


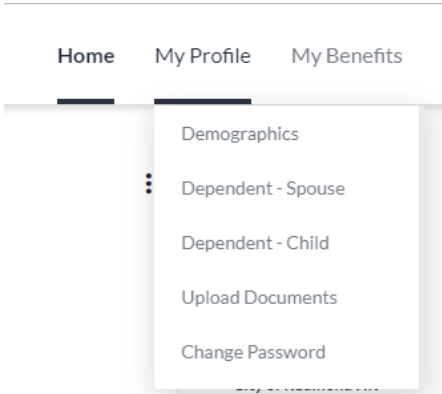
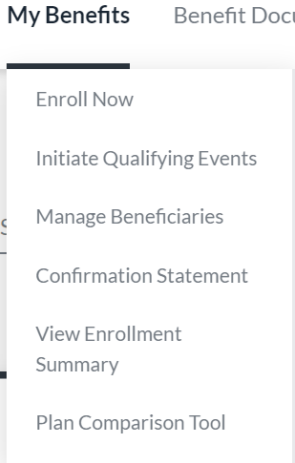
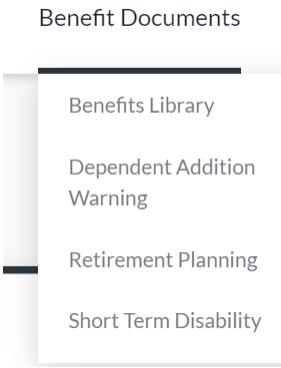
# Standard Operating Procedure: Workterra

## Navigating Workterra Home Page



**Purpose:** Navigating the Home Page for the Workterra Benefits Online Enrollment System

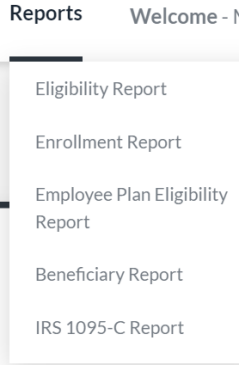
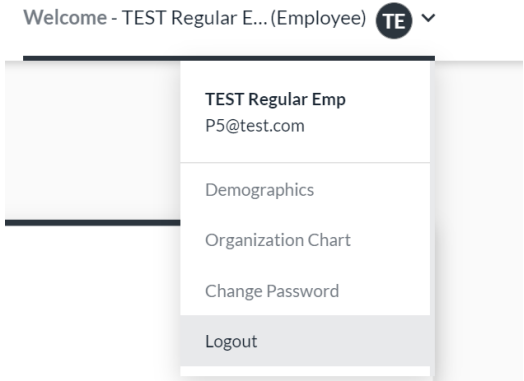
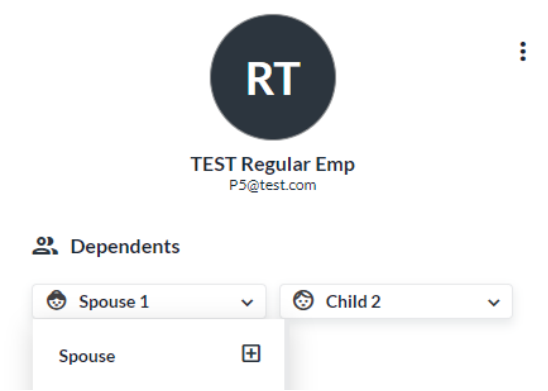
**Audience:** Benefits eligible employees

Home Page: Top Menu	Visual Aid
<p>Click <b>Home</b> to return to the Home screen at any time</p>	
<p>Click <b>My Profile</b> to open, view, and/or edit:</p> <ul style="list-style-type: none"> <li>• Demographics (View Only)</li> <li>• Dependent - Spouse</li> <li>• Dependent - Child</li> <li>• Upload Documents</li> <li>• Change Password</li> </ul>	
<p>Click <b>My Benefits</b> to open, view, and/or edit:</p> <ul style="list-style-type: none"> <li>• Enroll Now</li> <li>• Initiate Qualifying Events</li> <li>• Manage Beneficiaries</li> <li>• Confirmation Statement</li> <li>• View Enrollment Summary</li> <li>• Plan Comparison Tool</li> </ul>	
<p>Click <b>Benefit Documents</b> to open &amp; view:</p> <ul style="list-style-type: none"> <li>• Benefits Library</li> <li>• Dependent Addition Warning</li> <li>• Retirement Planning</li> <li>• Short Term Disability</li> </ul>	

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<p>Click <b>Reports</b> to open &amp; view:</p> <ul style="list-style-type: none"> <li>• Eligibility Report</li> <li>• Enrollment Report</li> <li>• Employee Plan Eligibility Report</li> <li>• Beneficiary Report</li> <li>• IRS 1095-C Report</li> </ul>	 <p>The screenshot shows the 'Reports' dropdown menu in the top right corner of the Workterra interface. The menu is open, displaying a list of report types: Eligibility Report, Enrollment Report, Employee Plan Eligibility Report, Beneficiary Report, and IRS 1095-C Report. The 'Reports' tab is selected, and the user's name 'Welcome - TEST' is visible in the top right corner.</p>
<p><b>Log Out:</b></p> <ul style="list-style-type: none"> <li>• Select the <b>dropdown arrow</b> next to your name in the top right corner</li> <li>• Click '<b>Logout</b>'</li> </ul>	 <p>The screenshot shows the user profile dropdown menu in the top right corner of the Workterra interface. The menu is open, displaying the user's name 'TEST Regular Emp' and email 'P5@test.com'. Below the user information, there are several menu items: Demographics, Organization Chart, Change Password, and Logout. The 'Logout' option is highlighted in grey.</p>
<p><b>Change Password:</b></p> <ul style="list-style-type: none"> <li>• Redmond uses single sign-on (SSO) for login. Users do not need to use the Change Password functionality in Workterra.</li> </ul>	
<p><b>Home Page: Left Menu</b></p>	<p><b>Visual Aid</b></p>
<p>Quick View of your Dependents:</p> <ul style="list-style-type: none"> <li>• To <b>Add/Edit Spouse</b> or <b>Child(ren)</b>, select the drop down next to the corresponding icon</li> </ul>	 <p>The screenshot shows the 'Dependents' section in the Workterra interface. At the top, there is a circular profile picture with the initials 'RT' and the user's name 'TEST Regular Emp' and email 'P5@test.com'. Below this, there is a section titled 'Dependents' with two dropdown menus: 'Spouse 1' and 'Child 2'. The 'Spouse 1' dropdown is open, showing a list of options including 'Spouse' and a plus sign icon.</p>

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<p><b>Favorite Actions</b> icons (may vary by user):</p> <ul style="list-style-type: none"> <li>• <b>Initiate Qualifying Event:</b> initiate a Qualifying Life Event (ex. Marriage, Newborn or Adoption)</li> <li>• <b>Upload Documents:</b> access page to upload documents required for benefit elections (ex. marriage certificate)</li> <li>• <b>Change Password:</b> Redmond uses single sign-on (SSO) for login. Users do not need to use the Change Password functionality in Workterra.</li> <li>• <b>Enroll Now:</b> brings you to an event (if one is open) or displays your current enrollment summary</li> <li>• <b>Forms Library:</b> access City of Redmond Benefits Guide and Medical Waiver Form</li> <li>• <b>Confirmation Statement:</b> access your confirmation statement--a summary of your current and future elected and waived benefits. This statement lists the effective date of coverage, cost of the benefit, who is covered by the benefit, the current approved and elected/pending coverage amounts, and beneficiary information</li> <li>• <b>Demographics (View Only):</b> review your personal information</li> <li>• <b>Dependent-Spouse:</b> review, add, and update demographic information about your spouse or domestic partner</li> <li>• <b>Dependent-Child:</b> review, add, and update demographic information about your dependent child(ren)</li> </ul>	
<p><b>Home Page: Right Menu</b></p> <p><b>Current Benefits</b> elections:</p> <ul style="list-style-type: none"> <li>• Select the <b>dropdown icon</b> next to each benefit election for additional details</li> <li>• <b>Out Of Pocket</b> amount displays the total employee cost per period for current benefits</li> </ul>	<p><b>Visual Aid</b></p>

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<p><b>Quick Links (may vary by user):</b></p> <ul style="list-style-type: none"> <li>Provides single click access to commonly used items</li> </ul>	<p>☰ Quick Links</p> <ul style="list-style-type: none"> <li>Initiate Qualifying Events</li> <li>Plan Comparison Tool</li> <li>Manage Beneficiaries</li> <li>City of Redmond Benefits Hub</li> </ul>
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Revision History		
Revision Date	Summary of revision	Revision Author
11/22/2022	SME Review	N Bruce
12/22/2022	Updated screenshots	C Miller