SEMA4 HR/Payroll

MN-PS110S
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Benefits Inquiry

Learning Guide

State of Minnesota

Minnesota Management & Budget (MMB)
SEMA4 HR Services
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Saint Paul MN 55155

Refer to SEMA4 Help for the most current SEMA4 information. This learning guide may be less current than instructions found in SEMA4 Help.

This document is available in alternative formats to individuals with disabilities. Call Statewide Administrative Systems Help Line at (651) 201-8100. Consumers with hearing or speech disabilities may contact us via their preferred Telecommunications Relay Service.

Welcome to the *Benefits Inquiry* learning guide, part of the SEMA4 curriculum.

Who should complete this guide?

Employees who:

- Explain benefits to employees
- Maintain current employee records

What skills will I learn?

You will be able to perform the following tasks in SEMA4:

- View benefit enrollment information
- View dependent/beneficiary information
- View insurance benefits summary information
- View employee event summary

What do I need to know before starting?

You must have completed *SEMA4 Overview*.

How much time will this take me?

Actual time will vary, but plan on approximately 2 hours. Make sure you have enough time to complete this guide in one day.

What do I need to proceed?

- Access to SEMA4
- Training user ID and password to sign in to the User Training database

How do I obtain a User ID and Password for the User Training database?

First you must register for the course. After you do so, you will receive an E-mail message with instructions, including a training user ID and password. Access the SEMA4 Training web site for registration instructions.

Directions

Read the introduction and work through each topic, completing the exercises.

Follow-up

- Complete the evaluation form and send it to SEMA4 HR Services.
- Follow your agency's procedures for tracking completed training.

Web Pages

The SEMA4 system uses Web pages to present information about an employee's benefit elections. All information displayed is view-only, meaning that you cannot change the data on these pages.

Topics in this Guide

- Viewing Benefit Enrollment Information
  - Viewing Health Benefits
  - Viewing Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD)
  - Viewing Spending Accounts (Pre-Tax Elections)
- Viewing Dependent/Beneficiary Information
- Viewing Benefits Summary Information
- Viewing Employee Event Summary

Although you can only *view* information on these pages, it is important to remember that all records of employees who were active at the time of the SEMA4 upgrade have a row of job data with the Action 'Data Change' and the Reason 'INC' (Insurance Conversion). This row was added to aid the conversion to SEMA4 8.3 and must be kept to ensure the integrity of the employee's insurance record. **Under no circumstances should this row be changed or deleted**.

Continue to the next topic, *Viewing Benefit Enrollment Information.*

Introduction

This section of the learning guide will familiarize you with viewing benefit enrollment information in SEMA4. You will view the following information.

1. Health Benefits
2. Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD)
3. Pre-Tax(Spending Accounts) Benefits

Descriptive information

Each Web page provides detailed, descriptive information about an employee's benefit choices.

Each page describes one type of benefit coverage

Each Web page provides employee information about only one benefit plan type (such as health, disability, life, etc.), including historic (if selected) and dependent information, rather than listing all selection codes on one screen.

Viewing the elections

SEMA4 offers two choices for viewing all of an employee's elections. You can choose to view all of the plans or selections, within a category (Health, Life/ADD, Spending Accounts) on one screen (by scrolling), or you can choose to view one Plan Type at a time.

1. Viewing Health Benefit Elections

Use the Health Benefit Elections page to view an employee's medical and dental plan elections. This page displays information such as an employee's coverage, effective dates, and covered dependents. Each benefit plan type is listed separately within the Health Benefit Elections page and can be viewed by clicking on the navigation arrows for Plan Type.

VIEW SEMA4 HELP

Complete the following steps to look up the step-by-step instructions in SEMA4 Help.

ACTION	RESULT
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**.	A list of HR/Payroll Functions displays
3. Select **Benefits** under Human Resources.	The Benefits – Contents page displays
4. Select **Pages and Fields**.	The Benefits – Pages and Fields displays
5. Scroll down and select <u>Health Benefit Elections</u> (Medical and Dental).	The Health Benefit Elections - Page Overview displays
6. Click **Steps**	View Health Benefit Information – Steps display
7. Scroll down to view the steps.	
8. Exit SEMA4 Help.	

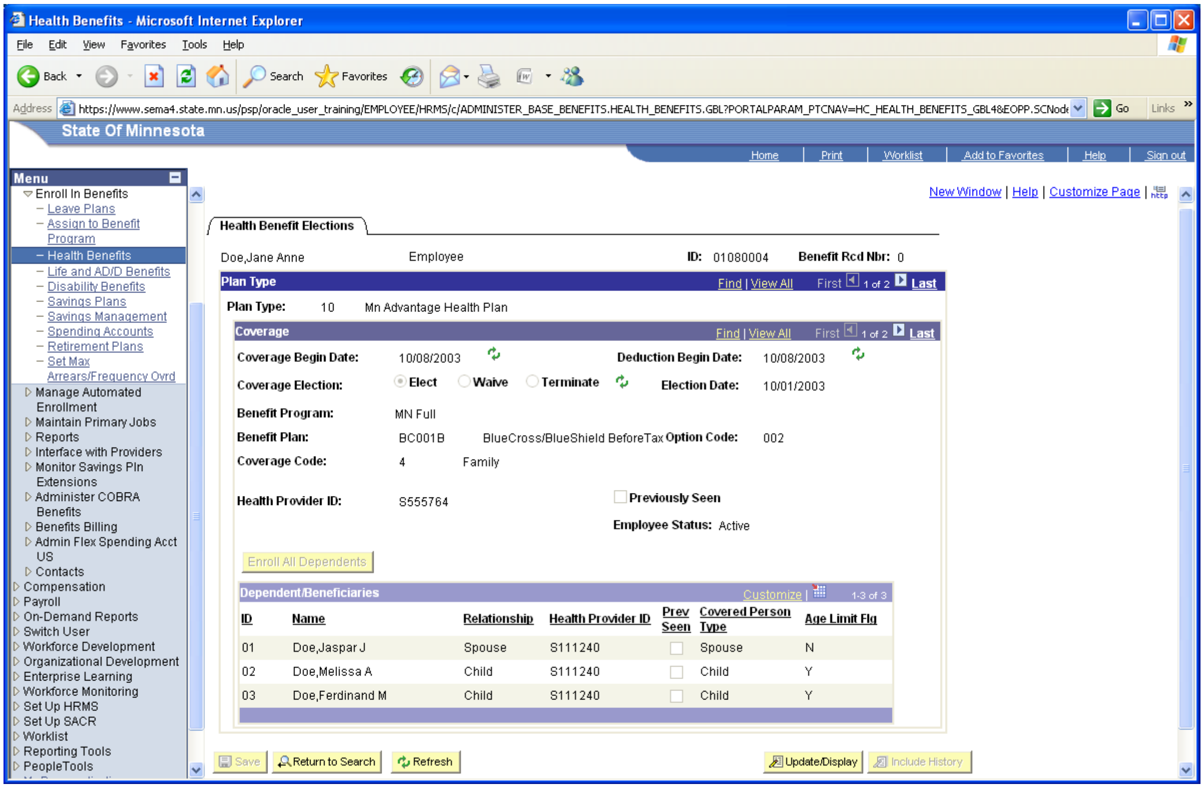
HEALTH BENEFIT ELECTIONS

In the following walk-through, you will look at health benefit enrollment information online. You will view the **Health Benefit Elections** page.

View Health Benefit Elections page

ACTION	RESULT
1. Sign in to the SEMA4. **User Training** database. Using your training user ID and password.	Main menu appears
2. Select **Benefits** > **Enroll in Benefits** > **Health Benefits**.	Health Benefits search page displays
3. Enter Doe in the Name field. Click Search	A list of search results display
4. Select Jane Anne Doe.	The Health Benefit Elections page displays
5. On the Plan Type header bar, click the **View All** link.	All of the Health Benefit plan types applicable to the employee display on the same screen
6. Scroll down to see the plan types, and then scroll up.	
7. On the Plan Type header bar, click the **View 1** link.	Only one of the Health Benefit plan types will display
8. Click the **Find** link.	A Search Box displays
9. Enter 11 as the Search String then click **OK**.	The page with Dental Coverage displays.
10. Click ◄ on the Plan Type header bar to view the previous benefit.	The next Health Benefit plan type displays
11. Click ► on the Plan Type header bar to view the next benefit.	The previous Health Benefit plan type displays
12. Click the **First** link on the Plan Type header bar to view the first plan type.	The last Health Benefit plan type displays
13. Click the **Last** link on the Plan Type header bar to view the last plan type.	The first Health Benefit plan type displays
14. Click the Include History button on the toolbar.	
15. In the Coverage header bar, click ► to view history.	Historical data displays

Health Benefit Elections page



Health Benefit Elections fields

Field	Description
Plan Type	This is the type of health benefit being viewed. Plan Type '10' = Medical, Plan Type '11' = Dental.
Coverage Begin Date	If the employee is eligible and currently enrolled in coverage (Coverage Election = Elect), this is the date coverage begins. If the employee is eligible and has chosen not to participate in coverage (Coverage Election = Waive), this is the date the employee no longer has coverage. (Note: Only part time employees may waive medical or dental coverage.) If the employee is no longer eligible for coverage (Coverage Election = Terminate), this is the first day the employee no longer has coverage. If the employee has never been eligible for this plan, no row will be found.
Deduction Begin Date	If the employee is eligible and enrolled in coverage (Coverage Election = Elect), this is the date deductions will begin. If the employee is eligible and has chosen not to participate in coverage (Coverage Election = Waive), this is the date on which deductions are discontinued. If the employee is no longer eligible for coverage (Coverage Election = Terminate), this is the first day of the pay period when deductions for the benefit are discontinued. If the employee has never been eligible for these plans, no row will be found.
Coverage Election	Indicates the employee's election: Elect indicates the employee is eligible and has chosen to enroll in coverage. Waive indicates the employee is eligible and has chosen not to participate in coverage. (Note: Only employees eligible for insurance but not eligible for full employer contributions, may waive medical coverage.) Terminate indicates the employee is no longer eligible for coverage. If the employee has never been eligible for these plan types, no row will be found.
Election Date	The date the enrollment was last processed through the Benefits Administration system.
Benefit Program	A collection of benefit plans the State offers to a group of employees subject to collective bargaining agreements and compensation plans. This is the benefit program for which the employee is eligible. This field displays the current benefit program from the employee's job record and is based on the Deduction Begin Date.
Benefit Plan	Identifies the specific health benefit plan in which the employee is enrolled. (Examples: Blue Cross, Health Partners, Preferred One, State Dental Plan)
Option Code	Describes the combination of the benefit plan selected and the coverage code. This code is automatically assigned by SEMA4.
Coverage Code	Identifies the coverage that the employee has selected. Code 1 = Employee Only. Code 4 = Family (Employee + Dependents).

Field	Description
Health Provider ID	The code identifying the primary care clinic selected by the employee at the time of enrollment. The employee must elect a plan administrator and a primary clinic for all medical plans. If Blue Plus or Health Partners dental plans are selected, the employee must select a primary clinic. If the employee selected the State Dental Plan, this field is blank for dental coverage. This information is collected at the time of the enrollment; however, the plan administrators will be the only ones to maintain this information; therefore the information on the screen may not be current.
Previously Seen	This information will be maintained by the plan administrators rather than in SEMA4.
Employee Status	Displays the employee's status from their job record (such as active, leave of absence, separated, etc.). (Note: This information is based on the Deduction Begin Date and may not be accurate for the Coverage Begin Date.)
Dependent/Beneficiaries	
ID	A unique identifier assigned by SEMA4 for each dependent as they are entered. The ID ties back to the dependent and/or beneficiary data found on the Dependent/ Beneficiary page.
Name	Displays the dependent's name from the Dependent/Beneficiary record.
Relationship	Displays the dependent's relationship from the Dependent/Beneficiary record.
Health Provider ID	The code identifying the primary care clinic selected at the time of enrollment. The employee must elect a plan administrator and a primary clinic for all medical plans. If Blue Plus or Health Partners dental plans are selected, the employee must select a primary clinic. If the employee selected the State Dental Plan, this field is blank for dental coverage. This information is collected at the time of the enrollment; however the Plans will be the only ones to maintain this information; therefore the information on the screen may not be current.
Prev Seen	This information will be maintained by the plan administrators rather than in SEMA4.
Covered Person Type	General category of relationship. Some relationships are considered part of a larger relationship.
Age Limit Flg	Indicator used to determine if the eligible dependent's coverage will end when the dependent reaches a pre-determined age.

HEALTH BENEFIT ELECTIONS

EXERCISE

In this exercise, you have an opportunity to view health benefit enrollment information.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions in the walk-through
- SEMA4 Help

Directions

An employee tells you he needs to verify current health benefits. You need to find his health benefit elections information.

View Health Benefit Elections page

ACTION	RESULT
1. Select **Benefits** > **Enroll in Benefits** > **Health Benefits**.	Health Benefits Elections search page displays
2. Enter Smith,G in the Name search field. Click Search	The Health Benefit Elections page for George L. Smith displays
3. On the Plan Type header bar, click the **View All** link.	All of the Health Benefit plan types applicable to the employee displays on the same screen
4. Scroll to view the plans.	All of the Health Benefit plan types display

REVIEW QUESTIONS

Review what you just learned by answering the following questions. If you have difficulty answering the questions, review the topic.

1. To view the Health Benefit Elections page in SEMA4, select Benefits >

   ______________________ __________ ______________ > Health Benefits.

2. Which field contains the effective date of coverage?

   ____

3. In which field would you find the plan for which the employee is enrolled?

   ____

4. Which field displays the primary care clinic selected by the employee when he/she first enrolled in the plan?

   ____

Check your answers on the next page.

REVIEW ANSWERS

Check your answers to the review questions.

1. To view the Health Benefit Elections page in SEMA4, select Benefits > Enroll in Benefits > Health Benefits.

2. Which field contains the effective date of coverage?

   Coverage Begin Date

3. In which field would you find the plan for which the employee is enrolled?

   Benefit Plan

4. Which field displays the primary care clinic selected by the employee when he/she first enrolled in the plan?

   Health Provider ID

2. Viewing Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD)

The **Life/ADD Elections** page includes both employee and dependent basic and optional life insurance enrollment information and lists dependents covered by each benefit. It includes Employee and Spouse Accidental Death and Dismemberment. It also includes Employee Short Term Disability (STD) and Long Term Disability (LTD) or where applicable Manager's IPP.

Each benefit plan type is listed separately within the **Life/ADD Elections** page and can be viewed by clicking on the navigation arrows for Plan Type.

VIEW SEMA4 HELP

Complete the following steps to look up the step-by-step instructions in SEMA4 Help.

ACTION	RESULT
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**.	A list of HR/Payroll Functions displays
3. Select **Benefits** under Human Resources.	The Benefits – Contents page displays
4. Select **Pages and Fields**.	The Benefits – Pages and Fields displays
5. Scroll down and select **Life and AD/D Benefits**.	The Life/ADD Elections - Page Overview displays
6. Click  Steps	View Life, AD/D and Disability Information – Steps displays
7. Exit SEMA4 Help.	

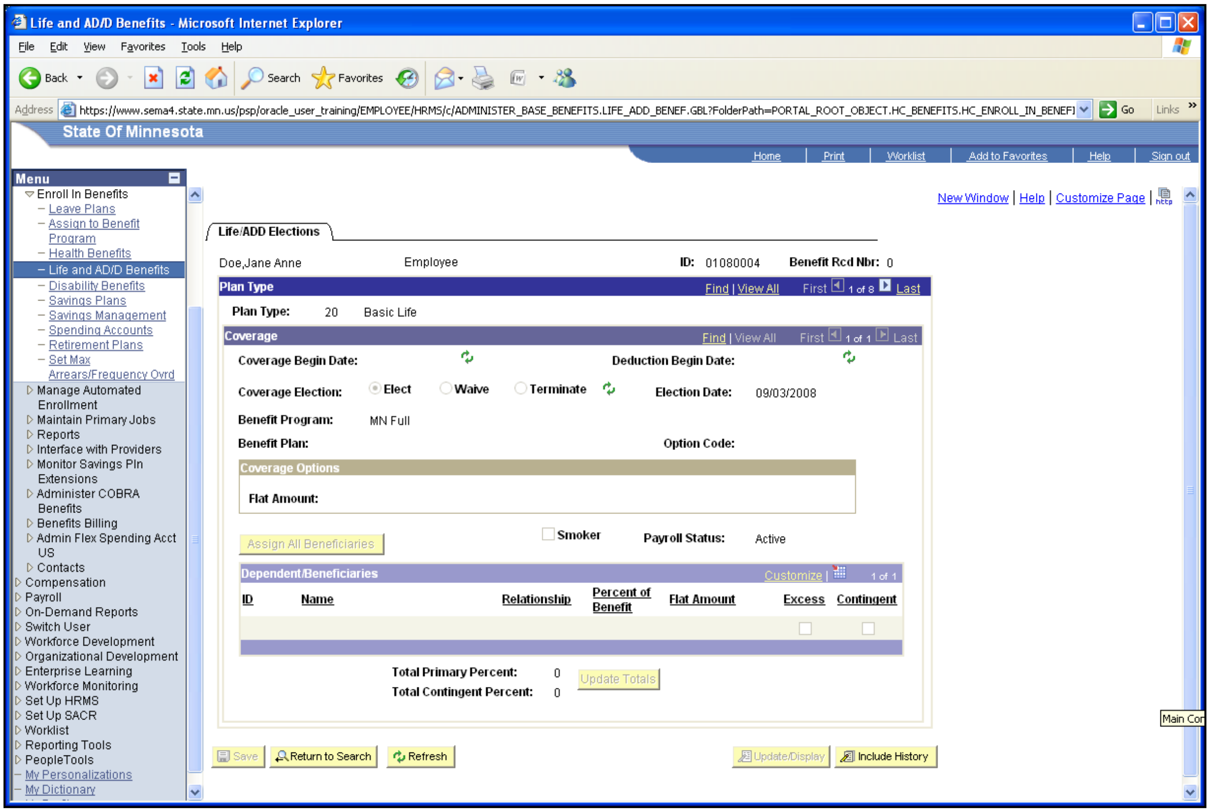
Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD)

In the following walk-through, you will look at health benefit enrollment information online. You will view the **Life/ADD Elections** page.

View Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD)

ACTION	RESULT
1. If you have signed out of SEMA4, sign into the User Training database.	Main menu appears
2. Select **Benefits > Enroll in Benefits > Life and AD/D Benefits**.	Life and AD/D Elections search page displays
3. Enter Doe in the name search field. Click Search	A list of search results display
4. Select Jane Anne Doe.	The Life/ADD Elections page displays
5. On the Plan Type header bar, click the **View All** link.	All of the Life/ADD plan types applicable to the employee displays on the same screen
6. Scroll down to see the plan types.	
7. Click the **View 1** link on the Plan Type header bar.	Only one of the Life/ADD plan types will display
8. Click the **Find** link.	A Search Box displays
9. Enter 2C in the Search String then click **OK**.	The page with Child Life Coverage displays.
10. Click on the Plan Type header bar to view the next benefit.	The next Life/ADD plan type displays
11. Click on the Plan Type header bar to view the previous benefit.	The previous Life/ADD plan type displays
12. Click the **Last** link on the Plan Type header bar to view the last plan type.	The last Life/ADD plan type displays
13. Click the **First** link on the Plan Type header bar to view the first plan type.	The first Life/ADD plan type displays

Life/ADD Elections page



Life/ADD Elections fields

Field	Description
Plan Type	This is the type of life/disability benefit being viewed. Plan Type '20' = Basic/Managers Life, Plan Type '21' = Employee Additional Life, Plan Type '22' = Employee AD/D, Plan Type '24' = Spouse Life, Plan Type '25' = Spouse AD/D, Plan Type '3I' = Income Protection Plan, Plan Type '2C' = Child Life, Plan Type '2S' = STD, Plan Type '2L' = LTD and Plan Type '2P' = IPP.
Coverage Begin Date	If the employee is eligible and enrolled in coverage (Coverage Election = Elect), this is the date coverage will begin. If the employee is eligible and has chosen not to participate in coverage (Coverage Election = Waive), this is the date on which deductions never started. If the employee is no longer eligible for coverage (Coverage Election = Terminate), this is the first day of the pay period when deductions for the benefit are discontinued. If the employee has never been eligible for these plans, no row will be found.
Deduction Begin Date	If the employee is eligible and enrolled in coverage (Coverage Election = Elect), this is the date deductions will begin. If the employee is eligible and has chosen not to participate in coverage (Coverage Election = Waive), this is the date on which deductions never started. If the employee is no longer eligible for coverage (Coverage Election = Terminate), this is the first day of the pay period when deductions for the benefit are discontinued. If the employee has never been eligible for these plans, no row will be found.
Coverage Election	Indicates the employee's election: Elect indicates the employee is eligible and has chosen to enroll in coverage. Waive indicates the employee is eligible and has chosen not to participate in coverage. Terminate indicates the employee is no longer eligible for coverage. If the employee has never been eligible for these plan types, no row will be found.
Election Date	The date the enrollment was processed through the SEMA4 Benefits Administration system. Similar to the transaction date in EMDI.
Benefit Program	A collection of benefit plans the State offers to a group of employees subject to collective bargaining agreements and compensation plans. This is the benefit program for which the employee is eligible. This field displays the current benefit program from the employee's job record and is based on the Deduction Begin Date.
Benefit Plan	Identifies the benefit plan the employee is enrolled (examples: MMLB – Employee Basic Life, LTD – Long Term Disability, STD – Short Term Disability).
Coverage Options	
Flat Amount	The actual coverage amount is displayed when it is a flat amount based on employee classification. If coverage is specific to the plan, this field will be blank.
Smoker	Indicates if the covered person is a smoker. It is not maintained.
Payroll Status	Displays the employee's status from their job record (such as active, leave of absence, separated, etc.). (Note: This information is based on the Deduction Begin Date and may not be accurate for the Coverage Begin Date.)

Field	Description
Dependent/Beneficiaries	
ID	A unique identifier assigned by SEMA4 for each dependent as they are entered. The ID ties back to the dependent and beneficiaries indicative data found on the Dependent/Beneficiary page.
Name	Displays the dependent/beneficiary's name from the Dependent/Beneficiary record.
Relationship	Displays the dependent's relationship to the State employee from the Dependent/Beneficiary record.
Percent of Benefit	Indicates the benefit distribution percentage the designated beneficiaries will receive.
Flat Amount	Indicates the benefit distribution dollar amount the designated beneficiaries will receive.
Excess	The amount received by the beneficiary checked when the total of the flat amount(s) entered is less than the policy amount.
Contingent	A beneficiary who is a secondary beneficiary rather than a primary beneficiary.

Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD) Exercise


In this exercise, you have an opportunity to view the optional health benefit enrollment information.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions in the walk-through
- SEMA4 Help

Directions

An employee has scheduled a meeting with an insurance agent to compare insurance options. You need to find his Life/ADD elections information.

View Accidental Death and Dismemberment (AD/D), Short Term Disability (STD) and Long Term Disability (LTD)

ACTION	RESULT
1. Select **Benefits** > **Enroll in Benefits** > **Life and AD/D Benefits**.	Life/ADD Elections search page displays
2. Enter employee ID 01080005 and click Search	The Life/ADD Elections page for George L. Smith displays
3. Click several times on the Plan Type header bar, to view the next benefit, until you have seen all plans for which the employee is eligible.	The next Life/ADD plan type displays with each click

REVIEW QUESTIONS

Review what you just learned by answering the following questions. If you have difficulty answering the questions, review the topic.

1. The path to the Life/ADD Elections page is Benefits > Enroll in Benefits > ________________

2. This page contains information on which of the following plans:
   A. Basic Life Insurance
   B. Short-Term and Long-Term Disability
   C. Child Life Insurance
   D. Manager's Life Insurance
   E. All of the above

Check your answers on the next page.

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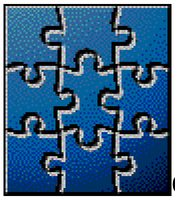
REVIEW ANSWERS

Check your answers to the review questions.

1. The path to the Life/ADD Elections page is Benefits > Enroll in Benefits > Life and AD/D Benefits.

2. This page contains information on which of the following plans:

    E. All of the above

3. Viewing Spending Accounts Benefits

The **Spending Account** page includes employee elections of pre-tax accounts – Medical Dental Expense Account (MDEA), Dependent Care Expense Account (DCEA), Transit Expense Account – Parking (TEA-Parking) and Transit Expense Account Bus Pass/Vanpool (TEA – Bus Pass/Vanpool). Each benefit plan type is listed separately within the Spending Accounts page and can be viewed by clicking on the navigation arrows for Plan Type.

SEMA4 HELP

Complete the following steps to look up the step-by-step instructions in SEMA4 Help.

ACTION	RESULT
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**.	A list of HR/Payroll Functions displays
3. Select **Benefits** under Human Resources.	The Benefits – Contents page displays
4. Select **Pages and Fields**.	The Benefits – Pages and Fields display
5. Scroll down and select **Spending Accounts**.	The Spending Accounts – Page Overview displays
6. Click **Steps**	View Spending Accounts Information – Steps displays
7. Exit SEMA4 Help.	

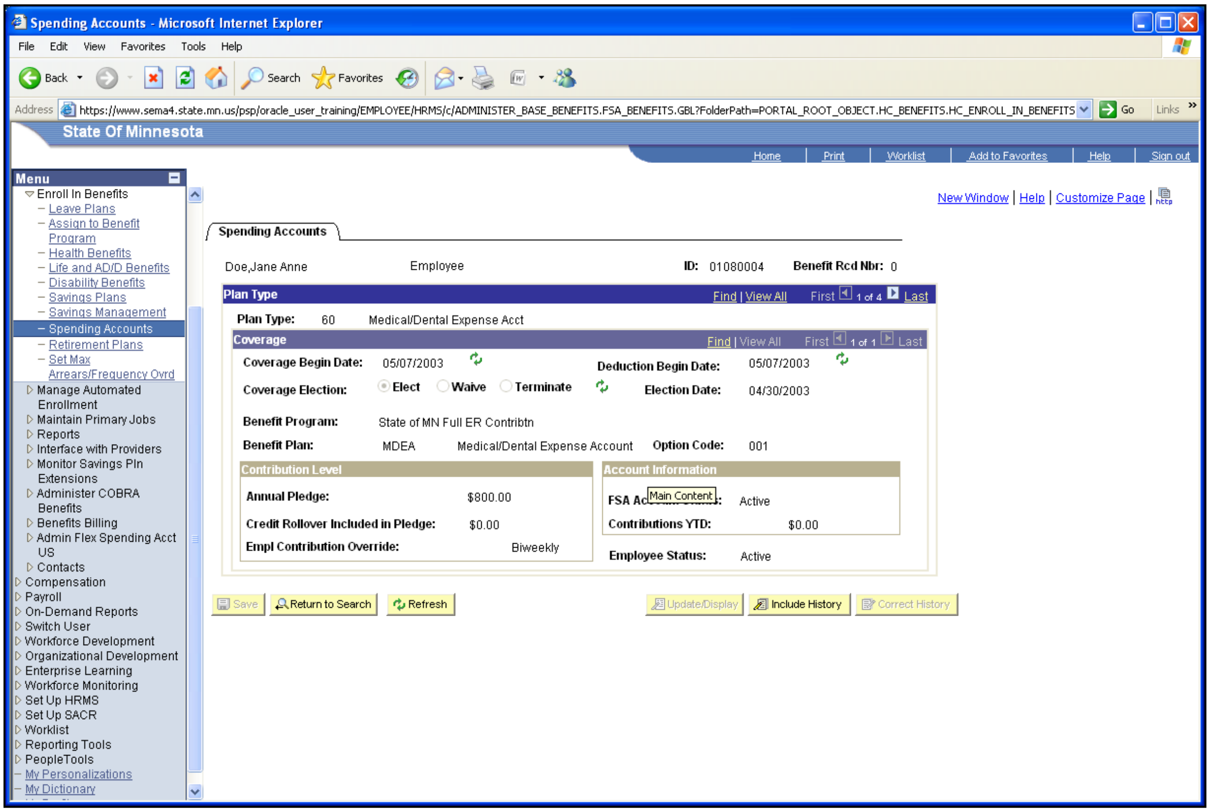
SPENDING ACCOUNTS BENEFITS

In the following walk-through, you will look at Health Benefit Enrollment information online. You will view the **Spending Accounts** page.

View Spending Accounts

ACTION	RESULT
1. If you have signed out of SEMA4, sign in to the User Training database.	Main menu appears
2. Select **Benefits > Enroll in Benefits > Spending Accounts**.	FSA Benefits search page displays
3. Enter Doe in the name search field. Click Search	A list of search results display
4. Select Jane Anne Doe.	The Spending Accounts page displays
5. On the Plan Type header bar, click the **View All** link.	All of the Spending Account (pre-tax) Benefits plan types applicable to the employee displays on the same screen
6. On the Plan Type header bar, click the **View 1** link.	Only one of the Spending Account plan types will display
7. Click the **Find** link.	A Search Box displays
8. Enter 6Y as the Search String then click **OK**.	The Transit Exp Acct - Parking page displays
9. Click on the Plan Type header bar to view the next benefit plan.	The next Spending Accounts plan type displays
10. Click on the Plan Type header bar to view the previous benefit plan.	The previous Spending Accounts plan type displays
11. Click the **Last** link on the Plan Type header bar to view the last employee selection for Spending Account coverage.	The last Spending Accounts plan type displays
12. Click the **First** link on the Plan Type header bar to view the first employee selection for Spending Account coverage.	The first Spending Accounts plan type displays

Spending Accounts page



Spending Accounts page fields

Field	Description
Plan Type	This is the type of Spending Account benefit being viewed. Plan Type '60' = Medical/Dental Expense Account, Plan Type '61' = Dependent Care Expense Account. Plan Type '6Y' = Transit Expense Account – Parking, and Plan Type '6Z' = Transit Expense Account – Bus Pass/Vanpool.
Coverage Begin Date	If the employee is eligible and currently enrolled in coverage (Coverage Election = Elect), this is the date coverage begins. If the employee is eligible and has chosen not to participate in coverage (Coverage Election = Waive), this is the date there is no coverage (the first day the employee would normally be eligible for the benefit). If the employee is no longer eligible for coverage or has elected to end coverage (Coverage Election = Terminate), this is the first day the employee no longer has coverage. If the employee has never been eligible for this plan, no row will be found.
Deduction Begin Date	If the employee is eligible and enrolled in coverage (Coverage Election = Elect), this is the date deductions will begin. If the employee is eligible and has chosen not to participate in coverage (Coverage Election = Waive), this is the date on which deductions could have started. If the employee is no longer eligible for coverage (Coverage Election = Terminate), this is the first day of the pay period when deductions for the benefit are discontinued. If the employee has never been eligible for these plans, no row will be found.
Coverage Election	Indicates the employee's election: Elect indicates the employee is eligible and has chosen to enroll in coverage. Waive indicates the employee is eligible and has chosen not to participate in coverage. Terminate indicates the employee is no longer eligible for coverage. If the employee has never been eligible for these plan types, no row will be found.
Election Date	Indicates the date the enrollment was processed through the SEMA4 Benefits Administration system. Similar to the transaction date in EMDI.
Benefit Program	A collection of benefit plans the State offers to a group of employees subject to collective bargaining agreements and compensation plans. This is the benefit program for which the employee is eligible. This field displays the current benefit program from the employee's job record and is based on the Deduction Begin Date.
Benefit Plan	Identifies the benefit plan the employee is enrolled. (Examples: Medical/Dental Expense Account, Dependent Care Expense Account)
Option Code	Describes the combination of the benefit plan selected and the coverage code. This code is automatically assigned by SEMA4.

Field	Description
Contribution Level	
Annual Pledge	The amount the employee has elected to place in a spending account (pre-tax account) for the calendar year.
Credit Rollover Included in Pledge	This field is used when flex credits are offered. It is not applicable for the State's current benefit package and is not used
Empl Contribution Override	This field is used when the employee is allowed to make an election based on a pay period instead of an annual basis. It is not applicable for the State's current benefit package and is not used
Account Information	
FSA Account Status	This field is used for processing Pre-Tax Claims. The State uses a third party administrator for this function. This field will not be maintained.
Contributions YTD	Shows the total contributions the employee has made since the beginning of the plan year (year-to-date).
Employee Status	Displays the employee's status from their Job record (such as active, leave of absence, separated, etc.). (Note: This information is based on the Deduction Begin Date and may not be accurate for the Coverage Begin Date.)

SPENDING ACCOUNTS

EXERCISE

In this exercise, you have an opportunity to view Spending Accounts information.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions in the walk-through
- SEMA4 Help

Directions

An employee wants a list of the pre-tax accounts they are eligible for to discuss with his spouse to make open enrollment selections. You need to find his Spending Accounts information.

View Spending Accounts Benefits

ACTION	RESULT
1. Select **Benefits** > **Enroll in Benefits** > **Spending Accounts**.	FSA Benefits search page displays
2. Enter employee ID 01080005 and click Search	Spending Accounts page displays
3. On the Plan Type header bar, click the **View All** link.	All of the Spending Accounts plan types applicable to the employee display on the same screen
4. Scroll down to view all the benefit plans on the Spending Accounts page.	

REVIEW QUESTIONS

Review what you just learned by answering the following questions. If you have difficulty answering the questions, review the topic.

1. To view the Spending Accounts page, select Benefits > Enroll in Benefits > ________________.

2. Which field contains the effective date of coverage?

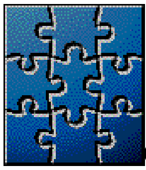
   ____

3. If an employee wanted to know how much she/he had indicated as an annual contribution amount, which field would you look in?

   ____

Check your answers on the next page.

REVIEW ANSWERS

Check your answers to the review questions.

1. To view the Spending Accounts page, select Benefits > Enroll in Benefits > Spending Accounts.

2. Which field contains the effective date of coverage?

   Coverage Begin Date

3. If an employee wanted to know how much she/he had indicated as an annual contribution amount, which field would you look in?

   Annual Pledge

Continue to the next topic, *Viewing Dependent/Beneficiary Information.*

Viewing Dependent/Beneficiary Information

Introduction

The Dependent/Beneficiary component has three pages: **Name, Address,** and **Personal Profile**. Click the page tabs to view these pages.

These pages list information about an employee's dependents/beneficiaries who have been linked to coverage at some time. *Do not assume that this means they are still covered.* Covered dependents and beneficiaries can only be found on the page specific to that benefit. For example, an employee's beneficiary for Basic Life is included on the Life/ADD Elections page. An employee's covered dependents are included on the Health Benefit Elections page.

The **Name** page displays information on an employee's dependents and beneficiaries. It includes the dependent/beneficiary's Dependent/Beneficiary ID, name and the effective date for the record.

The **Address** page displays information on an employee's dependents and beneficiaries. It includes the current address and phone number, provided by the employee for each of the employee's dependent(s) or beneficiary (or beneficiaries) listed and the effective date of the Address page (if a new address has been added, it may have a different effective date than the dates on the Name or Personal Profile pages.

The **Personal Profile** page displays information on an employee's dependents and beneficiaries. It includes the dependent/beneficiary date of birth, effective date for the Personal Profile page, the dependent' s relationship to the employee, the relationship type, the dependent's gender, and marital status along with other information.

The **Dependent/Beneficiary Riders** secondary page is accessed via a link on the Personal Profile page. It displays information on any court orders, spousal waivers or other documents affecting an employee's dependent or beneficiary benefit, entitlement or claim. It includes information about the benefit plan affected and the type of exception. Each dependent/beneficiary plan may have a rider/order. Any information about the dependent's Medicare status is in the US Federal Government section, accessed by clicking This information is not generally collected and will be blank for most dependents. A field for the dependent's Social Security number is found at the bottom of the page. This information is not required; the field is not always populated.

VIEW SEMA4 HELP

Complete the following steps to look up the step-by-step instructions for dependent/beneficiary information in SEMA4 Help.

ACTION	RESULT
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**.	A list of HR/Payroll Functions displays
3. Select **Benefits** under Human Resources.	The Benefits – Contents displays
4. Select **Pages and Fields**.	The Benefits – Pages and Fields displays
5. Select **Address** under Dependent/Beneficiary Pages.	The Address (Benefits) – Page Overview displays
6. Click 	View Dependent/Beneficiary Information – Steps displays
7. Click the **Back** button on the browser twice.	The Benefits – Pages and Fields displays
8. Select **Dependent/Beneficiary Riders** under Dependent/Beneficiary Pages.	The Dependent/Beneficiary Riders – Page Overview displays
9. Click the **Back** button on the browser.	The Benefits – Pages and Fields displays
10. Select **Name**.	The Name (Benefits) – Page Overview displays
11. Click the **Back** button on the browser.	The Benefits – Pages and Fields displays
12. Select **Personal Profile**.	The Personal Profile – Page Overview displays
13. Exit SEMA4 Help.	

VIEWING DEPENDENT/BENEFICIARY INFORMATION

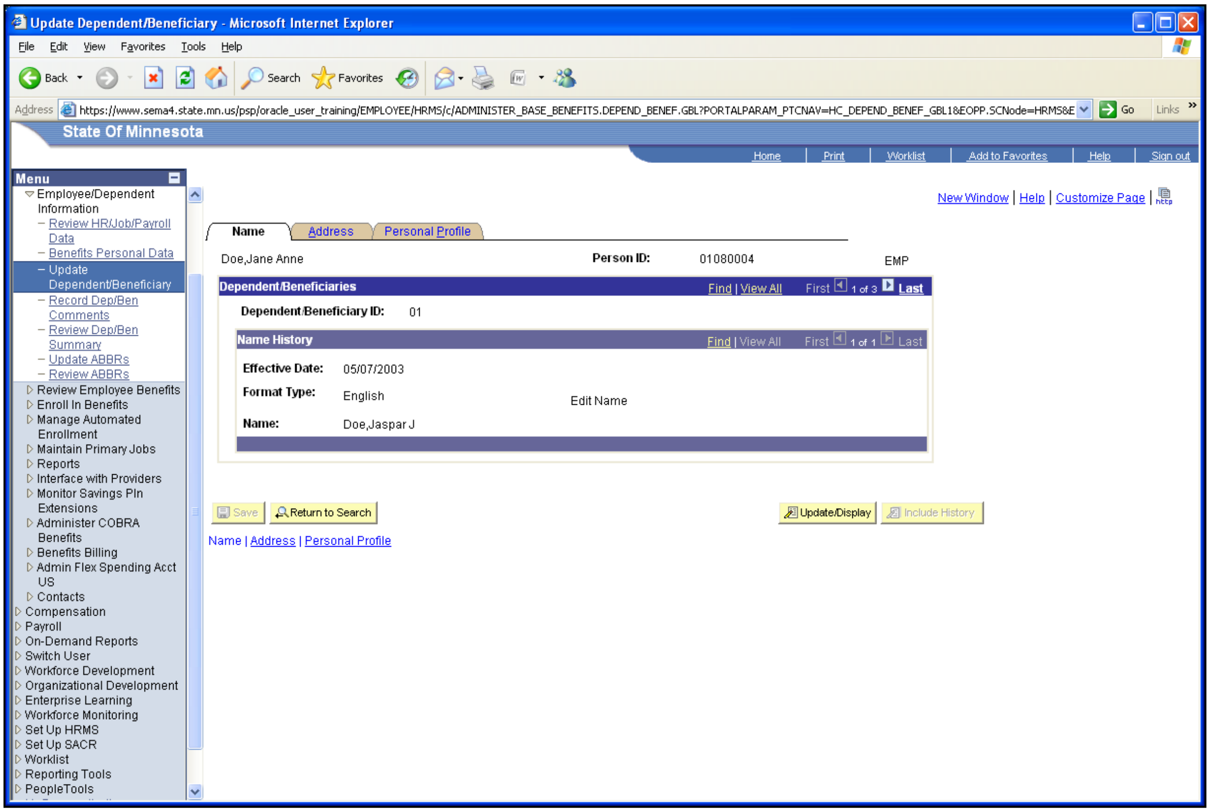
Walk-Through In the following walk-through, you will look at dependent/beneficiary information online.

View Dependent/Beneficiary Information

ACTION	RESULT
1. If you have signed out of SEMA4, sign in to the User Training database.	Main menu appears
2. Select **Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**.	Update Dependent/Beneficiary search page displays
3. Enter Doe in the name search field. Click Search	A list of search results display
4. Select Jane Anne Doe to display.	The Name page displays
5. In the Dependent/Beneficiaries header bar, click the **View All** link.	View all of the dependents'/beneficiaries' names listed
6. Scroll down to view the dependents.	
7. In the Dependent/Beneficiaries header bar, click the **View 1** link.	View one of the dependents'/beneficiaries' names listed
8. Click ▶ in the Dependent/Beneficiaries header bar to view the next dependent/beneficiary.	The next Dependent/Beneficiary displays
9. Click ◀ in the Dependent/Beneficiaries header bar to view the previous dependent/beneficiary.	The previous Dependent/Beneficiary displays
10. Click the **Last** link in the Dependent/Beneficiaries header bar to view the last dependent/beneficiary.	The last Dependent/Beneficiary displays
11. Click the **First** link in the Dependent/Beneficiaries header bar to view the first dependent/beneficiary.	The first Dependent/Beneficiary displays
12. Click the **Address** tab.	The Address page displays
13. Click the **Personal Profile** tab.	The Personal Profile page displays
14. Click	The US Federal Government Medicare displays

Historic information on dependents and beneficiaries is not kept by SEMA4.

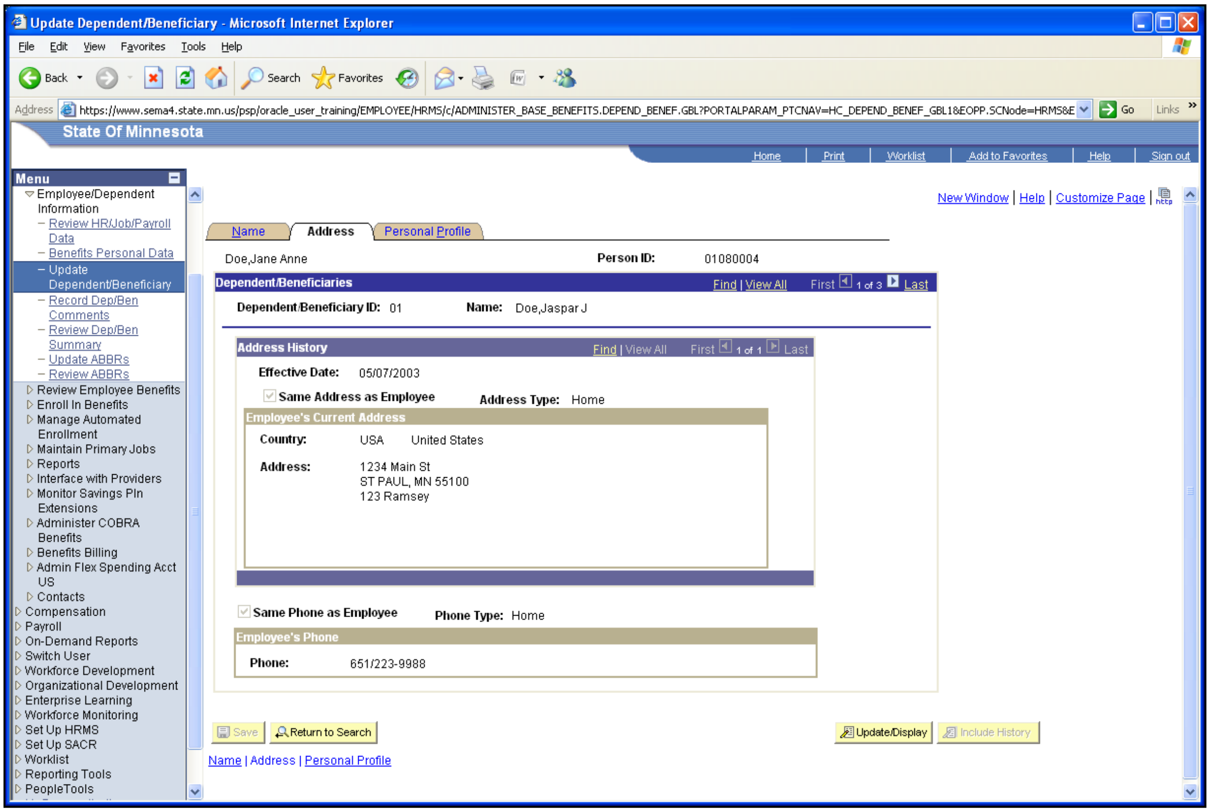
Name page


Update Dependent/Beneficiary - Microsoft Internet Explorer
State Of Minnesota
Home | Print | Worklist | Add to Favorites | Help | Sign out
Menu
Employee/Dependent Information
Review HR/Job/Payroll Data
Benefits Personal Data
Update Dependent/Beneficiary
Record Dep/Ben Comments
Review Dep/Ben Summary
Update ABBRs
Review ABBRs
Review Employee Benefits
Enroll In Benefits
Manage Automated Enrollment
Maintain Primary Jobs
Reports
Interface with Providers
Monitor Savings Pln Extensions
Administer COBRA Benefits
Benefits Billing
Admin Flex Spending Acct US
Contacts
Compensation
Payroll
On-Demand Reports
Switch User
Workforce Development
Organizational Development
Enterprise Learning
Workforce Monitoring
Set Up HRMS
Set Up SACR
Worklist
Reporting Tools
PeopleTools
New Window | Help | Customize Page
Name | Address | Personal Profile
Doe,Jane Anne
Person ID: 01080004
EMP
Dependent/Beneficiaries
Find | View All First 1 of 3 Last
Dependent/Beneficiary ID: 01
Name History
Find | View All First 1 of 1 Last
Effective Date: 05/07/2003
Format Type: English
Edit Name
Name: Doe,Jaspar J
Save
Return to Search
Update/Display
Include History
Name | Address | Personal Profile

Name fields

Field	Description
Dependent/Beneficiary ID	The dependent ID is assigned by SEMA4 when the dependent or beneficiary is entered. Note: Dependent/Beneficiary IDs are assigned in consecutive order when the dependent information is entered.
Relationship to Employee	Identifies the dependent or beneficiary's relationship to the employee (such as spouse, child, father).
DepBenef Type (dependent beneficiary type)	Identifies the type of dependent or beneficiary **Benef:** Beneficiary only. **COBRA Only:** COBRA dependent only **Dep/Benef:** Dependent and beneficiary. **Dependent:** Dependent only.
Format Using	Country code for the dependent or beneficiary. This value controls the formatting of the remainder of the page so it's country specific.
Prefix	If indicated by the employee, this field will contain the preferred prefix for the dependent's or beneficiary's name (such as Mr., Ms).
First	The first name of the dependent or beneficiary, as provided by the employee.
Middle	The middle name or middle initial of the dependent or beneficiary.
Last	The last name of the dependent or beneficiary.
Suffix	If indicated by the employee, this field contains the preferred suffix (Jr., Sr.) for the dependent's or beneficiary's last name.
Name	Displays the dependent or beneficiary's name in the standard SEMA4 name format.
Note: All information about dependents and beneficiaries is supplied by employee (example: If an employee supplies a nickname, that name will appear in SEMA4 for that dependent/beneficiary).	

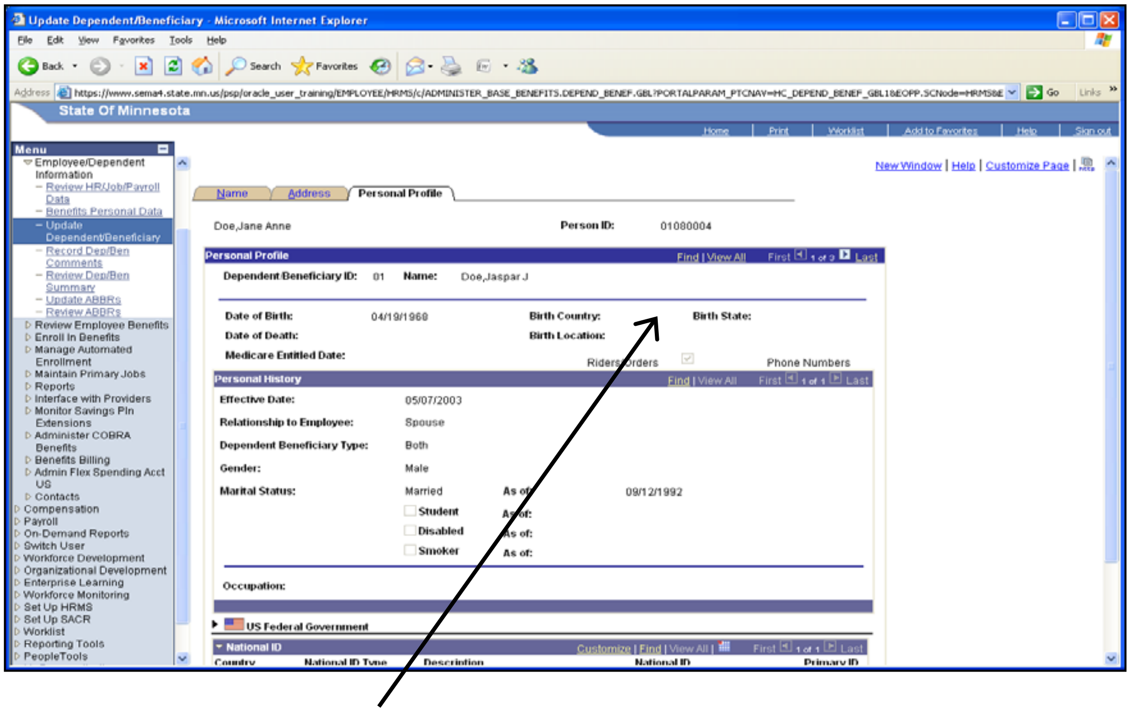
Address page



Address fields

Field	Description
Address Type	If the employee listed the dependent or beneficiary as having the same address as the employee, a check will appear in the box next to Same Address as Employee and "Home" will appear in this field. If the employee provided a different address type (such as legal) for the dependent or beneficiary, there is no check in the box next to Same Address As Employee and a different address will appear in this field. The dependent or beneficiary address will appear in the area below the check boxes. If the address is the same as the employee's, the area is labeled "Employee's Current Address." If the address is different from the employee's home address, the area is labeled "Contact Address."
Phone Type	If the employee listed the dependent or beneficiary as having the same phone number as the employee, a check will appear in the box next to Same Phone as Employee and "Home" will appear in this field. If the employee provided a different phone type (such as business) for the dependent or beneficiary, there is no check in the box next to Same Phone as Employee and a different value will appear in this field. The dependent or beneficiary phone will appear in the area below the address. If the phone number is the same as the employee's, the area is labeled "Employee's Phone." If the address is different from the employee's home address, the area is labeled "Contact Phone."
Note: employee supplies all information about dependents and beneficiaries.	

Personal Profile page



Personal Profile fields

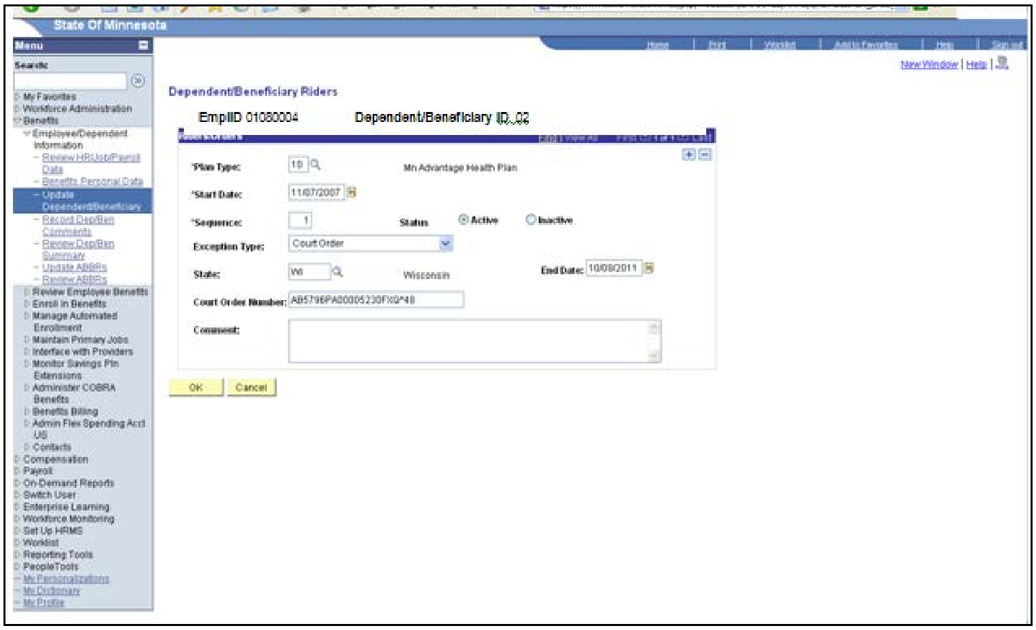
Field	Description
Birthdate	The dependent or beneficiary's birth date.
Birth Country	This field will not be maintained in SEMA4. The country in which the dependent or beneficiary was born.
Birth Location	This field will not be maintained in SEMA4. City or county of the dependent's or beneficiary's birth.
Gender	The dependent's or beneficiary's gender.
Marital Status	Dependent's or beneficiary's marital status.
Marital Status Date	The date of the current marital status. This information is not effective-dated, so historical information is not tracked. The field may be blank.
Student	This box is checked if the dependent or beneficiary is a student.
Student Status Date	The most recent date of the dependent's student status. This information is not effective-dated so historical information is not tracked. The health plan administrators establish and review this date. The information in this field is updated monthly and is based on input from the health plan administrators.
Disabled	Checked if the dependent or beneficiary is disabled. This information is not effective-dated so historical information is not tracked. The health plan administrators establish and review this date. The information in this field is updated monthly and is based on input from the health plan administrators.
Smoker	Checked if the dependent or beneficiary is a smoker. This field is not be maintained in SEMA4.
Occupation	Lists the dependent's or beneficiary's occupation provided by the employee. This field is not maintained in SEMA4.
Medicare Entitled Date	The date on which the dependent or beneficiary became eligible for Medicare.
Date of Death	If the person listed is deceased, the date of death.
Riders/Orders Link	Click this link to access any orders [example: QMCSO (Qualified Medical Child Support Orders)] that may exist in SEMA4. Please reference the next SEMA4 page described in this Guide.
Phone Numbers Link	This link opens a page with additional telephone number (examples: business, cellular) available for the individual listed.
Note: The employee supplies all information about dependents and beneficiaries.	

National ID

These fields are not used by SEMA4. This group box contains dependent/beneficiary national identification number(s). Dependents and beneficiaries with citizenship in more than one country can have more than one national ID and more than one row of information.

Dependent/Beneficiary Riders

This secondary page does not appear in User Training database.



Dependent/Beneficiary Riders fields

Field	Description
Empl ID	This is the employee's employee number. **Note:** The employee's name is not on this page. Use caution to ensure that you are looking at the correct employee.
Dependent/Beneficiary ID	The dependent ID assigned by SEMA4 when a dependent or beneficiary is entered. **Note:** The dependent's or beneficiary's name is not on this page. Use caution to ensure that you are looking at the correct dependent or beneficiary.
Plan Type	The type of plan to which the court order relates (such as medical, dental, medical and dental, life insurance).
Start Date	The effective date of the court order.
Sequence	Lists the priority order of court orders that go into effect on the same date. Lower numbers take precedence over higher numbers.
Status	Indicates whether the court order is ***Active*** or ***Inactive.*** This field is usually used to void court orders before the end date takes effect. When a court order is ***Inactive***, the system will not enforce any validations against it.
Exception Type	Indicates the type of rider. Riders can be court orders, a spousal waiver (example: the spouse formally waives any rights to beneficiary claims from a life insurance policy), or other.
End Date	The date on which the court order ends. After the court order expires, the system will no longer enforce any validations against it.
State	The state in which the court order was issued.
Court Order Number	The official number issued by the state for this court order.
Comment	Any comments regarding the rider may be found in this field.

View Dependent/Beneficiary Information Exercise

In this exercise, you have an opportunity to view dependent/beneficiary information.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions in the walk-through
- SEMA4 Help

Directions

An employee is planning for retirement and wants to check their insurance dependents and beneficiaries. You need to find the dependent/beneficiary information.

View Dependent/Beneficiary Information

ACTION	RESULT
1. If you have signed out of SEMA4, sign in to the User Training database.	Main menu appears
2. Select **Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**.	Update Dependent/Beneficiary search page displays
3. Enter employee ID 01080005 and click Search	The Dependent/Beneficiary Name page displays
4. In the Dependent/Beneficiaries header bar, click the **View All** link.	View all of the dependents'/beneficiaries' names listed
5. Scroll down to view the dependent and beneficiary information.	All of the dependents' and beneficiaries' names display
6. Click the **Address** page tab.	The Address page displays
7. Click the **Personal Profile** page tab.	The Personal Profile page displays

REVIEW QUESTIONS

Review what you just learned by answering the following questions. If you have difficulty answering the questions, review the topic.

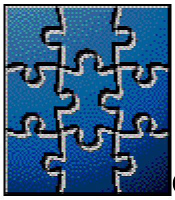
1. The Dependent/Beneficiary component has three pages. In this component, to view the address and phone number of an employee’s dependents and beneficiaries, click the __________________ page tab.

2. True or False. The Riders/Orders page reflects updated address information for a Dependent/Beneficiary.

3. Dependent coverage and applicable beneficiaries can only be found on the page specific to that benefit. Refer to the _______________ ______________ ________________ page to view dependents included under an employee's medical coverage.

Check your answers on the next page.

REVIEW ANSWERS

Check your answers to the review questions.

1. The Dependent/Beneficiary component has four pages. In this component, to view the address and phone number of an employee's dependents and beneficiaries, click the Address page tab.

2. True or False. The Riders/Orders page reflects updated address information for a Dependent/Beneficiary.

   False

3. Dependent coverage and applicable beneficiaries can only be found on the page specific to that benefit. Refer to the Health Benefits Elections page to view dependents included under an employee's medical coverage.

Continue to the next topic, *Viewing Summary Information.*

Introduction

SEMA4 provides summary information about the employee and the dependents/beneficiaries.

You can view these components by clicking on the correct link on the menu:

- Benefits Enrollment Summary
- Dependent/Beneficiary Summary

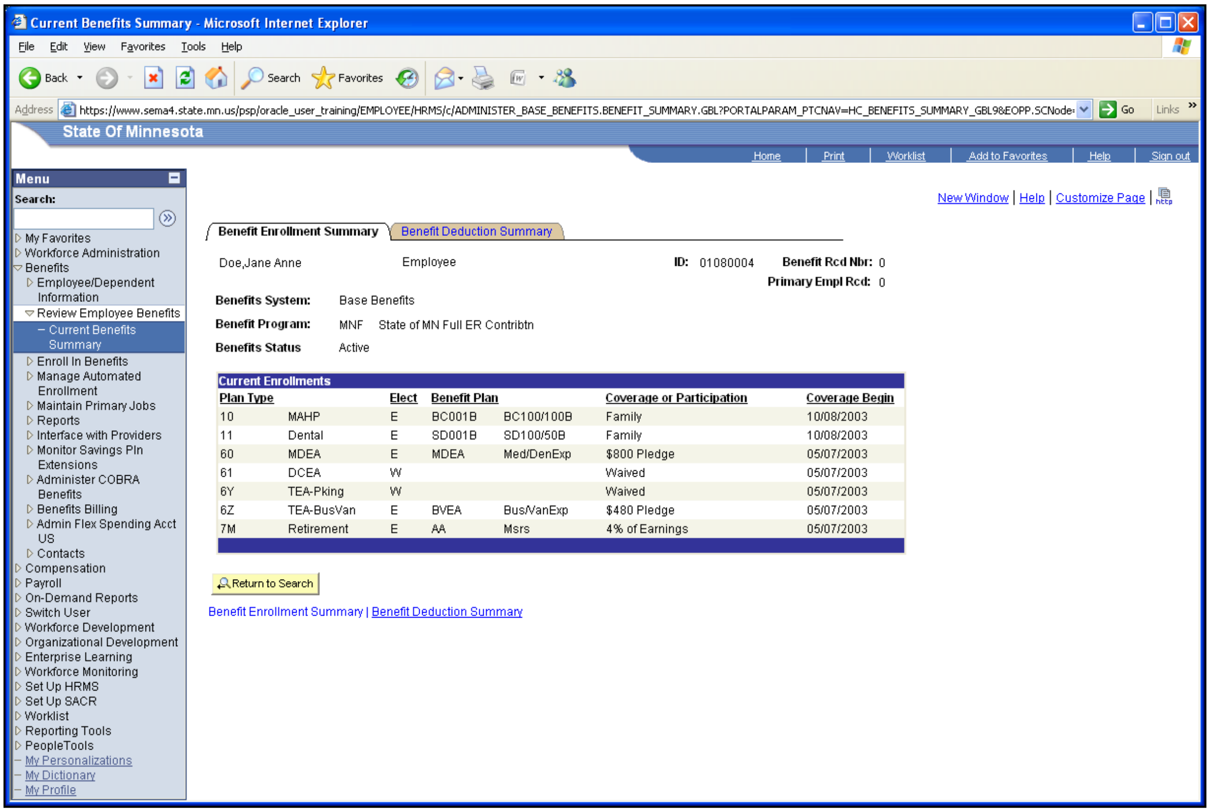
VIEW BENEFITS ENROLLMENT SUMMARY AND DEPENDENT/BENEFICIARY SUMMARY

In the following walk-through, you will look at the employee data summary and the dependent/beneficiary summary.

View the Benefits Enrollment Summary

ACTION	RESULT
1. If you have signed out of SEMA4, sign into the User Training database.	Main menu appears
2. Select **Benefit s> Review Employee Benefits > Current Benefits Summary**.	Current Benefits Summary search page displays
3. Enter Doe in the name search field. Click Search	A list of search results display
4. Select the Jane Anne Doe record.	The Benefit Enrollment Summary page displays
5. Review the information on the page.	
6. Select the Benefit Deduction Summary page tab.	The Benefit Deduction Summary page displays
7. Review the information on the page.	

Benefit Enrollment Summary page

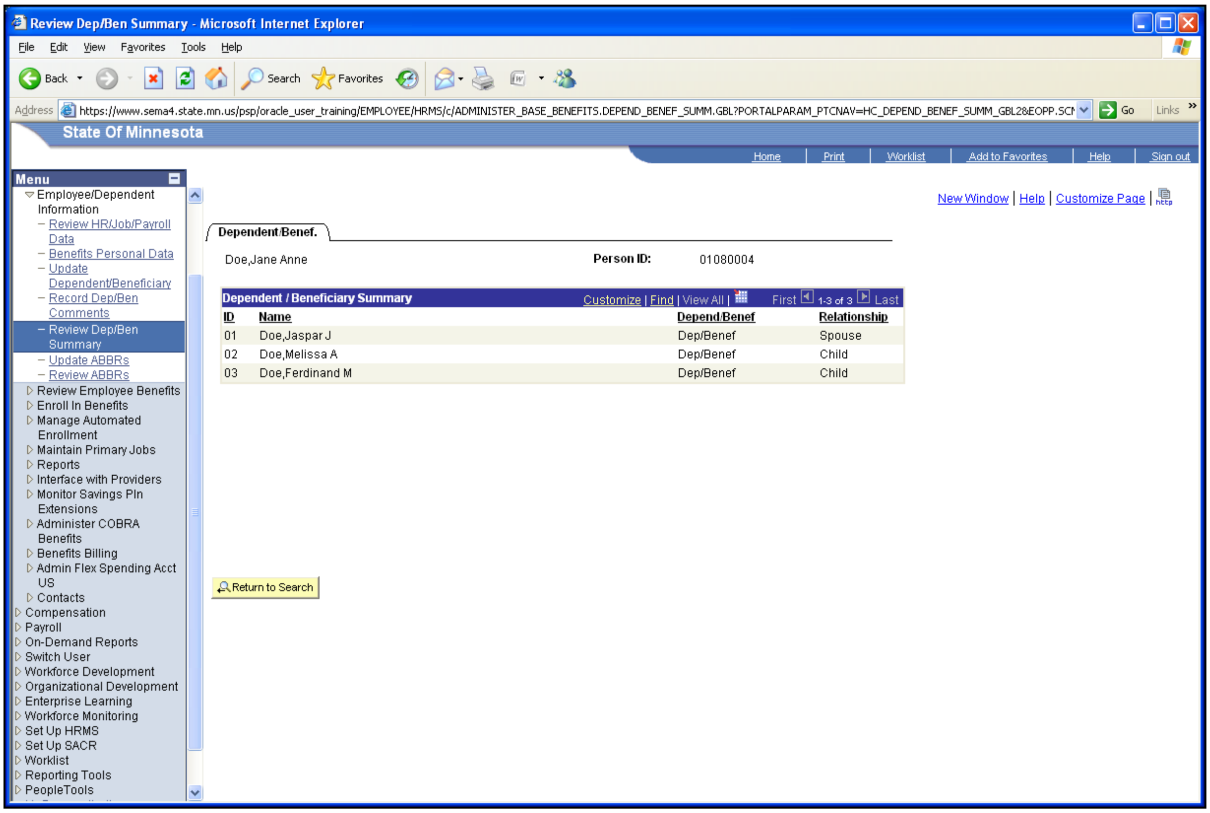


This page provides summary data of the employee’s current insurance elections.

View Dependent/Beneficiary Summary

ACTION	RESULT
1. On the menu, select **Benefits > Employee/Dependent Information > Review Dep/Ben Summary**.	The Review Dept/Ben. Search page displays
2. Enter **Doe** in the name search field. Click Search	Main menu appears
3. Select the Jane Anne Doe record.	The Dependent/Benef page displays
4. Review the information on the page.	
5. Click the **Home** link.	Main menu appears

Dependent/Benef. page



VIEW EMPLOYEE DATA SUMMARY AND DEPENDENT/BENEFICIARY SUMMARY

EXERCISE

In this exercise, you have an opportunity to view summarized employee and dependent/beneficiary information.

Resources

You may use these resources in completing this exercise:

- The step-by-step instructions in the walk-through
- SEMA4 Help

Directions

Follow the steps below to look up summarized employee and dependent/beneficiary information for employee George Smith.

View Employee Data Summary and Dependent/Beneficiary Summary

ACTION	RESULT
1. To find summarized employee data: Select **Benefits> Review Employee Benefits > Current Benefits Summary**.	Current Benefits Summary search page displays
2. Enter employee ID 01080005 and click Search	The Benefit Enrollment Summary page displays
3. Review the information.	
4. To find summarized dependent/beneficiary information: Select **Benefits > Employee/Dependent Information > Review Dep/Ben Summary**.	The Dependent/Benef. page displays
5. Review the information.	

Continue to the next topic, *Viewing Employee Event Detail.*

Introduction

Use the Employee Event Summary component to answer questions about whether enrollment forms were sent, and the status of a participant's benefits enrollment process.

The **Participant** page is found on the Employee Event Summary component and displays the status, processing, and eligibility information for a benefits participant.

On this page you can view information about the status of an employee's enrollment in benefit program elections.

VIEW SEMA4 HELP

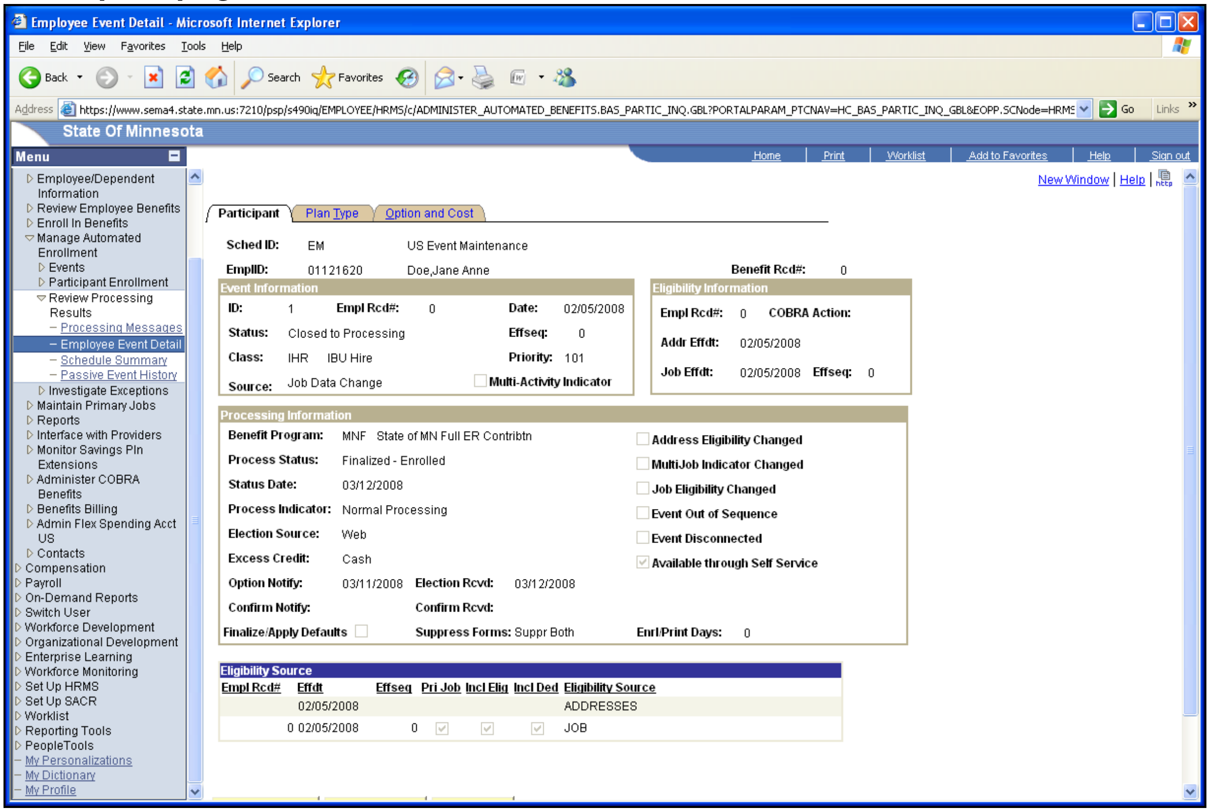
Complete the following steps to look up the step-by-step instructions in SEMA4 Help. (Data for this page is not in the User Training database.)

ACTION	RESULT
1. Access SEMA4 Help.	SEMA4 Help Contents displays
2. Select **HR/Payroll Functions**.	A list of HR/Payroll Functions displays
3. Select **Benefits** under Human Resources.	The Benefits – Contents displays
4. Select **Pages and Fields**.	The Benefits – Pages and Fields displays
5. Scroll down and select **Participant**.	The Participant – Page Overview displays
6. Click **Steps**	View Employee Event Summary – Steps displays
7. Exit SEMA4 Help.	

The Participant page is accessed by selecting **Benefits > Manage Automated Benefits > Review Processing Results > Employee Event Detail**.

(The User Training database does not contain Employee Event Detail data.)

Participant page



Participant fields (only fields important for checking the status of an employee's benefit enrollment are listed described)

Field	Description
Process Status	Shows the status of an employee's enrollment. **Notified** indicates enrollment forms were mailed to the employee. **Prepared** indicates that event has an impact on the employee's benefits - it may be terminating them, it may be changing the level of ER Contribution, etc. **Finalized Entered** indicates the employee has returned a completed enrollment form and the enrollment has been entered either in self service or election entry. **Finalized - Prepared None** indicates the event does not allow changes to the employee's benefits. **Program Elig Assigned** indicates the employee has been assigned to the Benefit Program and is the event is waiting to move further along in the process. (Note: For purposes of processing newly eligible employees, New Hires are initially assigned to a Default program.) **Enrolled** indicates the employee is enrolled for this event and enrollments can now be seen in Administer Base Benefit pages. All other status descriptions require SEGIP intervention; SEGIP will correct any problems.
Status Date	The date the Process Status occurred.
Election Source	If employee enrolled, you will see a brief description of how enrollment was accomplished. **None Entered** indicates that no enrollment information has been returned by employee and processed by SEGIP. – Default coverage may be applied. Employees with the Action Data Change and Reason IC (Insurance Conversion) may also have an Election Source of None Entered. **Manual** indicates that paper forms were returned to accomplish enrollment. **Web** indicates the employee enrolled using the Web.
Option Notify	The most recent date forms were generated. (Example: If only one set of enrollment forms were generated, the date of those forms appears. However, if corrected forms were required, the date the corrected forms were generated will appear.)

REVIEW QUESTIONS

Review what you just learned by answering the following questions. If you have difficulty answering the questions, review the topic.

1. To find out whether enrollment forms were sent and the status of a participant's benefits enrollment process, select Benefits > __________________________ > Review Processing Results > Employee Event Detail.

    a. Manage Automated Benefits
    b. Administer Base Benefits
    c. Automated Enrollment
    d. Manage Acct Status and Balance

2. The Employee Event Detail component contains three pages; the page on which to learn if forms were sent is the ____________ page.

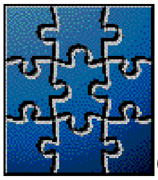
    a. Employee
    b. Dependent
    c. Participant
    d. Plan Type

3. To find out the status of enrollment, look at the __________ field.

    a. Employment Status
    b. Event Status
    c. Enrollment Status
    d. Process Status

Check your answers on the next page.

REVIEW ANSWERS

Check your answers to the review questions.

1. To find out whether enrollment forms were sent and the status of a participant's benefits enrollment process, select Benefits > __________________________ > Review Processing Results > Employee Event Detail.

    a. Manage Automated Benefits

2. The Employee Event Detail component contains three pages; the page on which to learn if forms were sent is the ____________ page.

    c. Participant

3. To find out the status of enrollment, look at the __________ field.

    d. Process Status

Continue to the *Conclusion.*

Summary

In this guide, you learned how to use steps in SEMA4 Help to view benefit enrollment information, dependent/beneficiary information and summary information in SEMA4.

Objectives

This guide included the following topics:

- *Viewing Benefit Enrollment Information*
  You learned how to use SEMA4 to view benefit enrollment information. You found information in the Health Benefit Elections page (including medical and dental benefits), Life/ADD Elections page, and the Spending Accounts page.

- *Viewing Dependent/Beneficiary Information*
  You learned how to view information about all dependents and beneficiaries listed by the employee.

- *Viewing Summary Information*
  You learned how to view summary information about an employee, and about dependents and beneficiaries.

- *Viewing Employee Event Detail*
  You learned how to view the status of an employee's enrollment in benefit program elections.

Evaluation Form

Complete the Evaluation form on the next page.

Thank you for participating!

Benefits Inquiry

Your Name (Optional) ____________________________ Date_____________________

Agency ____

Check the box that best describes what you learned.

CONCEPTS	I FULLY UNDERSTAND	I AM SLIGHTLY CONFUSED	I DO NOT UNDERSTAND	WAS NOT ADDRESSED
Accessing SEMA4 Help				
Accessing employee benefit information				
Accessing dependent/beneficiary information				
PROCESSES				
View employee medical coverage				
View employee dental coverage				
View employee life insurance coverage, accidental death and dismemberment coverage, short term disability coverage, and long term disability coverage				
View Spending Accounts benefits				
View employee's dependents and beneficiaries				
View employee data summary				
View dependent/beneficiary summary				

In what three ways will you apply what you have learned in this guide?

Write any other comments on the back of this form.

Thank you!