



VCHRP Employee Self Service

Benefits Life Event Instructions

Life Events are VCHRP online self-service processes where an employee can notify Benefits of their qualifying life event, upload their required documentation (certificates, declarations, etc.), and make their relevant benefits election changes at their own convenience.

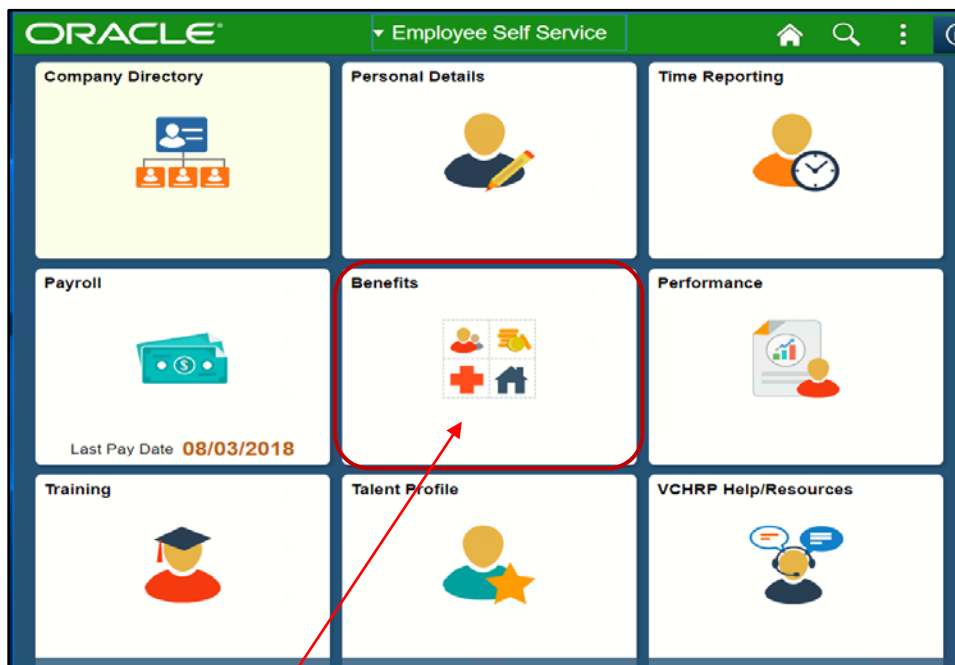
After an employee completes their part of the Life Event transaction, the Benefits Administrator will do the back-office processing of verifying and saving the uploaded documents and finalizing the benefits election changes.

There are currently 8 different Life Events available to employees through Employee Self Service. Each of the Life Events functions similarly. They all have the same steps. The only difference is which documentation is required to be uploaded during each event. For the Marriage event, a valid marriage certificate is required. For a Birth event, a birth certificate is required, etc.

For the purpose of this instruction, we will use the Marriage event to work through the Life Event process.

EMPLOYEE ROLE

- 1) Begin by signing into VCHRP (type "VCHRP" in your internet browser) and landing on the Employee Self Service page.



- 2) Click the 'Benefits' tile



VCHRP Employee Self Service Benefits Life Event Instructions

- 3) Click the 'Life Events' link.

Employee Self Service **Benefit Details**

Benefits Summary

Life Events

Dependent/Beneficiary Info

Benefits Enrollment

Affordable Care Act

Life Events

These are some mid-year life events that you as the employee or your family members may experience. If you have recently experienced one of these events and would like to make changes to your benefits, you may do so as long as the change is consistent with the event.

Once you select the appropriate event below, please enter the date of the event in the **As Of** box (if you are a new hire or rehired employee, this date will default to today's date as your coverage can only be effective prospectively).

When you click **Start Life Event** below, the system will guide you through the process of changing your benefits online for the type of Life Event you select.

- Marriage
- Registered Domestic Partnership
- Birth
- Adoption
- Legal Guardianship
- Divorce
- Dissolution of Domestic Partnership
- Hire/Rehire Benefits Enrollment

*As Of

Start Life Event

- 4) Select the type of Life Event you have experienced. (*In this case we will use Marriage*)
- 5) Enter an As Of date.
- 6) **Note:** The As Of date must be within **31** days (*retroactive*) from today.
- 7) Click **Start Life Event**.

Employee Self Service **Benefit Details**

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*As Of

Start Life Event

The Life Event must be completed within 31 days of your qualifying event or you will not be eligible to change your Benefit elections.



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Benefits Life Event Instructions

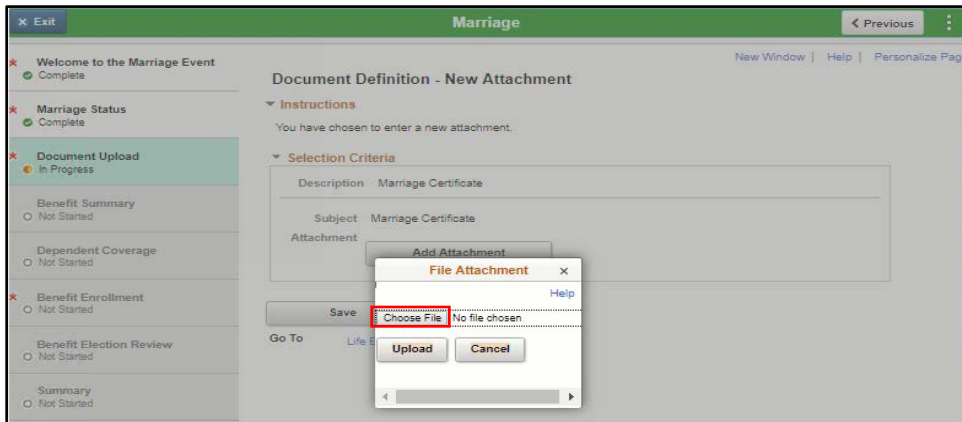
- 8) You will be presented with a Welcome page.
- 9) Click **Next >** to continue.

- 10) **Note:** Steps with an * are required. You must finish all required steps to complete your event. The other steps are optional.
- 11) You can click **X Exit** to leave and save your event so you can return to it later.
- 12) You can click the Action List **⋮** (the 3 white dots at the upper righthand corner of your screen), then click Cancel to erase your event completely.
- 13) You can click **< Previous** if you need to go back to change something.
- 14) The **Document Upload** page describes the required document you need to upload.
- 15) Have an electronic copy of your document ready on your computer so you can upload it to VCHRP.
- 16) Click **Add Attachment**.

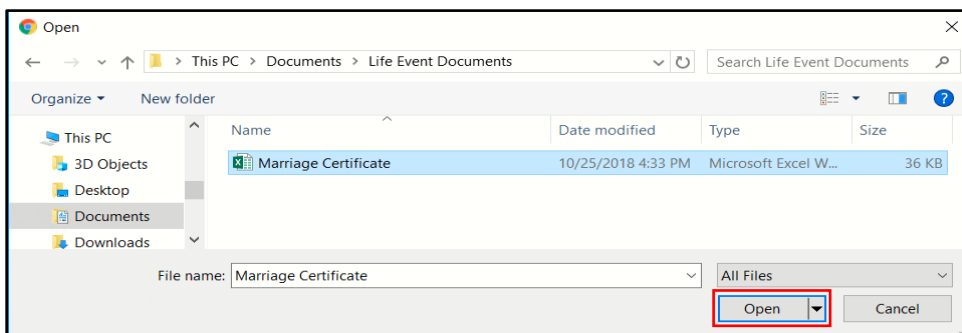


VCHRP Employee Self Service Benefits Life Event Instructions

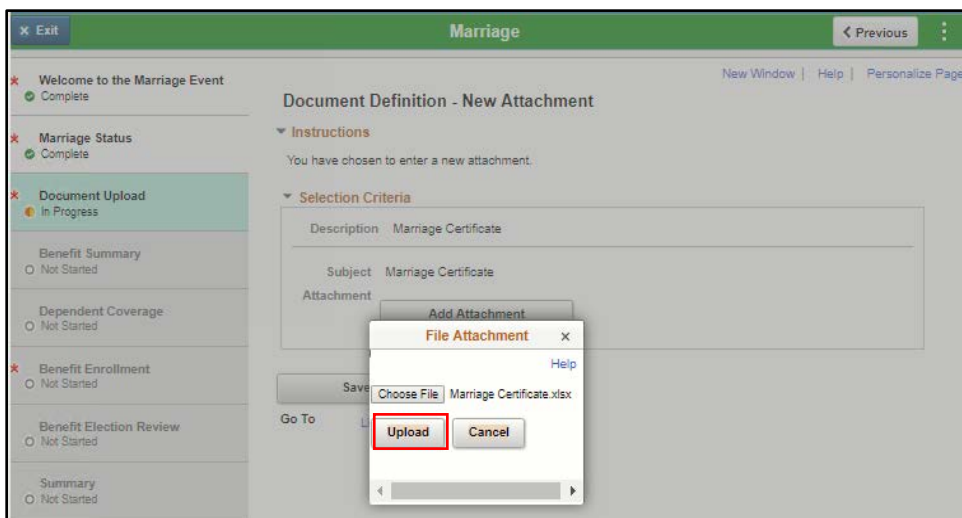
17) Click **Choose File** to locate your document on your computer to download.



18) Locate your file and click **Open** to select it for uploading.



19) Click **Upload** to upload the file into your Life Event.





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- 20) You can click **View Attachment** to check your document uploaded correctly.
- 21) Click **Save** to store your document for the Benefits Administrator to review.

Marriage

Welcome to the Marriage Event
Complete

Marriage Status
Complete

Document Upload
In Progress

Benefit Summary
Not Started

Dependent Coverage
Not Started

Benefit Enrollment
Not Started

Benefit Election Review
Not Started

Document Definition - New Attachment

Instructions
You have chosen to enter a new attachment.

Selection Criteria

| Description | Subject | Attachment |
|----------------------|----------------------|---|
| Marriage Certificate | Marriage Certificate | Marriage Certificate.xlsx View Attachment |

Save

Go To [Life Events - Document Upload](#)

- 22) You should see the message 'Saving Page'.
- 23) **Note:** If you need to upload **multiple** documents during one Life Event, after saving the first, click the **Document Upload** link on the left, then repeat steps 20 - 28 for each document to upload.
- 24) Click **Next >** to continue.

Marriage

Welcome to the Marriage Event
Complete

Marriage Status
Complete

Document Upload
Complete

Benefit Summary
Not Started

Dependent Coverage
Not Started

Benefit Enrollment
Not Started

Benefit Election Review
Not Started

Saving Page

Instructions
You are required to submit the document(s) listed here. Select the Add Attachment button, enter a description, upload the document.

Add Attachment



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- 25) Before you are allowed to change your benefits, you can review them with the Benefit Summary.
26) Click **Next >** to continue.

Marriage < Previous Next >

Benefit Summary

As Of: 11/01/2018
Refresh

| Type of Benefit | Plan Description | Coverage or Participation |
|----------------------|--------------------------------|---------------------------|
| Medical | Opt Out | Employee Only > |
| Life | Basic Management Life | \$50000 > |
| Life and AD and D | Optional Life - 3x salary | Salary X 3 > |
| Long-Term Disability | Long Term Disability - Class 1 | 66.666% of Salary > |
| 401(k) | MGMT - 6%+ contribution | 14.5% Before Tax > |
| 457 Fidelity | Fidelity - 457 Plan | \$150 Before Tax > |
| 457 Roth | Fidelity - 457 Roth | \$150 After Tax > |

- 27) You can also review your Dependent's coverage if any.
28) Click **Next >** to continue.

Marriage < Previous Next >

Dependent and Beneficiary Coverage Summary

To view your benefits as of another date, enter the date and select Go.
11/01/2018 Go

You have no benefit enrollments as of the date entered.



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- 29) **Benefit Enrollment** allows you to change your Benefits Elections online as appropriate for the Life Event you are experiencing.
- 30) Click **Start my Enrollment** to change your benefits elections
- 31) **Note:** This works just like Open Enrollment.

Marriage

Welcome to the Marriage Event
Complete

Marriage Status
Complete

Document Upload
Complete

Benefit Summary
Visited

Dependent Coverage
Visited

Benefit Enrollment
In Progress

Benefit Election Review
Not Started

Summary
Not Started

Benefit Enrollment

Now we're ready to prepare your benefit options, based upon the Life Event information that you've entered. Your information will be analyzed to see if there is any impact to your eligibility for benefits, and determine whether changes to your existing enrollments are allowed. Select the 'Start My Enrollment' pushbutton to begin your benefit enrollment.

Start My Enrollment

- 32) Click **Select** to begin the enrollment process (if there is more than one row, make sure you're on the row for the benefit event that matches your life event and description).

Marriage

Welcome to the Marriage Event
Complete

Marriage Status
Complete

Document Upload
Complete

Benefit Summary
Visited

Dependent Coverage
Visited

Benefit Enrollment
In Progress

Benefit Election Review
Not Started

Summary
Not Started

Benefits Enrollment

After your initial enrollment, the only time you may change your benefit choices is during open enrollment or if you experience a qualified mid-year event. The information icon provides you with additional information about your enrollment. The Select button next to an event means it is currently open for enrollment. Use the Select button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Open Benefit Events

| Event | Date | Status | Action |
|---------------------------|------------|--------|--------|
| Marriage/Domestic Partner | 11/01/2018 | Open | Select |

- 33) Follow the online enrollment event to change any of the available plans to suit your needs.

Marriage

Welcome to the Marriage Event
Complete

Marriage Status
Complete

Document Upload
Complete

Benefit Summary
Visited

Dependent Coverage
Visited

Benefit Enrollment
In Progress

Benefit Election Review
Visited

Summary
Not Started

Benefits Enrollment

Marriage/Domestic Partner

Important: Your enrollment will not be complete until you "Submit" your choices to the Benefits Department. If you want your changes saved, DO NOT exit this program without seeing the "Submit Confirmation" page.

Enrollment Summary

| Category | Current | New | Full Cost | Credits | Before Tax |
|------------------------------|-----------------------------|-----------------------------|-----------|---------|------------|
| Medical | Opt Out:EE Only | Opt Out:EE Only | 258.73 | 397.00 | 0.00 |
| Dependent Life | No Coverage | No Coverage | | | |
| Flex Spending Health - U.S. | Health Care FSA: \$1,080.00 | Health Care FSA: \$1,080.00 | 16.88 | 0.00 | 16.88 |
| Flex Spending Dependent Care | No Coverage | No Coverage | | | |



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- 34) When you are done, if you made any changes, choose **Save and Continue** to store your changes.
- 35) If you made no changes, choose **I Have No Changes**.

Marriage < Previous Next >

Current: No Coverage
New: No Coverage

This table summarizes estimated biweekly costs for your new benefit choices.

| Election Summary | | | |
|--|---------|------------|-----------|
| Summarized estimates for new Benefit Elections | | | |
| | Total | Before Tax | After Tax |
| Costs | 275.61 | 275.61 | 0.00 |
| Credits | -397.00 | -397.00 | |
| Your Costs | -121.39 | -121.39 | 0.00 |

If the Before Tax costs total is negative, it means the credits the County is providing for your benefits exceeds your actual benefit costs. Therefore, it results in a net earnings for you.

Save and Continue **I Have No Changes**

Click **Submit** to send your choices to the Benefits Department. We recommend, however, that you make a copy of this page for your records prior to submitting your choices.

Select the **I Have No Changes** button if you are happy with your prior elections and do not want to make any changes.

Important: Your enrollment will not be complete until you "Submit" your choices to the Benefits Department. If you want your changes saved, **DO NOT** exit this program without seeing the "Submit Confirmation" page.

- 36) Click **Submit** to complete your enrollment.

Marriage < Previous Next >

Once you click **Submit**, your benefit choices will be sent to the Benefits Department for processing. You may continue to submit changes through November 30th.

Due to IRS restrictions on Flexible Benefits Programs, the choices you make during Open Enrollment generally cannot be changed until the next annual Open Enrollment period. However, the IRS does permit you to file revised elections or adjust Flexible Spending Account contributions within 31 days of certain qualified mid-year events. Please read Chapter 1 of your Benefit Plans Handbook for more information about qualified mid-year events.

Excess Credit Rollover

If the "Before Tax" costs total on the Enrollment Summary page is negative, it means the credits the County is providing for your benefits exceeds your actual benefit costs. Therefore, it results in a net earnings for you.

Excess Before Tax credits will be applied to Cash

Authorize Elections

By submitting your benefit choices, you are authorizing the County of Ventura to take deductions from your paycheck to pay for your benefit costs, to send necessary personal information to your selected providers to initiate and support your coverage, and to perform any investigation necessary to verify your eligibility for the plan(s) as well as the eligibility of your dependents. You are also certifying that all enrolled dependents meet the eligibility rules of the plan(s).

Submit **Cancel**

Click **Submit** to send your choices to the Benefits Department.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

- 37) Click **OK** because you have to. (it's delivered that way)

Marriage < Previous Next >

Benefits Enrollment
Submit Confirmation

OK



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- 38) You can review the changes you just made.
- 39) If you find a mistake, you can go back to Benefit Enrollment and make more changes.
- 40) **Note:** Your changes will not take effect until the Benefits Administrator approves them.
- 41) Click **Next >** to continue.

The screenshot shows the 'Marriage' event page with a sidebar on the left and a main content area. The sidebar includes steps: Welcome to the Marriage Event (Complete), Marriage Status (Complete), Document Upload (Complete), Benefit Summary (Visited), Dependent Coverage (Visited), Benefit Enrollment (Complete), Benefit Election Review (Visited), and Summary (Not Started). The main content area is titled 'Your Benefit Choices' and contains a table with the following data:

| Benefit Plan | Benefit Option | Coverage / Category |
|----------------------|----------------|---------------------|
| Medical | OPT OUT | Employee Only |
| Life | Mgmt Life | \$50000 |
| Life and AD and D | Life 3x | \$372000 |
| Dependent Life | Dep Life 2 | \$10000 |
| Long-Term Disability | LTD CLS1 | 66.666% of Salary |
| 401(k) | MGMT 6% | Before-Tax |
| | | After-Tax |
| 457 Fidelity | Fid 457 | Before-Tax |
| | | After-Tax |

- 42) Click **Complete** to finish your Life Event.

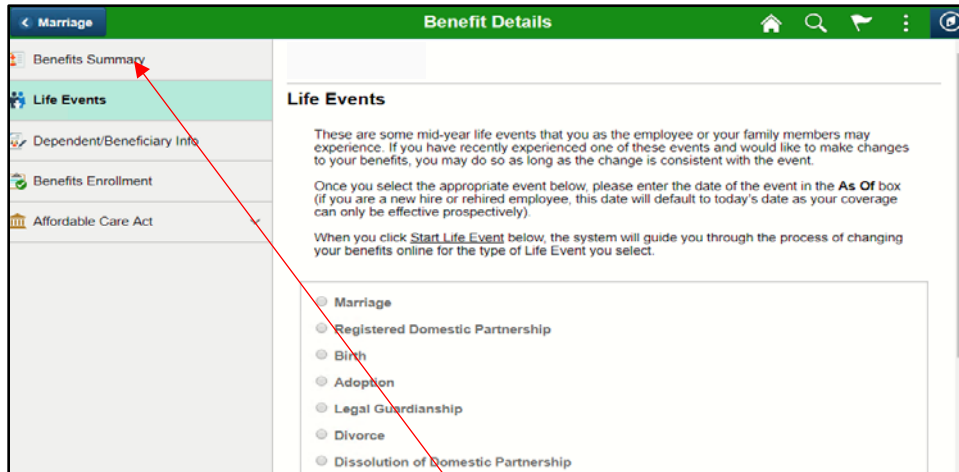
The screenshot shows the 'Marriage' event page with the 'Summary' section selected in the sidebar. The main content area displays a congratulatory message and a list of options to view or change: Personal Details (Address, Contact Details, Name, Emergency Contacts) and Payroll (View Paycheck, Direct Deposit, Tax Information (Fed/State)). A 'Complete' button is highlighted in a red box. Below the message, there is a 'Steps' section with a table that has 7 rows.



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43) You will be returned to the Life Events main page upon completion.



44) A Benefits Administrator will review your uploaded documents and get back to you if they have any questions. Once your documents are approved, the Benefits Administrator will finalize your benefits election changes. To verify your changes have been finalized, you may come back to the Benefits Self Service page any time and click on the 'Benefits Summary' link. Please note that you may need to change the As Of date to view enrollment data for a different day (the page is always populated with the plans you're enrolled in as of today).