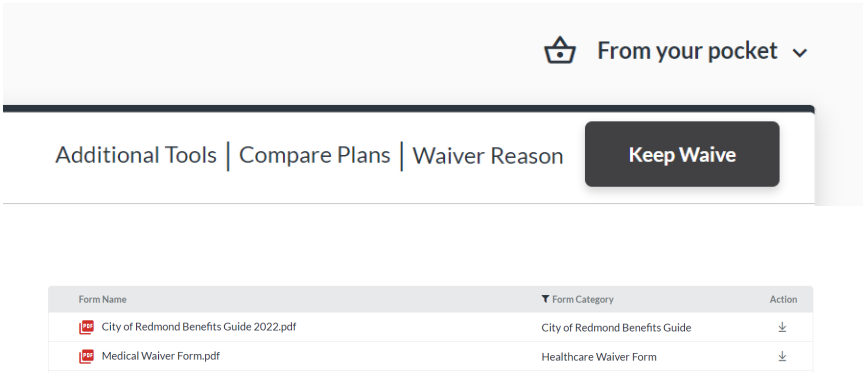
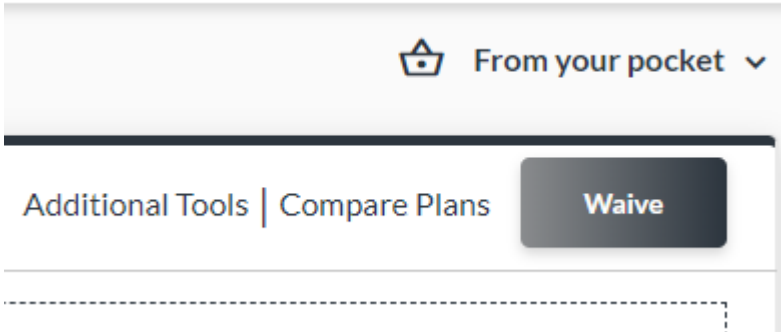


# Standard Operating Procedure: Workterra Enrolling in Medical, Dental, or Vision



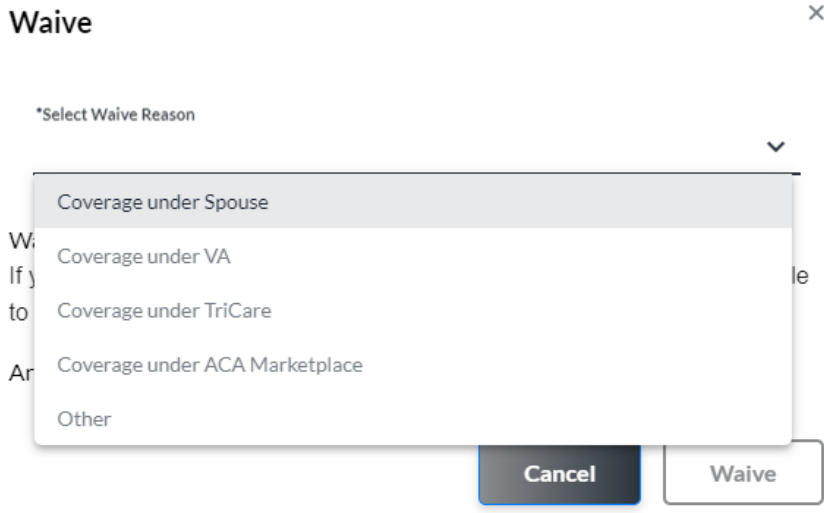
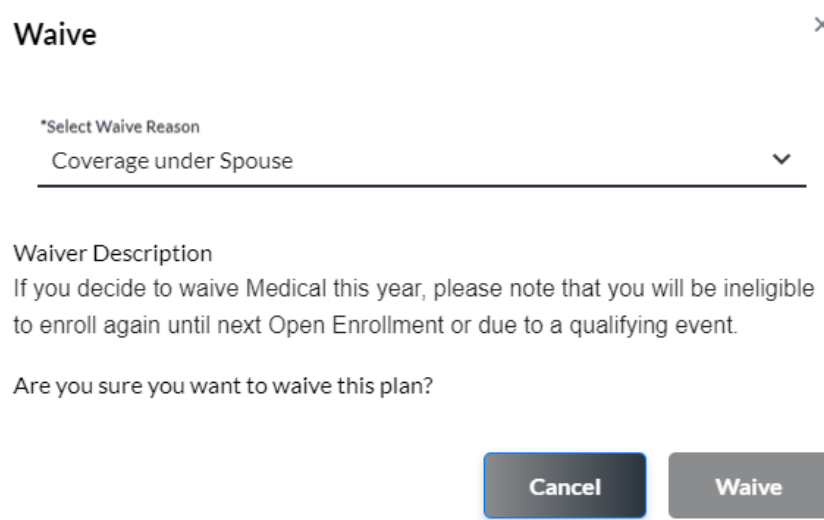

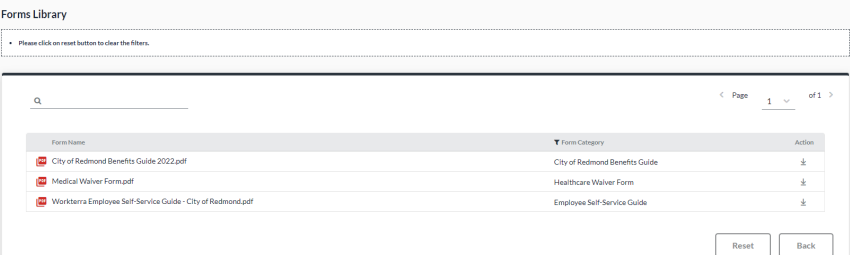
**Purpose:** The coverage effective date, the plans for which you are eligible, and the dependents who are eligible for enrollment will populate in the 'Enroll Now' pages for medical, dental, and vision. The employee and employer cost of coverage will update automatically based on the members covered.

**Audience:** Benefits eligible employees

Step	What to do	Visual Aid									
1.	Access <b>Medical, Dental, or Vision Enrollment</b> via an Enrollment workflow: Qualifying Event, New Hire, or Open Enrollment										
2.	<p><b>Navigation on benefit election screen:</b></p> <ul style="list-style-type: none"> <li>• <b>From your pocket</b> details your current benefit election summary and pay period costs. To view, click the dropdown arrow.</li> <li>• <b>Additional Tools</b> includes a link to the <b>Forms Library</b></li> <li>• The Forms Library contains the latest <b>City of Redmond Benefits Guide</b> and the <b>Medical Waiver Form</b>.</li> <li>• <b>Compare Plans</b> displays a matrix comparing the Medical plan features.</li> <li>• <b>Waiver Reason</b> displays if coverage was previously waived. Hover over button to see the current waiver reason.</li> </ul>	 <table border="1" data-bbox="760 1056 1523 1142"> <thead> <tr> <th>Form Name</th> <th>Form Category</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td> City of Redmond Benefits Guide 2022.pdf</td> <td>City of Redmond Benefits Guide</td> <td>↓</td> </tr> <tr> <td> Medical Waiver Form.pdf</td> <td>Healthcare Waiver Form</td> <td>↓</td> </tr> </tbody> </table>	Form Name	Form Category	Action	City of Redmond Benefits Guide 2022.pdf	City of Redmond Benefits Guide	↓	Medical Waiver Form.pdf	Healthcare Waiver Form	↓
Form Name	Form Category	Action									
City of Redmond Benefits Guide 2022.pdf	City of Redmond Benefits Guide	↓									
Medical Waiver Form.pdf	Healthcare Waiver Form	↓									
3.	<p>If electing to Waive benefit coverage, select the <b>Waive</b> or <b>Keep Waive</b> option.</p> <ul style="list-style-type: none"> <li>• <b>Keep Waive</b> displays if you are currently waiving benefit coverage.</li> </ul> <p>If enrolling skip to the enrollment instructions.</p>										

# Standard Operating Procedure: Workterra Enrolling in Medical, Dental, or Vision



4.	Select the <b>Waive Reason</b> .	
5.	Click <b>Waive</b>	
6.	A <b>popup</b> confirms your waiver and pends for HR approval	
7.	Download the <b>Medical Waiver Form</b> via the Forms Library  Note: you must waive Medical, Dental and Vision plan to be eligible for the waiver credit.	
8.	Complete and Sign the Form. <ul style="list-style-type: none"> <li>Reference the <b>Uploading Documents SOP</b> for instructions on uploading completed form to site.</li> </ul>	

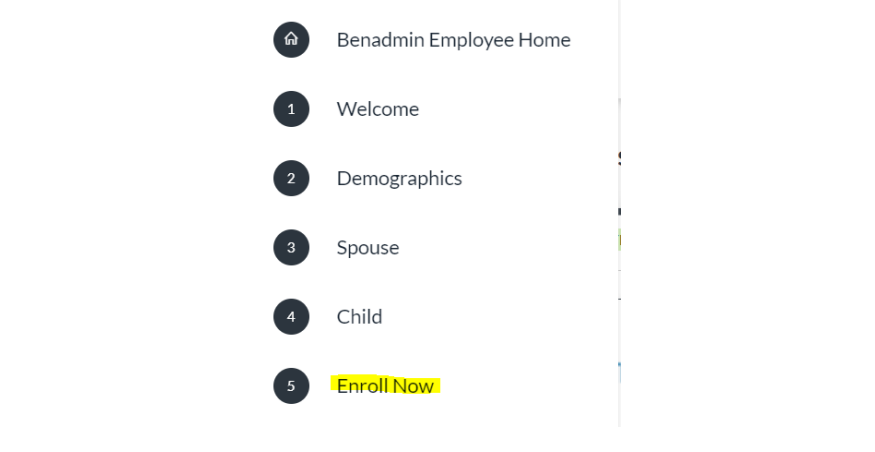
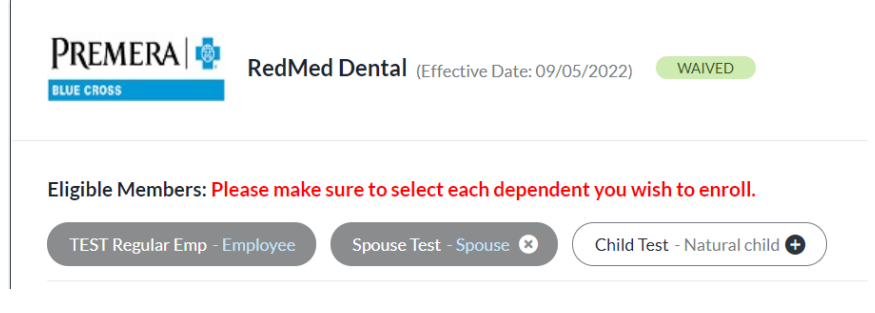
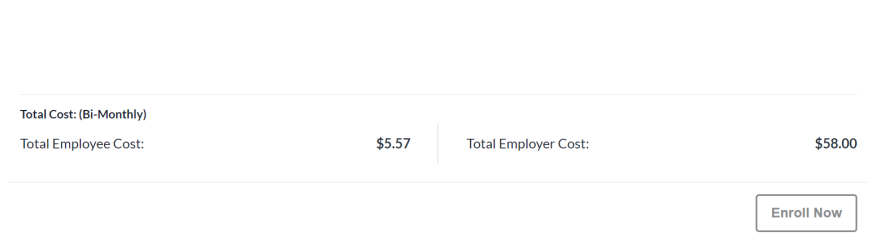
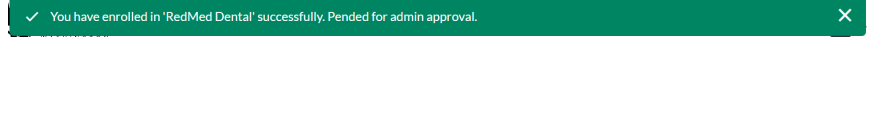
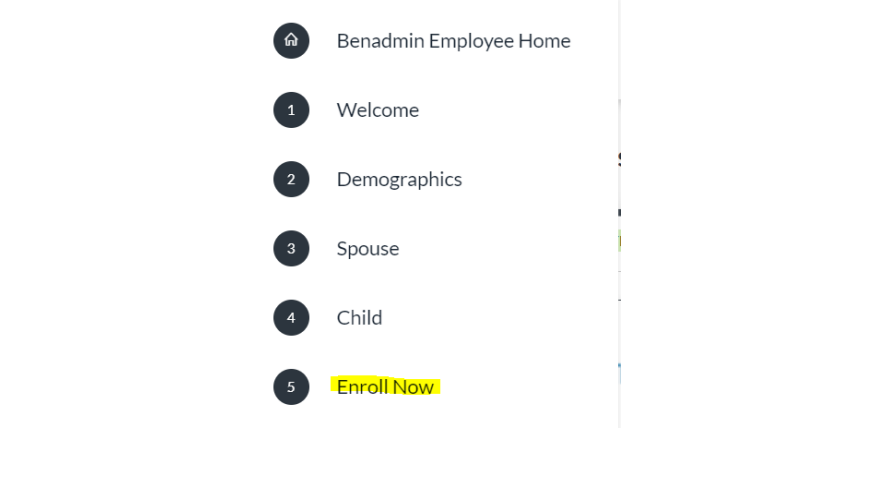
# Standard Operating Procedure: Workterra Enrolling in Medical, Dental, or Vision



Step	Medical Enrollment	Visual Aid
1.	<p>Both <b>Medical Plan</b> options display onscreen for <i>rate</i> comparison</p> <ul style="list-style-type: none"> <li>To compare plan <i>features</i>, click <b>Compare Plans</b> as noted above</li> </ul>	
2.	<p>To <b>add a dependent</b> to the plan, click the plus sign by their name. The selection will reflect on both plans for comparison</p> <p>To <b>remove a dependent</b>, click the 'x' by their name</p>	
3.	<p><b>Total Employee Cost</b> and <b>Total Employer Cost</b> update based on dependent elections</p>	
4.	<p>Click the <b>Enroll Now</b> button located by your preferred plan to capture your elections</p> <p><b>Note:</b> Both plans have an Enroll Now button so confirm you are selecting your preferred plan. If you have existing coverage, your current plan button says <b>Keep Plan</b>.</p>	
5.	<p>A <b>popup</b> confirms your election and pends for HR approval</p>	

# Standard Operating Procedure: Workterra Enrolling in Medical, Dental, or Vision



6.	<p>Election changes are allowed within the enrollment period.</p> <p>If you need to go back to Medical Plans, click <b>Back</b> or select <b>Enroll Now</b> in the left panel menu.</p>	
Step	Dental	Visual Aid
1.	<p>To <b>add a dependent</b> to the plan, click the plus sign by their name. The selection will reflect on both plans for comparison</p> <p>To <b>remove a dependent</b>, click the 'x' by their name</p>	
2.	<p><b>Total Employee Cost</b> and <b>Total Employer Cost</b> update based on dependent elections</p> <p>Click the <b>Enroll Now</b> button located by your preferred plan to capture your elections</p>	
3.	<p>A <b>popup</b> confirms your election and pends for HR approval</p>	
4.	<p>Election changes are allowed within the enrollment period.</p> <p>If you need to go back to Dental Plans, click <b>Back</b> or select <b>Enroll Now</b> in the left panel menu.</p>	

# Standard Operating Procedure: Workterra Enrolling in Medical, Dental, or Vision



Step	Vision	Visual Aid
1.	<p>To <b>add a dependent</b> to the plan, click the plus sign by their name. The selection will reflect on both plans for comparison</p> <p>To <b>remove a dependent</b>, click the 'x' by their name</p>	
2.	<p><b>Total Employee Cost</b> and <b>Total Employer Cost</b> update based on dependent elections</p> <p>Click the <b>Enroll Now</b> button located by your preferred plan to capture your elections</p>	
3.	<p>A <b>popup</b> confirms your election and pends for HR approval</p>	

Revision History		
Revision Date	Summary of revision	Revision Author
11/22/2022	SME Review	N Bruce