

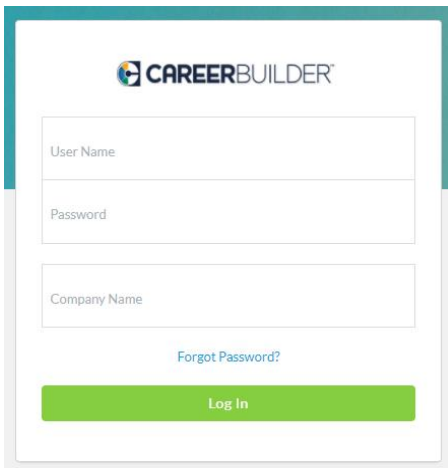
Employee Self Service for Mountain View Whisman SD

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Workterra is a tool which allows you to directly access and update your employee information via the Internet. Using Workterra employee self service, you can review and/or update your demographic, dependents, and benefit elections.

- You can access Workterra from any computer with an internet connection
- Our secure (https) site uses the latest technology to ensure that the information entered is secure and adheres to industry security standards.

Logging In



1. Launch an Internet browser such as Internet Explorer.
2. Navigate to <https://workterra.net>
3. Enter the information below and click **Login**

User name: Employee's first character of first name followed by entire last name

Password: Employee's entire last name followed by the first 4 digits of SSN

(Example: if your name is John Smith and the first 4 digits of your SSN is 6789, your User ID is **smith6789**.)

Company: Mountain View Whisman SD

Employee Usage Agreement and Legal Agreement

Agreement Acceptance

Instructions

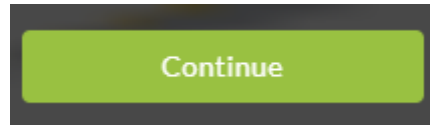
Please click on each of the links below to review and accept the agreements before proceeding through the enrollment tunnel.

Employee Usage Agreement

Legal Agreement

Please read and accept the Employee Usage Agreement and Legal Agreement

Please Read your Welcome Page Information and select **Continue**

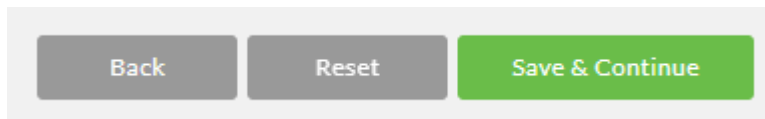


Change Password

Please provide your security questions and answers as well as update your password. When finished select **Save & Continue**.

Please note your password must be:

- Password must be a minimum of 8 characters.
- Password must contain at least one numeric digit.
- Password must contain at least one special character.
- Password must contain at least one UPPERCASE letter.



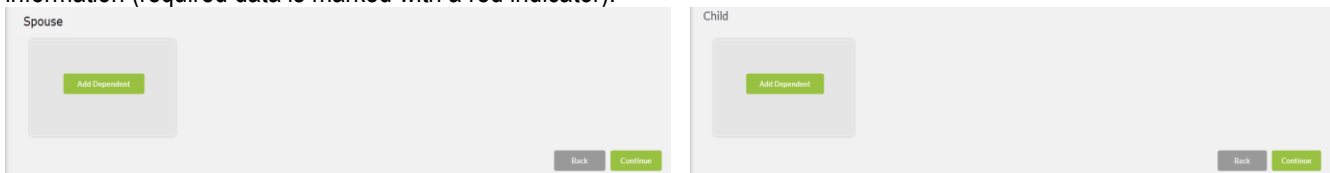
Demographics & Dependents

You will have an opportunity to review, add, or update your spouse, domestic partner or child information on the next few pages.

Please note: Grayed out fields are considered “review only” fields. Please contact your HR administrator if any changes are needed to these fields.

Please ensure that all dependents that you would like to cover across any benefit (Medical, Dental, Spouse Life, Child Life, etc...) are entered within these pages.

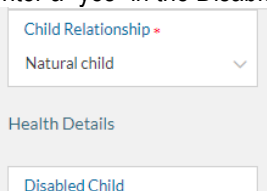
To add a spouse or child, click Add. The Add Spouse/ Add Child screen will open for you to enter their demographic information (required data is marked with a red indicator).



Click Save & Continue. If you have multiple children, select “Add Another Child” adding them one at a time and click “Save & Continue” once all are added.

[If you do not have a spouse, domestic partner or child, click Continue to proceed to the next page.](#)

For **Disabled Children**, please ensure that you classify the child as a “Disabled Child” in the Child relationship box as well as enter a “yes” in the Disabled child field.



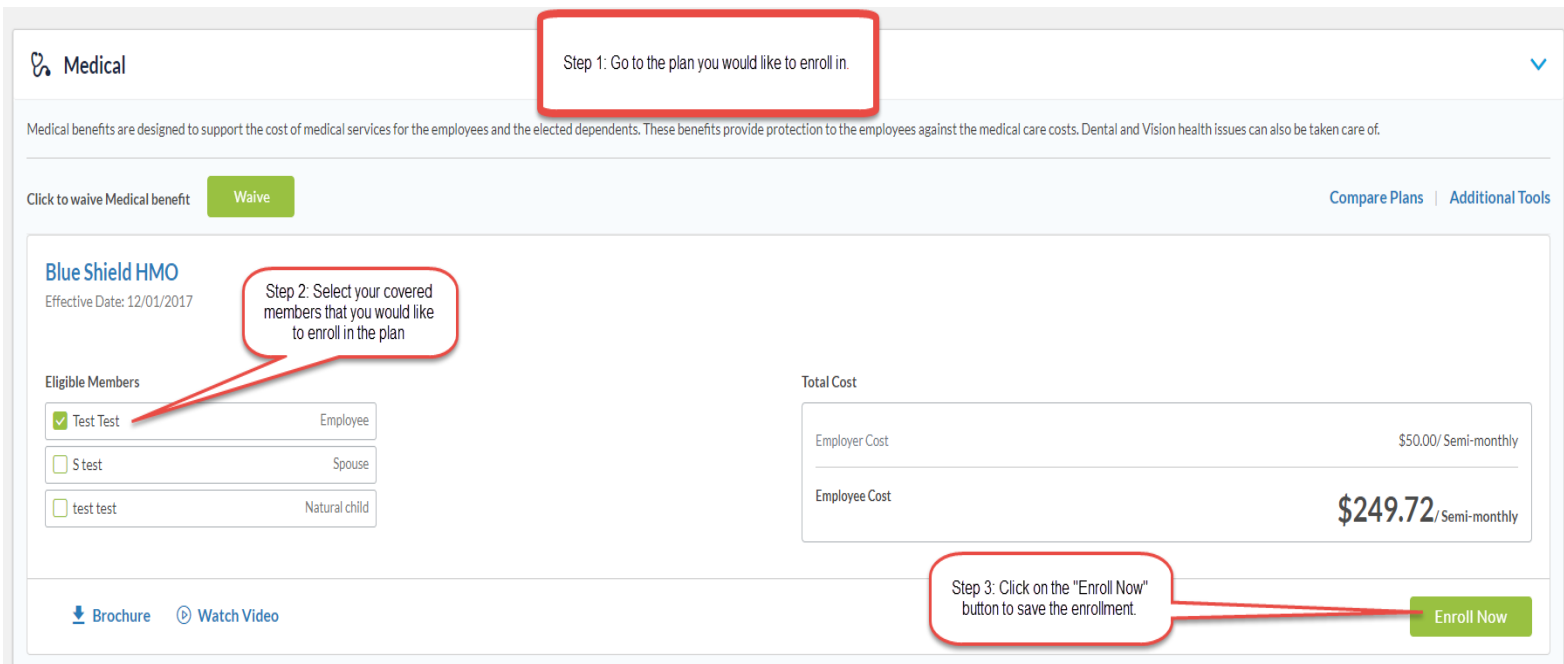
Plan Elections

Follow the steps below to enroll in your benefit plans.

If you do not wish to enroll and would prefer to decline the benefit, select “Waive this benefit”.

Please note that the following are available for additional information to assist you in choosing your benefits.

- Compare Plan – Click the Compare Plan box under each plan to open up a side by side comparison of the plans offered to you
- Additional Tools
 - Learn about your Health benefits – This houses links to the plan summaries
 - Forms Library – This houses links to additional benefit information



Medical Step 1: Go to the plan you would like to enroll in.

Medical benefits are designed to support the cost of medical services for the employees and the elected dependents. These benefits provide protection to the employees against the medical care costs. Dental and Vision health issues can also be taken care of.

Click to waive Medical benefit **Waive** [Compare Plans](#) | [Additional Tools](#)

Blue Shield HMO
Effective Date: 12/01/2017

Eligible Members

<input checked="" type="checkbox"/> Test Test	Employee
<input type="checkbox"/> S test	Spouse
<input type="checkbox"/> test test	Natural child

Total Cost

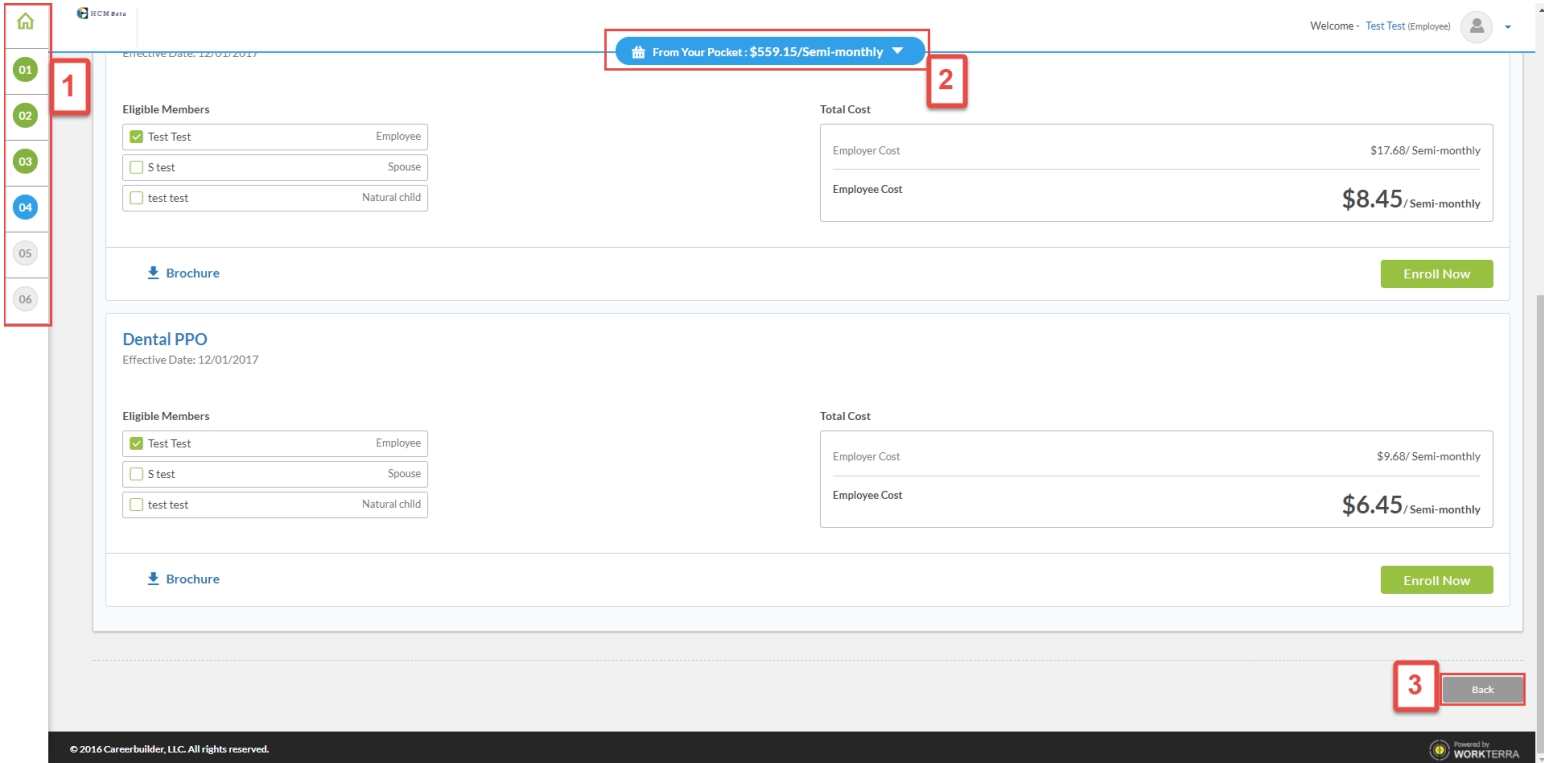
Employer Cost	\$50.00/ Semi-monthly
Employee Cost	\$249.72 / Semi-monthly

[Brochure](#) [Watch Video](#) Step 3: Click on the "Enroll Now" button to save the enrollment. **Enroll Now**

Please be sure to use only the navigational buttons provided within the tool. **Do not use your browser's back button.**

You can navigate into previous pages using these three options:

1. The slide out menu bar will allow you to move back to any page that you have previously visited
2. To revisit a plan you may click on the benefit plan listed in the election summary
3. Use the back button provided by the tool



The screenshot displays the Workterra interface with several navigation and content elements highlighted by red boxes and numbers:

- 1**: A vertical slide-out menu bar on the left side of the page, containing numbered links (01-06) for navigation.
- 2**: A dropdown menu at the top center of the page, currently showing "From Your Pocket : \$559.15/Semi-monthly".
- 3**: A "Back" button located at the bottom right corner of the page.

The main content area shows two benefit plan cards. The top card is for a plan with an effective date of 12/01/2017. It lists eligible members (Test Test, S test, test test) and a total cost of \$8.45/Semi-monthly. The bottom card is for a "Dental PPO" plan with an effective date of 12/01/2017, listing the same eligible members and a total cost of \$6.45/Semi-monthly. Both cards include a "Brochure" link and an "Enroll Now" button.

Adding a new beneficiary:

Your dependents (Spouse and children) that are already entered into OnlinEnroll will be in the beneficiary pool.



1. Select your first beneficiary:
 - a. To select an existing dependent as a beneficiary, select their name in the drop down
 - b. If you would like to add another beneficiary, select the applicable relationship in the drop down menu
 - i. A pop up box will appear asking for more information on your new beneficiary. Complete the fields and click done.
2. Enter the percentage for this beneficiary in the "percentage" field

You may also add secondary (contingent) beneficiaries by clicking on the button "Add Secondary Beneficiary"

Best practices for choosing multiple beneficiaries:

- Use whole numbers when updating the percentage
- Percentages must equal 100
 - For example: 3 beneficiaries should have the percentage of 33, 33, 34



Other tips:

- To add multiple beneficiaries click on the  plus sign
- To remove a beneficiary, click on the  delete icon to the right of the beneficiary name.
- A beneficiary should not be used twice in the same plan.
 - For instance, on the basic life plan, do not have your spouse listed twice as a primary beneficiary.

Beneficiaries

Instructions

- Please assign beneficiaries for the benefit plans shown below.
 - Depending on the plan, you may be able to assign secondary beneficiary tier.
 - Within each tier, you may have one or more beneficiaries (as long as the total adds up to 100%).
 - You can either choose a beneficiary from your saved dependents or create new a beneficiary.
- Click on [?] for more information on how to manage your beneficiaries.

Beneficiary Details  

MetLife Basic Life - Basic Life Save

Primary


Select Relationship --- Select Relationship --- S test(Spouse) test test(Child) Business Associate Friend Other Other Relative	Percentage (%) 100	<div style="display: flex; gap: 5px;"> + ✎ 🗑️ </div>
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[Add Secondary Beneficiary](#)

Back
Reset
Save & Continue



Completing the Enrollment Process


After completing all of your plan elections you will come to the Confirmation Page. Please review all of your elections for accuracy.

Please be sure to keep a copy of the confirmation statement for your records by clicking on the  PDF button to download save & print

After you have clicked on finish, you will be taken to your Employee Home Page. Your enrollment process is now complete.

Confirmation Statement



Test Test

Date of Birth
January 1, 1985 (32 years)





Gender
Male


Social Security Number
XXXXX3123

Address
test

DC ---
USA

Employee Review	EMPLOYEE REVIEW		
Underwriting	Employment Status Full Time	Location B CA	
Payroll	New Field 3	Reason for Status Change ---	
Demographics	Current Job Title ---	Job Description ---	Supervisor False
Dependent Information	Officer Status No	Company Stock Holdings % 0	
Last Recent Activity			

Employee Review	PLAN NAME	COVERAGE	EMPLOYER COST	EMPLOYEE COST
Underwriting	 Blue Shield PPO (Pre-tax) Effective 12/01/2017	Test Test (Employee) S test (Spouse)	\$261.06	\$609.15
Payroll	 Flexible Spending Account (Post-tax) Effective 12/01/2017	Annual Employee Coverage - \$0.00 Annual Employer Coverage - \$0.00	\$0.00	\$0.00
Demographics	 Basic Life (Post-tax) Effective 12/01/2017	Test Test (Employee)	\$0.00	\$0.00
Dependent Information	Primary Beneficiary S test (Spouse)	Current Coverage \$20,000.00 Elected Coverage \$200,000.00 (EE cost \$19.00)	100%	
Last Recent Activity	 Supp Life (Post-tax) Effective 12/01/2017	Test Test (Employee) Current Coverage \$20,000.00 Elected Coverage \$200,000.00 (EE cost \$19.00)	\$0.00	\$0.30
Current Enrollment Summary	Primary Beneficiary S test (Spouse)		100%	



To go directly to a specific section, click on an option you want to review using this panel.

Please note "Elected Coverage" is the coverage that is pending for EOL.

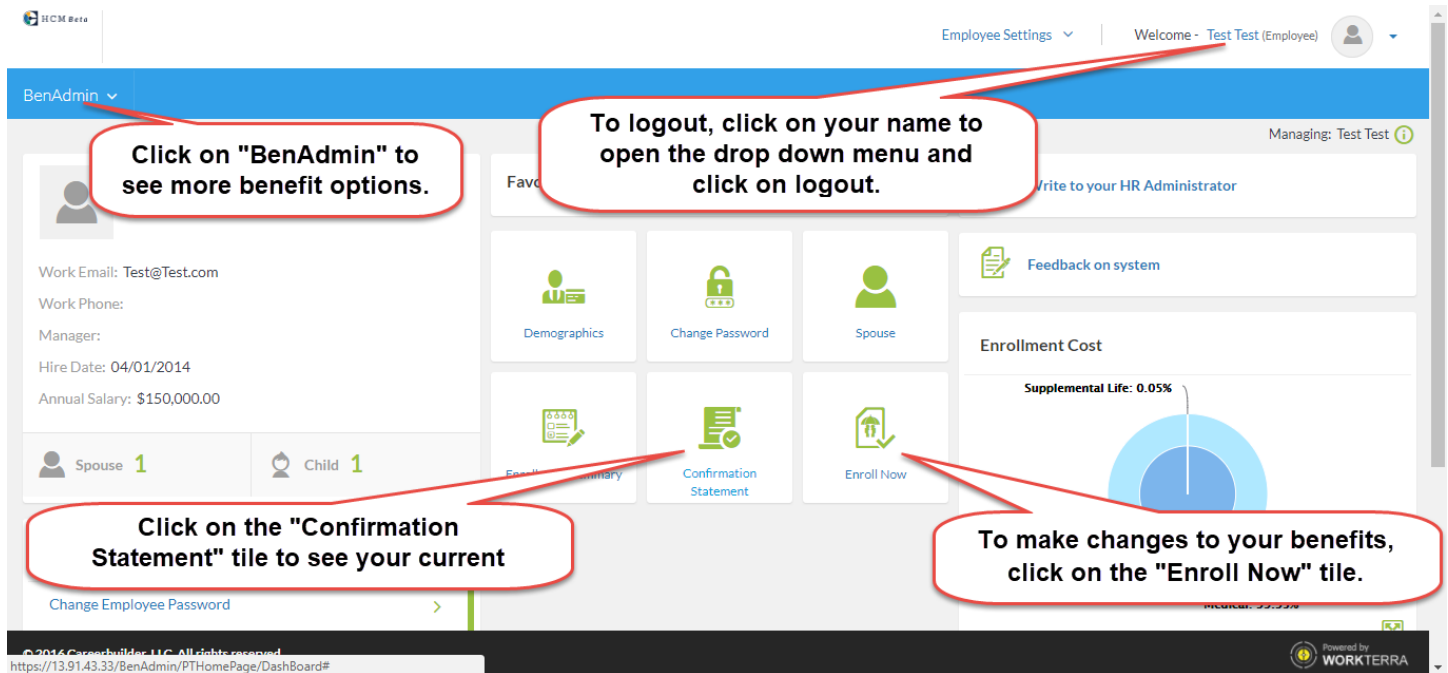
Once you have completed reviewing your elections, you can click "Finish" to complete the Enrollment process.

Year-round Access & Qualifying Events

(HOME PAGE NAVIGATION & MAKING QUALIFYING EVENT CHANGES)

Below is an example of your Employee Home Page.

If this is your first time logging into the site and you have not already updated your password, please update your password by clicking on **"Change Password"** tile.



The screenshot shows the Employee Home Page for BenAdmin. The page includes a navigation bar with "Employee Settings" and "Welcome - Test Test (Employee)". The main content area features several tiles: "Demographics", "Change Password", "Spouse", "Enroll Now", "Confirmation Statement", and "Enroll Now". A "Feedback on system" tile is also present. The page also displays employee information such as "Work Email: Test@Test.com", "Work Phone:", "Manager:", "Hire Date: 04/01/2014", and "Annual Salary: \$150,000.00".

Callouts on the page provide the following instructions:

- Click on "BenAdmin" to see more benefit options.** (Points to the user name in the top left)
- To logout, click on your name to open the drop down menu and click on logout.** (Points to the user profile icon in the top right)
- Click on the "Confirmation Statement" tile to see your current** (Points to the Confirmation Statement tile)
- To make changes to your benefits, click on the "Enroll Now" tile.** (Points to the Enroll Now tile)

To begin a Qualifying Event (i.e. Marriage, Newborn, Divorce, etc.) click on the "Enroll Now" button found on the Home Page. If an event is not open you will see an option to open a Qualifying Event by clicking "OK."

Then select the Qualifying Event that applies to you, enter the date of the event, and click "Save". The system will now walk you through your personalized experience.

Please note the following in regards to Qualifying Events:

- To initiate a Qualifying Event, while still within your Open Enrollment period, go to: BenAdmin > Initiate Qualifying Events
- Please ensure the dependent relationship type is updated when processing a Qualifying Event, as this determines eligibility e.g. If processing a Divorce QE you must change your spouse relationship type from spouse to ex-spouse. This will ensure that the system will terminate the spouse's benefits and generate the notification for COBRA.
- During a Qualifying Event, Beneficiary designation will be available after your plan change is approved by the administrator. To view or change your Beneficiaries outside of an open window, go to: My Benefits > Beneficiary
- During a Qualifying Event, you will have the opportunity to upload the appropriate supporting documents (i.e. marriage certificate, birth certificate, etc.) for your HR Administrator approval. Please be sure to upload your document in the upload document page.



The screenshot shows the "Initiate Qualifying Events" form. The form has a title bar with "Employee Home" and "Enroll Now". The main content area is a table with the following entries:

Event Name
<input type="checkbox"/> Add a Dependent
<input type="checkbox"/> Added
<input type="checkbox"/> Address Change
<input type="checkbox"/> Marriage

At the bottom of the form, it says "Showing 1 to 4 of 4 entries" and "First Previous 1 Next Last".