

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.

The screenshot shows the 'Notification Templates' interface in miViewPoint. On the left is a sidebar with a list of templates: New User Email, Email Confirm, Password Reset, Send Completed PO to Vendor Email, Open Enrollment Available (selected), Open Enrollment Elections Submitted, Time Missing Email, Time Approval Missing Email, New Vacation Request Pending, Vacation Request Status Change, New W2 Available, New Paycheck Email, and AR Invoice Email. The main area is titled 'Open Enrollment Available' and contains a 'Subject' field with the text 'Civic Systems Open Enrollment to Begin'. Below this is a 'Message' section with a rich text editor. The editor contains the text: 'Civic Systems open enrollment begins {{OpenEnrollmentStartDate}} and will end on {{OpenEnrollmentEndDate}}. Please click here {{LoginLink}} to access the site and updated your benefits.' At the bottom of the main area is a 'Text Message' section with a text area.

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

Notification Templates

Search for a template

- New User Email
- Email Confirm
- Password Reset
- Send Completed PO to Vendor Email
- Open Enrollment Available
- Open Enrollment Elections Submitted**
- Time Missing Email
- Time Approval Missing Email
- New Vacation Request Pending
- Vacation Request Status Change
- New W2 Available
- New Paycheck Email
- AR Invoice Email

Open Enrollment Elections Submitted

Subject: Civic Systems Open Enrollment Received

Message

Normal text

Thank you for completing your open enrollment as of {{SubmittedDate}}.

Text Message

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

Groups

Search for a group

- Admin
- Civic Team Member
- Development
- Implementation
- Portal Admin
- Support
- Time Approval - Amber

GENERAL TABS GENERAL LEDGER CIVIC CONNECT RIGHTS

Group Name *

Benefits Eligible Employees

Payroll Departments

Payroll Departments

Project Management Departments

Project Management Departments

Accounts Receivable Categories

Accounts Receivable Categories

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.

Groups

Search for a group

Admin

Benefits Eligible Employees

Civic Team Member

Development

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Portal Admin

Support

Time Approval - Amber

GENERAL TABS GENERAL LEDGER CIVIC CONNECT RIGHTS **GROUP USERS**

Add A User

Select a user to add

Drag a column header here to group by that column

First Name	Last Name	Email
Q	Q	Q

No data

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.

Benefits

+ Add Copy

Search for a benefit

Deferred Comp

Health Insurance

Benefit Name

Health Insurance

Description

Enter a benefit description

Benefit Amount Type

Set Amount

Save Delete

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.

The screenshot shows a web application for managing benefits. On the left is a sidebar with a 'Benefits' header, an 'Add' button, a 'Copy' button, a search bar, and a list of benefit categories including 'Deferred Comp' and 'Health Insurance'. The main area has a top bar with 'Save' and 'Delete' buttons. Below this is a large empty box for a description. A dropdown menu for 'Benefit Amount Type' is set to 'Set Amount'. An 'IMPORT PAY CODE' button is visible. A table lists the imported pay code:

Name	Descripti...	Pay Code	Pay Code Update Type	Amount Rate Percent Type	Set Amount	Pay Periods	Max Amount	Employ... Amount	Hidd...	Related Benefits
HEALTH INSURANCE SINGLE		43-1 (HEALTH INSURANCE SINGLE)	Employee Code	Amount	.0000	24	.0000	.0000	<input type="checkbox"/>	

- iv. Click the pencil to edit.
- v. Enter any information specific to the benefit option. Pay periods, amounts, etc.
 1. 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.

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- viii. Upload attachments to the benefit.
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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

The screenshot shows the 'Open Enrollment' section of a web application. On the left, there is a sidebar with the title 'Open Enrollment' and two buttons: '+ Add' (orange) and 'Copy' (dark blue). Below these is a search bar labeled 'Search for a template' and a 'Test' button. The main area contains a form with three fields: 'Template Name' (with the value 'Test2'), 'Assigned Employees Group' (with the value 'Benefits Eligible Employees'), and 'Approval Group' (with the value 'Admin'). Above the form are four buttons: 'Save' (orange), 'Delete' (red), 'Test' (yellow), and 'Initialize' (green), followed by a vertical ellipsis menu icon.

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.

This screenshot shows the same form as the previous one, but with an additional section below the 'Approval Group' field. This section is titled 'Benefit Name' and contains a table with two rows: 'Health Insurance' and 'Deferred Comp'. Each row has a drag handle icon on the left and a trash can icon on the right. Above this table is a plus sign (+) icon, indicating that more benefits can be added.

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.

Open Enrollment

There is currently no open enrollment period available

Health Insurance

HealthMark

	Name	Description	Amount
<input type="radio"/>	DECLINE COVERAGE		\$0.00
<input type="radio"/>	HEALTH INSURANCE SINGLE		\$0.00
<input type="radio"/>	HEALTH INSURANCE FAMILY		\$100.00

Deferred Comp

Total Pay Period Deduction

\$0.00

- 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

Open Enrollment

SAVE ELECTIONS

SUBMIT ELECTIONS

2024 Open Enrollment for Civic Systems.

Health

All full-time employees are eligible to receive health insurance. Please choose one of the plans below.

	Name	Description	Amount
<input type="radio"/>	DECLINE COVERAGE		\$0.00
<input type="radio"/>	Health Insurance - Single	This is to give a little more information about the benefit.	\$54.68
<input type="radio"/>	Health Insurance - Single + 1		\$84.68
<input type="radio"/>	Health Insurance - Married		\$148.69

Dental

Flex Benefit

Total Pay Period Deduction

\$0.00

- 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.

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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

Master - Open Enrollment Elections

SaveSave AsDeleteGenerate

Report Options

Column Chooser

Report Layout

Open Enrollment Period

2025 OE

Selection Criteria

NEW CRITERIA

Field Name	Criteria
No data	

Report Orders

Column Name	Name	Sort	Title	Subtotal	Line	Page Break
[Employee].Name		Ascendi...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[Report].BenefitName		Ascendi...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Master - Open Enrollment Elections

SaveSave AsDeleteHide Report

1 of 1

Whole Page

PrintCopyShare

CIVIC		Open Enrollment Elections				Page 1
		[OpenEnrollmentPeriod]ID 3				August 14, 2025 12:02 PM
Period	Employee Name	Benefit Name	Selected Benefit	Amount	Annual Amount	Submission Date
Dowdy, Gna						
2025 OE	Dowdy, Gna	Deferred Comp	DEFERRED COMPENSATION - Dollar Amount	\$100.00	\$2,400.00	7/31/2025 4:10:25 PM
2025 OE	Dowdy, Gna	Health Insurance	HEALTH INSURANCE FAMILY	\$100.00	\$ 0.00	7/31/2025 4:10:25 PM
2025 OE	Dowdy, Gna	Vision	Vision - Family	\$25.00	\$ 0.00	7/31/2025 4:10:25 PM
Dowdy, Gna				\$225.00		
Total				\$225.00		

