

Work Instruction: Managing Qualifying Events in ADP

1. Audience

Employees who have experienced a qualifying event and want to change benefit coverages.

2. Objective:

Dependent change entry when a qualifying event occurs.

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	03/18/2022	Original issue.	Glawe
001	01/02/2023	Converted to ADP	Glawe
002	02/29/2024	Updated New HR Department #	Glawe

4. Scope

This instruction is used in benefits administration.

5. Prerequisites

- Active Employee ADP Account

6. Records

Employee benefits records (electronic)

7. Associated Documents

Current year Benefits Summary

8. Evaluative Factors

None

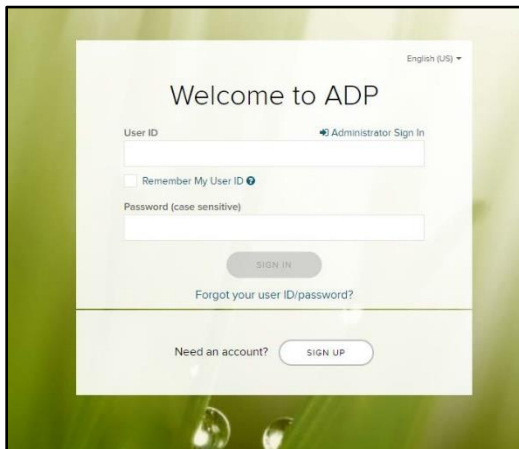
9. Responsibility

HR is responsible for maintaining employee records in ADP

10. Instructions

1. Log in to the Workforce Now Employee Self-Service* website.
<https://workforcenow.adp.com>

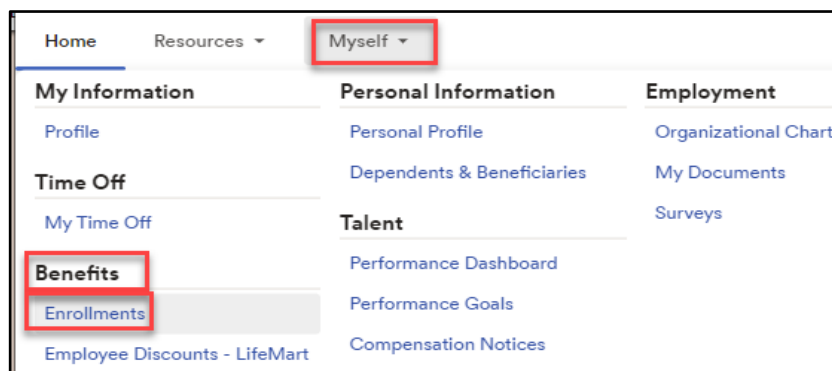
Note: Employees can trigger a life event; however, a life event profile must exist, and the life event effective date **MUST** fall into the profile's enrollment window or the event will not be triggered.



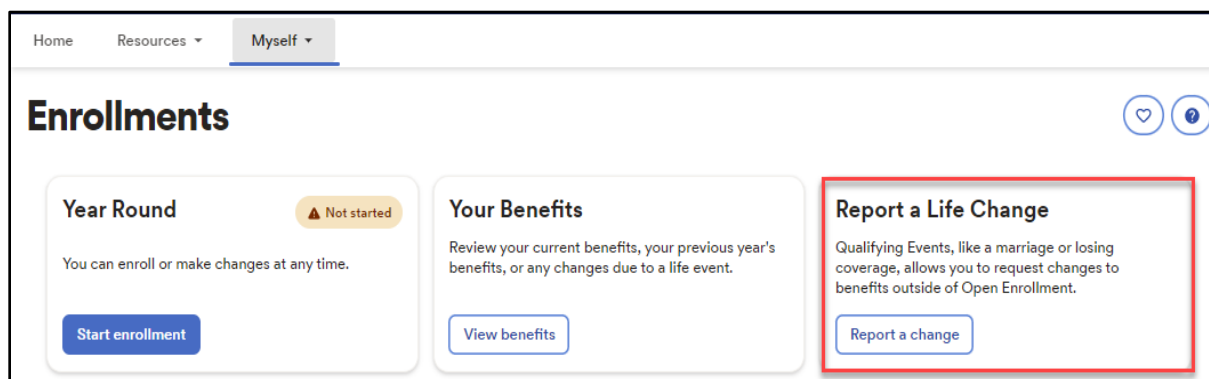
2. Enter your User ID and password, and then click **Sign In**.

Note: If this is your first time logging in, click **Sign Up**. If you are unsure of the registration code, please contact your HR team.

3. In the **Mega Menu**, navigate to **Myself > Benefits > Enrollments**.



4. After clicking on Enrollments, you will be taken to your enrollments page. You can navigate to the **Report a Life Change** tile, then **“Report A Change”**.



This slider window is displayed so you can enter a life event. Workforce Now understands which life events to display based on the employee's record and dependent dynamics (For example: If there is no spouse in the system Marriage will display. If there is a spouse in the system, then Divorce/Legal Separation will appear).

5. To start, click **Add New Child** or any applicable Life Event that fits your situation. You can choose any option available for life events that are applicable to you and how your company has life events configured. Let's start with **Add New Child**:



6. After inputting the required fields, you will be able to update your enrollments (if applicable).

The screenshot shows the 'Add New Child' form with the following fields and values:

- Relationship:** Relationship * (Child), Child Classification (empty)
- Basic Information:**
 - First Name * (empty)
 - Middle Name (empty)
 - Last Name * (empty)
 - Generation Suffix (empty)
 - Birth Date * (MM/DD/YYYY)
 - Gender * (empty)
 - Professional Suffix (empty)
 - Tax ID Type (empty)
 - Tax ID (empty)
 - National Identifier (empty)

Buttons at the bottom: Cancel, Add another, Continue.

7. Next, confirm the information below is correct, then click **Continue to Enrollments**.

The screenshot shows the 'Add New Child' form with a confirmation message: "Please confirm the information below is correct, then click Continue to Enrollments."

Child Test

Email Address	Gender Male	Fulltime Student No
Home Phone	Relationship Child	Medicaid No
Personal Mobile	Child Classification Biological Child	Medicare No
Date of Birth 01/01/2023	Tax ID Type SSN	Tobacco User No
Age 0 Years, 0 Months	Tax ID 000-00-0521	Disabled No
Address 345 Park Avenue Manhattan New York, NY 10154 United States	National Identifier US	

Buttons at the bottom: Cancel, Continue to Enrollments. A red arrow points to the 'Continue to Enrollments' button.

8. ADP will then continue to your enrollments. You will be presented with a pop-up showing an informational message about your Life Event.

The screenshot shows a pop-up window titled "Add New Child" with a close button (X) in the top right corner. On the left is a sidebar with four menu items: "Welcome" (highlighted with a blue bar), "Manage Dependents", "Select Benefits", and "Review and Submit". The main content area has a "Welcome" heading and a paragraph: "Your total rewards package includes benefits that are designed to keep you healthy and secure. To enroll, click on the menu options to the left and select the best options for you and your family. The final day to enroll is Friday the 30th." Below this is a section titled "What's Changing" with a bulleted list: "Medical Option Deductibles", "CDHP with HSA Deductibles and Out-of-Pocket Maximums Emergency Room Co-payments", "HSA Contribution Limits", "Aflac Group Critical Illness Insurance", and "Associate Contributions". A blue link says "If you have any questions please reach out to your benefits team. Happy enrollment!". At the bottom right are "Back" and "Next" buttons.

9. When you choose to enroll in a plan, you may then include your newly added dependents. You will have the opportunity to choose “**Covered Individuals**” to include the newly added dependent.

The screenshot shows a pop-up window titled "Available Plans" with a close button (X) in the top right corner. At the top, a notification bar says "Plan costs updated." Below is a "Medical" section with the instruction "Select the plan that meets your needs and add the dependents you want to cover." Under "Covered Individuals", there are three options: "Luke Skywalker (You)" (checked), "Mary Smith Skywalker (Spouse)" (unchecked), and "Child Test (Child)" (checked and highlighted with a red box). Below this, it says "3 Plans Available" with a link to "Plan comparison". The first plan listed is "PPO, Medical PPO" (2 individuals selected) with "Your Health Provider" as the provider. To the right, a table shows "Employer Cost" as \$173.08 and "Your Cost" as \$69.23, with both values highlighted by a red box. At the bottom right are "Waive benefit" and "Cancel" buttons.

*Please note: The coverage level for your enrollment (Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family) is driven by which dependents you select to enroll.

10. Review your enrollment, costs, and covered individuals carefully.

After making your elections and selecting **Next**, you will be taken to the **Review and Submit** step to review all your elections before submitting for approval (if applicable).

The screenshot shows a web interface for a 'Life Event: Birth' enrollment. On the left is a vertical navigation menu with four items: 'Welcome', 'Manage Dependents', 'Select Benefits', and 'Review and Submit'. The 'Review and Submit' item is highlighted with a red box. The main content area is titled 'Review and Submit' and contains several sections. At the top, there is a summary box with a calendar icon and the text '22 days left to enroll' (Effective: January 1, 2023), 'Employer cost per paycheck \$173.08', and 'Your cost per paycheck \$69.23'. Below this is a yellow warning box stating 'Your benefit elections will not be effective until you click Submit enrollment.' The next section is 'Enrolled plans', which states 'You are enrolled in the following plans. You can make changes until the enrollment period closes.' It lists a 'Medical' plan, effective January 1, 2023, with a green 'Enrolled' status indicator. At the bottom right, there are three buttons: 'Finish later', 'Back', and 'Submit enrollment'. The 'Submit enrollment' button is highlighted with a red box.

Life Event: Birth

Welcome
Manage Dependents
Select Benefits
Review and Submit

Review and Submit

22 days left to enroll
Effective: January 1, 2023

Employer cost per paycheck
\$173.08

Your cost per paycheck
\$69.23

Your benefit elections will not be effective until you click Submit enrollment.

Enrolled plans
You are enrolled in the following plans. You can make changes until the enrollment period closes.

Medical
Effective: January 1, 2023
Enrolled

Finish later Back **Submit enrollment**