

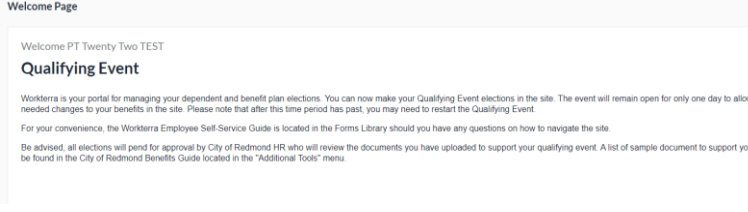
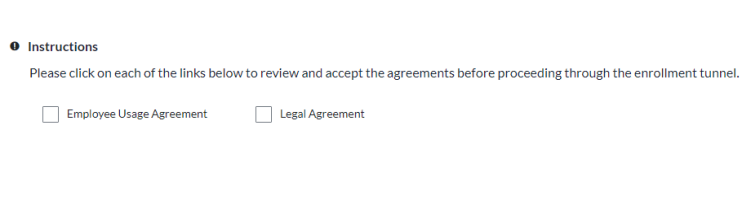
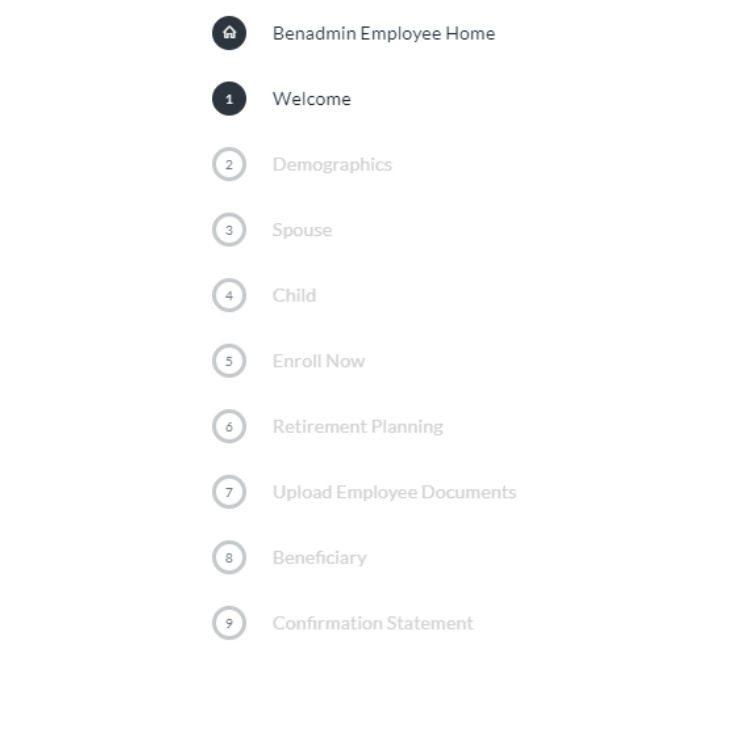
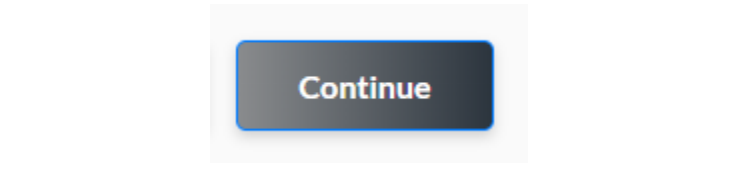
Standard Operating Procedure: Workterra

Navigating Workterra Enrollment Workflow



Purpose: Navigating the Enrollment Workflow for the Workterra Benefits Online Enrollment System

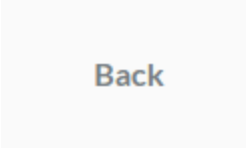
Audience: Benefits eligible employees

Step	What to do	Visual Aid
1.	For Open Enrollment, New Hire, or Qualifying Events, the Workterra system will navigate you through a guided workflow to make your benefit elections <ul style="list-style-type: none"> Start by reading the Welcome Page information (varies based on type of event) 	
2.	Click the box next to the Employee Usage Agreement and Legal Agreement to review <ul style="list-style-type: none"> Select 'Continue' once you have read both 	
3.	Click on any of the numbered bubbles on the left side of the screen to expand the workflow menu. <ul style="list-style-type: none"> Numbers/Icons in black are completed or your current step. You can return to completed steps any time during the enrollment process. Numbers in white are future steps in the enrollment process. You are not able to skip forward to an enrollment step with a white number. 	
4.	Follow onscreen prompts to move to the next steps. These include ' Continue ', ' Save & Continue ', ' Enroll Now ', or ' Waive '	

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5.	To go back to a previous step, click the 'Back' button on the bottom of the page or select the corresponding bubble in the left workflow menu.	
6.	The Benefit Effective Date is dependent on if you are completing new hire, open enrollment, or qualifying event elections. The Effective Date appears by the benefit name on the Enroll Now pages and on the Confirmation Statement .	Kaiser Fndn Hlth Plan of WA HMO (Effective Date: 09/05/2022)
7.	Once all Benefit Elections have been made, select 'Finish' after reviewing the Confirmation Statement.	
8.	Benefit elections are saved in the system as you proceed through the workflow with notifications sent to the Redmond Benefits team for review and approval. <ul style="list-style-type: none"> • During the enrollment window you can make necessary changes to your elections—whether or not you select 'Finish'. • The Qualifying Event workflow remains open for one day to complete your benefit elections; however, you have 30 days to upload documents. <ul style="list-style-type: none"> ○ If you do not complete the elections during the same day, you will have to re-start the Qualifying Event. ○ If you wish to cancel the Qualifying Event request after the workflow closes, please contact RedmondBenefits@redmond.gov 	

Revision History		
Revision Date	Summary of revision	Revision Author
11/22/2022	SME Review	N Bruce
12/12/2022	Add language on QE period	C Miller

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WASHINGTON