

1. Draft your open enrollment emails.

- a. Go to miPayOnline – Administration – Organization – Organization. On the Open Enrollment tab you will have two emails. The first email will be sent to alert employees that the open enrollment is available.

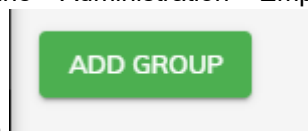
The screenshot shows the 'Open Enrollment Available Email' draft interface. At the top, there is a navigation bar with tabs: Basic Info, Paychecks, W-2's, Forms, Time Entry, Time Off, and Open Enrollment (which is selected). Below the navigation bar, the subject line is 'Open Enrollment Available Email Subject *' and the body text is 'Civic Systems Open Enrollment to Begin'. The email body is in a rich text editor with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and source code. The email body text is: 'Civic Systems open enrollment begins {{OpenEnrollmentStartDate}} and will end on {{OpenEnrollmentEndDate}}. Please click here {{LinkURL}} to access the site and updated your benefits.'

- b. The second email is sent when an employee completes/submits his/her open enrollment.

The screenshot shows the 'Open Enrollment Submitted Email' draft interface. At the top, there is a navigation bar with tabs: Basic Info, Paychecks, W-2's, Forms, Time Entry, Time Off, and Open Enrollment (which is selected). Below the navigation bar, the subject line is 'Open Enrollment Submitted Email Subject *' and the body text is 'Civic Systems Open Enrollment Received'. The email body is in a rich text editor with a toolbar containing icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and source code. The email body text is: 'Thank you for completing your open enrollment as of {{SubmittedDate}}.'

2. Create the Open Enrollment Group(s)

- a. Go to miPayOnline – Administration – Employees – Groups



- b. Click Add Group
- c. Name the Group
- d. Click Save Group

- e. Assign the employees eligible for benefits to the group.

Groups SAVE GROUP DELETE GROUP

Group Name *
Open Enrollment

15 / 50

Available Employees

<input type="checkbox"/>	Em...	Fir...	La...	De...
<input type="checkbox"/>	1853	Civic ...		
<input type="checkbox"/>	5	Jacob	Smith	Admin...
<input type="checkbox"/>	10	Julie	Rockf...	
<input type="checkbox"/>	15	Sharon	Morris	Fire
<input type="checkbox"/>	20	Annette	Spenc...	Admin...
<input type="checkbox"/>	25	Dougl...	Johns...	Electric
<input type="checkbox"/>	30	George	Austin	Water
<input type="checkbox"/>	35	Randy	Slade	Police
<input type="checkbox"/>	40	Dale	Roberts	Buildi...
<input type="checkbox"/>	45	Maurice	Hobson	Water
<input type="checkbox"/>	50	Marvin	Gilson	Public...

ADD SELECTED

Group Employees

<input type="checkbox"/>	Employ...	First Na...	Last Na...
<input type="checkbox"/>	75	Shawn	Brown

DELETE SELECTED

- f. Click Save Group
- g. Repeat if the groups will have different benefit options.
- h. These groups will need to be monitored each year.
3. Create the Benefits to be enrolled in
- a. Go to miPayOnline – Administration – Employees – Benefits
- b. Click New

Benefits SAVE BENEFIT DELETE BENEFIT

NEW **COPY**

Search for a benefit

Health

HSA

Dental

Flex Benefit

Benefit Name
Health

Benefit Description
All full-time employees are eligible to receive health insurance. Please choose one of the plans below.

Benefit Amount Type
Set Amount

Name	Description	Pay Code	Pay Code Update Type	Amount Rate Percent	Set Amount	Pay Periods	Max Amount	Employ... Amount	Hidd...	Related Benefits
Health Insurance - Single	This is to give a little more information about the benefit.	91-0 (Health Insurance)	Employee Code	Amount	54.68	24	.00	83.24	<input type="checkbox"/>	
Health Insurance - Single + 1		91-0 (Health Insurance)	Employee Code	Amount	84.68	24	.00	169.24	<input type="checkbox"/>	
Health Insurance - Married		91-0 (Health Insurance)	Employee Code	Amount	148.69	24	.00	304.69	<input type="checkbox"/>	

- c. Name the Benefit
- d. Add a description for the benefit (employees will see this on the enrollment screen)
- e. Set the Benefit Amount Type
- i. Set Amount – standard amount entered by you in the setup
- ii. Employee Entered – employee makes election (example is voluntary flex or hsa contributions)

f. Add details of benefit

Option Details

Sequence Number 9	Name *
Description	Pay Code * Select a Pay Code
Pay Code Update Type * Select an amount type	Amount Rate Percent Type * Select an amount type
Set Amount	Pay Periods *
Max Amount	Employer Amount
Hidden <input type="checkbox"/>	Related Benefits Related benefits (eg: this is an HSA benefit, so yo...

SAVE CANCEL

- i. Click the New button (plus sign on right side of screen).
 - ii. Name the benefit option
 - iii. Enter a description to give more information (example would be if you have multiple health care plans)
 - iv. Select the related pay code in payroll
 - v. Pay Code Update Type - Identify whether you will update the amount at the Pay Code level or at the Employee Pay code level
 - vi. Amount Rate Percent Type – Identify whether this is a dollar amount or a percentage.
 - vii. Enter the set amount
 - viii. Enter the number of pay periods the benefit will occur on
 - ix. Enter the maximum amount for the code (if applicable)
 - x. Enter the employer amount of the code (if applicable)
 - xi. Related Benefits – allows you to connect two benefit options together (like HSA to specific insurance plans)
 - xii. Click Save.
 - xiii. Repeat as needed.
- g. These benefits will need to be updated each year.
4. Set up an open enrollment template
 - a. Go to miPayOnline – Administration – Employees – Open Enrollment

b. Click New

The screenshot shows the 'Open Enrollment' template creation interface. At the top, there's a header with 'Open Enrollment' and buttons for 'SAVE TEMPLATE', 'DELETE TEMPLATE', 'TEST', and 'INITIALIZE'. Below the header, there are tabs for 'NEW' and 'COPY'. A search bar is present. The main area shows a list of templates with columns for 'Assigned Employees Group' and 'Open Enrollment'. A list of benefits is shown on the right, including Health, HSA, Dental, and Flex Benefit.

- Name the template. You may only need one template unless you offer different benefits, different timeframes to different groups of employees based on union contracts etc
- Add the Assigned Employees Group. This is the group that you set up to control which employees are eligible for open enrollment.
- Add the Approval Group. This will normally be your Payroll Group.
- Add the benefits that this group is eligible for.
- Save the template.
- Test will allow you to see what the enrollment screen will look like BEFORE rolling it out.
- Initialize the template when you are ready to begin the enrollment process each year.

The screenshot shows the 'Initialize Open Enrollment' dialog box. It contains fields for 'Name', 'Description', 'Open Enrollment Start', 'Open Enrollment End', and 'Initialize a single employee (Optional)'. There are checkboxes for 'Send Notification Emails' and 'Templates To Activate' with options 'Select All', 'Public Works', and 'Water'. At the bottom are 'INITIALIZE' and 'CANCEL' buttons.

- Name the Enrollment, usually this will be the year.
- Provide a description if you want. This will be part of the message that employees see in the enrollment screen.
- Enter an Open Enrollment Start date. Employees will not be able to access the open enrollment until this date.
- Enter an Open Enrollment End date. Employees will not be able to access the open enrollment after this date.
- Initialize a single employee can be selected when you onboard a new hire.
- Checking the box to Send Notification Emails will alert the employees will send an email to the employees letting them know the enrollment time frames.

- p. Select which templates you want to initialize.
- 5. Employees make elections
 - a. Employees will go to miPayOnline – Open Enrollment.

Name	Description	Amount
<input type="radio"/> DECLINE COVERAGE		\$0.00
<input type="radio"/> Health Insurance - Single	This is to give a little more information about the benefit.	\$54.68
<input type="radio"/> Health Insurance - Single + 1		\$84.68
<input type="radio"/> Health Insurance - Married		\$148.69

Dental	✓	⌵
Flex Benefit	✓	⌵
Total Pay Period Deduction		\$0.00

- b. Employees will make each election (or click decline coverage).
- c. As the employee makes elections, the employee will see a total amount per pay check appear at the bottom of the screen.
- d. When ALL options have an election made (including declining coverage), the employee can save elections to come back to later or submit elections.
- 6. Payroll to review and approve elections.
 - a. Go to miPayOnline – Approvals – Open Enrollment Approval.
 - b. You can view the elections in process and submitted elections here (and you can see those that have not started).
 - c. You can approve individual elections, individual employees or all elections by clicking the box(es) to the left of the employee/election.
 - d. Click Approve Elections in the upper right corner to update the payroll database. **The timing of this is critical as it will update the pay code amounts for the next payroll to be processed.**