QUICKVIEW FSA Enrollment through ESS

<u>Trigger:</u> An employee has decided to enroll in a Medical or Dependent <u>Flexible Spending Account</u> (FSA) during the open enrollment period for FSA's.

- 1. Employee connects to the Self Service Portal via the following link: <u>https://portal.passhe.edu/irj/portal</u>
- 2. Sign in at the Self Service Portal screen. Detailed instructions for signing into the portal can be found in the ESS Training Manual at the following link: http://www.passhe.edu/inside/hr/syshr/Pages/ess.aspx



3. From the tabs across the top of the welcome page, select "Employee Self-Service". (Note: Different tabs may be displayed depending on user access.)



4. Select the link for "Benefits".

ſ	Welcome Clint Eastwood	Pennsylvania State System of Higher Education
l	Home Employee Self-Service	Financial Aid Office
L	Overview Personal Information	(Benefits) Leave & Time Payroll Help Documents
l	Overview	

5. Select the link for "Benefits Enrollment".

Nome Employee Self-Service Francial Ad Office							
Overview Personal Information Benefits Leave & Time Payrol Help Documents							
Benefits Overview	History, Back Forward						
Employee Self-Service >> Benefits							
This page will provide you with information about each available Employee Self-Service (ESS) application for you to access in this sub-section of ESS. To access an application, simply click on the lit chosen. A link to this sub-sections overview page will be shown to the left of the ESS application that you can use to return to this page.	nk shown below and you will be taken to a new page with the ESS application you have						
Available Applications							
Berefits Participation Overview							
Display your currently enrolled benefits programs.							
Benefits Enrollment							
This page will allow you to enroll in benefits made available through employee Self-Service.							

6. Highlight the line of the desired plan for enrollment and select "Enroll in Plan".

Benefits Enrollment FSA Open Enrollment									
Benefits Enrollment FSA Open Enrollment This page will display all the benefits enrollment options available to you for enrollment for the current enrollment event. As a reference, all applicable current enrollments have been displayed. To enroll in a benefit plan, simply select the option from the "Enrollment Offers" table and click the "Enroll in Plan" button. If you have already setup enrollment for next year and wish to either change or remove the enrollment, then click the "Change Enrollment" or "Remove Enrollment" buttons, respectively. If you wish to enroll for next year with the same options as you setup for the current year, if applicable, you may click the "Copy Current Enrollment to Next Year" button. Enrollment changes will not be stored in the benefits system until you save the changes on the next page of this application. Once you are satisfied with your enrollment options, click the "Continue with Enrollment" button below to proceed to the next page of this application. Enrollment for the current year. You are not currently enrolled in any applicable benefit plans for this calendar year.									
Enrollment offers for the next cale	ndar year.								
Plan	Plan Type	Plan Begin	Plan End	Enrolled	Annual Contrib.	Plan Information			
Dependent Care Reimb Acct	FSA - Dependent	1/1/2011	12/31/2011		\$0.00	FSA - Dependent			
Medical Reimbursement Acct	FSA - Medical	1/1/2011	12/31/2011		\$0.00	FSA - Medical			
Medical Reimbursement Acct FSA - Medical 1/1/2011 12/31/2011 \$0.00 FSA - Medical Enroll in Plan Change Enrollment Remove Enrollment Continue with Enrollment Continue with Enrollment									

7. Users will receive a pop-up window asking for the desired annual contribution amount. Enter the appropriate amount and select "Enroll in Plan".



8. If an additional FSA Plan is desired, steps 6 and 7 should be repeated. If selections are complete, then continue with step 9 by selecting "Continue with Enrollment".

nrollment for the current year.								
ou are not currently enrolled in any applicable benefit plans for this calendar year.								
roliment otters for the next cale	idar year.							
Plan	Plan Type	Plan Begin	Plan End	Enrolled	Annual Contrib.	Plan Information		
Dependent Care Reimb Acct	FSA - Dependent	1/1/2012	12/31/2012		\$2,400.00	FSA - Dependent		
Medical Reimbursement Acct	FSA - Medical	1/1/2012	12/31/2012		\$0.00	FSA - Medical		
Enroll in Plan Change Enrollment Remove Enrollment								
Continue with Enrollment								

9. Review selections and select "Submit Enrollment" if everything is correct. If the information is not correct, select "Return to Enrollment Offers" and correct the errors.

Senefits Enrollment Summary of Plan Selections									
his page displays a summary of what your benefits enrollment will be stored as upon final submission. If you are satisfied with your selection, click Submit Enrollment". If you would like to make changes, you may go back to the previous screen and make all relevant changes to your benefits enrollment.									
Enrollment is not complete until you click Submit Enrollment below.									
Enrollment Summary									
Enrollment Summary Plan	Plan Type	Plan Begin	Plan End	Annual Contrib.	Action				
Enrollment Summary Plan Dependent Care Reimb Acct	Plan Type FSA - Dependent	Plan Begin 01/01/2012	Plan End 12/31/2012	Annual Contrib. \$2,400.00	Action New or Updated Enrollment				

10. At this point, enrollment(s) are complete. Users may wish to print a copy of the enrollment summary for their records by selecting "Printer Friendly Version". If the user has an email address pre-existing in the SAP system at the time of registration, an email confirming the FSA election(s) will be sent to the employee instantaneously.

Benefits Enrollment Summary of Plan Selections										
This page displays a summary of what your benefits enrollment will be stored as upon final submission. If you are satisfied with your selection, click "Submit Enrollment". If you would like to make changes, you may go back to the previous screen and make all relevant changes to your benefits enrollment.										
	Enrollment completed successfully!									
Enrollment Summary	Enrollment Summary									
Plan	Plan Type	Plan Begin	Plan End	Annual Contrib.	Action					
Dependent Care Reimb Acct	FSA - Dependent	01/01/2011	12/31/2011	\$2,400.00	New or Updated Enrollment					
I Your benefits enrollment options have been stored in the benefits system.										
A copy of this enrollment summary h	A copy of this enrollment summary has been emailed to: APEIFFER@SYTECPA.ORG									
If you would like to print a copy of this summary click here: Printer Friendly Version If you wish to see your enrollment for next year click here: Show Benefits Enrollment										
Return to Enrollment Offers										