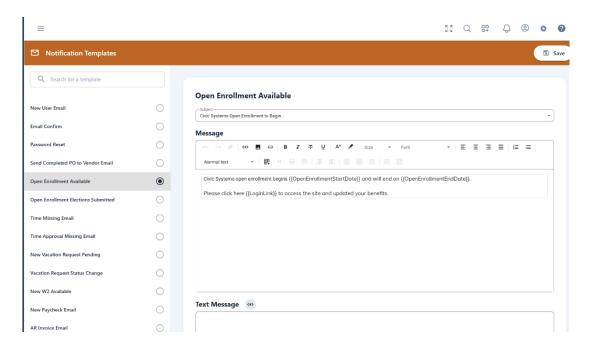
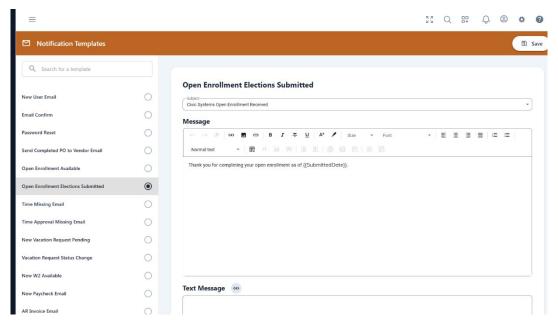
miViewPoint Open Enrollment

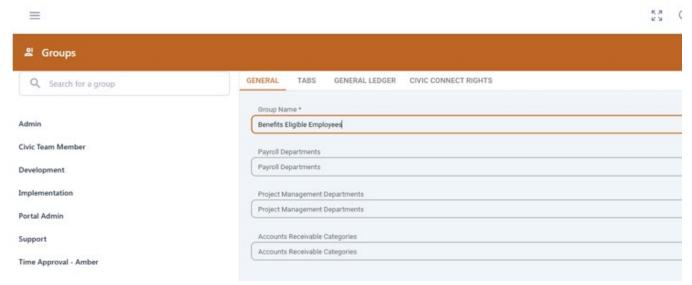
- 1. Caselle Pay Code Configuration
 - a. Use of Open Enrollment doesn't REQUIRE separate pay codes for each plan and plan option, but it can be helpful. For example, rather than having one "Health Insurance" pay code, multiple codes for each plan option can be created, i.e. "Health EE Only", "Health EE + Spouse", "Health EE + Child", "Health EE + Family".
- 2. Draft your open enrollment emails and text messages:
 - a. Administration>Notifications>Notification Templates>Open Enrollment Available. This notification is sent to alert employees that a new open enrollment period has begun and is available for them to make elections.



b. Administration>Notifications>Notification Templates>Open Enrollment Elections Submitted. This notification is sent when an employee completes the open enrollment.

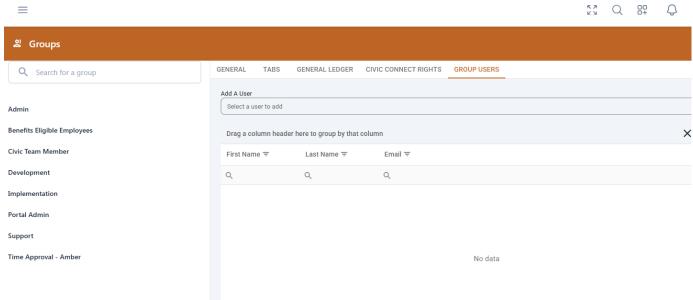


- 3. Create the Open Enrollment Group(s). This identifies the employees who should be included in the Open Enrollment.
 - a. Administration>Users and Groups>Groups
 - i. Click Add New
 - ii. Enter Group Name
 - iii. Click Save



- iv. After Saving, a new tab will appear, "Group Users". Select the tab.
- v. Add the employees to the group by selecting them from the Add A User drop-down menu.

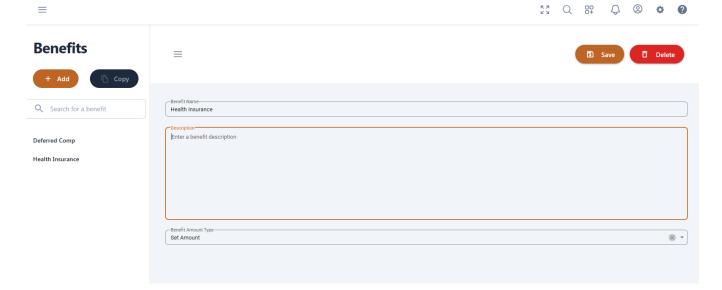
vi. After all applicable employees have been added, click Save.



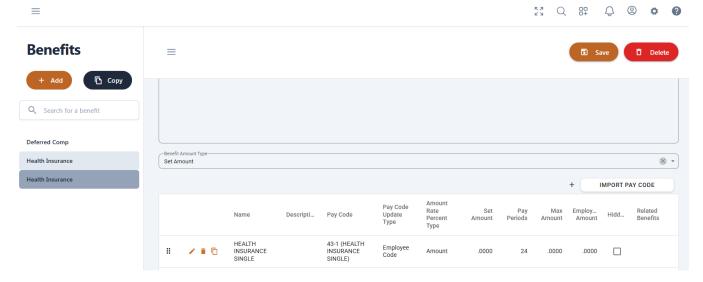
- vii. Repeat for any additional groups that may be needed. If separate benefits are available for part-time vs full-time employees, for example.
- viii. These groups will need to be monitored each year prior to Open Enrollment.

4. Create the Benefits

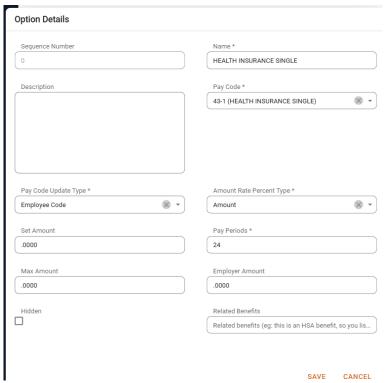
- a. Administration>Payroll>Employees>Benefits
 - i. Click Add
 - ii. Enter a Benefit Name, i.e. "Health Insurance"
 - iii. Enter a description, Optional
 - iv. Choose a Benefit Amount Type, either a Set Amount or Employee Entered.
 - v. Click Save.



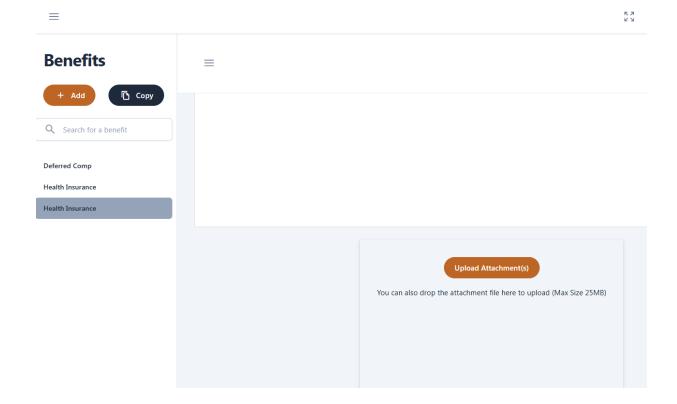
- b. After Saving, a Benefit Options section will appear at the bottom. Benefit Options can be entered manually or imported from the Caselle Pay Code settings. To import from the pay code settings:
 - i. Click on Import Pay Code
 - ii. Choose the appropriate Pay Code, i.e "Health Single"
 - iii. The pay code will then appear as an option.



- iv. Click the pencil to edit.
- v. Enter any information specific to the benefit option. Pay periods, amounts, etc.
 - Pay Code Update Type Identify whether to update the amount at the Pay Code Level or at the Employee Pay Code level
 - 2. Amount Rate Percent Type Identify whether the amount is a dollar amount or percentage.
 - 3. Set Amount Enter a set amount if ARP is Amount
 - 4. Pay Periods Confirm or enter number of pay periods for which the amount should be calculated annually.
 - 5. Max Amount Enter a Max amount if applicable
 - 6. Employer Amount Enter the employer amount, if applicable.
 - 7. Related Benefits Allows multiple benefits to be connected (HSA to specific High Deductible Health plans, for example)
- vi. Click Save



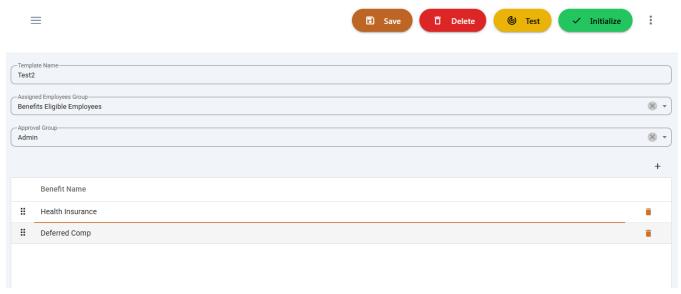
- vii. Repeat for additional plan options related to the same benefit.
- viii. Upload attachments to the benefit.
 - 1. Scroll to the bottom of the page.
 - 2. Click Upload Attachment or drag/drop documents.



- ix. Repeat this step for each benefit plan.
- 5. Create an Open Enrollment Template
 - a. Administration>Payroll>Employees>Open Enrollment Templates
 - i. Click Add
 - ii. Add the Template Name
 - iii. Choose the Employee Group for which the Open Enrollment template will apply.
 - iv. Choose the Approval Group.
 - v. Click Save



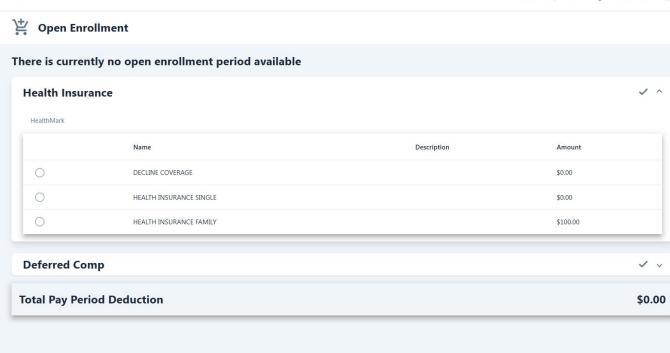
- vi. After Saving, the benefits section will appear below.
- vii. Click the "+" sign on the right to select the benefits should be included in the Open Enrollment template.



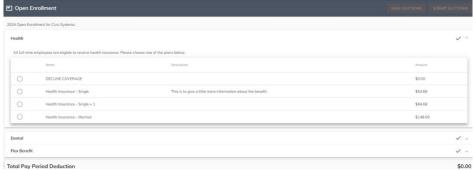
viii. Click Save

- b. Test the Open Enrollment template
 - i. Click "Test". This will display the Open Enrollment process from the perspective of an employee choosing elections.





- c. Initialize Open Enrollment when ready to begin enrollment process
 - i. Administration>Payroll>Employees>Open Enrollment Templates
 - ii. Click Initialize
 - iii. Name the Enrollment
 - iv. Enter a description, Optional.
 - v. Enter an Open Enrollment Start Date and End Date. Employees will only be able to access the Open Enrollment options during this period of time.
 - vi. Initialize a single employee (if using for new hires). Otherwise, the employee group selected for the benefit will be initialized.
 - vii. Check the Send Notification Emails, if applicable.
 - viii. Select the Open Enrollment templates to include.
- 6. Employees make elections
 - a. Employees will go to MVP>Payroll>Open Enrollment

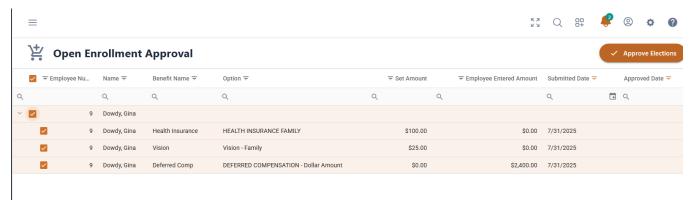


b. Employees will make each election, or decline coverage.

- c. As the employee makes elections, the employee will see a total amount per pay check appear at the bottom of the screen and for each benefit/pay code.
- d. When ALL options either have an election made or declined coverage, the employee can save the election to come back to later, OR submit elections for approval.
- 7. Payroll reviews & approves elections -

NOTE: The timing of election approvals is critical as pay codes will be updated immediately upon approval. Verify that all payrolls at old rates have been completed before approving elections.

- a. Payroll>Open Enrollment Approval
- b. The display provides the ability to view the elections that are in process, submitted, and those that have not been started.
- c. Elections can be approved by individual elections, individual employees, or all by clicking the box(es) to the left of the employee/election.
- d. After the boxes are selected, click Approve Elections.



8. Reporting

- a. Go to Payroll>Reports>Open Enrollment Elections.
- b. Select an Open Enrollment Period
- c. Add any additional criteria, optional
- d. Click Generate

