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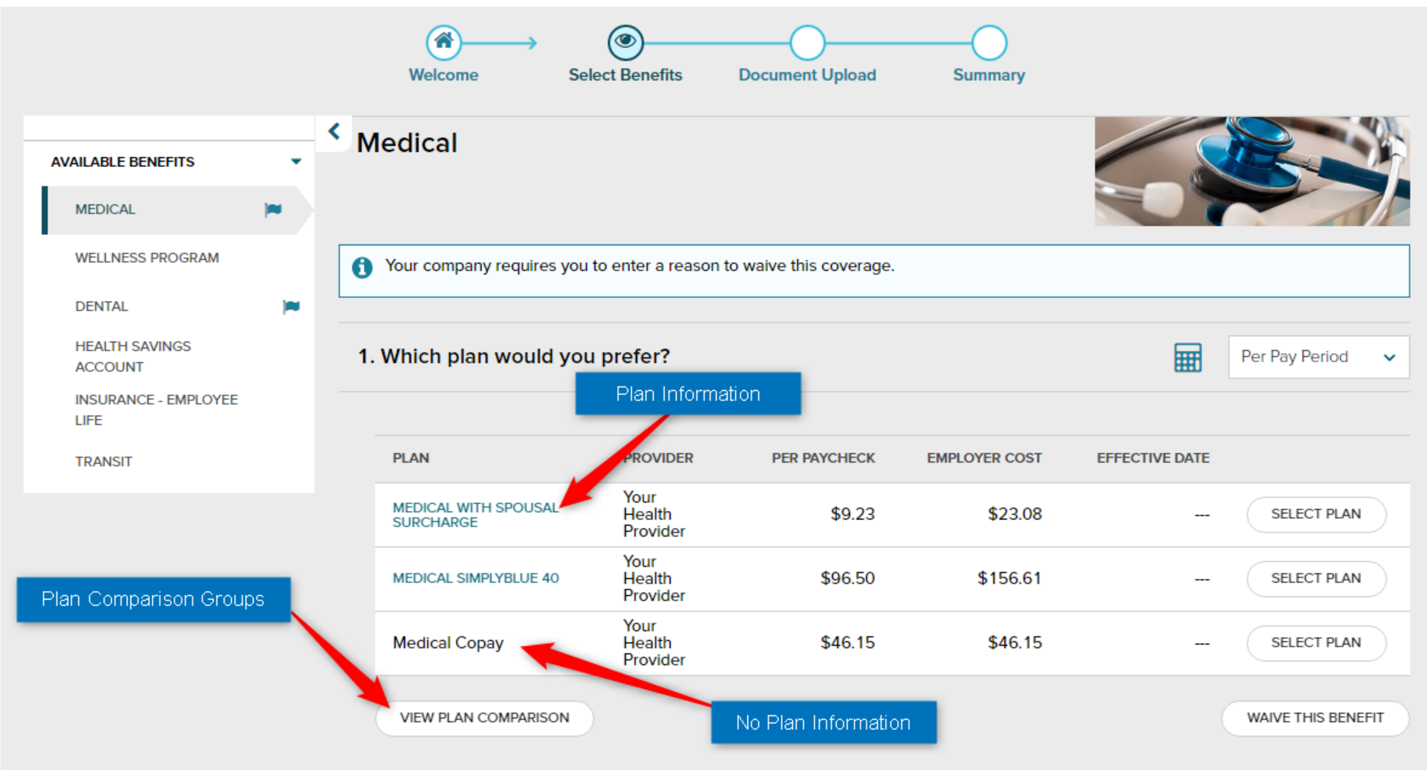
Adding Information to Benefit Plans

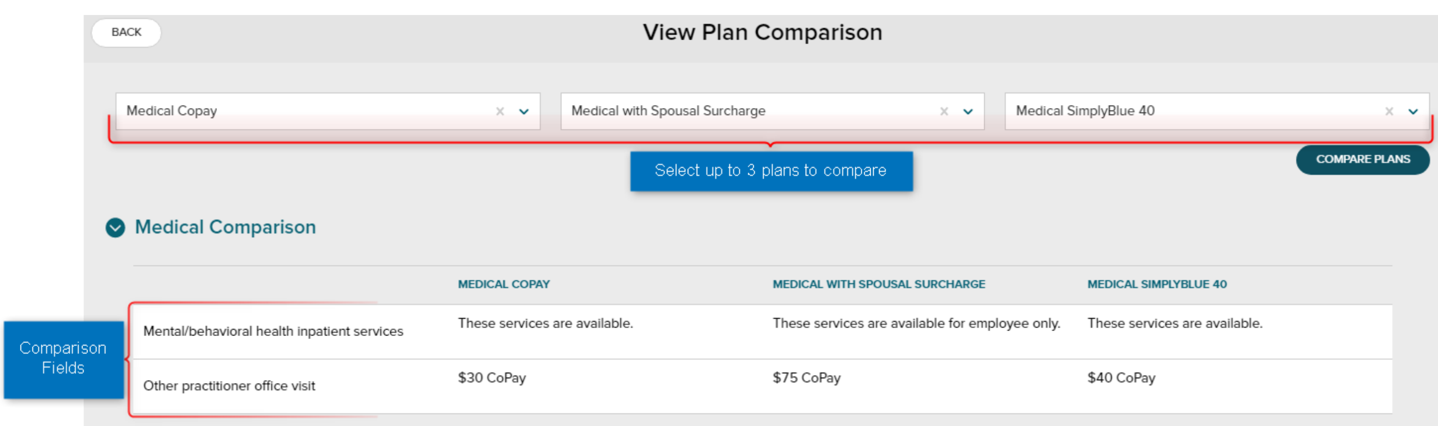
Overview

There are two options for providing employees with information about their benefit plans: Plan Comparison Grids and Plan Information.

Plan Comparison Grids

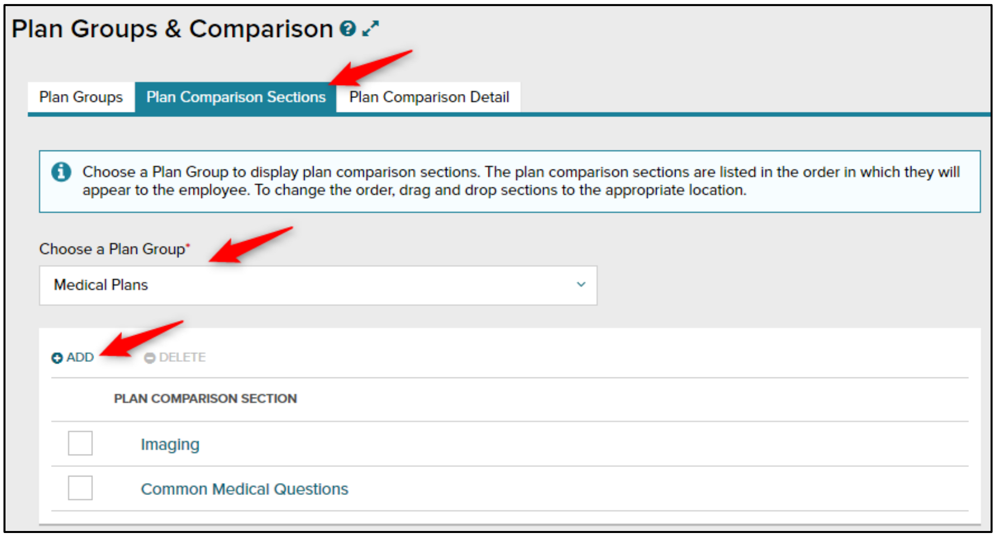
Plan comparison grids are made up of two parts; the plan comparison group which is a header for the grid and comparison fields which make up the body.



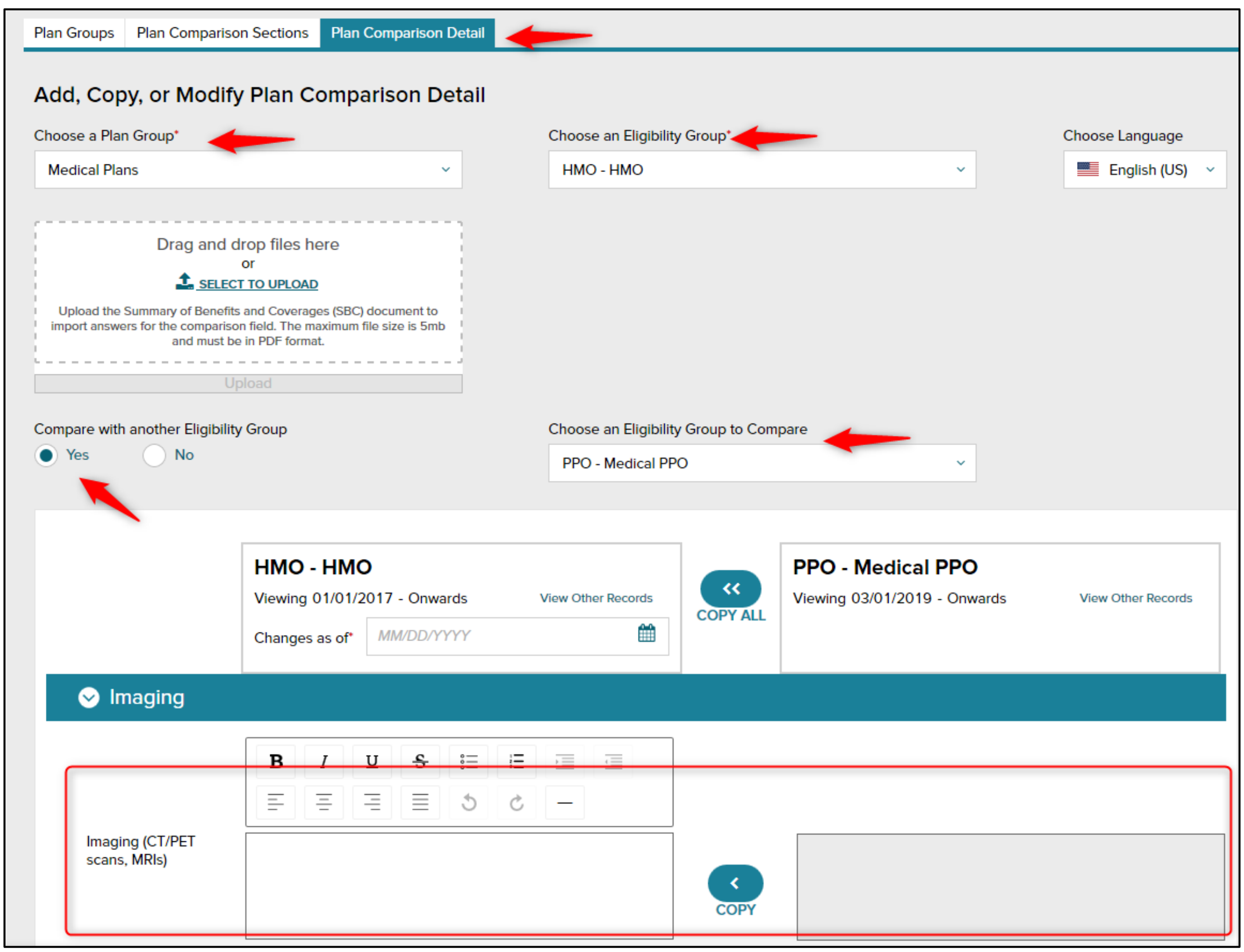


Comparison fields must be set up first. Start by going to **Setup → Tools → Validation Tables → Benefits → Comparison Fields**. Add, edit or remove comparison fields here.

Next set up comparison groups and assign comparison fields to the groups. Start by going to **Setup → Benefits → Plan Groupings & Comparison → Plan Comparison Sections**. Select the Plan Group that you would like to display plan comparison sections.



The final step is to setup the **Plan Comparison Detail**. Select the Plan Group, then the Eligibility Group (the plans) you would like to write up comparison information for. Then complete the required fields.



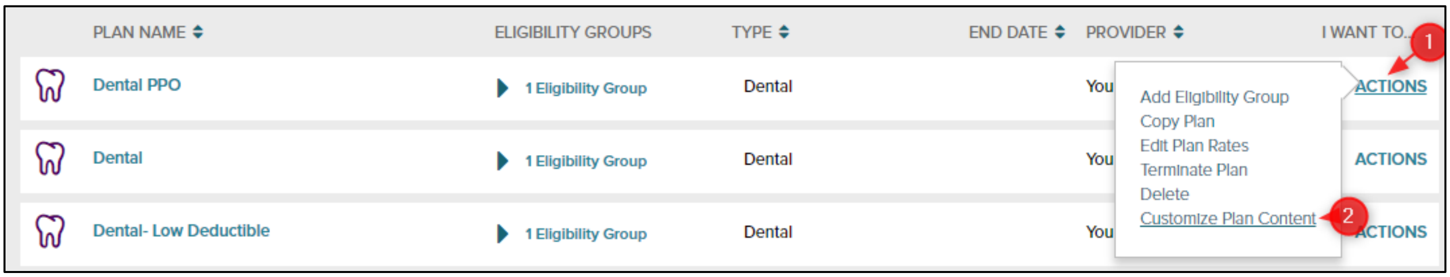
Click **Done** to save your changes.

Plan Information

To provide additional benefit information or to provide a link to employees enrolling in the plan, the Custom Plan Content editor can be used to upload pictures, graphics, and files that you want to display or use as a source for a link when the employee clicks the blue Information icon next to the benefit plan on the Available Enrollments page.

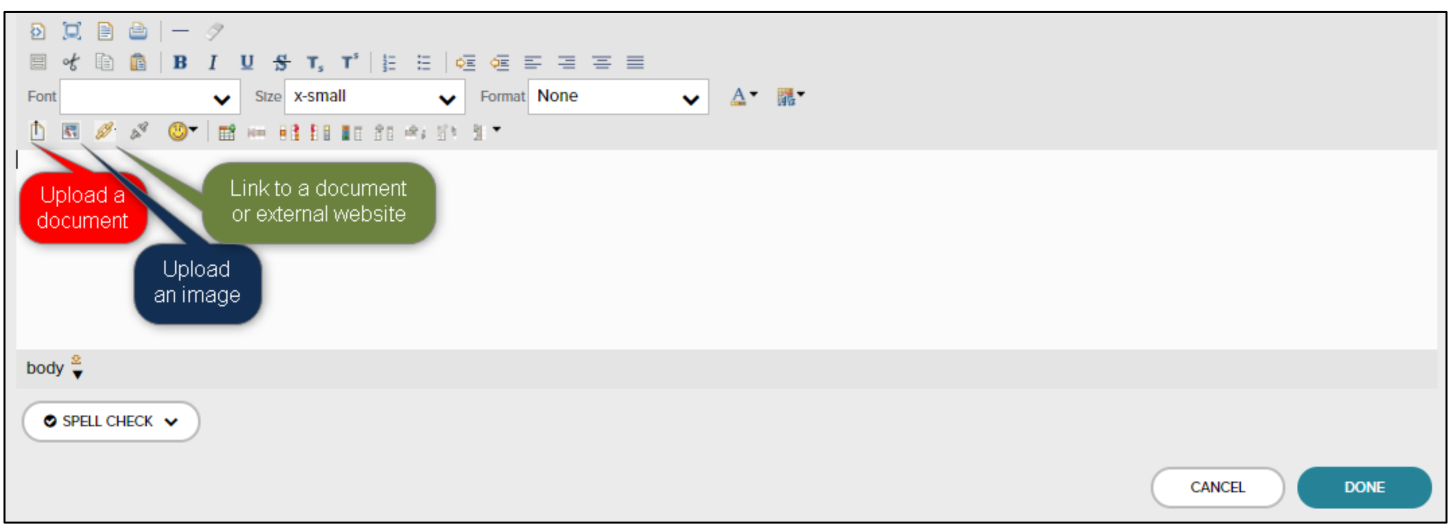
Please Note: This information is only visible during an active enrollment window or when a person is enrolled in the benefit.

Navigate to **SETUP> Benefits> Plan Setup**. Click on the blue 'Actions' link to the right of the benefit plan you want to update and choose 'Customize Plan Content'.



Add or modify information as needed to provide education to your employees.

- Use the icons at the top of the page to specify the font and color or add links and tables. Hover over an icon to learn the action it performs. These icons are similar in function to those used in Microsoft Word.
- After you create your customized content, click Spell Check in the bottom left corner and correct any spelling errors.
- When you finish, click Done.



Add a Document

Adding a document to your Plan Content is a 2-step process.

1. **First the document needs to be uploaded to the File Management library.**
   - Click on the File Management icon 

- The File Management screen will open
- Select ‘Browse’ to find the file and select ‘Open’
- Select ‘Upload’ to save the document to the File Management library

2. Next the document will need to be linked to your Plan Content.

- Add and select the text the employee will click on to view the document
- Click on the Create Link icon
- The Create Link screen will open
- Select the uploaded file from the list shown
- Click ‘Create’

Tips on Customizing Plan Content

- ✓ To preview what the formatted content will look like, click the Preview icon.
- ✓ To view or edit the HTML behind the content, click the Source icon
- ✓ To enlarge the area while you work on the content, click the Toggle Full Screen icon To return to the original view, click the icon again.
- ✓ To insert a link to a web site, select the text and click the Create Link icon Click the URL button and enter the web address and click Create.
- ✓ To insert a picture, select the Insert Image icon Click the Uploaded File or URL button, Select the file or Enter the address and click Create.
- ✓ To apply attributes to the text font, background color, or style, select the content and then select the attribute to apply.