

[Contact Us \(/s/contactsupport\)](/s/contactsupport)

Ask a question



[PEOPLE](#) > [BENEFITS](#)
(/S/TOPIC/0TO6S000000CHF2WAI... (/S/TOPIC/0TO6S000000CHFBW...

Benefits Advisor: Enrollment Guide

Describes Enrollment processes and procedures for both New Hire Enrollment and Open Enrollment.

🕒 Dec 5, 2022 · Knowledge

Title

Benefits Advisor: Enrollment Guide

Body

PAYCOR HAS A NEW AND IMPROVED WAY TO NAVIGATE.

Paycor's New Homepage and Navigation re-design provide users with improved accessibility and readability to enable users to scan and consume volumes of info in a short time. This combined with the enhanced usability across devices provides leaders intelligent insights to make decisions quickly. While you are seeing the new updates currently, you have the opportunity to navigate back to the old view via the toggle option. This feature will be available as we continue to make updates to all pages in Paycor. Here are directions for both navigations:

- [Old Navigation](#)
- [New Navigation](#)

- [Enrolling in Benefits](#)
- [Viewing Your Information](#)
- [Verify Your Family Information](#)
- [Navigating the Plan Type Pods](#)
- [Enroll in a Plan](#)
- [Plan Selection](#)
- [Life Insurance](#)
- [Beneficiaries](#)
- [Review and Confirm](#)
- [Success Page](#)

OLD NAVIGATION INSTRUCTIONS

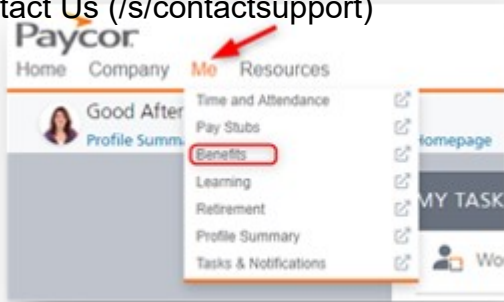
- [Accessing Your Online Benefits Portal](#)

ACCESSING YOUR ONLINE BENEFITS PORTAL

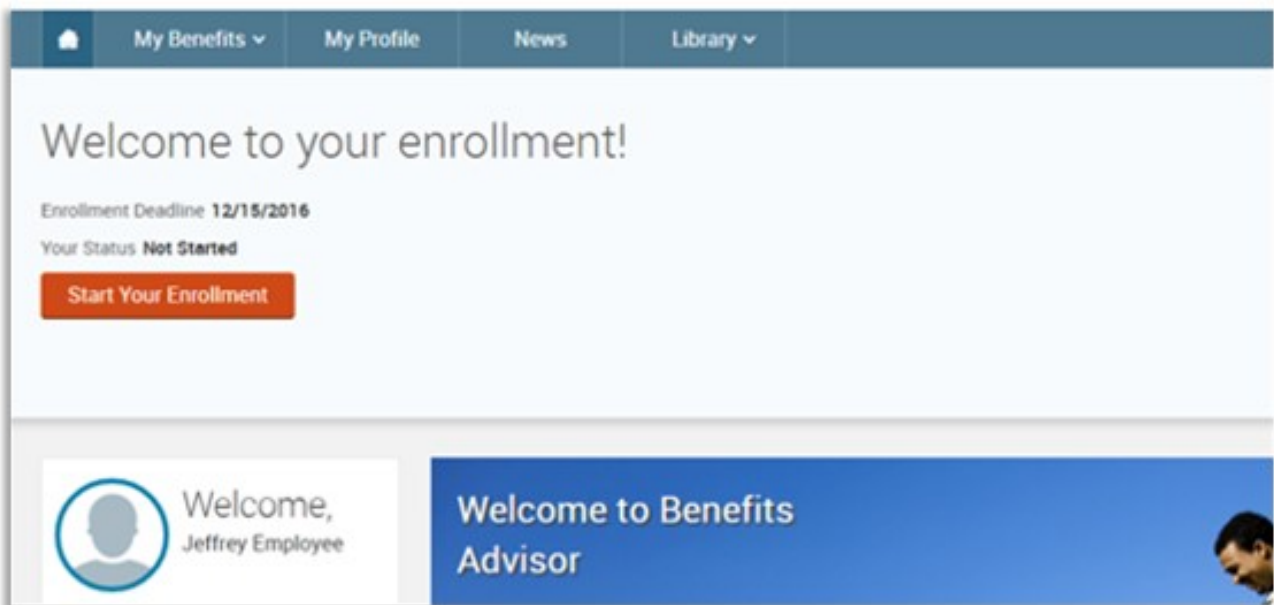
Chat With An Advocate

1. Login to Paycor. Hover over Me, and then click Benefits. You are **not** asked to login in again.

Contact Us (/s/contactsupport)



2. You are directed to your Benefits Home screen:



3. From this screen, you can:

- View your benefits
- Get information on the plans you're enrolled in
- Find carrier information
- Process a life event change that allows you to update your benefits, such as:
 - **Marriage:** add a spouse
 - **Birth/Adoption of a child:** add a new child
 - **Divorce:** remove a former spouse
 - **Loss of coverage through a spouse's plan:** allows you to add benefits
- View demographic information on file. This includes name, address, phone numbers and email addresses.

Note: Demographic changes **must** be made in the Paycor system. Any data changes made there flow to the Benefits system overnight.

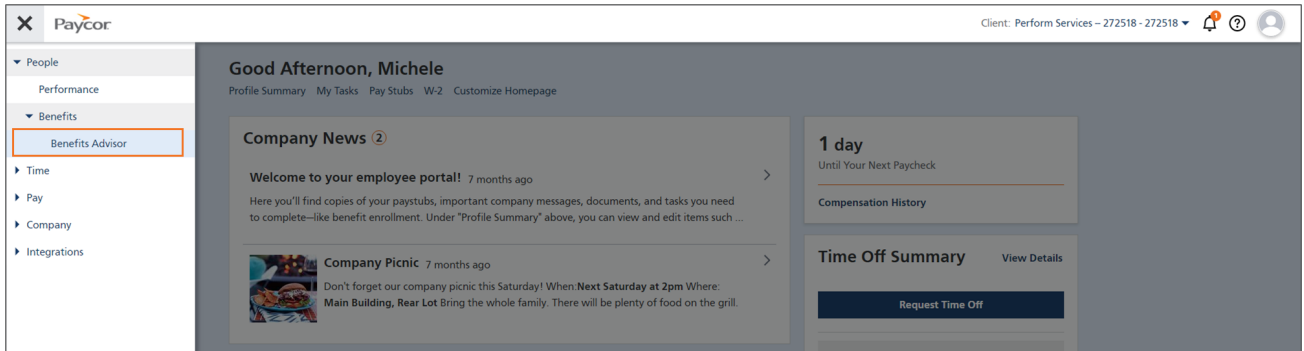
NEW NAVIGATION INSTRUCTIONS

- [Accessing Your Online Benefits Portal](#)

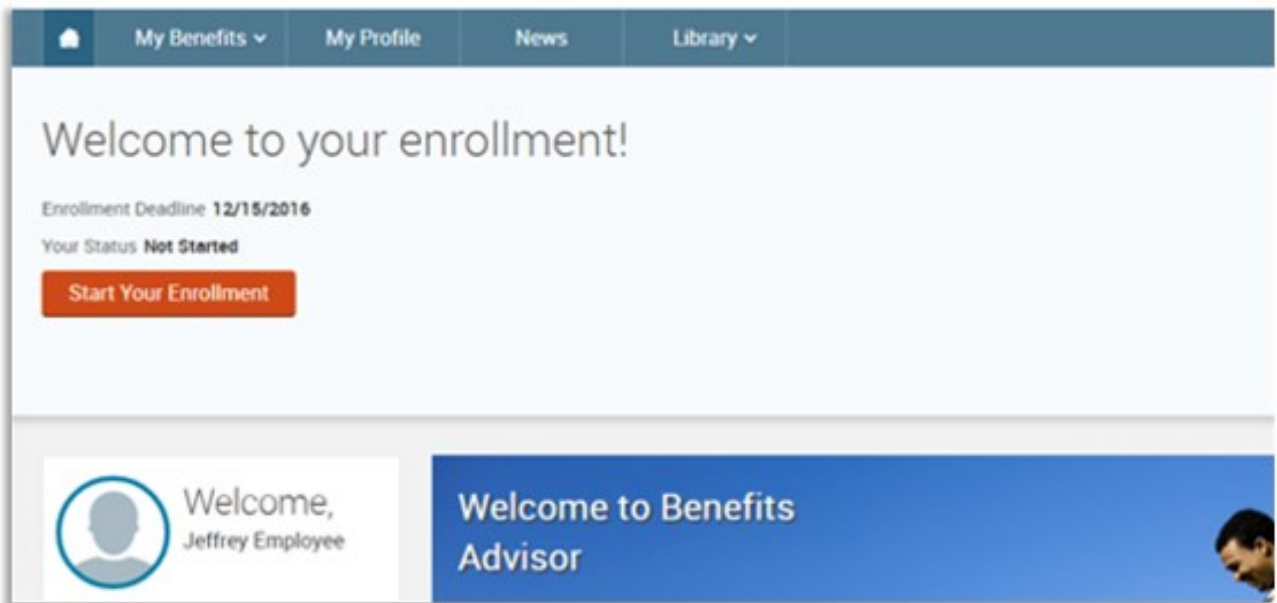
ACCESSING YOUR ONLINE BENEFITS PORTAL

Contact Us ([/s/contactsupport](https://support.paycor.com))

1. Login to Paycor. Click **People > Benefits**, and then click **Benefits Advisor**. You are **not** asked to login in again.



2. You are directed to your Benefits Home screen:



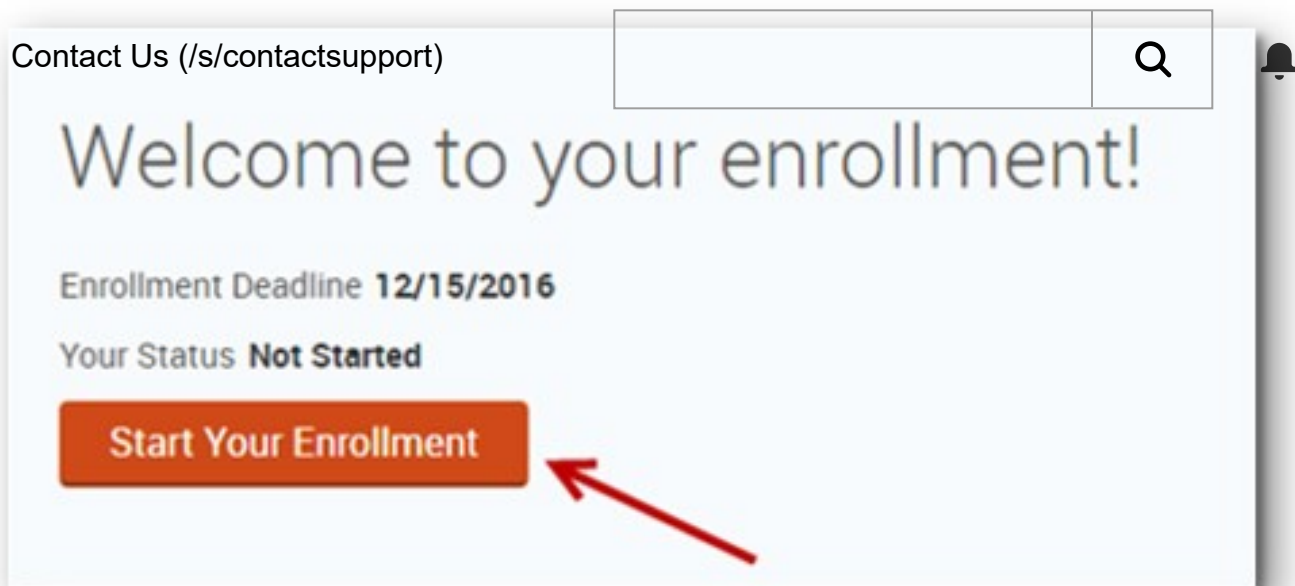
3. From this screen, you can:

- View your benefits
- Get information on the plans you're enrolled in
- Find carrier information
- Process a life event change that allows you to update your benefits, such as:
 - **Marriage:** add a spouse
 - **Birth/Adoption of a child:** add a new child
 - **Divorce:** remove a former spouse
 - **Loss of coverage through a spouse's plan:** allows you to add benefits
- View demographic information on file. This includes name, address, phone numbers and email addresses.

Note: Demographic changes **must** be made in the Paycor system. Any data changes made there flow to the Benefits system overnight.

ENROLLING IN BENEFITS

On the home screen, select Start Your Enrollment on the message board:



VIEWING YOUR INFORMATION

1. Before beginning your enrollment, verify the accuracy of all your personal information (e.g. address, DOB, etc.).

2. When you are finished, check and click Continue.

Contact Us (/s/contactsupport)

Cell Phone: 000-000-0000
 Work Phone: 000-000-0000
 Work Phone Ext.:
 CONTACT 2
 Name:
 Relationship:
 Phone: 000-000-0000
 Cell Phone: 000-000-0000
 Work Phone: 000-000-0000
 Work Phone Ext.:
 I agree

[Back to Top](#)

VERIFY YOUR FAMILY INFORMATION

In this section, please be sure to add all dependents that might be missing from the Family Information section before proceeding to the next section.

1. To do this, click the **Add Dependents** card.
2. To make corrections or add information to existing dependents, click the Edit link on the dependent's name and make the corrections or additions.

Family Information

Please enter all family information before beginning your enrollment regardless of whether the family members are to be covered by your benefits or not. To do so, click Add Dependents. To verify or edit the information of a family member who has already been entered, click Edit under their information. If you do not have any family members, click Continue.

Jeff Tester Male Employee 47 years old (9/18/1968) SSN: XXX-XX-1111 Edit >	Jen Tester Female Spouse 36 years old (1/1/1980) SSN: 999-22-2222 Edit >	Danny Tester Male Child 7 years old (1/1/2009) SSN: 999-33-3333 Edit >	 Add Dependents
--	--	--	--------------------

Continue

Note: If you want to add dependents, all fields with an asterisk (*) are required.

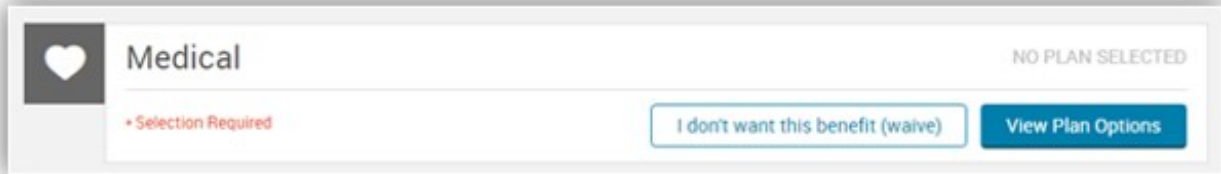
When all your family information has been entered, read through the Dependent Information Notice section, check I agree and click Continue.

NAVIGATING THE PLAN TYPE PODS Contact Us (/s/contactsupport)



Most plan types require you to select a plan. This is noted in the lower left corner of the plan type pod with red text ***Selection Required**.

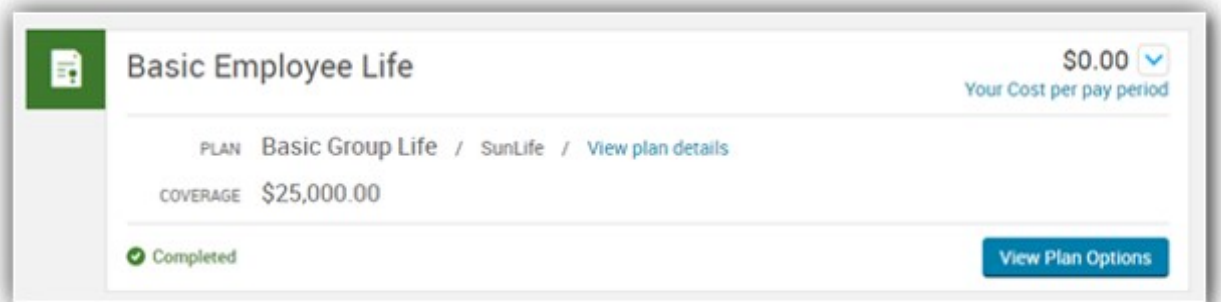
1. You can waive out of the plan by selecting **I don't want this benefit (waive)**. Selecting **View Plan Options** opens a plan selection page, detailed in the Plan Selection section.



2. After a plan is selected or the plan is waived the plan type icon turns green. The ***Selection Required** text changes to **Completed**. This lets you know the enrollment for that plan type is complete. The plan pod displays the plan's name, vendor, coverage level, and whether dependents are covered, **not** covered, or ineligible. Anytime during the enrollment process changes can be made by selecting View Plan Options.



3. When auto-enrolled or employer-paid plans without a waive option are offered, they'll appear in their own pod. Clicking the View Plan Options button opens the plan selection page for that plan type where you find information about the plan entered by administrators, including plan data, benefit coverage and plan highlights.



4. In enrollments where you might have a previous election (e.g. open enrollment), these can be re-saved without having

to view or update plan selections by using the Keep My Selection button.

Contact Us (/s/contactsupport)



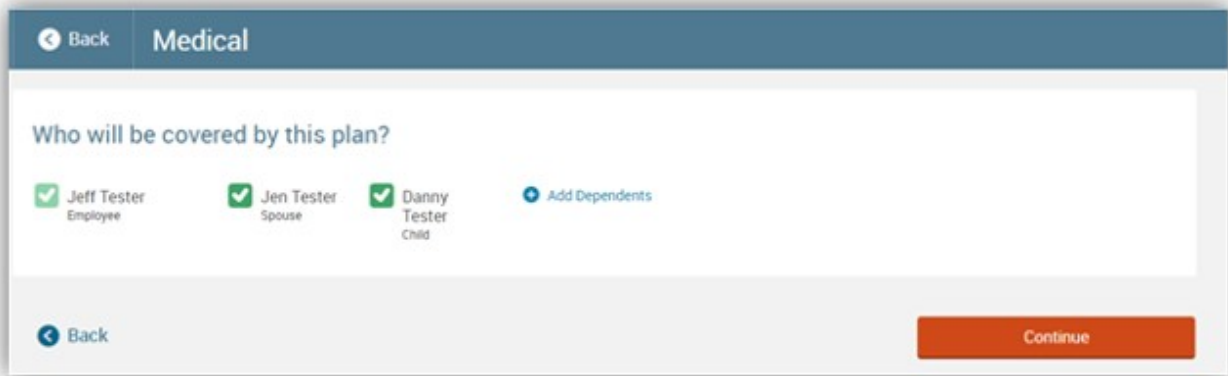
[Back to Top](#)

ENROLL IN A PLAN

1. **View Plan Options** brings you to the plan selection page. If the plan can cover your dependents, you **must** first choose which of those dependents to cover before being able to review all the plans available. You can cover a dependent by checking the box next to the dependent's name. Click Back to return to the landing page or click Continue to proceed after selecting dependents.

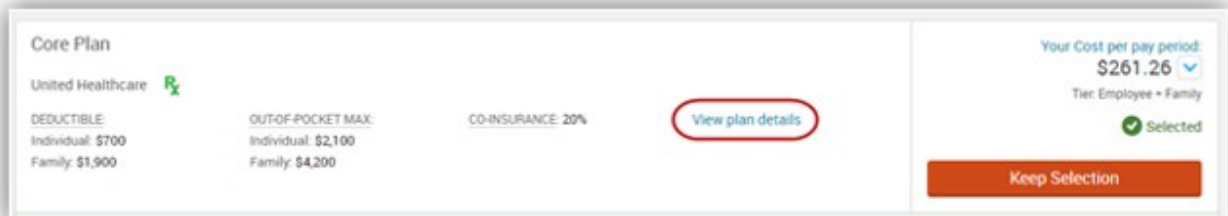
Note: You can change the dependents covered on the next page as well.

2. Add additional family members by clicking the Add Dependents link. Clicking this link takes you back to the Family Information page of the Your Info step, where you can enter information about the new dependent. To return to Your Benefits step after adding a new dependent, you **must** save the dependent and continue through the rest of the Your Info step.



PLAN SELECTION

1. Each plan offered is listed in a pod which explains the plans name, vendor, and plan data. The Plan Brochure link, if available, downloads the summary of benefits and the View Plan Details shows more details.



2. The plan's cost appears to the right of any plan data. Clicking the arrow next to the cost opens a flyout menu with more detailed information, which typically includes the total premium and employer contribution. The coverage tier, if applicable,

appears below your cost.

Contact Us (/s/contactsupport)

The screenshot shows a benefits plan summary for United Healthcare. It includes a search bar, a notification bell, and a cost summary table. The cost summary table is as follows:

Cost Summary (per pay period)	
Total Premium	\$752.92
Spousal Surcharge	\$0.00
Employee Cost	\$261.26

Other plan details visible include: DEDUCTIBLE (Individual: \$700, Family: \$1,900), OUT-OF-POCKET MAX (Individual: \$2,100, Family: \$4,200), and CO-INSURANCE 20%.

When you have chosen a plan, the selection appears in the corresponding benefit plan type pod on the landing page as complete.

LIFE INSURANCE

1. You can elect additional life insurance for you or your family members. When viewing the plan type, click Select then select an amount.
2. **Continue** completes the election choice.

Note: The maximum is based on your plan parameters.

The screenshot shows the 'Supplemental Employee Life' selection screen. It includes a 'Coverage Calculator' section with a 'How Much Do I Need?' button, a 'Life Insurance FAQ' section with a dropdown menu, and a 'VOICEDOVER AUDIO' section with a play button. The main content area shows the 'Voluntary Life - Employee' plan selected, with a coverage amount of \$150,000. A cost summary table is also present:

Cost Summary (per pay period)	
Total Premium	\$22.15
Employer Cost	\$0.00
Spousal Surcharge	\$0.00
Employee Cost	\$22.15

Additional information includes: Minimum Coverage Amount: \$25,000.00, Maximum Coverage Amount: \$232,942.32, Increments of \$1,000.00, and Guaranteed Coverage Amount: \$150,000.00. There are 'Continue' and 'Waive' buttons at the bottom.

3. If you elect more than the Guaranteed Coverage amount you are presented with the following message:

Contact Us (</s/contactsupport>)

Voluntary Employee Life

Coverage will not be issued until you receive an issue from the insurance carrier. Therefore, you will need to complete an Evidence of Insurability form. You will be directed to the SunLife web page after confirming this enrollment and will need to select "Apply for Evidence of Insurability online" under "My Life insurance benefits". When the carrier approves the requested amount, your HR Manager will update the system and the new coverage amount will be reflected on your confirmation statement and in your pay check.

OK

BENEFICIARIES

Designate or add beneficiaries on this page. Your Totals for each plan **must** equal 100% to continue. When finished, click **Continue**.

Company Wide Enrollment

Beneficiary Information

Designate or add beneficiaries to this page. When finished, click Continue to review your elections and complete your enrollment.

Basic Employee Life

Please choose your beneficiaries

Primary Beneficiaries (required)

Name	Percentage
My Estate (Employee)	<input type="text"/> %
Jen Tester (Spouse)	100.00 %
Danny Tester (Child)	<input type="text"/> %
Total: 100%	

[Add New Beneficiary](#)

[Add Secondary Beneficiaries](#) (optional)
Secondary beneficiaries receive money if your primary beneficiaries are unable to inherit.

- 1 Your Info
- 2 Your Benefits
- 3 Enroll
- Beneficiaries
- Review and Confirm
- 4 Complete

Your Cost per month **\$131.42**

Continue

[Back to Top](#)

REVIEW AND CONFIRM

- Carefully review all your benefit elections and covered dependents.

Note: You can change your elections by clicking Edit Selection for any of your plan selections. The dependents you wish to have included in your coverage are listed.

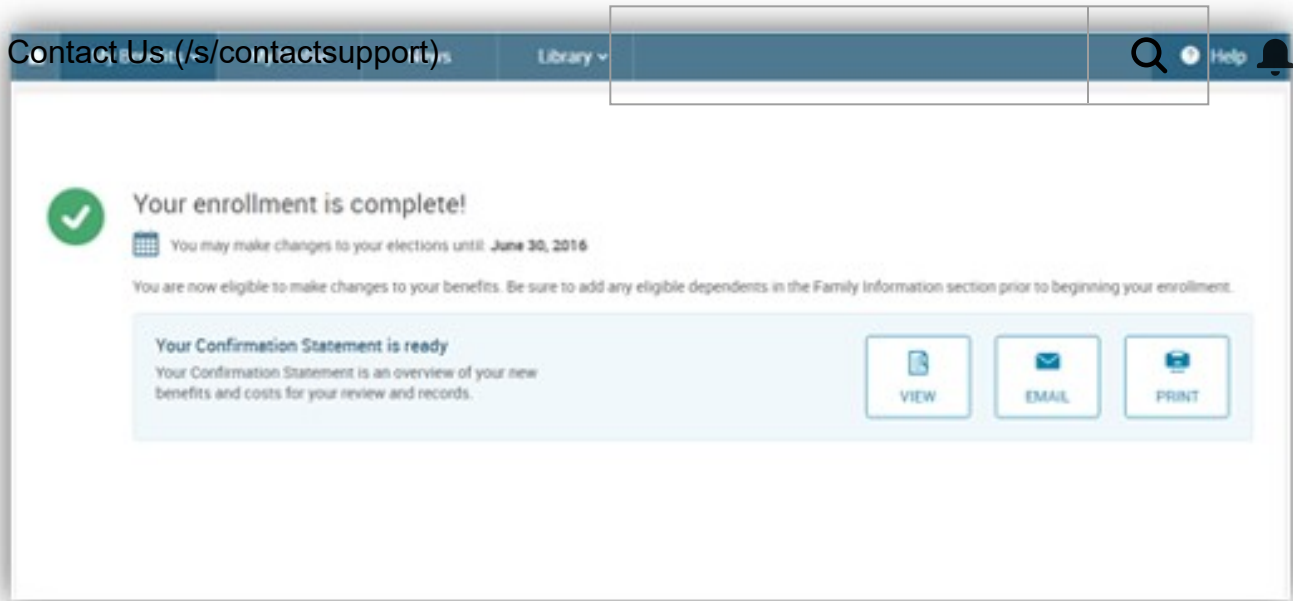
Contact Us (/s/contactsupport)

2. If you have elected more than the Guaranteed Coverage on a plan, information regarding completion of the Evidence of Insurability is found on this page as well. You are able to download the required form and can view the current coverage amount and premium versus the pending coverage amount and premium.

3. When you have reviewed your selections, check I agree and click **Continue**.

SUCCESS PAGE

It is highly recommended that you send yourself an email or print your confirmation statement of your elections.



Note: The EMAIL option only appears if you have an email address on file.

[Back to Top](#)

URL Name

Benefits-Advisor-New-Hire-Enrollment-Guide

People

(/s/topic/0TO6S000000chF2WAI/p...

Hiring, And Terminating

(/s/topic/0TO6S000000chF7WAI/hi...

HR

(/s/topic/0TO6S000000chFAWAY/hr)

Benefits

(/s/topic/0TO6S000000chFBWAY/b...

GettingStarted

(/s/topic/0TO6S000008M68wWAC/...

Help For Employees

(/s/topic/0TO6S000008M68yWAC/...

Related Articles

Benefits Advisor: Benefit Administration Guide (</s/article/Benefits-Advisor-Benefit-Administration-Guide>) 2.43K

Benefits Advisor: Running Reports after Open Enrollment Configuration (</s/article/Open-Enrollment-Running-Reports-after-Open-Enrollment-Configuration>) 604

Benefits Advisor: Launching Open Enrollment (</s/article/Benefits-Advisor-Launching-Open-Enrollment>) 803

Benefits Advisor: Employee Guide, Accessing your Benefits Portal (/s/article/Benefits-Advisor-Employee-Guide-Accessing-your-Benefits-Portal) Contact Us (/s/article/Contact-Us)



2.34K

Benefits Advisor: Plan Selection Guide (/s/article/Benefits-Advisor-Plan-Selection-Guide)

227

Trending Articles

2022 Federal Unemployment Tax (FUTA) Credit Reduction States and Adjustment Process

(/s/article/2022-Federal-Unemployment-Tax-FUTA-Credit-Reduction-States-and-Adjustment-Process)

Year-End Frequently Asked Questions (FAQ) and Resources

(/s/article/Year-End-Frequently-Asked-Questions-FAQ-and-Resources)

Year-End: How to Hold Books Open and How Long they Stay Open

(/s/article/Year-End-How-to-Hold-Books-Open-and-How-Long-they-Stay-Open)

Configure Company: Tax Documents

(/s/article/Configure-Company-Tax-Documents)

Customer Contacts: How to Set up and Manage Delivery Options

(/s/article/Customer-Contacts-How-to-Set-up-and-Manage-Delivery-Options)

Not what you are looking for?

Browse through all of our support articles

[View All Help Topics >](#)

(<https://support.paycor.com/s/topiccatalog>)

© 2021 Paycor, Inc | [Refer Paycor \(https://go.paycor.com/Referral.html\)](https://go.paycor.com/Referral.html) | [Privacy Policy \(https://www.paycor.com/privacy-policy/\)](https://www.paycor.com/privacy-policy/) | [1-855-565-3285 \(tel:18555653285\)](tel:18555653285) |