

**Purpose**: Workterra allows you to upload documents that are required by the City of Redmond to support enrolling in, or terminating, benefits. Examples include a Marriage Certificate or a Declaration of Domestic Partnership.

When completing a new hire enrollment or a qualifying event, the system will attach your document to the corresponding enrollment event. If you are using the Enrollment Links on your Home Page or the Upload Documents option in the "My Profile" section in the left menu, you will need to select the enrollment event to which you are attaching your document. For example, to add a Declaration of Marriage form, you must have already initiated a marriage qualifying event enrollment.

Audience: Benefits eligible employees

Step	What to do	Visual Aid
1	Save a copy of your completed document to your computer. Supported formats are: txt, doc, docx, rtf, xls, xlsx, html, pdf, jpg, or png .The upload limit is 1 MB per file.	Upload Documents Supported Formats: txt, doc, docx, rtf, xls, xlsx, html, pdf, jpg, png. Upload limit 1 MB per file.
2	From the Workterra homepage, click on the "My Profile" menu and select "Upload Documents." Note: If uploading a document during the enrollment process, skip steps 2-3. The Upload Document screen will appear automatically within that workflow.	Home My Profile My Benefits Demographics Dependent - Spouse Dependent - Child Organization Chart Upload Documents Change Password Profile
3	From the "Enrollment Mode" drop-down menu, select the appropriate enrollment event that pertains to the documents to be uploaded. Click "OK" on the Upload Document pop-up window that appears.	Image [August 25, 2022]   ~     New Hire Enrollment [August 25, 2022]   Last Name   Relationship   Action     Marriage [October 1, 2022]   Last Name   Relationship   Action     Newborn or Adoption [October 4, 2022]   TEST   Employee   \$

## Standard Operating Procedure: Workterra Uploading Documents



4	Click on the upload icon in the Action	Redmond Welcome
	column for the appropriate person (i.e., either you or a dependent).	Image: Speare Click on Save button     Instructions     To save all changes, please click on Save button     This is to notify you that your changes will be pending for City of Redmond HR review. Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attach the necessary documents to expedite approval.     Image: Please attac
5	This example is for adding a new dependent child. Click on the upload icon, click on the upload icon within the pop-up window for "Document Upload" and select the document from your files. Click "Save & Continue."	Instructions To save all changes, please click on Save button This is to notify you that your changes will be pending for City of F Note: Category name having asterisk (*) is required category. Newly Added Dependent Documentation Note: Category name having asterisk (*) is required category. Note: Category name having asterisk (*) is required category. Action Supported Formuts bit doc. doc, rit ski skin, henr, pdf.jpg.org. Upload limit 1 MB per file. Add New Save & Continue
6	Verify that the uploaded document is there by clicking the arrow next to the person's name. The status will be "Pending" while it's awaiting HR's review. Click the "Save" button	Sarah O'Malley Natural child Document Category Document Name Uploaded On Status Action Newly Added Dependent Documentation Birth Certificate.jpg Oct 5, 2022, 9:04:37 AM Pending
/	when done.	Reset Save
8	Now the uploaded document/s will appear under "Other Uploaded Documents" and they are ready for review.	Other Uploaded Documents      Page   1   V   of 1   >     Document Name   Enrollment Mode   Event Name   Date Timestamp   Approval Status   Action     Birth Certificate.jpg   Qualifying Event Enrollment   Newborn or Adoption   10/5/2022 9:09:40 AM   Pending   Image: Content Conten Content Content Content Content Content Content Conten

**Verification of competency:** A person is considered to have mastered this task when they can perform all steps listed above without any assistance.

Revision History				
Revision Date	Summary of revision	Revision Author		
10/5/2022	Initial development of SOP	D Emami		
11/22/2022	SME Review	N Bruce		