Benefits

Other Benefit Types that may be displayed, depending on your eligibility:

- Other Flexible Spending
- Flex Spending Transportation
- Short-Term Disability
- Spousal Life
- Dependent Life
- AD and D
- Spousal Surcharge

Benefits Summary

Health Benefits

- Spousal Surcharge
- Life
- AD and D
- Dependent Life
- Spousal Life
- Short-Term Disability
- Flex Spending Health – U.S.
- Flex Spending Transportation
- Other Flexible Spending Accounts

- Flex Spending Dependent Care
- Flex Spending Parking (optional, may not be visible)

Other Benefit Types that may be displayed, depending on your eligibility:

- A D and D
- Long-Term Disability
- Supplemental LTD
- Vacation
- Personal
- Dependent/Beneficiary Info
- Savings Contribution Summary
- Insurance Summary

Benefits Enrollment
Employee Self Service Overview

Employee Self-Service (ESS) is a convenient, secure, and user-friendly resource you can access online through the new OneRoundy’s employee portal. It not only enables you to see your individual records, but also provides tools to give you more control of your personal information.

OneRoundy’s is available to everyone from home or a company computer through a click from our store websites or the main Roundy’s web site. Covering many Human Resources, Benefits, Payroll and Timekeeping functions, OneRoundy’s is access on demand so you can bypass the request process or the need to complete a form for viewing or changing personal information.

- Review or update my personal information (address, phone number, email, emergency contacts)
- Review my current and prior paycheck details
- Review or update my W-4 tax information
- Request another W-2
- Review my health care plan coverage
- Select health care plan (new employees only)
- Review life, accidental death and dismemberment (AD&D), and disability insurance elections
- Review or update my dependent and beneficiary details
- Review my Flexible Spending Account plan
- Review my 401(k) payroll deductions
- Submit vacation and personal time off requests (retail hourly team members only)
- Review my time card (hourly employees only)
- Review my schedule (hourly employees only)

Getting Started With Employee Self Service

New Roundy’s Computer System Users
If you have not previously logged into a Roundy’s computer system, you must create a new password prior to using the OneRoundy’s Employee Self Service system. Click on “Manage My Password” at the top of the OneRoundy’s Portal Page. Follow the instructions in the “Password Management” section starting on the next page of this document to create your password.

Current Roundy’s Computer System Users
Use your current user ID and password.

Congratulations! You are now ready to use the OneRoundy’s Employee Self Service system.
Password Management
Roundy’s Password and Account Management Portal allows you to manage the passwords you use for Roundy’s computer systems. Click on “Manage My Password” at the top of the OneRoundy’s Employee Self Service Portal Page to go to begin.

First-Time Roundy’s System Users
If you have not previously logged into a Roundy’s computer system, you are required to create a password prior to using Employee Self Service for the first time. Please perform the following steps.

Existing Roundy’s computer system users do not need to perform these steps.

1. Enter your 6-digit Employee ID.
2. Select the first option by clicking in the circle to the left of the text “By providing answers to my secret questions”.

3. Enter in the last 4 digits of your Social Security Number.
4. Click the “Submit” button.
5. You will now need to answer an additional security question. Click the “Close” button.

6. Enter the answer to the additional security question twice.
7. Click the “Submit” button.
8. Click the check box to the left of “Group: Default”.
9. Enter a new password. Consider a new password that you will remember and enter it in both boxes. **Rules for password:**
   - Cannot be shorter than 7 characters
   - Cannot be larger than 100 characters
   - Requires a minimum of 1 letter
   - Cannot use first name, last name or userID
   - Requires a minimum of 1 number
   - Requires a minimum of 1 special character (/ ? | @ $ & or *)
   - Cannot use old passwords

10. Click on the “Submit” button.

11. Click the “Exit” button.

You have now completed creating your new password and can begin using the OneRoundy’s Employee Self Service system.
Forgot Password
Click on “Manage My Password” at the top of the OneRoundy's Employee Self Service Portal Page to go to begin.

1. Enter your 6-digit Employee ID.

2. Select the first option by clicking in the circle to the left of the text “By providing answers to my secret questions”.

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Employee Self Service User Guide

Page 9 of 112
3. Answer the security questions.

4. Click the “Submit” button.

5. Click the check box to the left of “Group: Default”.

6. Enter a new password. Consider a new password that you will remember and enter it in both boxes.
Rules for password:
- Cannot be shorter than 7 characters
- Cannot be larger than 100 characters
- Requires a minimum of 1 letter
- Cannot use first name, last name or userID
- Requires a minimum of 1 number
- Requires a minimum of 1 special character (/ ? @ $ & *)
- Cannot use old passwords

7. Click on the “Submit” button.

You will be presented with the following message:

8. Click the “Exit” button.

You have now completed resetting your password.
Timekeeping/Scheduling Overview

The Timekeeping and Scheduling functionality within Employee Self Service is provided by the Kronos System and consists of Time-Off requests, Time Card Review, Schedule Review, and Accruals Review. The following pages of this guide provide instructions for logging into the Kronos System and completing each of those functions. For Time-Off requests, both hourly and salaried employees will need to use the ESS process, as both employee types have schedules within Kronos.

- Submit vacation and personal time off requests (retail hourly team members only)
- Review my time card (hourly employees only)
- Review my schedule (hourly employees only)
Logging into Kronos

1. Enter in the following values:
   a. User Name: Person ID (i.e. 136816)
   b. Password: Password setup from the My Password link on the OneRoundy’s portal page.

2. Click on Sign In.

3. You will be signed on to the Kronos System and will be presented with the main Kronos Home Page.
Time-Off Request

1. After the employee logs into Kronos, using the ESS link the following is displayed.

2. Click on My Requests.
3. The Time Period will default to Next Pay Period.

4. Click on Request Off, under Requests in the lower left part of the screen.

5. Using the calendar grid, change the week to the time frame for the request with the up/down arrows on either side of the grid. Click on the day(s) for the request, and then select either: Personal Day, Request Off or Vacation from the lower left corner.
6. The request appears in the lower right pane. Click on [Submit] to start the request.

7. Under My Current Requests and on the calendar, the new request is displayed, with a status of [Submitted].
Time-Off Request Approval/Refusal (By Manager)

Using the request made above, see the following for the Approval/Refusal procedure.

1. Any manager or SOM at that store can Approve/Refuse the request. The manager will log into Kronos.
2. The manager must open Schedule Planner for his or her store, for the time period the request has been made for.

3. Click on the Requests tab, in the lower part of the screen.
4. In the drop down next to Request For, select All Requests. Then click on Reload.

5. The current request will appear in the bottom pane. It may be necessary to increase the height of the bottom pane to see the request(s). Right-click on the request and select: **Refused, Approved, Pending** or **Retracted**.
6. When ‘Approved’ is selected, the request now shows with a Status of ‘Approved’. Click on Save under the By Employee tab.

7. Now, the employee would log into the ESS link for Kronos and see the following under My Requests:
8. The request now shows a Status of approved in the displayed calendar and in the My Current Requests pane. Also, the vacation request has been entered into the schedule.

9. The 17 PER 0:01 entry has been added to the schedule (See highlighted box).
Time Card Review

1. After the employee logs into Kronos, using the ESS link the following is displayed.

2. Click on **My Timecard**. Select the desired *Time Period* to view punches / pay code entries.

3. To return to the main menu, click on `<Home` in the upper right corner.

Schedule Review

1. After the employee logs into Kronos, using the ESS link the following is displayed.
2. Click on **My Reports**.

3. Select **Schedule**, under AVAILABLE REPORTS, and select the desired **Time Period**. Click on **View Report**. (Keep in mind, for a schedule to be visible, the SOM has to have posted it. Non-posted schedules will not appear!)
4. Click [Return] to get back to the REPORTS screen. Click <Home>, in the upper right corner, to return to the main menu.

Accrual Review
1. After the employee logs into Kronos, using the ESS link the following is displayed.

2. Click on My Reports.
3. Select *Accrual Balances and Projections* from the lower left pane. Click on the calendar icon to the right of *As Of*, to select a date. After those selections are made, click on [View Report].

4. Click Return to get back to the REPORTS screen. Click < Home, in the upper right corner, to return to the main menu.
Human Resources, Payroll, and Benefits Overview

The Human Resources, Payroll, and Benefits functions are provided by the PeopleSoft system. The following pages of this guide provide instructions for logging into the PeopleSoft System and completing each of those functions.

- Review or update my personal information (address, phone number, email, emergency contacts)
- Review my current and prior paycheck details
- Review or update my W-4 tax information
- Request another W-2
- Review my health care plan coverage
- Select health care plan (new employees only)
- Review life, accidental death and dismemberment (AD&D), and disability insurance elections
- Review or update my dependent and beneficiary details
- Review my Flexible Spending Account plan
- Review my 401(k) payroll deductions
Logging into ESS PeopleSoft

1. From the Employee Self Service web page, click on the link for PeopleSoft functionality.

2. Enter in the following values:
   a. User ID: Person ID (i.e. 136816)
   b. Password: Password setup from the My Password link on the OneRoundy’s portal page.

3. Click on Sign In.
4. You will be signed on to one of the following menu pages, depending on which PeopleSoft section you chose.
   a. Personal Information:

   ![Image of Personal Information menu page]

   b. Payroll:

   ![Image of Payroll menu page]

   c. Benefits:

   ![Image of Benefits menu page]
Personal Information

Rewards Card

1. Click on **Rewards Card**.

2. Enter your Rewards Card Number and then select Verify Card Number.
3. If the Name on the Card matches your name, click on the **Save** button. You should see the following page.
4. If the Name on the Card matches does not match your name, confirm that you entered the number from your card correctly. If your rewards card number could not be verified, you must first register your card number at a store before it can be associated with your employee id.

**Personal Information Summary**

1. Click on Personal Information Summary
Scroll down to view the entire summary page and all information that is available:

a. Home Address
b. Phone Numbers
c. Emergency Contacts
d. Email Addresses
e. Marital Status
f. Employee Information

2. Each of the first four (Home Address, Phone Numbers, Emergency Contacts, and Email Addresses) can be edited by clicking on the button below each section, or by clicking on the associated links on the **Personal Information** page.
Home and Mailing Address

Edit Home Address

1. Click on the Change home address button on the Personal Information Summary page, or the Home and Mailing Address link on the Personal Information page.

2. Click on the pencil icon under the Edit column. (If you hover the mouse on the pencil icon, a box with “Edit” will appear).

3. Edit any of the fields as necessary. The Change As Of date can be either today’s date or a future date. To change the date, click on the small calendar icon to the right of the date on the first line, under Edit Home Address.
4. Scroll through the calendar to select a date. If it is the current date, click on Current Date on the bottom of the calendar pop-up box. After a date is clicked on, the value in the Change As Of field will be updated.

5. When edits are complete, click on the Save button.

6. Click on the OK button.
7. The informational **Home and Mailing Address** screen reappears with the updated information.

### Phone Numbers

#### Edit Phone Number

1. Click on the **Change phone numbers** button on the **Personal Information Summary** page, or the **Phone Numbers Address** link on the **Personal Information** page.

#### Change an Existing Phone Number

2. To change an existing phone number, make changes in Telephone/Extension boxes. If you have more than one phone number displayed, you will be allowed to change the Preferred status from one number to the other. (Suggested format is: Area Code/xxx-xxxx). When done, click on the **Save** button.
3. Click on the **OK** button.

4. The updated page will be displayed.

Add a New Phone Number

5. To add another phone number, click on the **Add Phone Number** button. A new line will appear.
6. Click on the drop down box arrow on the left-most field on the new line. Select a **Phone Type** for the new number. (i.e. Other, Work).

7. Enter in the new phone number in the **Telephone** column of the new line. (Suggested format is: Area Code/xxx-xxxx).
8. If the new number is your preferred contact number, (the phone number to be used to call you from your work location or the home office), click on the **Preferred** check box on the new line. Any of the listed phone numbers can be the preferred.
   a. NOTE: Only ONE phone number can be the preferred!

9. Click on the **Save** button.

10. Click on the **OK** button.
Delete an Existing Phone Number

11. Click on the trash icon on the row of the phone number to delete.

   b. NOTE: You CANNOT delete the entry marked as the preferred phone number. If you wish to delete that one, select another phone number as the preferred first.

12. If you still wish to delete the phone number from your record, click on the **Yes – Delete** button. Otherwise, click on the **No – Do Not Delete** button.

13. The **Yes – Delete** was clicked in this case. See that the selected phone number entry no longer appears. If the **No – Do Not Delete** button was clicked, the phone number entry would still display.

14. Click on the **Save** button.

15. Click on the **OK** button.
16. The informational **Phone Numbers** screen reappears with the updated information.

**Email Addresses**

**Edit Email Address**

1. Click on the **Change email addresses** button on the **Personal Information Summary** page, or the **Email Addresses** link on the **Personal Information** page.

2. To add another email address, click on the **Add Email Address** button. A new line will appear.
3. Click on the drop down box arrow on the left-most field on the new line. Select an **Email Type** for the new email address. (i.e. Other).

4. Enter in a valid email address in the **Email Address** field.

5. If the new email address is your preferred email address (the email address to be used to contact you from your store or the home office) or it is your only email address, click on the **Preferred** check box on the new line. Any of the listed email addresses can be the preferred.
   a. **NOTE:** Only ONE email address can be the preferred!
6. Click on the **Save** button.

7. Click on the **OK** button.

8. The informational **Email Addresses** screen reappears with the updated information.

**Delete an Email Address**

9. Click on the trash icon on the row of the email address to delete.
   a. NOTE: You CANNOT delete the entry marked as the preferred email address. If you wish to delete that one, select another email address as the preferred first.
10. Click on the trash icon on the row of the email address to delete. If you still wish to delete the email address from your record, click on the **Yes – Delete** button. Otherwise, click on the **No – Do Not Delete** button.
11. The **Yes – Delete** was clicked in this case. See that the selected email address entry no longer appears. If the **No – Do Not Delete** button was clicked, the second email address entry would still display.

12. Click on the **Save** button.

13. Click the **OK** button.

14. The information **Email Addresses** screen appears.

EDIT a non-business email address. NOTE: Once entered, an employee’s business email address cannot be changed. Also, not all employees will have a Roundy’s email address.

15. Enter changes in the **Email Address** box. When there are multiple email addresses, the **Preferred** box can also be changed from one address to another.

16. Click on the **Save** button.
17. Click the **OK** button.

18. The Personal Information **Email Addresses** screen appears.

### Emergency Contacts

#### Edit Emergency Contact

1. Click on the **Change emergency contacts** button on the **Personal Information Summary** page, or the **Emergency Contacts** link on the **Personal Information** page.
Add an Emergency Contact

2. To add another emergency contact, click on the Add Emergency Contact button. A new screen will appear.

3. To add a new emergency contact, the following fields need to have values entered in/selected:
   a. Contact Name:
   b. Relationship to Employee:
   c. Telephone:
4. Enter the Contact Name and select the Relationship to Employee. The Relationship to Employee can be selected by clicking on the drop down arrow in the box.
5. If they apply, select the check boxes for **Contact has the same address as the employee** AND/OR **Contact has the same telephone number as the employee**.
6. If the option for **Contact has the same address as the employee** is not checked, click on the **Edit Address** button.
7. Enter address information for the emergency contact and click on the OK button.

8. If the option for **Contact has the same telephone number as the employee** is not checked, enter in a **Telephone** number. (Format: Area Code/ xxx-xxxx)
9. If the new emergency contact has any additional phone numbers, click on the **Add Phone Number** button.

10. Click on the drop down arrow under **Phone Type** and select a type.
11. Enter in a **Phone Number** and **Extension** (If applicable).
12. When all the information has been added, click on the **Save** button.

13. Click on the **OK** button.

14. The new emergency contact appears in the list.

**Delete an Emergency Contact**

15. Click on the trash bin icon under the **Delete** column for the emergency contact to delete.
   - a. NOTE: You CANNOT delete the entry marked as the preferred phone number. If you wish to delete that one, select another phone number as the preferred first.
16. If you still wish to delete the emergency contact from your record, click on the **Yes – Delete** button. Otherwise, click on the **No – Do Not Delete** button.

17. The **Yes – Delete** was clicked in this case. See that the selected emergency contact entry no longer appears. If the **No – Do Not Delete** button was clicked, the third phone number entry would still display.

18. Click on the **Save** button.

19. Click on the **OK** button.
Payroll

View Paycheck

1. From the Payroll screen, click on the link View Paycheck.

2. The pay stubs from the 8 most recent pay periods display. If you wish to see an older stub, click on the arrow above the heading ‘PDF File’ and the next 8 entries will be displayed. Pay stubs run for check dates after 6/1/2013 will have the PDF File checkbox checked. This means the check will be displayed as a PDF file.
3. Click on the Check Date to view the pay stub.

4. A new window pops up, showing the check/advice. The PDF version of the stub can be printed using the print icon.

5. When done viewing, close the PDF window.

6. Pay stubs created prior to 6/1/2013 will appear as a page similar to the following:
Scroll Down to see more of the information.
7. All payroll related data is displayed for that period’s check. This page can be printed but will not format onto just one page.

8. Click on the **Return to Pay Check Selection** link found at the bottom of the page to return to the **View Paycheck** page.
Direct Deposit

1. From the Payroll screen, click on the link Direct Deposit.

Add an Account

2. Click on the Add Account button.

3. Click on View check example to see the location of the routing and account numbers on your check.
4. Click the OK button to return to the Direct Deposit page.

5. Enter the required fields. Take note of the text in green for information instructions.
   a. **Routing Number** – Must be a nine digit number
   b. **Account Number** – Enter without spaces
   c. **Account Type** – Choose Checking or Savings from dropdown (arrow)
   d. **Deposit Type** – Choose Amount, Percent, or Balance from the dropdown (arrow)
   e. **Amount or Percent** – Leave blank for a balance type, otherwise enter the percent or dollar amount
   f. **Deposit Order** – Will default to 999 for a balance type, otherwise enter 1 for the first account, 2 for the second account, etc.

6. Click on the [Submit] button.

7. Click on the [Submit] button.
View an Account

8. Click on the link under the **Account Type** column of the account you want to view. Example: **Savings**, **Checking**.

9. The information for that account is displayed.

10. When done viewing, click on the Return to **Direct Deposit** link.
Edit an Account

11. Click on the Edit button on the line of the account you wish to edit.

12. Edit the appropriate fields, up to and including:
   a. **Routing Number** – Must be a nine digit number
   b. **Account Number** – Enter without spaces
   c. **Account Type** – Choose Checking or Savings from dropdown (arrow)
   d. **Deposit Type** – Choose Amount, Percent, or Balance from the dropdown (arrow)
   e. **Amount or Percent** – Leave blank for a balance type, otherwise enter the percent or dollar amount
   f. **Deposit Order** – Will default to 999 for a balance type, otherwise enter 1 for the first account, 2 for the second account, etc.

13. Take note of the text in green for information instructions. When the edits are complete, click the Submit button.
14. Click on the OK button.

Delete an Account

15. Click on the Delete button on the line of the account you wish to edit. In this case the Delete button on the top line was clicked.

16. If you still wish to delete the account from your record, click on the Yes – Delete button. Otherwise, click on the No – Do Not Delete button.

17. Click on the OK button.
18. The **Yes – Delete** was clicked in this case. See that the selected account entry no longer appears. If the **No – Do Not Delete** button was clicked, the “Savings” account entry would still display.
**W-4 Tax Information**

1. Click on the link **W-4 Tax Information** to update or view your Federal Tax information. If you wish to submit changes online, please enter a primary email address under Self Service Personal Information first.

Scroll down to view the rest of the screen.
2. Fields that can be edited include:
   a. Enter total number of Allowances you are claiming:
   b. Enter Additional Amount, if any, you want withheld from each paycheck:
   c. Indicate Marital Status:
   d. Check here and select Single status if married...
   e. Check here if your last name differs from that shown on your social security card.
   f. Withholding Year
   g. …claim exempt status.

3. If any changes are made, click on the Submit button.

4. In the Password box, enter your password. Click on the Continue button.

5. Click the OK button.
The updated W-4 Tax Information will be displayed and a confirmation email will be sent to your primary email account.

**State Tax Information**

1. Click on the **State Tax Information** to update or view your State Tax information. If you wish to submit changes online, please enter a primary email address under Self Service Personal Information first.
2. Fields that can be edited include:
   a. **Filing Status** (except for Illinois residents)
   b. Enter total number of Withholding Allowances you are claiming
   c. Enter Additional Amount, if any, you want withheld from each paycheck

3. If any changes are made, click on the **Submit** button.

4. In the **Password** box, enter your password. Click on the **Continue** button.

5. Click the **OK** button.

The updated State Tax Information will be displayed and a confirmation email will be sent to your primary email account.
W-2 Reissue Request

1. From the Payroll screen, click on the link **W-2 Reissue Request**.

2. In the **W2 Request for year** field, enter in the year you want for the W-2 reissue. Select the address you want it sent to selecting a value from the **Select where you want your W-2 delivered** drop down.

3. After the values have been selected, click on the **Submit** button.

4. Click the **OK** button.
W-2 Reissue Request

Renee Johnson

Complete the following information to request a reissue of your W-2 form.

Home Address:
3601 W College Ave
Greenfield WI 53221

W-2 Reissue Request:

W2 Request for year: 2013
Select where you want your W-2 delivered: Home Address

Submit

NOTE: During tax season, every effort will be made to reissue your W-2 within 2-3 working days. After April 15th, it could take 5-6 working days to process your request.
Benefits

Dependents and Beneficiaries

Dependent/Beneficiary Coverage

1. From the Benefits menu, click on the link **Dependent/Beneficiary Coverage** under **Dependents and Beneficiaries**.

2. On the **Dependent/Beneficiary Coverage Summary** page, click on the **Dependent/Beneficiary Summary** link.
3. Clicking on the dependent/beneficiary Name on either the Dependent/Beneficiary Coverage Summary or the Dependent and Beneficiary Information page will take you to the Dependent/Beneficiary Person Information page where you can view the person’s information.

4. Click on the Edit button to change dependent/beneficiary personal information.
a. Information that can be changed for the dependent/beneficiary
   i. Name: First, Middle, Last, Prefix, Suffix
   ii. Date of Birth
   iii. Gender
   iv. SSN (i.e. Social Security Number)
   v. Relationship to Employee
   vi. Marital Status

5. Click on the checked Same Address as Employee box and click the Edit box to open up the Edit Address page to enter a different address. Click the OK button when finished or the Cancel button to return to the previous page without saving any changes.
6. Click on the checked Same Phone as Employee box to open up the phone number field and enter a different phone number.
7. Click the **Save** button when finished.

8. Click the **OK** button.

9. Click on the **Return to Dependent/Beneficiary Summary** link.
Health Care Dependent Summary

1. From the Benefits menu, click on the link Health Care Dependent Summary under Dependents and Beneficiaries to view your enrolled health care dependents.

2. Health Care dependent personal information can be viewed and edited just like from the Dependent/Beneficiary Coverage and Summary pages by clicking on the dependent’s Name.
Insurance Beneficiary Summary

1. From the Benefits menu, click on the link Insurance Dependent Summary under Dependents and Beneficiaries to view your designate primary beneficiaries.

2. Click on the View Summary by Beneficiary Name link to see a different view of the same information.
3. Beneficiary personal information can be viewed and edited just like from the Dependent/Beneficiary Coverage and Summary pages by clicking on the beneficiary’s Name.

Benefits Summary

1. From the Benefits menu, click on the link Benefits Summary. This will display the benefits for which you are eligible. If your coverage is ‘Waived’ you will not be able to click on the Type of Benefit to view details.
Health Benefits

1. To view Health Insurance coverage, click on the **Health Benefits** link. Only the date can be changed.

2. The **view your benefits as of** date defaults to the current date. To change it, click on the calendar icon next to the date field towards the upper left corner of the screen.
3. Clicking on either [Link to Anthem BCBS Medical] or [Link to Anthem BCBS Dental/Vision] will open another window on that Anthem BCBS website. From there you can login with your specific Anthem ID and password.

**Spousal Surcharge**

1) To view Spousal Surcharge information, click on the **Spousal Surcharge** link. Only the date can be changed.

**Life**

1. To view Life Insurance information, click on the **Life** link.
2. To add or change a beneficiary, click on the **Edit** button. From this page you can add a new beneficiary by clicking on the **Add a New Beneficiary** button or modify the percentages in the New Primary Allocation or New Secondary Allocation boxes. There must be at least one primary beneficiary. After changes are completed click on the **Save** button.

3. The **view your benefits as of** date defaults to the current date. To change it, click on the calendar icon next to the date field towards the upper left corner of the screen.

4. Select the new date using the calendar. Click on the **Go** button.
5. To View/Edit the beneficiary person for Life insurance, click on the name link in the **Dep/Ben Coverage Details** box, at the bottom of the screen.

You may have to scroll down to see everything on the screen.
6. If just viewing, click on the Return to Life Insurance Main link at the bottom of the page. If you wish to edit the beneficiary information, click on the **Edit** button at the bottom of the screen.

You may have to scroll down to see everything on the page.

7. Make the appropriate edits to the beneficiary information. When complete, click on the **Save** button.

8. Click on the **OK** button.
9. The changes have been saved. Click on the Return to Life Insurance Main link.

10. Click on the Return to Employee Benefit Summary link.
AD and D

1. To view Accidental Death and Dismemberment coverage, click on the AD and D link.

2. The view your benefits as of date defaults to the current date. To change it, click on the calendar icon next to the date field towards the upper left corner of the screen.

3. Select the new date using the calendar. Click on the Go button.
4. When done viewing, click on the Return to Employee Benefit Summary link.
Dependent Life

1. To view Dependent Life information, click on the **Dependent Life** link. The employee is the beneficiary for Dependent Life policies.

Spousal Life

1. To view Spousal Life information, click on the **Spousal Life** link. The employee is the beneficiary for Spousal Life policies. The page is similar to the Dependent Life page.

Short-Term Disability

1. To view the Short-Term Disability coverage, click on the **Short-Term Disability** link.
2. The view your benefits as of date defaults to the current date. To change it, click on the calendar icon next to the date field towards the upper left corner of the screen.

3. Select the new date using the calendar. Click on the Go button.

4. When done viewing, click on the Return to Employee Benefit Summary link.
Flex Spending Health – U.S.

1. To view Flex Spending Health information, click on the **Flex Spending Health – U.S.** link. To view claims and payments, click on **Link to Health Equity** which will open another window on the HealthEquity website.

![Image of Health Spending Account Review](image)

You may have to scroll down to see everything on the page.
Flex Spending Transportation

1. To view Flex Spending Transportation account information, click on the Transportation FSA link.

2. To view Flex Spending Transportation claims, click on the Service Start Date (in the Claim Details section) that you wish to view.
3. To view Flex Spending Transportation payments, click on the Payment History link on the Claim Detail page.

4) OR Return to the Flexible Spending Account Review page and click on the Check Date (in the Check Details section) that you wish to view.
Other Flexible Spending Accounts

Flex Spending Dependent Care

**Flex Spending Parking** (optional, may not be visible)

See instructions for Flex Spending Transportation.

Other Benefit Types that may be displayed, depending on your eligibility:

A D and D

Long-Term Disability

Supplemental LTD

Vacation

Personal
Dependent/Beneficiary Info

1. From the Benefits menu, click on the Dependent/Beneficiary Info link.

2. Dependents and/or Beneficiaries are displayed.

3. To view the Dependent and Beneficiary Coverage Summary information, click on the Dependent/Beneficiary Coverage Summary link.
4. The **view your benefits as of** date defaults to the current date. To change it, click on the calendar icon next to the date field towards the upper left corner of the screen.

5. Select the new date using the calendar. Click on the **Go** button.

6. To view or edit the beneficiary information, click on the beneficiary name link under the **Dependent/Beneficiary Name** column.
7. The procedure to edit beneficiary information has been documented earlier here. Click on the Return to Dependent and Beneficiary Coverage Summary link.

8. When done, click on the Return to Dependent/Beneficiary Summary or Return to Benefits Menu link.
Savings Contribution Summary

1. From the Benefits menu, click on the link **Savings Contribution Summary** link.

2. The view your benefits as of date defaults to the current date. To change it, click on the calendar icon next to the date field towards the upper left corner of the screen.

3. Select the new date using the calendar. Click on the **Go** button.
Insurance Summary

1. From the Benefits menu, click on the link Insurance Summary to view your insurance benefits.

2. The options here are the same as what is shown under the Benefits Summary page. Follow the instructions noted under that page for viewing and editing of: Life, AD and D, Short-Term Disability, and Long-Term Disability.

3. To view or edit a beneficiary for those insurance options, click on the Insurance Beneficiary Summary link.

4. To view or edit the beneficiary information, click on the link of the person’s name under the Name column as described previously.

5. When done, click on the Return to Insurance Summary link or the Return to Benefits Menu link.
Benefits Enrollment

1. If you are a new hire and are ready to begin your benefit enrollment, click on the link **Benefits Enrollment** from the **Benefits** menu. As of the first release of Employee Self Service, this option will only be active for new hires. At a later time, open enrollment for all employees, new and existing, may become available.

2. Click on the **Select** button to begin the enrollment process.
3. Click on the **Edit** button for the first benefit. In this case it is **Health Benefits**.

Scroll down.
4. Choose a health plan or choose ‘Waive’ if you are covered under someone else’s health coverage.

5. In this example, Blue Priority Plan Union (pre-tax) was chosen.

6. Click on the Add/Review Dependents to verify dependent information or to add a dependent.
7. Click on the dependent’s name to view the dependent’s personal information.

8. Click on the Edit button to update the dependent’s personal information. Personal and marital status information can be updated, as well as the dependent’s address and phone number. To change the dependent’s address, click the checked ‘Same Address as Employee’ box which will clear the address and provide an Edit button. Click the Edit button and enter address information in the fields provided. To change the dependent’s phone number, click the checked ‘Same Phone as Employee’ box and enter the dependent’s phone number in the provided field. When done click the Save button.
9. Click on the Return to Dependent/Beneficiary Summary link.

10. To add a dependent, click on the Add a dependent or beneficiary button. Fill in the dependent’s personal and marital status information. If the dependent has the same address as you, make sure the ‘Same Address as Employee’ box is checked. If you want the dependent’s phone number to be listed as yours, make sure the ‘Same Phone as Employee’ box is checked. To enter a different address or phone number, see the instructions above for updating existing dependent information. When done, click the Save button. Then click on the Return to Dependent/Beneficiary Summary link.
11. Click on the Return to Event Selection link.

12. Click on the box in the Enroll column for each dependent that you want enrolled in your health coverage.
13. Click on the **Continue** button to store your Health Insurance selections. A summary page will be displayed showing your selections.

14. Click on the **Continue** button and you will be returned to the Enrollment Summary page. Note the cost of the health benefit is now displayed in the Before Tax column.
15. Click on the **Edit** button for the second benefit type. In this case it is **Life**.
16. If you are eligible for company paid Life insurance, you will be automatically enrolled. You should designate your primary beneficiary at this time. You may also designate secondary beneficiaries. The sum of all primary beneficiary allocations must be 100%. If you enter secondary allocations, the sum must also be 100%.
17. Click on the **Continue** button to store your Life Insurance selections. A summary page will be displayed showing your selections.

18. Click on the **Edit** button for the second benefit type. In this case it is **Supplemental Life**.
19. Supplemental Life is optional. If you would like to enroll, click on the **Yes** button to open additional fields for entry. Enter the desired Coverage amount and the primary allocation percentage. If you need to enter any additional beneficiaries, click on the **Add/Review Beneficiaries** button before entering beneficiary allocations.

20. Click **Continue** button to store your selections. In this example, the **Cancel** button was clicked and the selection reverts to declined enrollment.
21. AD and D enrollment, like Life enrollment, is automatic but a beneficiary should be designated. Please refer to the instructions for Life.

22. Dependent Life and Spousal Life enrollment are similar to Supplemental Life, except that you are the beneficiary. Only a coverage amount needs to be entered if you wish to enroll in either of these plans. Please refer to the instructions for Supplemental Life.

23. Click on the **Edit** box to enroll in Flex Spending Health – U.S.

24. Click on the Health Care FSA button to open additional fields.
25. Click on the **Worksheet** link to calculate what your per-pay-period deduction would be.

26. Enter an amount in the box to the right of ‘Your New Annual Pledge’. Then click the **Calculate** button.
27. Click the Return to Benefits Enrollment – Health Flexible Spending link. Your amount will be transferred to the Annual Pledge box, or you can enter another value to change the amount.

28. Click on the Continue button to store your Flex Spending Health-U.S. selections. A summary page will be displayed showing your selections.
29. Click the Continue button to return to the Enrollment Summary page.
30. Flex Spending Dependent Care enrollment is similar to Flex Spending Health-U.S. Please refer to the instructions for Flex Spending Health-U.S.
31. Make sure you have reviewed and enrolled or declined all the benefits that are listed on your Enrollment Summary page. When you are done, the Enrollment Summary page will display the before-tax and after-tax costs of your selections.

Scroll down.
32. If you need to come back and finish your selections at a later time, click on the Return to Benefits Menu link.

33. If you are ready to finalize your selections, click on the Submit button.

34. Click the Finalize button to send you FINAL choices to the Benefits Department.
35. Click the **OK** button. A confirmation page will be displayed.