

Standard Operating Procedure: Workterra Confirmation Statement



Purpose: The Confirmation Statement is a summary document that captures the benefits elected and waived, the effective dates of plan participation, the dependents enrolled in each plan, the employee and employer cost of coverage, and other relevant information related to enrollment in City of Redmond benefits.

The Confirmation Statement is meant to be the last step before completing the enrollment process. At the bottom of the Confirmation Statement is the "Finish" button that closes the enrollment and takes you to the Home Page.

Audience: Benefits eligible employees

Step	What to do	Visual Aid
1	At the end of an enrollment process, the Confirmation Statement page will appear. Scroll down to review all details for accuracy. If not correct, return to the benefit that is incorrect using the numbers in the left menu bar. Make the necessary change(s) to the election.	
2	Click "Print" if a printed version (i.e., PDF or hard copy) is desired. Click "Finish" to complete the enrollment process. Note: Another option for a printable view is to click on the "PDF" icon at the top right.	
3	Upon clicking "Finish," a "Confirmation Statement" pop-up will appear to indicate that the changes have been submitted successfully. Click "OK."	

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4	<p>To view or print the Confirmation Statement at any time, click on the "Confirmation Statement" box on the left under "Favorite Actions."</p> <p>Note: It can also be accessed via the "My Benefits" drop-down menu by selecting "Confirmation Statement."</p>			
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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