

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 transferred 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:

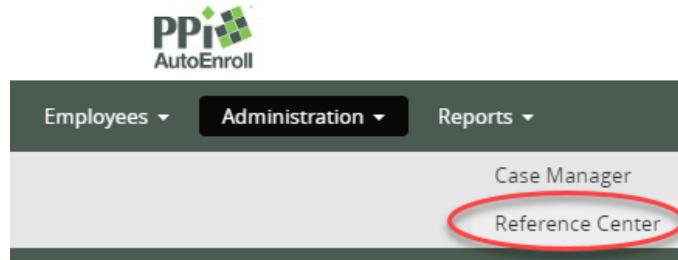
1. Pre-Loading Basic Member Information
2. Monitoring & Approving employee Transactions
3. Running Administrator Reports
4. Managing the Employee Reference Center

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

Name	Active	Visibility	Tags	Last Modified	Actions
Medical	Structures - SAP	11/30/2016			Edit Folder Delete Folder
Dental	Structures - 2	12/01/2015			Edit Folder Delete Folder
Vision	Structures - 1	11/30/2015			Edit Folder Delete Folder
Flexible Spending Accounts	Structures - SAP	11/30/2015			Edit Folder Delete Folder
Life and Disability	Structures - SAP	11/29/2017			Edit Folder Delete Folder
Supplemental Coverage	Structures - 1	11/29/2017			Edit Folder Delete Folder

Add, Edit,
Delete folders
and sub-folders

Name	Active	Visibility	Tags	Last Modified	Actions
UHC Choice Plus Traditional w/ Deductible - Benefits Summary	<input checked="" type="checkbox"/>			11/16/2018	Edit Delete
UHC Choice Plus HSA 2000/4000 - Benefits Summary	<input checked="" type="checkbox"/>			11/16/2018	Edit Delete

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.

Name	Active	Visibility	Tags	Last Modified	Actions
Member handbook	<input checked="" type="checkbox"/>	Structures - 2		05/23/2016 Yvette Garner-Henley - PPI	Actions

- 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.

Add Folder

File Info Structure Groups Visibility

Title *

Description

Preview Edit HTML

Font size

Cancel Save

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

Add Folder

File Info Structure Groups Visibility

Available Groups (2)
Selected Groups (2)

Assigned Groups (1)
Selected Groups (1)

Same As Parent

Assign All Unassign All

Type Here to : Exclude From Search

Type Here to : Exclude From Search

Cancel Save

Add Folder

File Info Structure Groups Visibility

Custom Visibility

Show when

Folder Information

Publish folder and all contents to

Please Select One

Admin Home Page

Member Home Page

Admin & Member Home Pages

Cancel Save

Visibility tab.

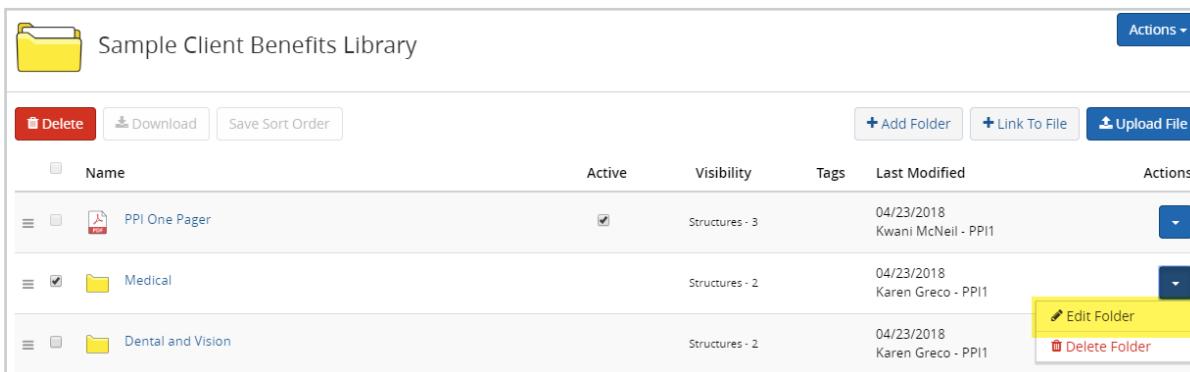
- **Custom Visibility.** Select when to show. Depending on which field you select, you also may need to choose a value an addition.
- **Folder Information.** To create even more customized access, select specific instances when a folder should show and where to publish the folder.
- **Admin Home Page**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

3. Click Save

Edit Folders

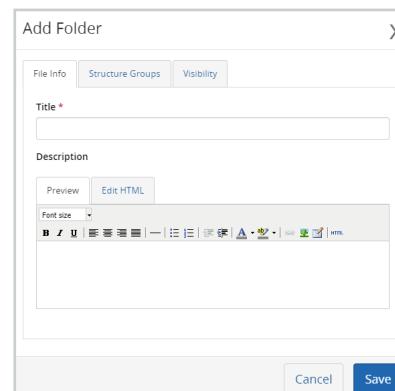
Edit information about the folder such as folder name, Structure Group assignments, or Visibility rights.

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



Name	Active	Visibility	Tags	Last Modified	Actions
PPI One Pager	<input checked="" type="checkbox"/>	Structures - 3		04/23/2018 Kwani McNeil - PPI1	▼
Medical	<input checked="" type="checkbox"/>	Structures - 2		04/23/2018 Karen Greco - PPI1	▼
Dental and Vision	<input checked="" type="checkbox"/>	Structures - 2		04/23/2018 Karen Greco - PPI1	▼

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



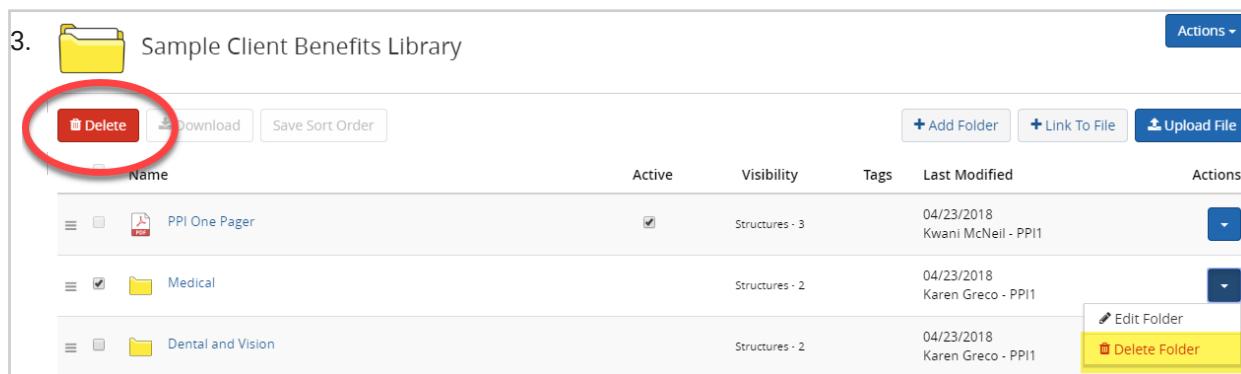
Delete Folders

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.



Name	Active	Visibility	Tags	Last Modified	Actions
PPI One Pager	<input checked="" type="checkbox"/>	Structures - 3		04/23/2018 Kwani McNeil - PPI1	▼
Medical	<input checked="" type="checkbox"/>	Structures - 2		04/23/2018 Karen Greco - PPI1	▼
Dental and Vision	<input checked="" type="checkbox"/>	Structures - 2		04/23/2018 Karen Greco - PPI1	▼

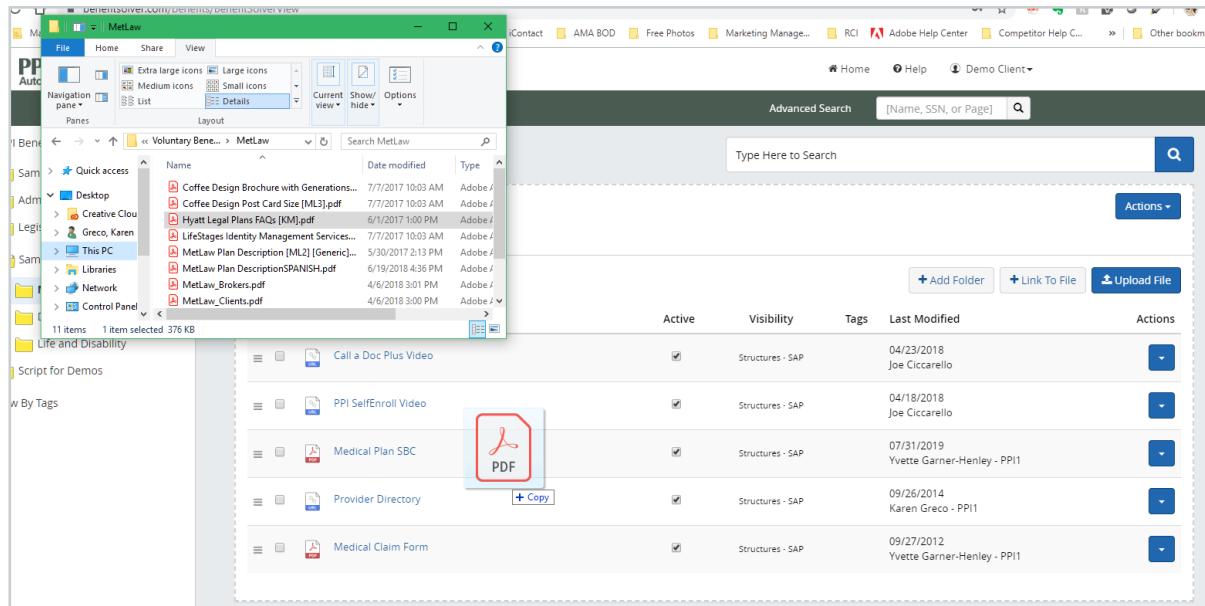
Set Up Documents

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.

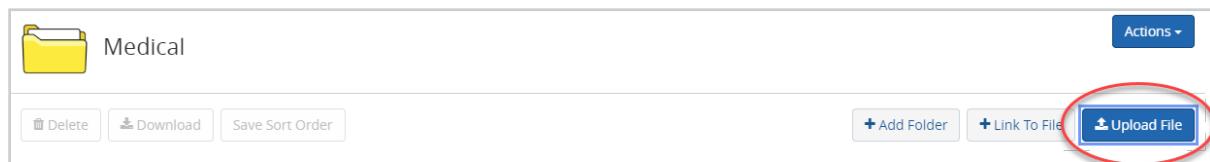
Add Documents

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.**



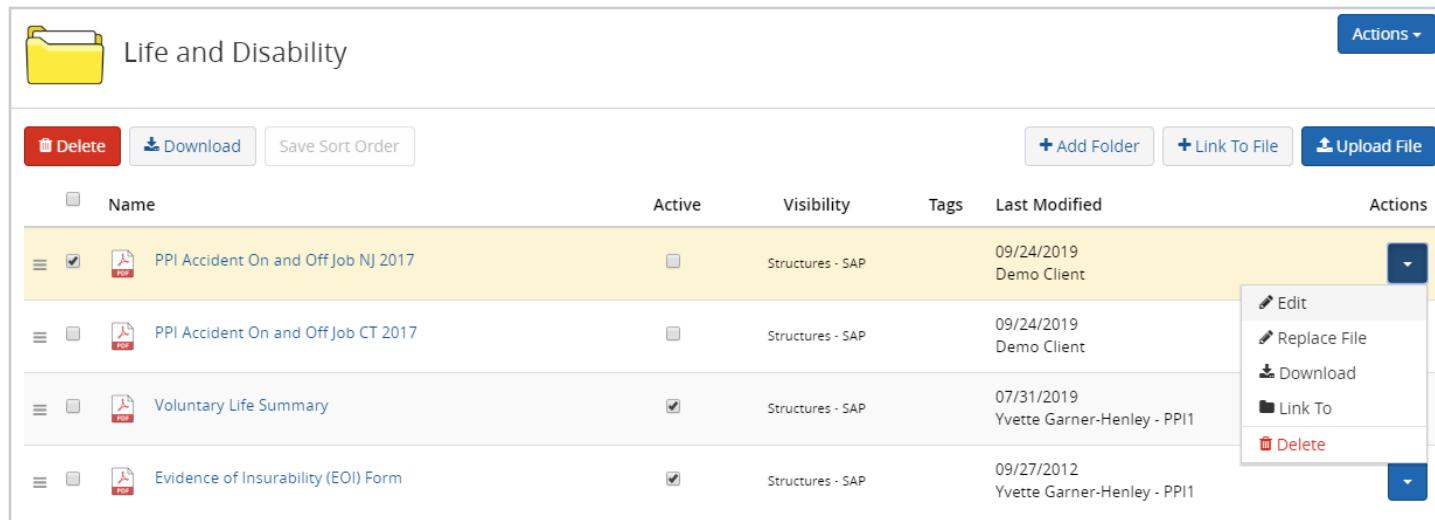
- b. Click **Upload File**. Select file(s) to be uploaded to the folder and click **Open**. Up to 50 files can be selected at one time.



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.



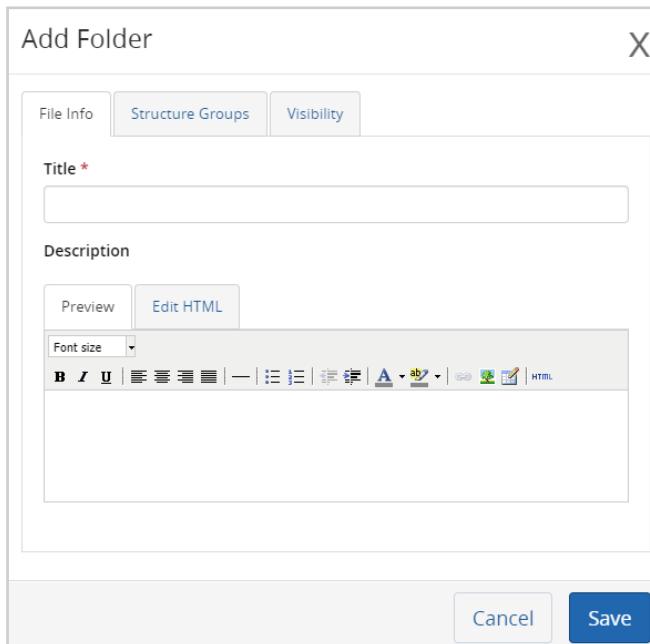
The screenshot shows a list of files within a folder named 'Life and Disability'. The files are listed in a table with columns: Name, Active, Visibility, Tags, Last Modified, and Actions. The 'Actions' column contains a dropdown menu with options: Edit, Replace File, Download, Link To, and Delete. The 'Edit' option is highlighted. The table rows show the following data:

Name	Active	Visibility	Tags	Last Modified	Actions
PPI Accident On and Off Job NJ 2017	<input type="checkbox"/>	Structures - SAP	09/24/2019 Demo Client		Edit
PPI Accident On and Off Job CT 2017	<input type="checkbox"/>	Structures - SAP	09/24/2019 Demo Client		Replace File
Voluntary Life Summary	<input checked="" type="checkbox"/>	Structures - SAP	07/31/2019 Yvette Garner-Henley - PPI1		Download
Evidence of Insurability (EOI) Form	<input checked="" type="checkbox"/>	Structures - SAP	09/27/2012 Yvette Garner-Henley - PPI1		Link To
					Delete

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.

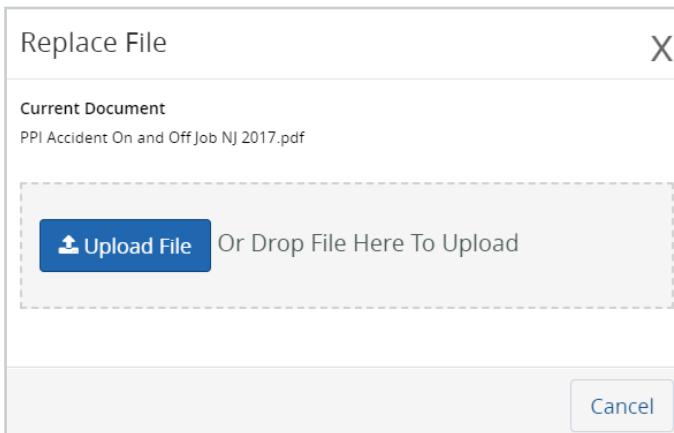


The 'Add Folder' dialog box contains three tabs: File Info, Structure Groups, and Visibility. The File Info tab is active, showing fields for Title (with a red asterisk) and Description. The Description field includes a rich text editor with buttons for Preview, Edit HTML, Font size, and various styling options. The Structure Groups tab and Visibility tab are also visible. At the bottom are 'Cancel' and 'Save' buttons.

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.)

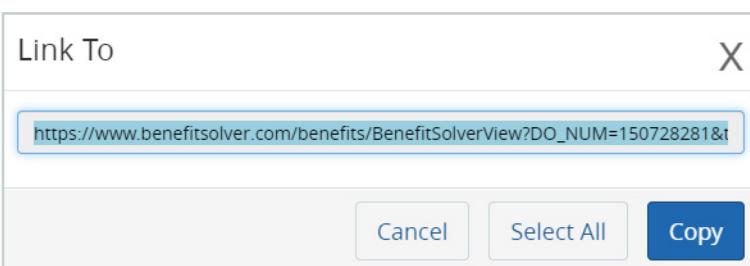


Download a File

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).

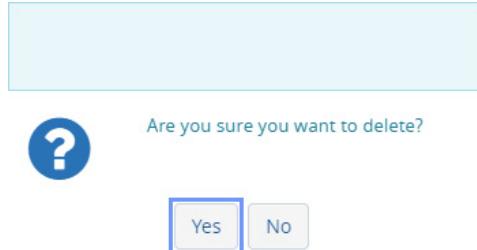
Link to a File

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



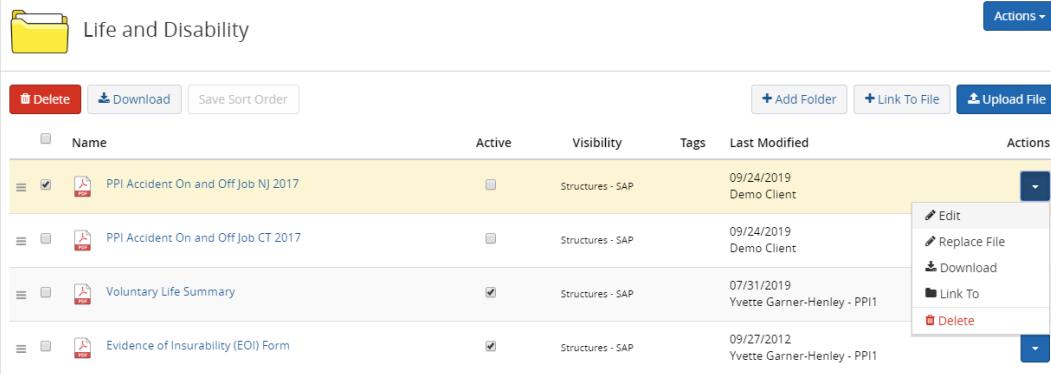
Delete a File

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



Make a Document Public

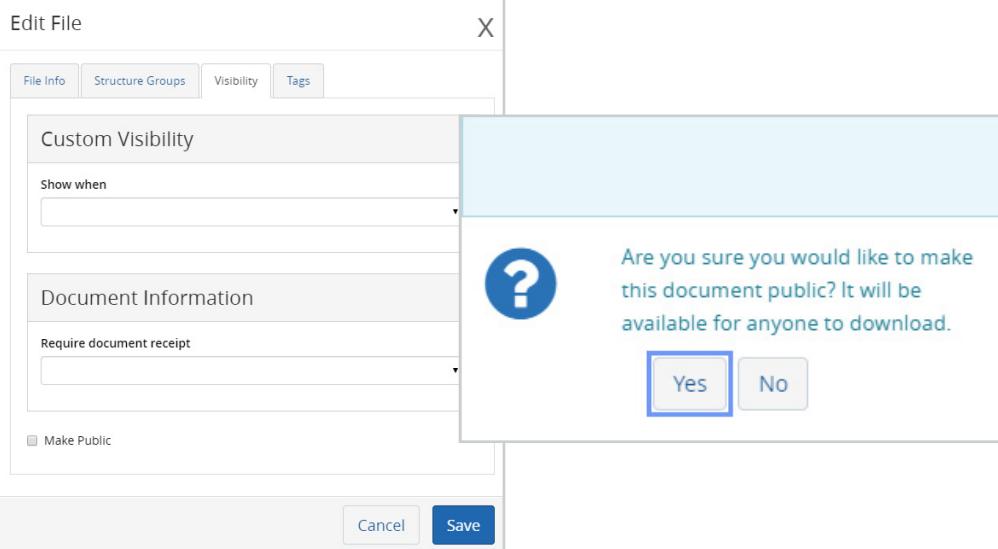
1. To activate a document to be shared publicly, from the **Actions** menu, select **Edit**.



The screenshot shows a list of documents in a folder named 'Life and Disability'. The first document, 'PPI Accident On and Off Job NJ 2017', is selected. A context menu is open over this document, showing options: Edit, Replace File, Download, Link To, and Delete. The 'Edit' option is highlighted.

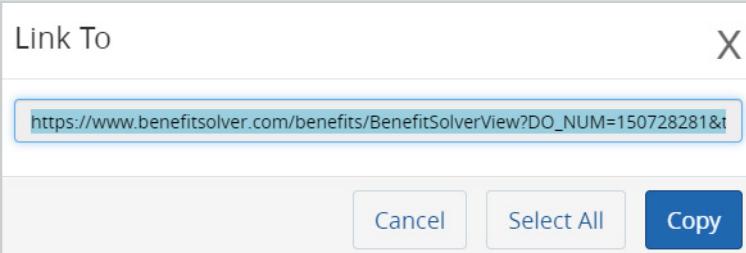
Name	Active	Visibility	Tags	Last Modified	Actions
PPI Accident On and Off Job NJ 2017	<input type="checkbox"/>	Structures - SAP	09/24/2019 Demo Client		Edit
PPI Accident On and Off Job CT 2017	<input type="checkbox"/>	Structures - SAP	09/24/2019 Demo Client		Replace File
Voluntary Life Summary	<input checked="" type="checkbox"/>	Structures - SAP	07/31/2019 Yvette Garner-Henley - PPI1		Download
Evidence of Insurability (EOI) Form	<input checked="" type="checkbox"/>	Structures - SAP	09/27/2012 Yvette Garner-Henley - PPI1		Link To

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**.



The screenshot shows the 'Edit File' dialog for the 'Voluntary Life Summary' document. The 'Visibility' tab is selected. A confirmation dialog is overlaid on the right, asking 'Are you sure you would like to make this document public? It will be available for anyone to download.' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a blue border.

3. Obtain the link to the document you have made public.
 - a. From the **Action** menu, select **Link To**.
 - b. Share this link with anyone who needs access to the document

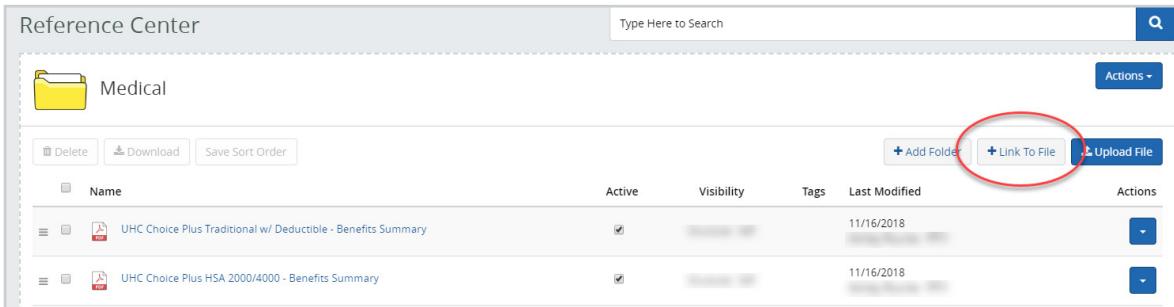


The screenshot shows the 'Link To' dialog. A URL is pasted into the text input field: https://www.benefitsolver.com/benefits/BenefitSolverView?DO_NUM=150728281&t. Below the input field are three buttons: 'Cancel', 'Select All', and a highlighted 'Copy' button.

Set Up Links to Other Websites

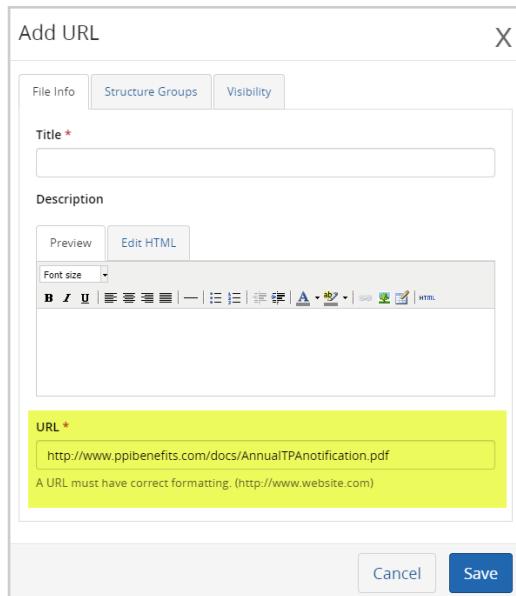
Add a Link

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



The screenshot shows a 'Reference Center' interface. At the top, there's a search bar and a toolbar with buttons for 'Delete', 'Download', 'Save Sort Order', '+ Add Folder', '+ Link To File' (which is circled in red), and 'Upload File'. Below the toolbar is a table listing files. The first file is 'UHC Choice Plus Traditional w/ Deductible - Benefits Summary' and the second is 'UHC Choice Plus HSA 2000/4000 - Benefits Summary'. The table columns include 'Name', 'Active', 'Visibility', 'Tags', 'Last Modified', and 'Actions'.

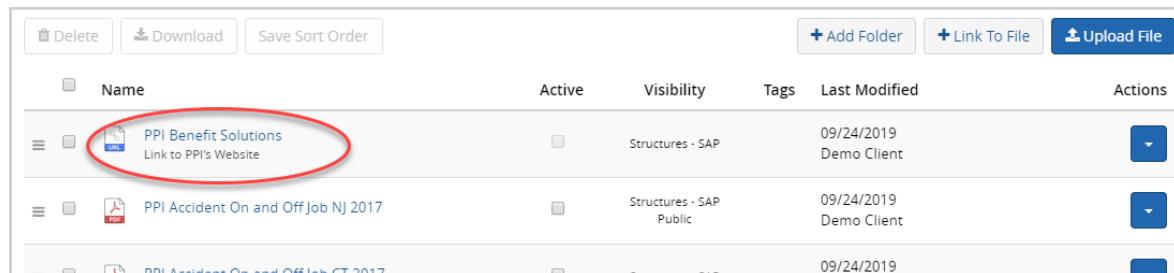
2. Add a Title and a description of the link.
3. Input the URL on the **File Info** tab.



The screenshot shows the 'Add URL' dialog box. It has tabs for 'File Info', 'Structure Groups', and 'Visibility'. The 'File Info' tab is active. It contains fields for 'Title' and 'Description', and a rich text editor for 'Edit HTML'. Below these is a 'URL' field which is highlighted in yellow and contains the value 'http://www.pplibenefits.com/docs/AnnualTPAnotifcation.pdf'. A message below the URL field says 'A URL must have correct formatting. (http://www.website.com)'. At the bottom are 'Cancel' and 'Save' buttons.

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.



The screenshot shows the 'Reference Center' after saving the new link. The table now includes a new row for 'PPI Benefit Solutions' with a file icon, the name 'PPI Benefit Solutions', and the description 'Link to PPI's Website'. The link is circled in red. The other files listed are 'PPI Accident On and Off Job NJ 2017' and 'PPI Accident On and Off Job CT 2017'.

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**.

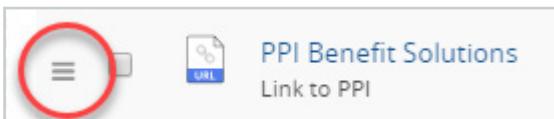
Delete a URL

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

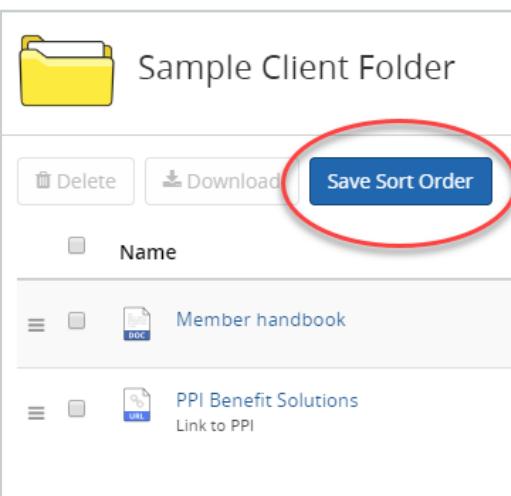
1. Click the three gray bars to the left of the folder/file name.



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.