

Helpful Hints!

The Lifeworks system has been created to apply “Rules”. These rules include the waiting period and eligible hours per week which are defined by the Request for Coverage (RFC).

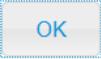
Benefits administration can be easier if you take the time to review the resources on the CIS website (www.cisoregon.org). Under CIS Benefits, click on the Admin Portal link to access the following:

- Written “How to” instructions for processing employer-related events
- Video “How to” instructions for processing employer-related events
- Enrollment instructions you can give to new hires
- Administrative Manual
- Helpful Hints to avoid common problems

Common Employer Issues

- Administrators are not completing the New Hire process in its entirety – cannot stop in the middle of the process. Must continue until you see:

You have initiated a **New Enrollment** Event with an effective date of **07/01/2014**.



OK

- Be careful with data entry – a wrong SSN, DOB and/or Zip Code will result in the employee not being able to self-register. The employee cannot self-register if the information is wrong. The employer should contact CIS so we can update the record with any corrected information. Do not send the full SSN info via email, call us if the SSN or DOB needs to be corrected. To correct the Zip Code, you can email us the Zip Code with the employee’s name and last 4 of the SSN.
- Do not notify employees to go online to enroll until the day after you set up their record. The system updates nightly based on the employment information entered by the employer.

- New employees who waive coverage still need to go online and complete the New Hire enrollment event. "Waive" is considered an enrollment option. If an employee does not go online, and he/she is eligible for employer paid life and disability, the employer will not be billed for at least 60 days until the event expires resulting in 2-3 months of retro premium billings.
- Administrators are looking for ways to make the system perform a change they want to make on behalf of the employee by running incorrect or invalid events.
 - This can and has resulted in other events (salary updates, marriage/birth, etc.) being reversed and terminating coverage or generating incorrect adjustments on invoices.
 - Running an incorrect or invalid event usually requires CIS approval. If the event doesn't need approval, the employee's enrollment is held up.
- Administrators are generating a Change in Hours Worked per Week or Change in Employee Group or Transfer to report a termination of Employment. A **Termination of Employment** event needs to be generated.

Common Employee Issues

- Logins: Employees who have already self-registered and do not remember their login information need to click "Forgot your password?" or "Forgot login id?".
 - CIS is unable to reset a password so please **do not** refer them to CIS
 - Employees can try again. If the employee receives a warning that their account is locked, they generate a temporary password by using the Forgot Password/Unlock Account link.
- Employees are required to go online and make their own elections and status changes such as marriage, birth, divorce. This also includes changing addresses and uploading documentation. Changes must be made within 31 days of the event (except for address changes).
- Employees are notified of pending events requiring action (e.g., initial enrollment, pending elections available for hours or employee group change, event requiring documentation) if an email address is included in the employees account when initially setup by the employer.

What Events Can Employers Process for Employees?

Employers can report only the events listed below on the Admin Portal. The “Date of Event” must coincide with the actual event date. Events that require CIS approval will not display immediately. **Note: Events cannot be reported more than 30 days in advance or 30 days retroactively, unless specified differently below.**

Events - Definitions and Process

Begin Leave – Contact CIS

Change in Employee Group/Transfer – Move an employee to another employee group such as Union to Non-Union or General Service to Management, etc. (*CIS approval required*) – Contact CIS if enrollment does not appear to be correct.

- Enter actual date of move to new employee group

Change in Hours Worked per Week – Increase or decrease the hours an employee is regularly scheduled to work per week. This may allow an employee to make new elections when increasing hours or possibly lose benefits if reducing hours below the minimum eligible requirements in the RFC.

Death of A Child – Enter actual date of death

Death of a Spouse/Domestic Partner – Enter actual date of death

Death of An Employee – Enter actual date of death

New Enrollment – Add a new hire or rehire (*CIS approval may be required*)

- Enter actual date employee was hired/rehired

Return from Leave – Contact CIS

Salary Change – Increase or decrease an employee’s salary

- Enter actual date the salary increase becomes effective and salary amount
- Retro salary updates are limited to first of the current month
- Contact CIS Benefits to request a template to update salaries for a large number of employees

Termination of Employment – Terminate or retire an employee

- Enter actual last date of work for termination of employment or retirement
- Enter subsidy information, if applicable

Event Processing & Pending Documentation Reports: What Are These?

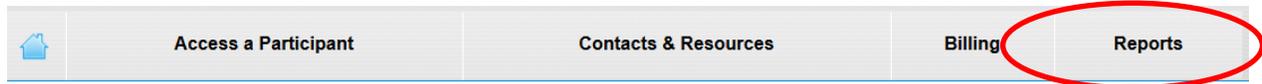
Employers will receive emails every Monday **IF**:

- An employee made new elections or changes (e.g., marriage, birth, etc.) that impact payroll
- An employee has not yet provided required documentation.

If you receive an email, you need to generate the Event Processing Report, the Pending Documentation Report, or both, to get the details of the change and who it was for. Below is an example of how to run the Event Processing Report.

To access the Event Processing report:

1. Click on the Reports tab.



2. Click on Launch Report Console



3. Click on CIS Event Processing Report

Report	Description
CIS Pending EOI Report	Provides CIS Pending EOI data
CIS Event Processing Report	Provides Event Processing Report

4. Ignore the list of employers. Enter a **Report Begin Date**, using a date at least 10 days prior to today's date. The report will capture all events between the report begin date and the day you run the report.

Event Processing Report

Select your initial filter criteria below and click the Run Report button to return the results. You may select more than one in each list. Further filtering can be done after the initial results are returned.

Pick Benefit Admin Groups to include:

- <All Values>
- Adair Village, Staff
- Amity, Police
- Amity, Staff
- Arlington, Staff
- Association of Oregon Counties, Staff
- Astoria, Fire
- Astoria, General Service
- Astoria, Non-Union
- Astoria, Parks

Pick the Report Begin Date (End Date is today)

5. The report will provide the names of employees who made a change or who is pending, not what was changed or pending. To find out what change has been made or what is pending, pull up the employee on Lifeworks and click on the **Events** tab.



You need to review the **Event History** log to determine what event was recently reported.

In this example, the employee made an enrollment change due to **Birth** on 5/15/2014 with a Benefit Event Date, or effective date, of 5/5/2014. This resulted in an automatic approval since a birth certificate is not required.

Event History

Benefit Event	Organization	Benefit Event Date	Expiration Date	Status	Event Calc Date	User Name
Conversion Recalc	Tualatin, TPOA	01/02/2014		Completed	01/09/2014	Nick Heins
Admin Override	Tualatin, TPOA	02/01/2014		Completed	01/13/2014	Lisa Grove
Employee EOI Processing	Tualatin, TPOA	02/01/2014		Completed	01/13/2014	Lisa Grove
Salary Change	Tualatin, TPOA	03/01/2014	03/01/2014	Completed	03/12/2014	Heather Matthews
Birth, Adoption or Legal Guardianship	Tualatin, TPOA	05/05/2014	06/05/2014	Completed	05/15/2014	

Or maybe a **New Enrollment** event for a new hire completed:

Event History

Benefit Event	Organization	Benefit Event Date	Expiration Date	Status	Event Calc Date	User Name
New Enrollment	Sherman County, Sheriff	07/01/2014	09/01/2014	Completed	07/14/2014	Pamela Bowles

Then proceed to the **Benefits** tab to see the new enrollment status that became effective **5/5/2014**:

Benefit	Plan	Riders	Option	Effective Date	End Date	Amount Elected	Employee Pay Period Cost	Employer Monthly Cost
Medical	Kaiser Copay A	AC + HA	Employee & Family	05/05/2014		\$0.00	\$0.00	\$1,640.58
Dental	Willamette Dental		Employee & Family	05/05/2014		\$0.00	\$0.00	\$154.23
Vision	Kaiser Vision		Employee & Family	05/05/2014		\$0.00	\$0.00	\$15.27

If an event is still pending (e.g., documentation needs to be uploaded), the name of event will display. In the two examples below a marriage certificate/license and proof of divorce is required. Employers may receive a notice that an event is pended and then another notice when the documentation has been received and approved (*only if it resulted in a premium change*).

Pending Event Information

[Initiate New Event](#)

Benefit Event	Organization	Benefit Event Date	
Marriage	Hillsboro, Fire	06/14/2014	Make Changes

Pending Event Information

[Initiate New Event](#)

Benefit Event	Organization	Benefit Event Date	
Divorce/Legal Separation	Boardman, Police	06/20/2014	Make Changes

To see what documentation is still pending, click on the **Employee Communications** tab to see what documentation needs to be received.



Documents provided or not yet received.

Document Description	Effective Date	Document Type
Jamieson Gilson - marriageLicense	06/16/2014	Marriage License

I Can't See the Benefits or Enrollment Change!

If an enrollment event results in a coverage change in the future, you need to click on the **Benefits** tab and then click on View Coverage History. The View Coverage History page shows retroactive, current, and future benefit selections.



Current Elections

[View Coverage History](#)

If benefits do not display, it does not mean something was done incorrectly. It probably means that the event has been pended for documentation and/or CIS approval. Confirmation Statements are generated overnight. To view/print a Confirmation Statement, click on the Employee Communications tab and the Enrollment Confirmation link.



Employee Communications

Below are the documents that have been generated, uploaded, or are required documents that have not yet been received.

Correspondence

Description	Date Generated	Delivery Method
Enrollment Confirmation	07/17/2014	printed

How to Access the Admin Portal

1. To access Lifeworks, go to www.cisoregon.org and under the CIS Benefits tab click on Admin Portal. You must be logged into www.cisoregon.org to have access to the Admin Portal page.



2. Click on the **Admin Portal** link shown below.

LIFEWORKS LOGIN

- [Admin Portal](#)
- Username: your work email address
- Password: please ✉ [email us](#) at CIS Employee Benefits to receive your default admin password

3. Log on using your **work email address** as the username and your password. The username is not the same as your current password to CIS' website unless you changed it to match.

Welcome to your Admin Portal

Username

Password

LOG IN