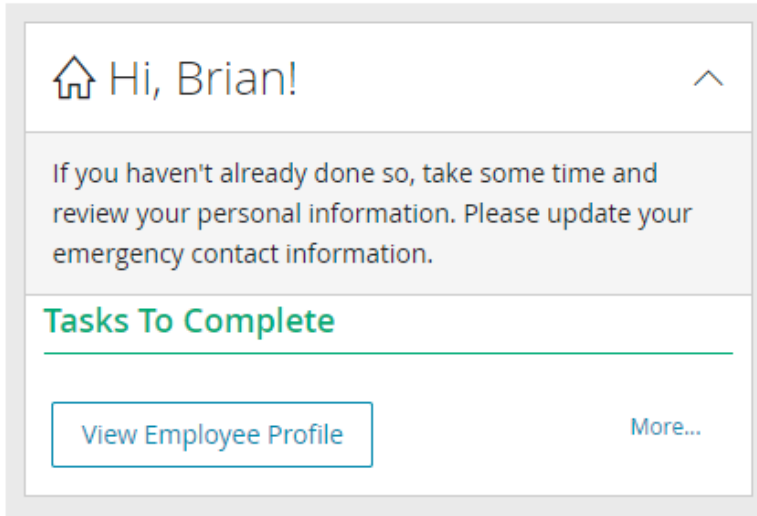


Benefits Enrollment Guide

Verify your Personal Information

Before beginning your enrollment, please verify the accuracy of all your personal information (e.g., address, DOB, etc.) in the Paylocity Self-Service Portal. **If you need to make any changes, it takes 24 hours to sync with the Enterprise Benefits system.**

1. Navigate to **HR & Payroll > Self Service Portal**.
2. Select **View Employee Profile** to add or edit personal information from three available tabs.

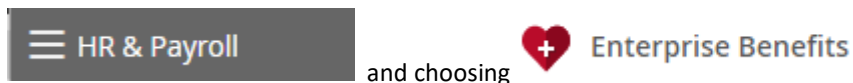


• Details

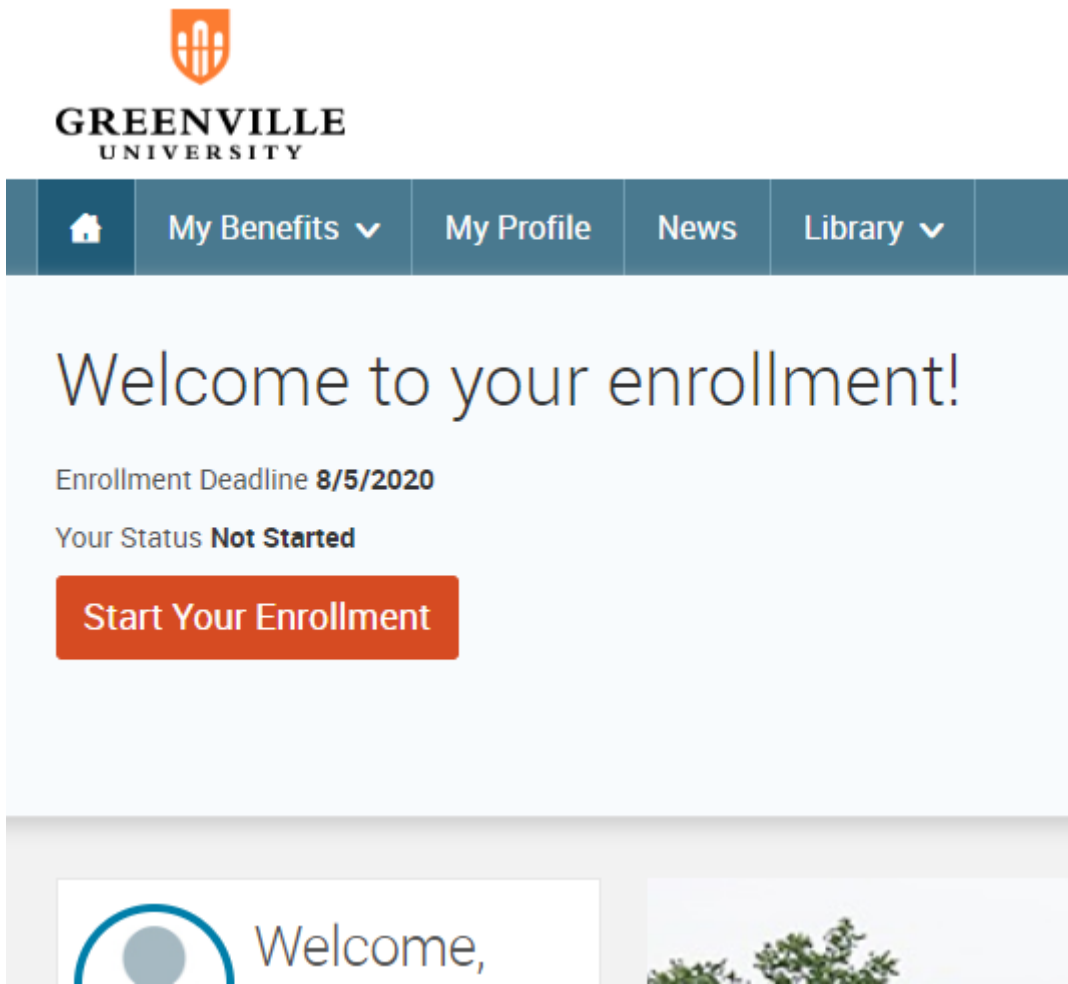
1. Enter **First Name, Last Name, and Middle Name**.
2. Enter **Title**.
3. Select an applicable **Suffix**.
4. Enter a **Preferred First Name**.
5. Enter **Prior Last Name**
6. Enter **Social Security Number**.
7. Enter **Marital Status** from the dropdown.
8. Enter **Birth Date**.
9. Enter possible Disability.
10. Select **Ethnicity** from the dropdown.
11. Select **Sex**.
12. Click **Save**.

Access to Online Enrollment

You will be able to access the Enterprise Benefits site directly from the Paylocity Employee Self Service Portal by clicking on



From the Enterprise Benefits Home Page, click on **START YOUR ENROLLMENT**.



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Home My Benefits ▾ My Profile News Library ▾

Welcome to your enrollment!

Enrollment Deadline **8/5/2020**

Your Status **Not Started**

Start Your Enrollment

Welcome,

The enrollment process consists of the following 4 steps/tabs. You will be taken through each tab to make changes or confirm your information on file and choose your benefits for the plan year.

Please Note: Any field that has an asterisk next to it is required.

1. Your Info

Employee Information

Note: If you just made changes to your personal information in the Self-Service Portal, it takes 24 hours to sync up with Enterprise Benefits. You can continue making your elections before the sync is complete.

It is not necessary to complete the Annual Tax Information section.

Family Information

2. Your Benefits

3. Enroll

4. Complete


Verify your Family Information

Please be sure to add all dependents that may be missing from the Family Information section before proceeding to the next section. To do this, click on [Add Dependents](#). When all of your family information is accurate, check “I agree” and click “Continue.”

My Benefits ▾ **My Profile** Library ▾

Personal Information
Family Information
 Beneficiaries
 Security Question
 Life Event
 Employee File
 Personalized Forms

Family Information

Demo TEST21 Male Employee 41 years old (9/3/1977) SSN: 000-00-0021 Edit >	Test Spouse Female Spouse 43 years old (1/1/1975) SSN: 456-88-9999 Edit >	Test Child2 Male Child 17 years old (5/1/2001) SSN: 666-55-8888 Edit >	 Add Dependents
---	---	--	---

Dependent Information

* First Name

Middle Initial

* Last Name

* Date of Birth

* Social Security Number

* Gender Male Female

Disabled Yes No

* Relationship

* Fields are required

Making Benefit Elections

Medical, Dental, Vision

To start your enrollment, on the “New Hire Enrollment” tab, then on the “View Plan Options” button.

Upon making your plan selection, you will be able to cover eligible dependents on file by checking the box next to the dependent’s name. If you wish to add a new dependent at this time, click on the ‘Add Dependents’ button to be taken directly to the family tab to add the dependent.

Indicate which of your family members are to be covered on this particular plan, then click on “Continue.”

Select who to cover with this plan [+ Add Dependents](#)

<input checked="" type="checkbox"/> TEST USER8 Employee	<input type="checkbox"/> Spouse Test Spouse	<input type="checkbox"/> Child Test Child
---	--	--

From here, you can review details of a specific plan by clicking on “View Plan Details.”

Dental Plan BCBS View plan details	Your Cost per pay period: \$13.63 <input type="button" value="v"/> Tier: Employee <input type="button" value="Select"/>
<input checked="" type="checkbox"/> Waive Dental	<input type="button" value="Waive"/>
Back to Benefits	


If you are satisfied with your selection, click on ‘Save & Continue.’



At this time, the tab will turn green next to the benefit you have completed and will be marked as “Completed.” You will then repeat these steps for each benefit offered.

Employer-Provided Plan

The Basic Life and AD&D, and the Business Travel Accident coverages are provided through Lincoln National Insurance at no cost to employees. These tabs should be already green, indicating that you are already enrolled, and no further action is needed.

	Basic Employee Life Your Cost per pay period: \$0.00 <input type="button" value="v"/>
PLAN Basic Life and AD&D / Lincoln / View plan details	
COVERAGE AMOUNT \$30,000	
<input checked="" type="checkbox"/> Completed	
<input type="button" value="View Information"/>	

If, at any time, you want to review or change your elections, click on the plan you would like to edit. When you are satisfied with all of your benefit plan elections, click on the ‘Continue’ button on the right side of the page.



Beneficiary Assignments

The next part of the benefits enrollment process is to assign beneficiary(ies) for each life insurance policy. For your convenience, your dependents on file will automatically appear on the beneficiary listing. However, you do not have to assign a percentage to them if you do not wish. You can always add someone else by clicking the "Add New Beneficiary" button. Enter your assignments to total 100 %. When done, click 'Continue.' You can also add secondary beneficiary(ies) in the event your primary beneficiaries are no longer living.

Basic Employee Life

You must choose a Primary Beneficiary; Secondary Beneficiaries are optional.

Relationship	Name	Primary %	Secondary %
(Employee)	My Estate	<input type="text"/> %	<input type="text"/> %
(Spouse)	Spouse Test	<input type="text"/> %	<input type="text"/> %
(Child)	Child Test	<input type="text"/> %	<input type="text"/> %
		<input type="text" value="0.00"/> % Must equal 100%	<input type="text" value="0.00"/> % Must equal 100%

[+ Add Beneficiary](#)

Almost Finished!

You will now be on the final review page. Review all of your benefit elections and covered dependents. Once you've completed your review, check the **I agree, and I'm finished with my enrollment** box at the bottom of the page and click the "Complete Enrollment" button on the right side of this page.

Confirmation

You can send yourself an e-mail confirmation of your elections or print it for your records. Click the printer icon on the right hand side of the screen.

Please Note: Although the online benefits enrollment site is secure and your information is encrypted during transit, it is important that you log off when you have completed your session. Click the Log Off icon in the upper right-hand corner of the enrollment site to log off. For security purposes, the system will automatically log out if you leave your system idle for more than 30 minutes.

PASSWORD » LOG OUT »