u>
  - Life plans **SECTION B**
  - o FSA plans **section c**
  - HSA plan <u>section D</u>
  - 401k Savings plan <u>SECTION E</u>
  - Short Term Disability plan **SECTION F**
  - o Long Term Disability plan <u>secтюм G</u>
  - o Retirement and Pension plans **section н**

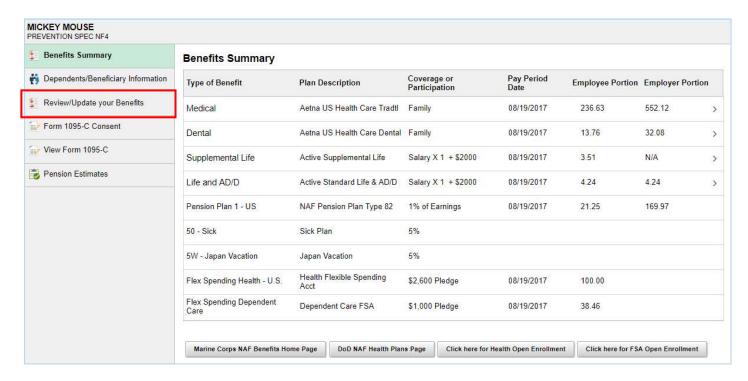
- **Step 1:** Enter the following URL link into the address bar of your internet browser. https://hrms.usmc-mccs.org
- **Step 2:** Log into Self Service by entering your User ID and Password.
- **Step 3:** Select Submit.



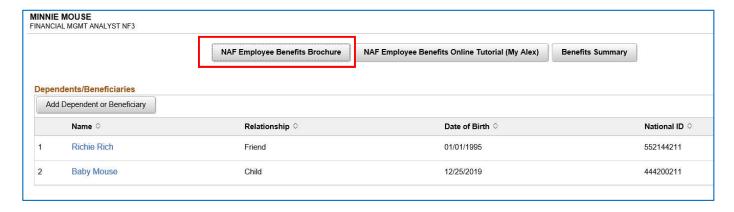
**Step 4:** Select the Benefits tile on the Employee Self Service Home Page.



**Step 5:** The Benefits Summary page is displayed. Select the Review/Update your Benefits tab.



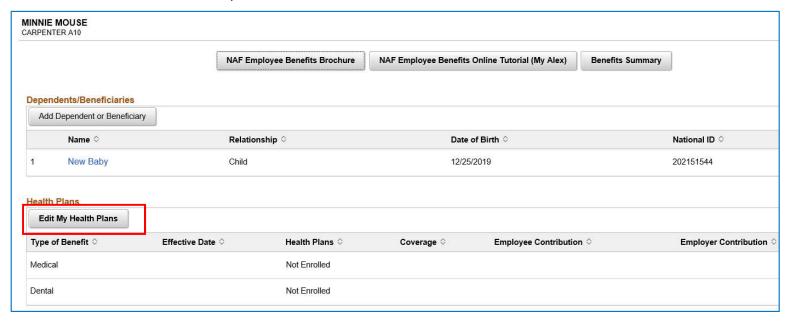
**Step 6:** To learn more about our employee benefits prior to enrolling, terminating, or making updates, select the NAF Employee Benefits Brochure button.



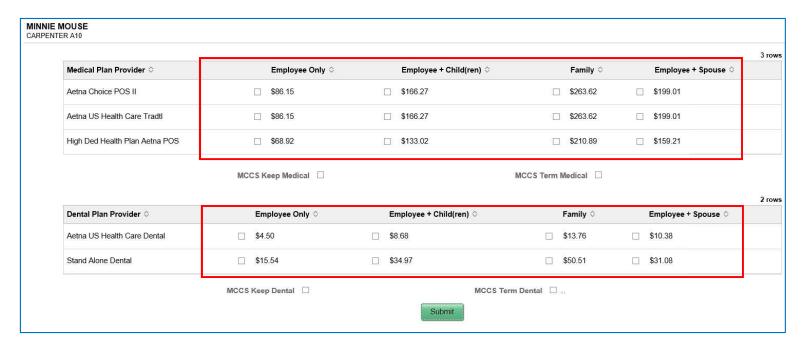
#### SECTION A - Updating your Medical & Dental Health Benefits

**NOTE:** Enrollments, Terminations, and updates to Health Plans can only occur during one of the following circumstances: (anytime outside of these circumstances, the Edit My Health Plans button will be greyed out and unavailable)

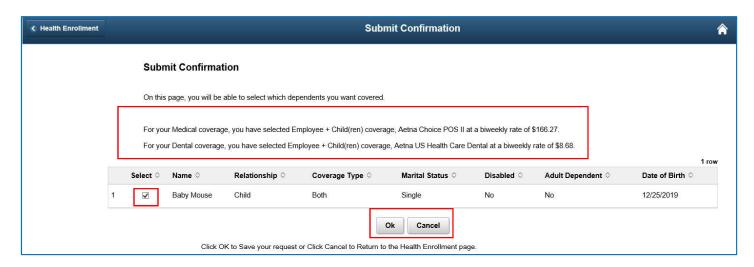
- ✓ Within 31 days of being Hired or Rehired
- ✓ Within 31 days of a Qualifying Life Event (Marriage, Divorce, Birth)
- ✓ During Annual Open Enrollment Season in November
- **Step 1:** To update the Medical and Dental Health plans within 31 days of being hired, rehired, or a recent qualifying life event, select the Edit My Health Plans button.



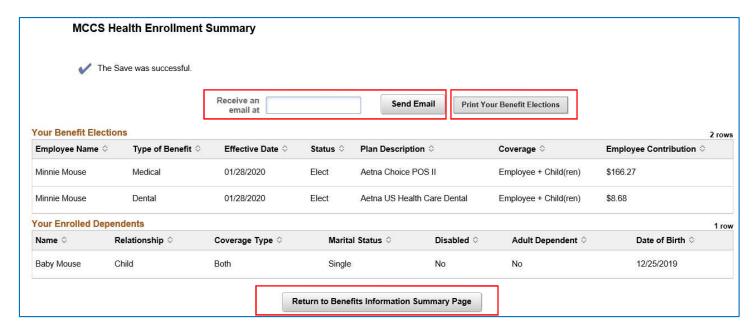
- **Step 2:** If you are enrolling in the plans, select one of the Medical Plan Providers and the relevant Dependent(s) by clicking on the respective box. (See Step 13 to terminate a plan.)
- **NOTE:** The plans are "smart coded" meaning when you make a selection under the Medical Plan Provider, the options under the Dental plans will update accordingly. The same occurs under Medical if you make a selection under the Dental Plan Provider.
- **Step 3:** Select the matching Dental Plan Provider and the Dependent(s) by clicking on the open box.
- **Step 4:** Once finished with making your selections, select Submit.
- **NOTE:** It is not a requirement to be enrolled into both plans; employees can choose only Medical, only Dental, or both.



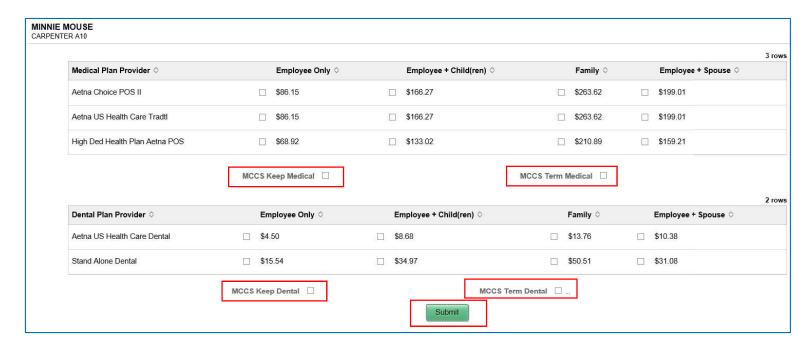
- **Step 5:** If you have selected a plan option other than Employee Only, you must designate your Dependent/Beneficiaries by checking the appropriate boxes. Review your enrollment selection and select the dependents you want covered.
- **Step 6:** Click OK to save your selection or click Cancel to return to the Health Enrollment page.



- **Step 7:** Verify your save was successful. To receive a Benefit Election Summary by email, enter a valid email address and select the Send Email button.
- **Step 8:** To print your Benefit Election Summary select the Print Your Benefit Elections button.
- **Step 9:** To return to the summary page, select the Return to Benefits Information Summary Page button.



- **Step 10:** If you have a Qualifying Life Event and you are terminating your enrollment into the Medical and/or Dental plans rather than enrolling in them, select the MCCS Term option. To maintain your current enrollment in a plan, select MCCS Keep option.
- **Step 11:** Select Submit to enter your selections.

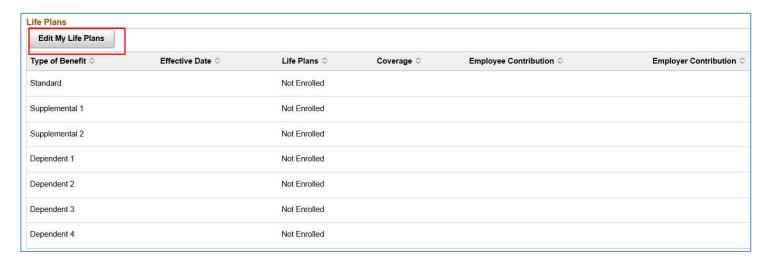


#### **SECTION B – Updating your Life Plans**

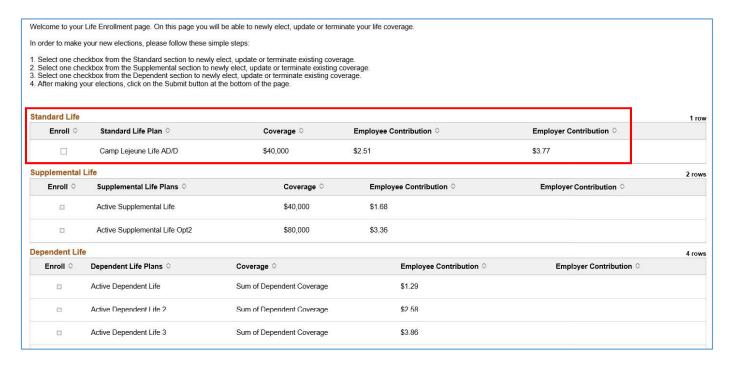
**NOTE:** Enrollments, Terminations, and updates to Life Plans can only occur during one of the following circumstances: (anytime outside of these circumstances, the Edit My Life Plans button will be greyed out and unavailable)

- ✓ Within 31 days of being Hired or Rehired
- ✓ Within 31 days of a Qualifying Life Event (Marriage, Divorce, Birth)

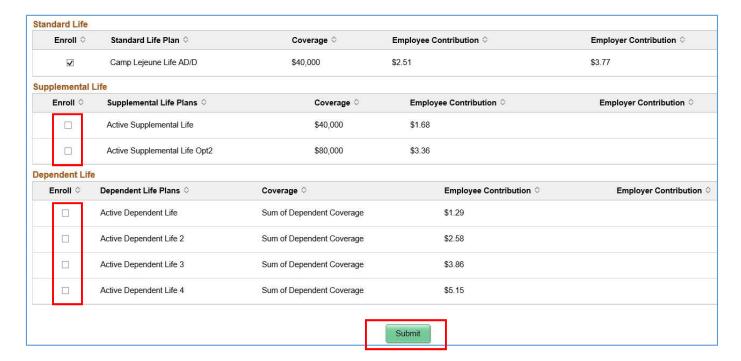
**Step 1:** To update your Life Plans, select the Edit My Life Plans button.



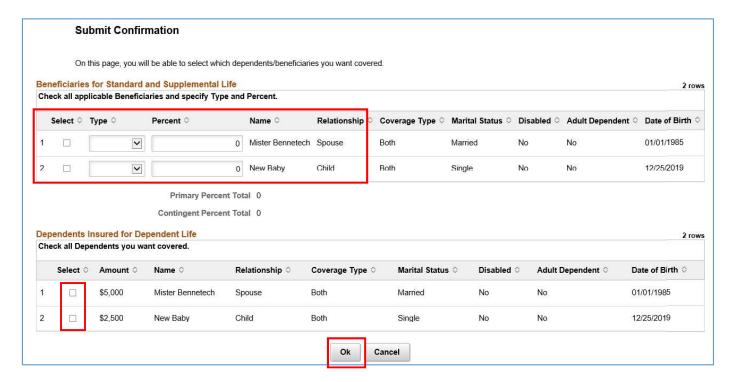
**Step 2:** To enroll in the Supplemental or Dependent Life Plans, you must first enroll into the Active Standard Life & AD/D plan. Select the checkbox.



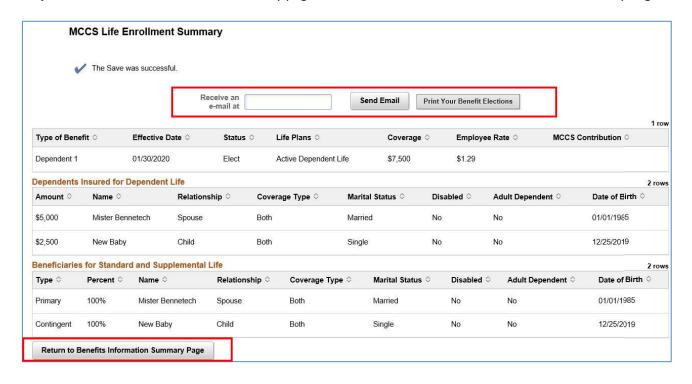
- **NOTE:** Supplemental and Dependent Life Plans are not required to enroll in the Active Standard Life & AD/D Plan. They are additional layers that are optional.
- **Step 3:** Select one of the options under the Supplemental Life Plans as applicable based on the layer of coverage you have chosen.
- **Step 4:** Select one of the options under the Dependent Life Plans as applicable based on the layer of coverage you have chosen.
- **Step 5:** Select Submit.



- **Step 6:** Select your Beneficiaries, Primary and Contingent as applicable.
- **Step 7:** Select your Dependents.
- Step 8: Select OK.

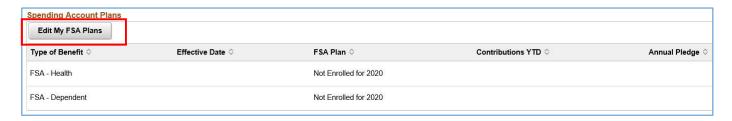


- **Step 9:** To print your Benefit Election Summary select the Print Your Benefit Elections button. To receive a Benefit Election Summary by email, enter a valid email address and select the Send Email button.
- **Step 10:** To return to the Benefit Summary page, select the Return to Benefits Information Summary Page button.



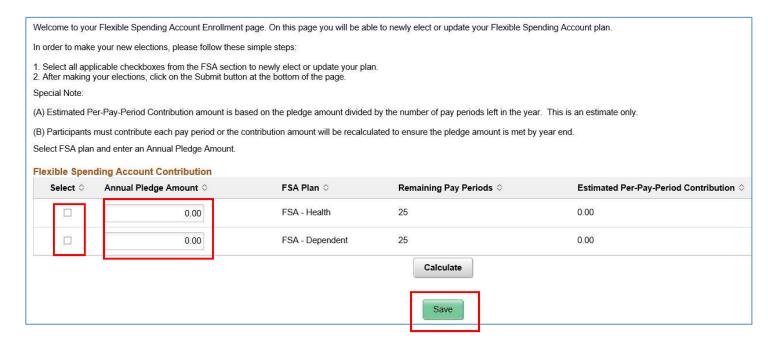
#### **SECTION C – Updating your FSA Plans**

**Step 1:** Select the Edit My FSA Plans button to make updates to your Flexible Spending Account plans.

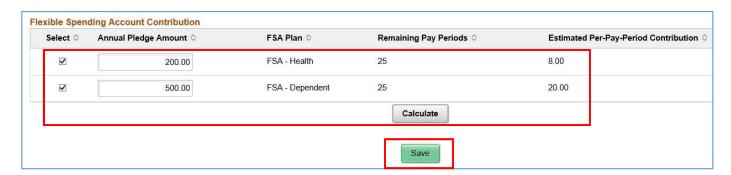


- Step 2: Select the FSA plan checkbox for Health, Dependent or both.
- **Step 3:** Enter an Annual Pledge Amount.

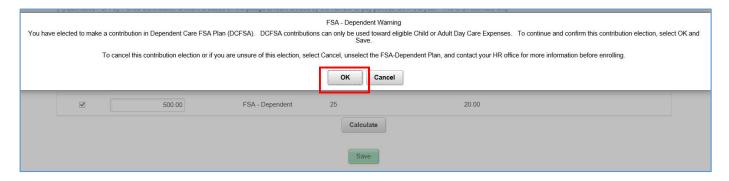
**NOTE:** The minimum annual pledge amount for each FSA plan is \$200.



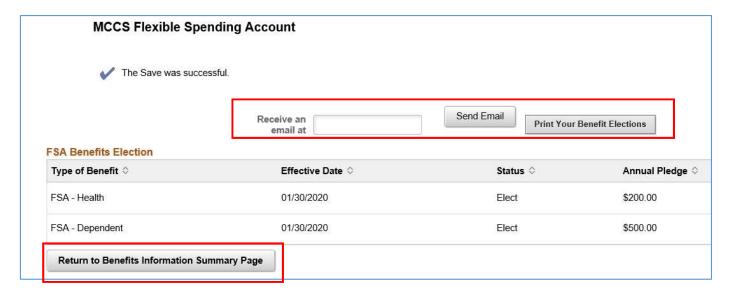
- **Step 4:** After selecting a plan(s) and entering your pledge amount(s), select Calculate. The system will calculate an estimated contribution amount to be deducted from your paycheck each pay period.
- **Step 5:** Select Save.



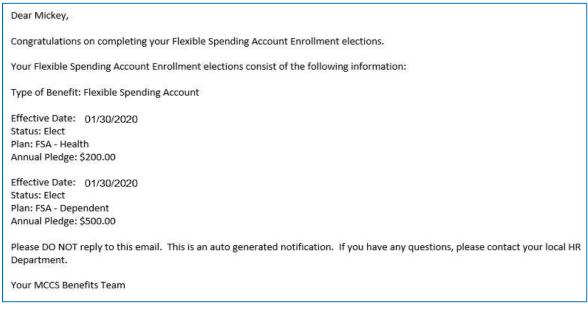
**Step 6:** If you elected to contribute to a Dependent FSA plan, upon clicking save you will receive the following message. Click OK to continue, click Cancel to go back and make any necessary updates.



- **Step 7:** To print your Benefit Election Summary select the Print Your Benefit Elections button. To receive a Benefit Election Summary by email, enter a valid email address and select the Send Email button.
- **Step 8:** Select the Return to Benefits Information Summary Page button.

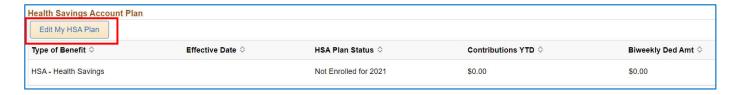


#### **SAMPLE EMAIL**

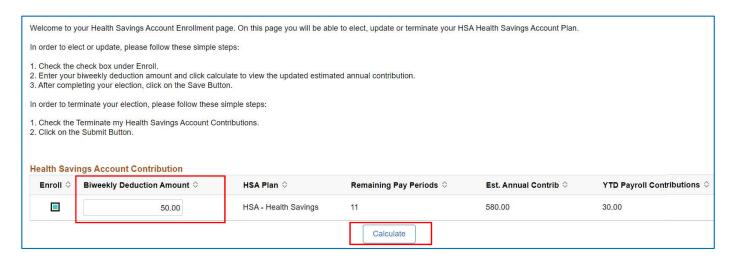


#### **SECTION D – Updating your HSA Plans**

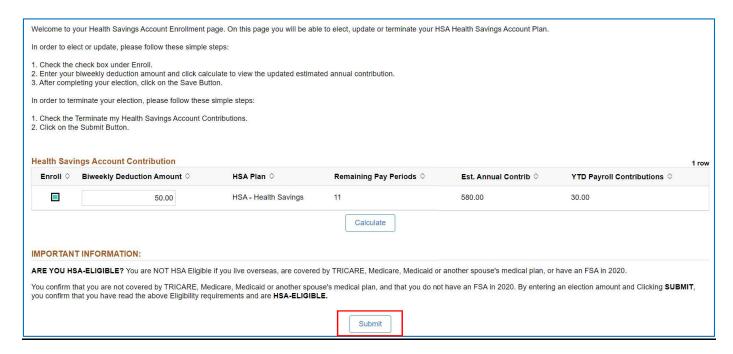
- **Step 1:** Select the Edit My HSA Plan button to make updates to your Health Saving Account plan.
- **NOTE:** You must be enrolled in the HDHP medical plan before you can enroll in HSA plan.



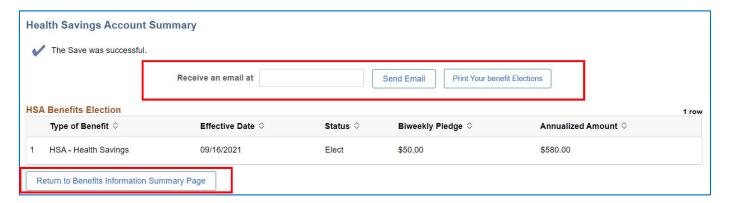
- **Step 2:** Enter a Bi-Weekly Deduction Amount.
- **Step 3:** After entering your Bi-Weekly Deduction Amount, select Calculate. The system will calculate an estimated annual contribution amount.



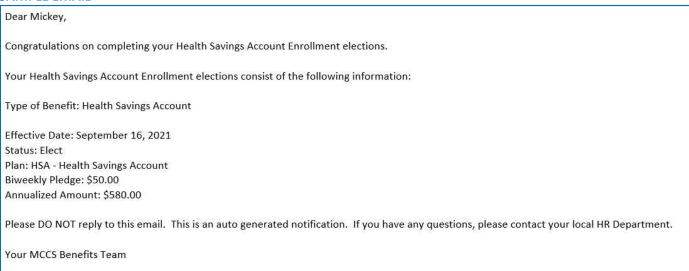
#### **Step 4:** Select Submit.



- **Step 5:** To print your Benefit Election Summary select the Print Your Benefit Elections button. To receive a Benefit Election Summary by email, enter a valid email address and select the Send Email button.
- **Step 6:** Select the Return to Benefits Information Summary Page button.

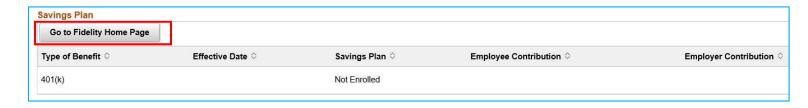


#### **SAMPLE EMAIL**



#### **SECTION E – 401k Savings Plan**

**Step 1:** To register and set up your 401k contributions, select the Go to Fidelity Home Page button. You will be taken to the Fidelity Homepage. Continue with the registration process on their website.

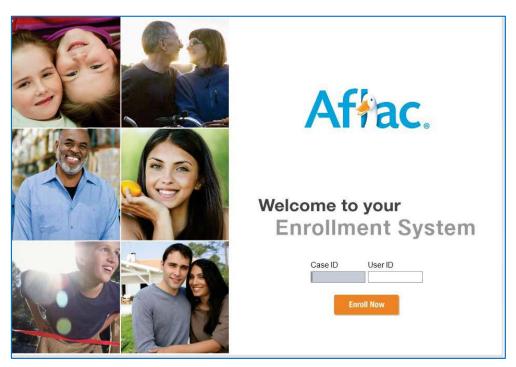




#### **SECTION F – Short Term Disability Plan**

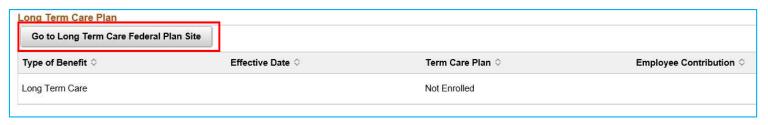
**Step 1:** To register and set up a Short Term Disability Plan, select the Go to AFLAC Login Page button. You will be taken to the AFLAC Homepage. Continue with the registration process on their website.

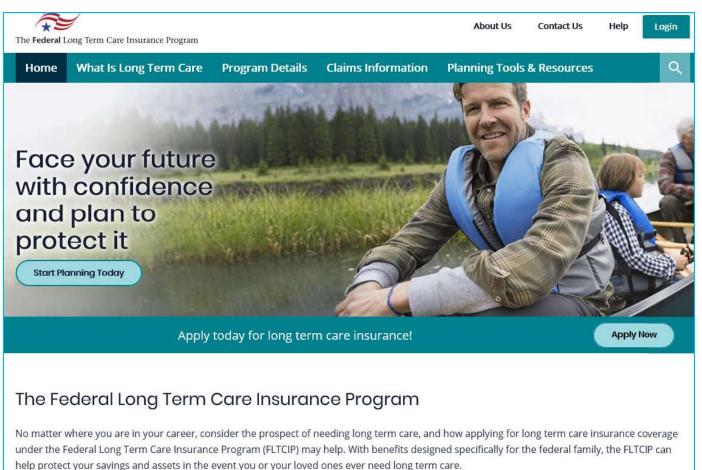




#### **SECTION G – Long Term Care Plan**

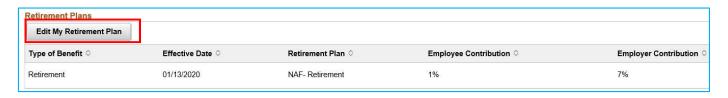
**Step 1:** To register and set up a Long Term Care Plan, select the Go to Long Term Care Federal Plan Site button. You will be taken to the Federal Long Term Care Homepage. Continue with the registration process on their website.





#### **SECTION H – Retirement Plans**

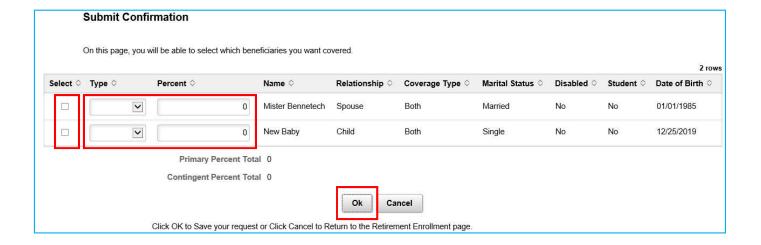
**Step 1:** Select the Edit My Retirement Plan button to update your election.



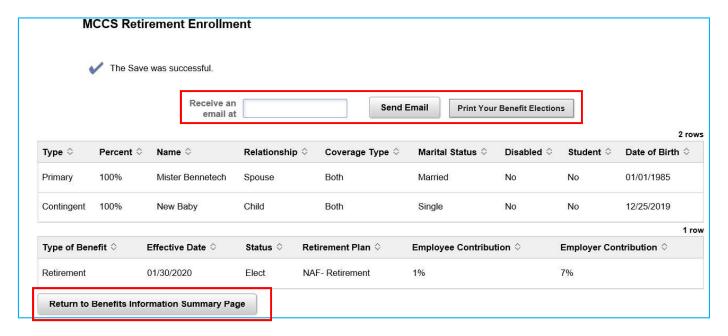
- **Step 2:** To terminate your Retirement plan select the checkbox for Terminate my current NAF-Retirement plan.
- **NOTE:** These updates are for NAF Retirement plans only.
- **Step 3:** To make changes to your existing beneficiaries, select the checkbox under Update Beneficiary(s).
- **Step 4:** Select Submit.



- **Step 5:** Select the applicable Type and enter the Percent of the benefit for each beneficiary.
- **Step 6:** Select the checkboxes and click OK.
- **Step 7:** If you don't want to make any changes, select Cancel.



- **Step 8:** To print your Benefit Election Summary select the Print Your Benefit Elections button. To receive a Benefit Election Summary by email, enter a valid email address and select the Send Email button.
- **Step 9:** Select the Return to Benefits Information Summary Page button.



This process is complete.