SelfEnroll
Employee Reference Center Guide

The PPI® Benefit Solutions Employee SelfEnroll Portal gives your employees the convenience and flexibility to enroll in benefits online. SelfEnroll eliminates the need for paper forms and other time-consuming processes, providing faster, more secure and more efficient results. A rules-based configuration supports your complex benefits program to ensure employees see the right benefits, and an interface built on preventing common mistakes ensures
employees understand what is required of them to activate their coverages.

As the administrator, SelfEnroll gives you more control over your employee data, eliminates the need to manually determine eligibility, and provides ability to manage the informational content employees see on their portal. A greater variety of reports help you keep tabs on enrollment and payroll deductions, and employee elections and other relevant information are automatically transfered to your insurance carrier without manual intervention.

SelfEnroll Employer Highlights

- Basic member information is pre-loaded for immediate access
- Determines eligibility and calculates benefits and costs based on specific benefit rules
- Houses a variety of documents and links, eliminating costly printing of benefit documents such as benefit summaries, claim forms, and other HR materials
- Provides automatic eligibility feeds to carriers
- Payroll deduction and change reports make it easy to share data between systems

This SelfEnroll Administration User Guide will cover:

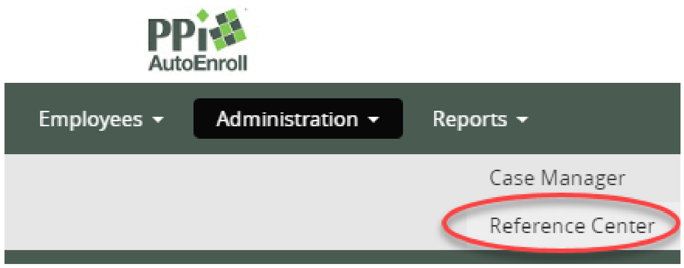
1. Pre-Loading Basic Member Information
2. Monitoring & Approving employee Transactions
3. Running Administrator Reports
4. Managing the Employee Reference Center

Employee Reference Center

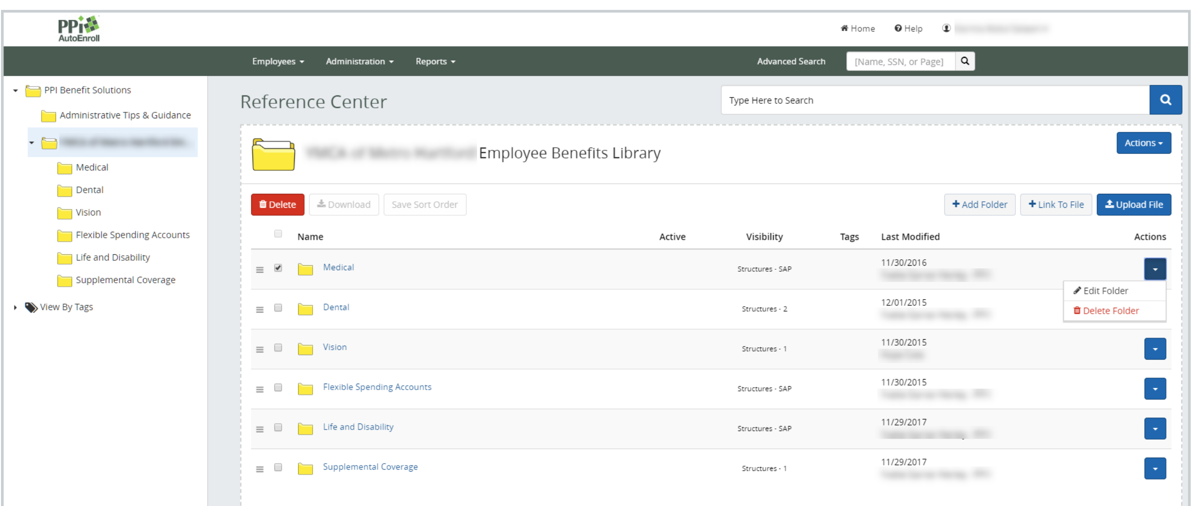
Post Documents to Your Benefits Library

The Reference Center allows administrators to post documents, links, and other resources for employees in a secured online environment. Only administrators may upload, delete or edit content in the Reference Center, but active employees have the ability to log in and view the resources that are specifically tailored to them.

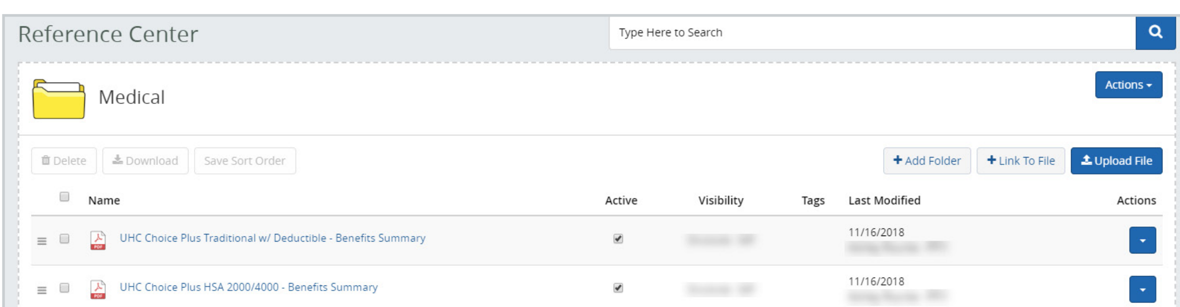
1. Under **Administration**, select **Reference Center**



2. The Reference Center is made up of the following items:
   - Folders
   - Documents & Links



Add, Edit, Delete folders and sub-folders

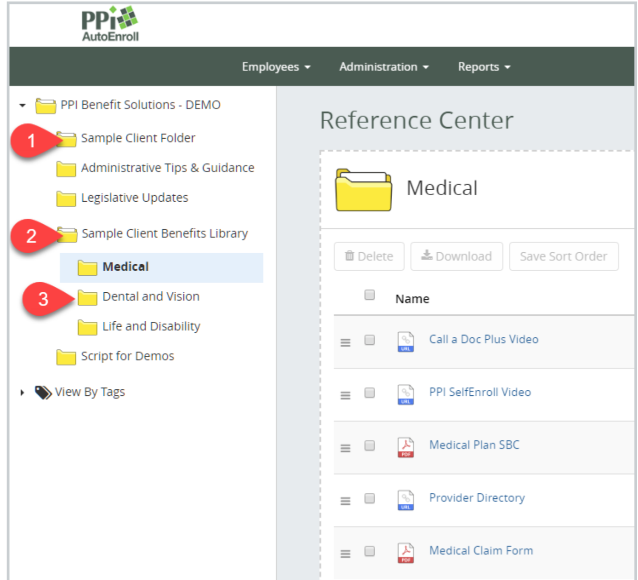


Add, Edit, Delete content and content links

Please note the following:

All folders and documents should be contained under the employer's main "Employee Benefits Library" folder. The Reference Center will allow as many sub-folders as necessary. However, the appearance and accessibility of the Reference Center is important. It is recommended to go no more than three levels deep with content:

1. Main Employer Benefits Library Folder,
2. Sub Benefit Category folders for medical, dental, etc.
3. Subset Folders under the Benefit Category folders if necessary



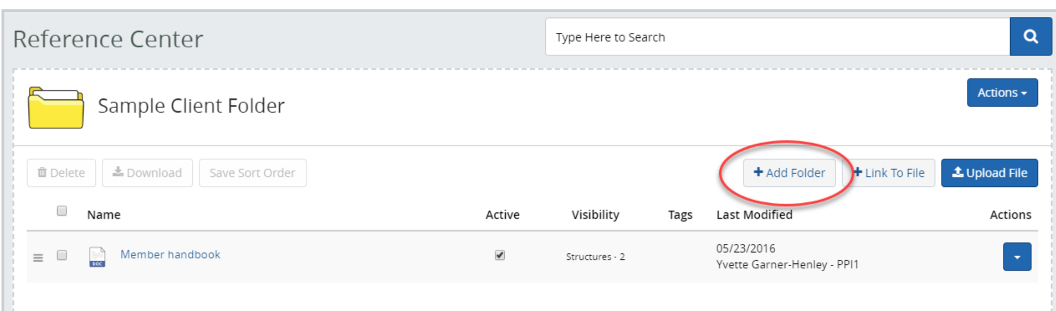
Initial file construction will be completed by PPI during implementation.

The visibility of content can be limited to certain employees through the use of Structure Groups set up for your organization. With this in mind, it is important to know in advance of set-up, what folders are to be accessible to which location/groups.

Set Up Folders and Subfolders

PPI maintains a general set of Reference Center folders available to all administrators. Please **DO NOT** edit this material. Any folders/documents you publish should be maintained within your Main Employee Benefits Library Reference Center folder.

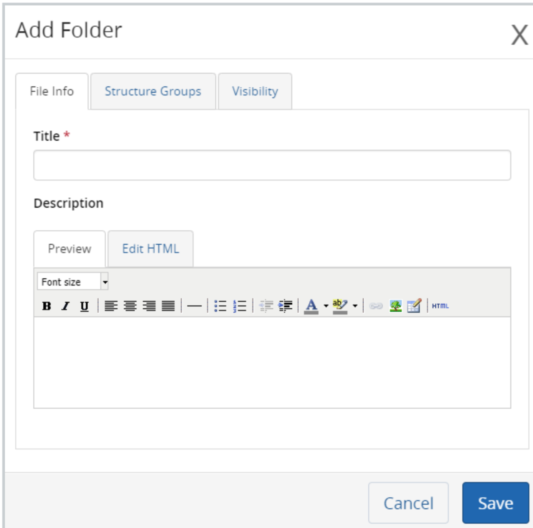
1. Determine which level the folder should reside.



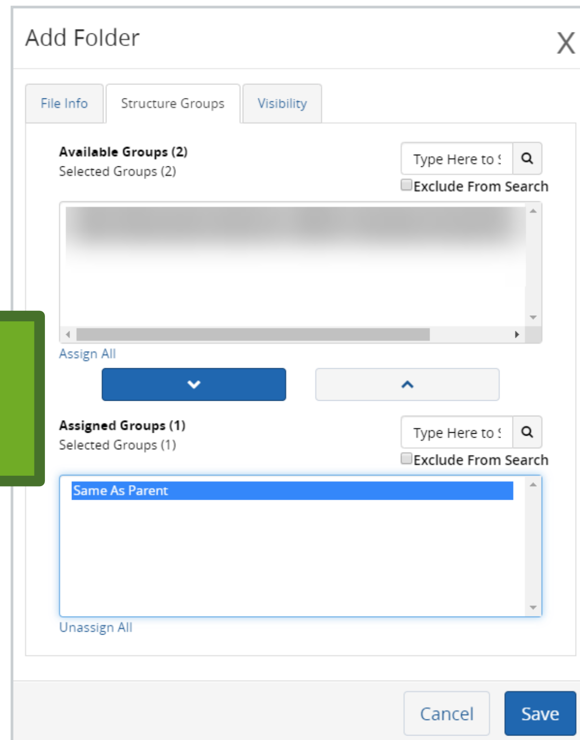
- To add a folder within the client level, select **Add Folder+.**
- To add a subfolder within a folder, click the existing folder to "open it", select > **Add Folder+.**

2. Complete the **File Info, Structure Group,** and **Visibility** tabs. Do not skip this step.

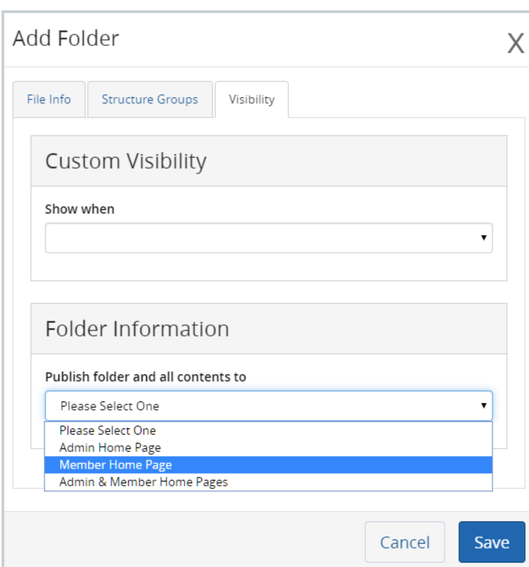
- **File Info tab.** Type appropriate information for Title (folder name) and a Description.



Structure Groups tab. Assign structure groups in Available Groups to Assigned Groups. Only those with in the Structure Groups assigned will see the folder.



SUBFOLDER TIP If the same groups as the parent folder have viewing rights, click **Same as Parent.**



Visibility tab.

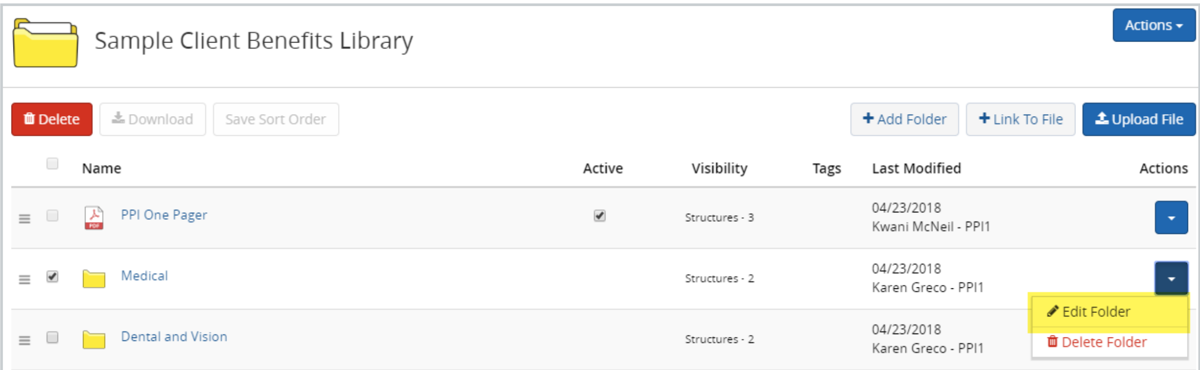
- **Custom Visibility**. Select when to show. Depending on which field you select, you also may need to choose a value an addition.
- **Folder Information**. To create even more custom-ized access, select specific instances when a folder should show and where to publish the folder.
- **Admin Home Page** = viewing by Admins only
- **Member Home Page** = viewing by Employees only
- **Admin & Member Home Pages** = viewing by all users.

3. Click Save

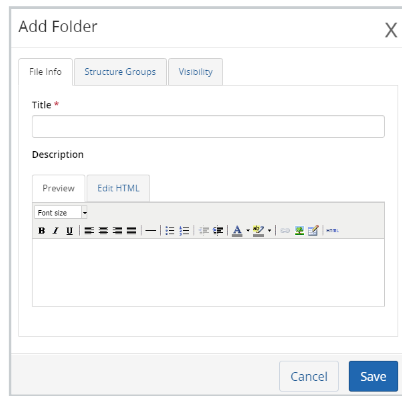
Edit Folders

Edit information about the folder such as folder name, Structure Group assignments, or Visibility rights.

1. Click the **Actions** menu for the folder requiring a change.
2. Select **Edit Folder**.



3. Make edits to the tab(s) affected (File Info, Structure Groups, Visibility)

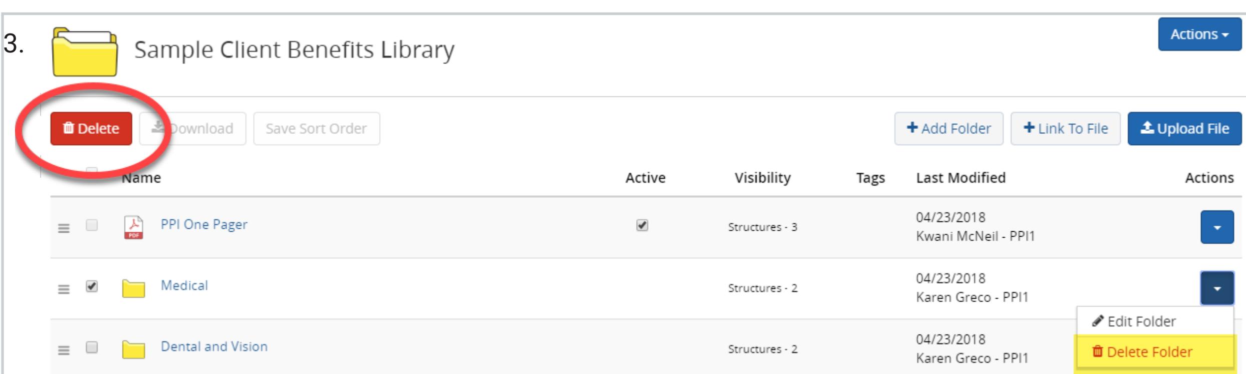


Delete Folders

1. Click the **Actions** menu for the folder requiring a change.

TIP	Only empty folders can be deleted. If resources exist within the folder, they must be moved or deleted.

2. Check the folder to ensure it's empty.
3.



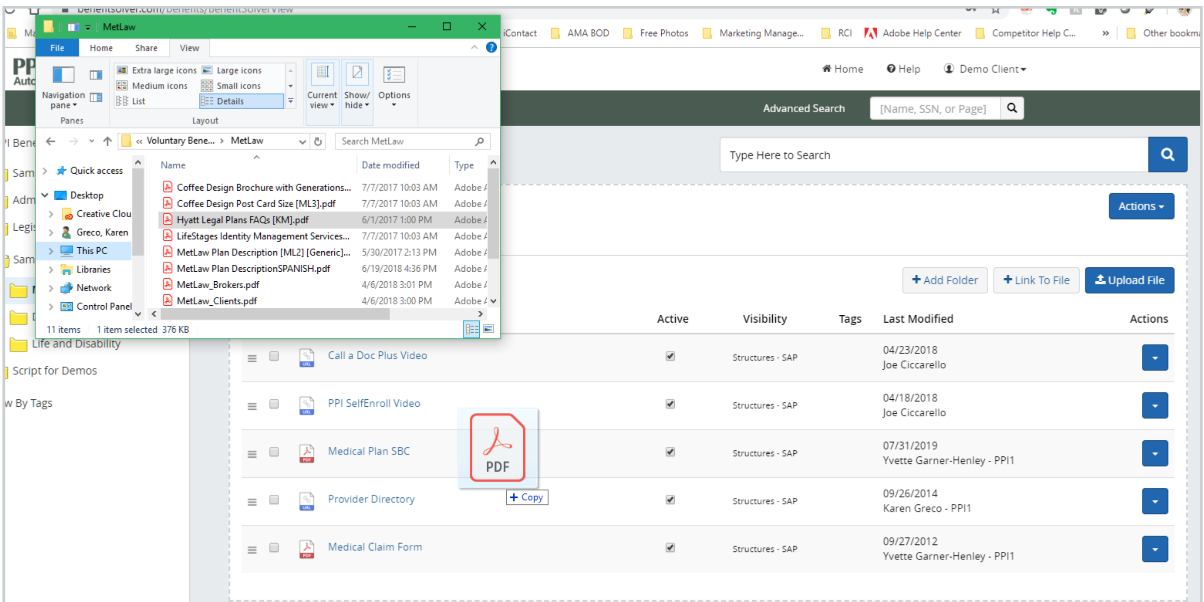
Set Up Documents

Documents can be added directly to the client folder. While technically it's not required that you create additional folders, the hierarchy of folders can help provide better organization and grouping of documents.

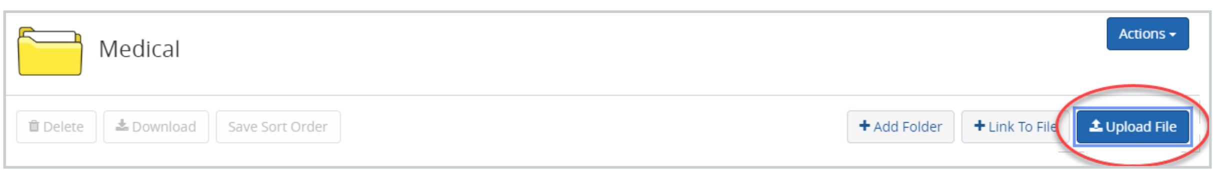
Add Documents

1. Add the file by a drag and drop or through a file upload:.

   a. **Drag & Drop** up to 50 files into the Reference Center. A status bar will appear and display the status of your upload. **The Max file size is 500MB**.



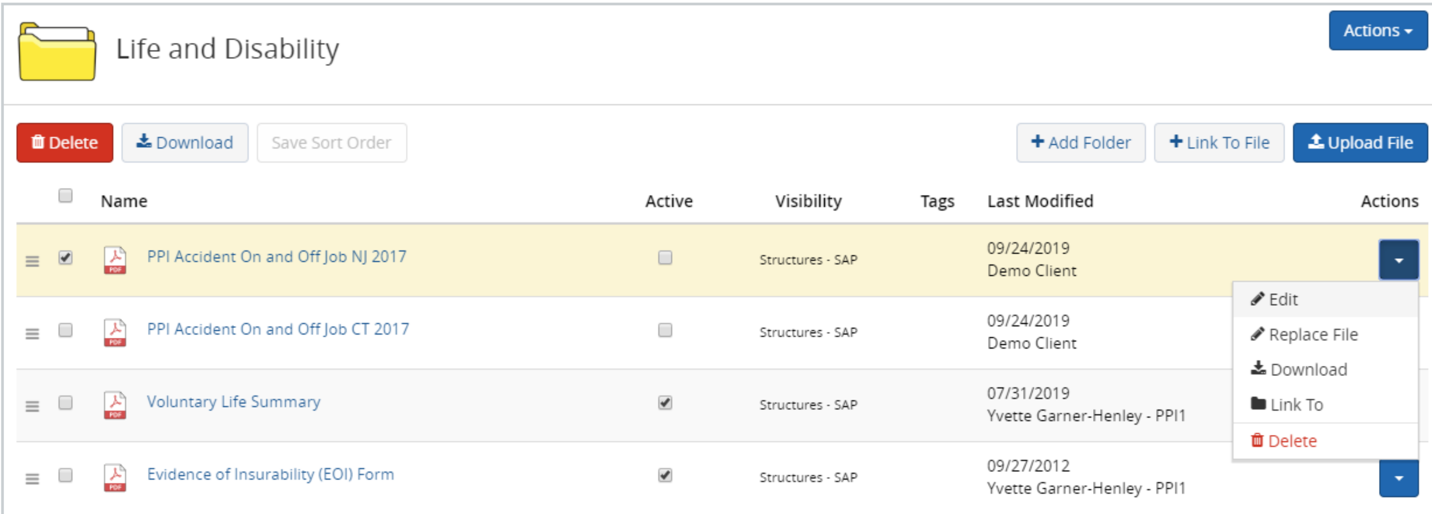
   b. Click **Upload File**. Select file(s) to be uploaded to the folder and click **Open**. Up to 50 files can be selected at one time.



A status bar will appear showing the status of your upload. **The Max file size is 500MB**.

Edit File Information, Replace file, Download, and Link To

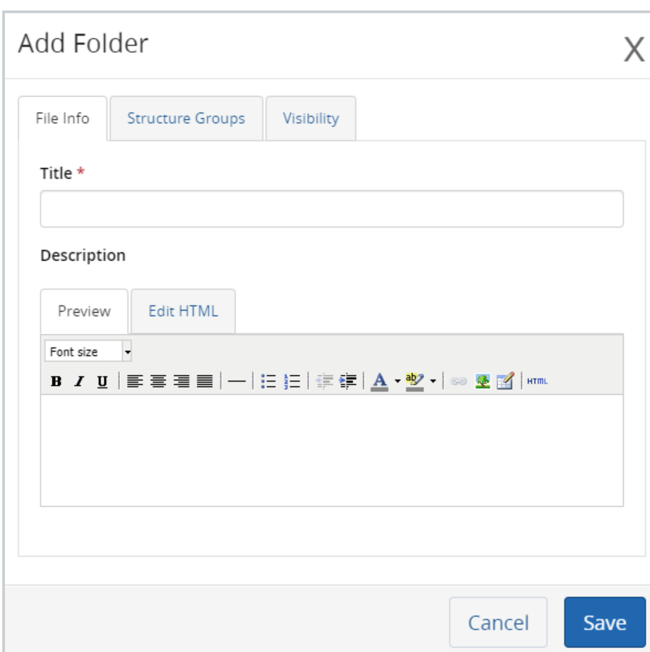
To edit, replace, download, or Link to a file, click the Actions menu from the far right of the file's row.



Edit/Add File Information

If you don't complete the information in this pop up for each of the tabs, the same view rights as the parent folder apply.

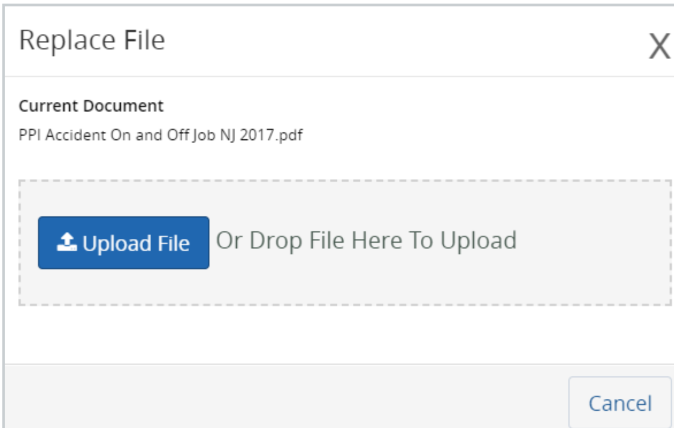
1. Click the **Actions** menu.
2. Click **Edit**.
3. Complete all relevant tabs. For information about **File Info, Structure Groups,** and **Visibility,** See Step #2 earlier in this document on page 10.



TIP Tell documents to display the right documents to the right audience by using the correct Structure Group in the Structure Groups tab.

Replace a File

1. Click the **Actions** menu.
2. Select **Replace File**.
3. Click **Upload** (or drag and drop the replacement file into the pop-up box.)

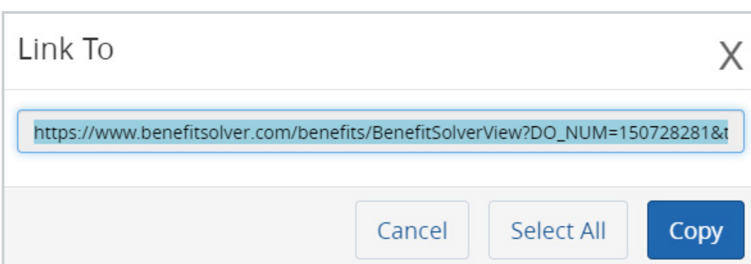


Download a File

1. Click the **Actions** menu.
2. Select **Download File**. The file will download on the bottom left of your screen (and in the Download folder on your computer.

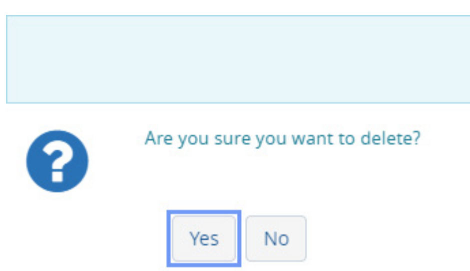
Link to a File

1. Click the **Actions** menu.
2. Select **Link To**. This option is RARELY used.



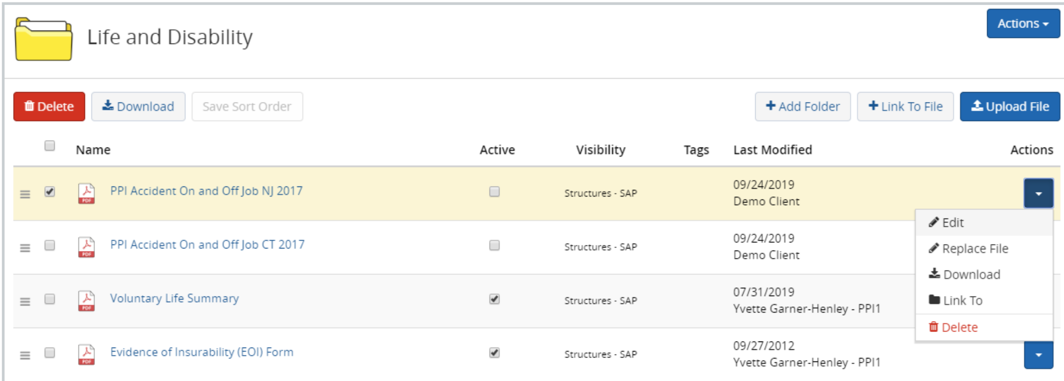
Delete a File

1. Click the **Actions** menu.
2. Select **Delete**.
3. Click **Yes.**

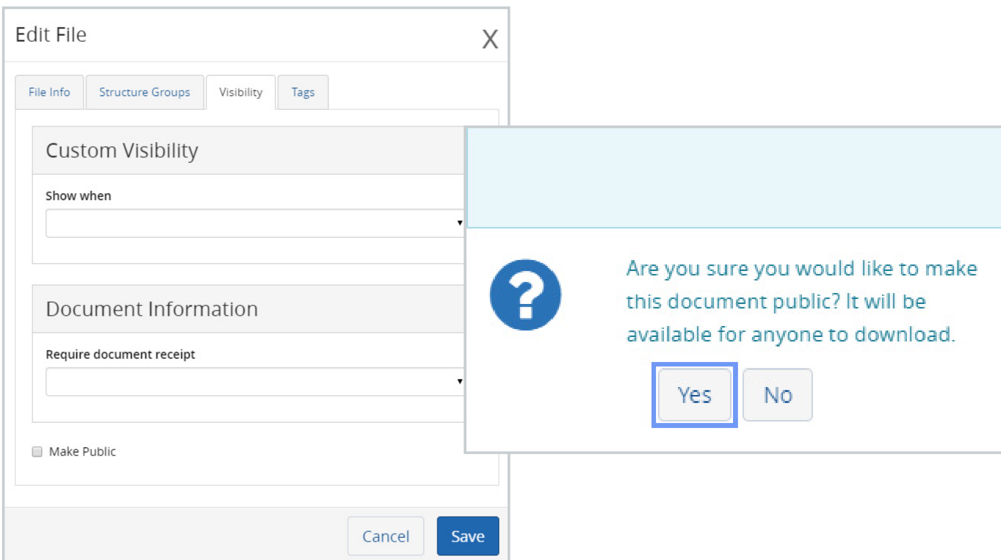


Make a Document Public

1. To activate a document to be shared publicly, from the **Actions** menu, select **Edit**.



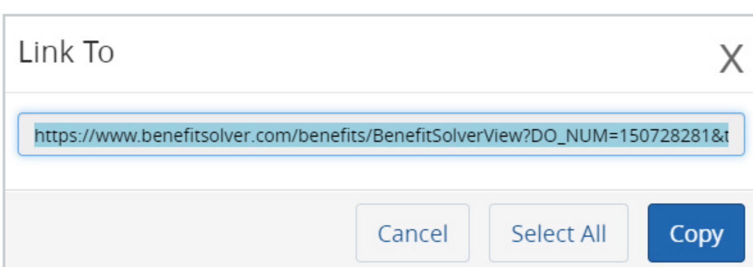
2. In the **Visibility** tab, check the box to **Make Public**. A dialog box will display asking if you are sure you want to make the file public. Click **Yes**.



3. Obtain the link to the document you have make public.

    a. From the **Action** menu, select **Link To.**

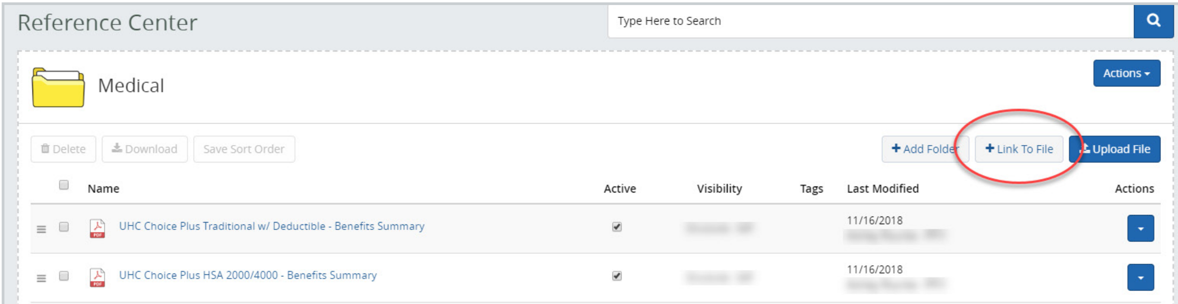
    b. Share this link with anyone who needs access to the document



Set Up Links to Other Websites

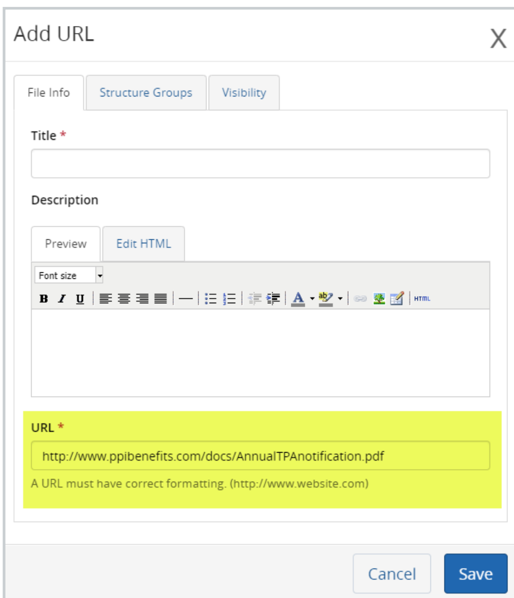
Add a Link

1. Click **Link To File+**.



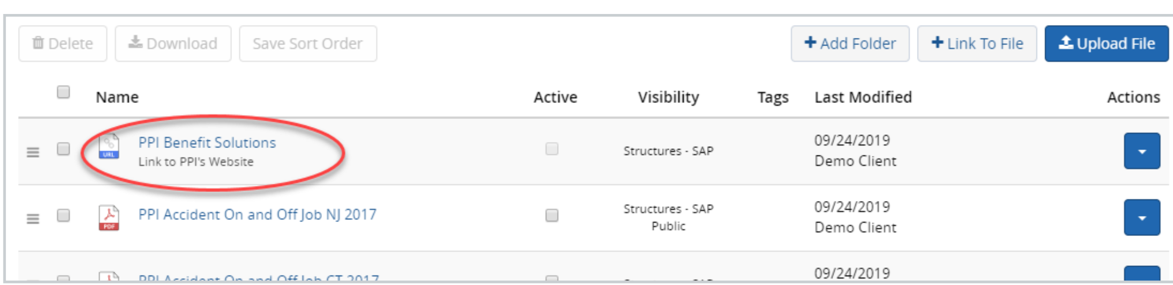
2. Add a Title and a description of the link.

3. Input the URL on the **File Info** tab.



TIP Make sure to enter the URL in the full format: https://www.website.com

4. Click **Save.** The link will now appear in the Reference Center on the member portal.



Edit a Link's Title, Description, Structure Groups, or Visibility

1. Select **Edit** from the **Action Menu**.

2. Make corrections in the **Edit File** window.

3. Click **Save**.

Replace a URL

1. Click the **Actions** menu to the far right of the link name.
2. Select **Replace URL,** and type in the new address.
3. Click **Save**.

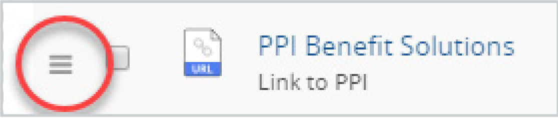
Delete a URL

1. Click the **Actions** menu to the far right of the link name.
2. Select **Delete.**

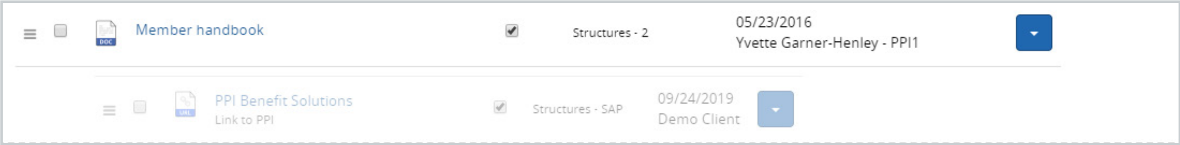
Reorder and Reorganize Folders and Documents

Reorder Folders and Documents

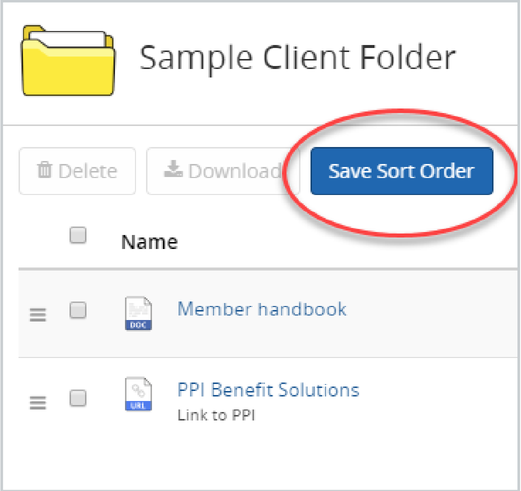
1. Click the three gray bars to the left of the folder/file name.



2. When the cursor displays, drag the file/folder and drop it to the position of your choosing



3. Click **Save Sort Order**.



Move a Document to a New Folder

To move a document to a new folder, select a file and drag and drop it into the new folder.

WARNING	When you move a file to a new folder, it will change who can see it. The file's rights will be changed to the new folder's Structure Groups.

Note: Moving one folder into another folder is not available. For example, you cannot move a parent level folder into a sub-folder.