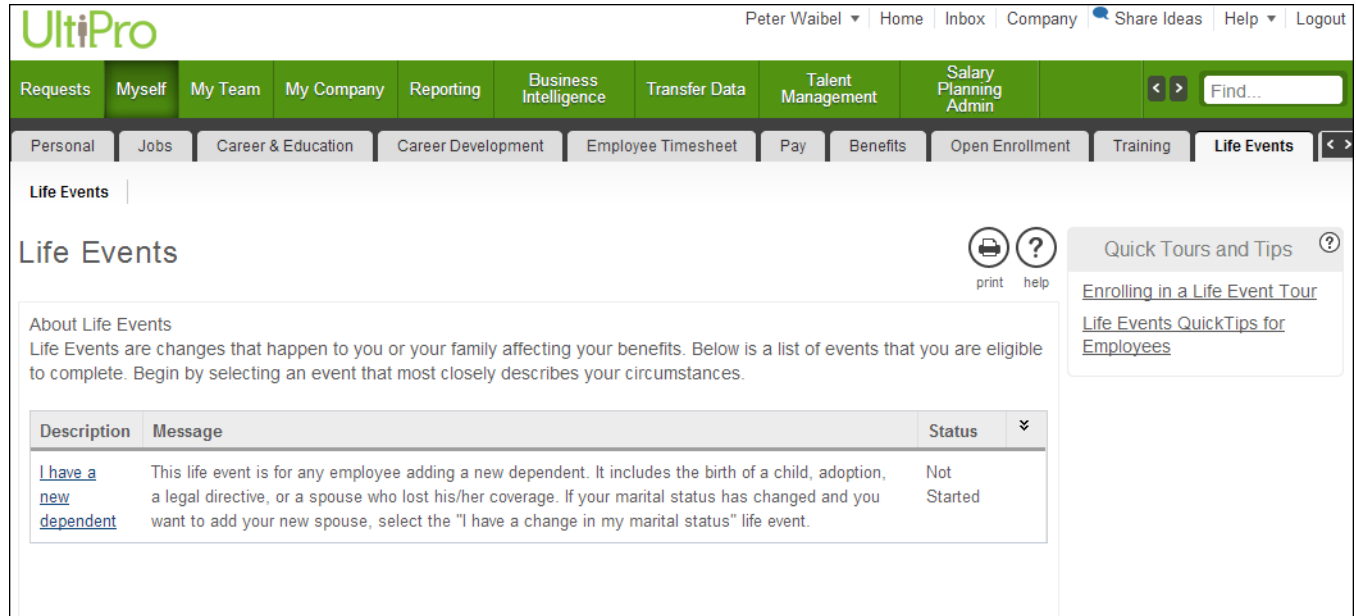


Selecting a Life Event

Select a life event on the Life Events page. You can view the description, message, status, and audit information for each life event.



The screenshot shows the UltiPro web interface. At the top, there is a navigation bar with the UltiPro logo on the left and user information (Peter Waibel) and links (Home, Inbox, Company, Share Ideas, Help, Logout) on the right. Below this is a secondary navigation bar with various functional areas: Requests, Myself, My Team, My Company, Reporting, Business Intelligence, Transfer Data, Talent Management, and Salary Planning Admin. A search bar is located to the right of these links. A third navigation bar contains tabs for Personal, Jobs, Career & Education, Career Development, Employee Timesheet, Pay, Benefits, Open Enrollment, Training, and Life Events. The Life Events tab is currently selected. The main content area is titled "Life Events" and includes a "print" icon and a "help" icon. Below the title, there is a section titled "About Life Events" with a brief explanation. A table lists available life events with columns for Description, Message, and Status. A "Quick Tours and Tips" sidebar is visible on the right, containing links for "Enrolling in a Life Event Tour" and "Life Events QuickTips for Employees".

Description	Message	Status
I have a new dependent	This life event is for any employee adding a new dependent. It includes the birth of a child, adoption, a legal directive, or a spouse who lost his/her coverage. If your marital status has changed and you want to add your new spouse, select the "I have a change in my marital status" life event.	Not Started

To select a life event:

1. From the Life Events page, select the Description link for the applicable life event. The About This Life Event page appears.
2. Review the life event information, as needed.

Entering Life Event Information

The About This Life Event page provides specific information related to this life event. The Draft button allows you to enter and save some information now and continue the election at a later time.

The screenshot displays the 'About This Life Event' page in the UltiPro system. The page header includes 'Life Events', 'I have a new dependent', and 'Peter M Waibel - 400100039'. The UltiPro logo is in the top right corner. A sidebar on the left lists 'Steps' with 'About This Life Event' selected, and other options like 'Verify Beneficiary And Dependent Information', 'Flexible Spending Account', 'Flexible Spending Account Health Care', and 'Confirm Your Elections Or Changes'. The main content area is titled 'About This Life Event' and features a toolbar with buttons for back, next, submit, draft, reset, cancel, print, and help. Below the toolbar, there are two input fields: 'When did this happen?' with a date picker set to 12/02/2013, and 'What was the reason?' with a dropdown menu showing 'Add dependents'. A paragraph of text explains that a new dependent such as the birth of a child, adoption, or a legal order allows for changes to benefit plans, but notes that if a dependent was previously eligible but not added during an annual enrollment process, they cannot be added at this time.

To enter life event information:

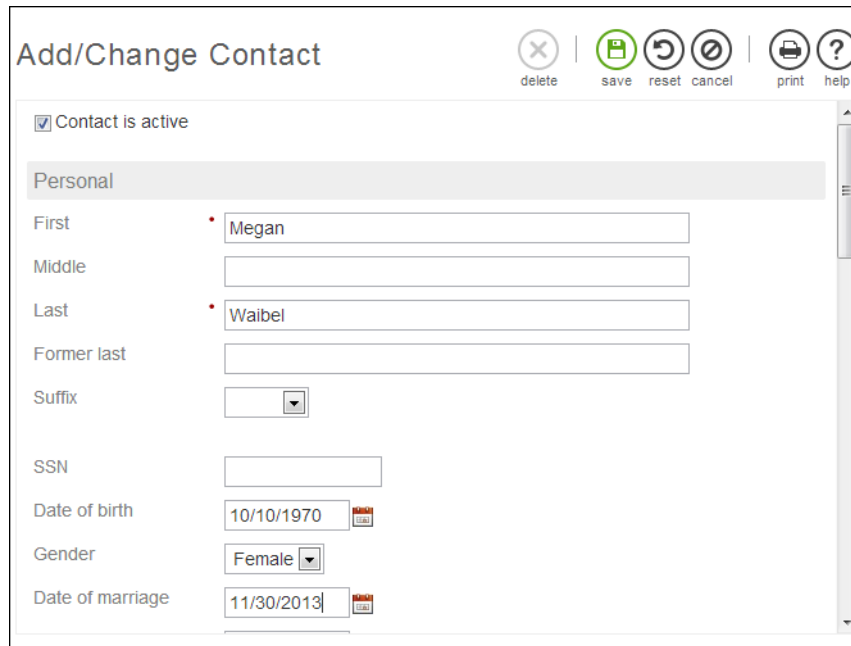
1. At the When Did This Happen field, enter a date for the life event, if needed.
2. At the What Was the Reason field, select a reason, if needed.
3. Select Next. Either the Verify Beneficiary and Dependent Information page or a required/optional plan page appears.

Verifying Beneficiaries and Dependents

Verify information about employee beneficiaries and dependents on the Verify Beneficiary and Dependent Information page. This page includes summary information for each contact name, relationship, and designation.

Hint:

If you are unable to add or change information on this page, or do not have an Add, Edit, or Delete button available to you, it may be due to how your company has configured the system. Please contact your company's system administrator for more details.



The screenshot shows a web form titled "Add/Change Contact". At the top right, there are six icons: delete (X), save (floppy disk), reset (refresh), cancel (no), print (printer), and help (question mark). Below the title, there is a checkbox labeled "Contact is active" which is checked. The form is divided into a "Personal" section. The fields are: First name (Megan), Middle name (empty), Last name (Waibel), Former last (empty), Suffix (dropdown menu), SSN (empty), Date of birth (10/10/1970), Gender (Female), and Date of marriage (11/30/2013). There are small red asterisks next to the First and Last name fields, and small calendar icons next to the Date of birth and Date of marriage fields.

To verify, add, or change beneficiaries and dependents:

1. View summary information.
2. To edit information about a beneficiary or dependent, from the Verify Beneficiary and Dependent Information page, select the Name link. The Add/Change Contact page appears. Edit the information, as needed. Select Save. The Verify Beneficiary and Dependent Information page appears. Select Next.

- To add a beneficiary or dependent, from the Verify Beneficiary and Dependent Information page, select Add. The Add/Change Contact page appears. Enter contact information, as needed. Select Save. The Verify Beneficiary and Dependent Information page appears. Select Next.










Life Events
I have a new dependent
Peter M Waibel - 400100039

UltiPro

Steps

- About This Life Event
- Verify Beneficiary And Dependent Information**
- Flexible Spending Account
- Flexible Spending Account Dependent Care
- Flexible Spending Account Health Care
- Confirm Your Elections Or Changes

Verify Beneficiary and Dependent Information

 add
 back
 next
 submit
 draft
 reset
 cancel
 print
 help

Find by

Name ^	Relationship	Designation
Waibel, Megan	Spouse	<input checked="" type="checkbox"/> Beneficiary <input checked="" type="checkbox"/> Dependent <input checked="" type="checkbox"/> Emergency contact

Enrolling in a Plan

Depending on the benefit plan and deduction/benefit type, you may select one or more benefit plans.

The Current Plan section displays deduction/benefit plans in which you are enrolled for the deduction/benefit type as of the current system date.

The Steps section displays the About Life Events or About Open Enrollment and Confirm Your Changes steps. A Verify Beneficiary and Dependent Information step also appears, if applicable. In addition, when only a single plan can be selected for the deduction/benefit type, all plans appear on one Select a Plan page.

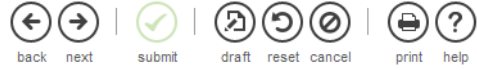
Evidence of insurability (EOI) may be required for life insurance plans. A message will appear stating that evidence of insurability is required for amounts surpassing what the company has configured as the guaranteed issue amount for a particular plan. The maximum benefit amount that can be elected will be displayed.

When multiple plans can be selected for the deduction/benefit type, each plan appears on separate pages. You must select or decline each plan. For example, for the Flexible Spending Account plan type, you may select or decline dependent care or health care.

Based on the valid dependent relationships configured by your company for the Open Enrollment plan, only those dependents that match the relationship configured for the plan will appear for enrollment. For example, while you may have "spouse", "child", and "brother" configured as dependents in your Contacts, the plan you are enrolling in may only have spouse and child configured as valid dependent relationships for enrollment into the plan.

- Example Deferred Compensation plan

Deferred Compensation



Select a Plan

Use the options below to choose or decline a plan.

For more information, please contact your Benefits Administrator.

Current Plan

as of 12/31/2013

► **401K Def Comp Percent Contribution**

I decline the 401K Def Comp \$ Contribution plan.

401K Def Comp \$ Contribution

\$600.00 Biweekly

Amount Per Pay Period

600.00

Goal Amount

Goal amount

\$600.00 per pay check*

Enter a value less than or equal to \$16,500.00.

\$15,600.00 annually*

*estimated amounts

401K Def Comp \$ Contribution Plan Information

The company matches 25% of your contribution.

Enroll Beneficiaries

Name	Primary	Secondary
<input checked="" type="checkbox"/> Megan Waibel	<input checked="" type="radio"/> 100.00 100.00 %	<input type="radio"/> <input type="text"/> 0.00 %

- Example Dental plan

Dental

← back
next →
✓ submit
📄 draft
↺ reset
⊗ cancel
🖨 print
👤 help

Select a Plan

Use the options below to choose or decline a plan.

You may choose either the Dental PPO or Dental HMO plan.

Current Plan
as of 12/31/2013

▶ **Dental HMO Plan**

I decline Dental plans.

Dental HMO Plan

Options

<input type="radio"/> Employee + Spouse	\$20.00
<input type="radio"/> Employee Only	\$12.50
<input type="radio"/> Family	\$40.00
<input type="radio"/> None	\$0.00

Dental HMO Plan Plan Information

This is the Dental HMO plan.

Dental PPO Plan

\$12.50 Biweekly

Options

<input type="radio"/> Employee + Spouse	\$20.00
<input checked="" type="radio"/> Employee Only	\$12.50
<input type="radio"/> Family	\$40.00
<input type="radio"/> None	\$0.00

Dental PPO Plan Plan Information

This is the Dental PPO plan.

Employee Only Option Information

If you select this option, you will enroll yourself with no dependents.

- Example Medical plan

Medical

← back → next ✓ submit 📄 draft ↺ reset ⊗ cancel 🖨 print 👉 help

You may choose to enroll in either the CIGNA HMO or PPO plans. The CIGNA HMO plan requires you to select a doctor when you enroll either yourself or your dependents.

▶ Medical PPO Plan

I decline Medical plans.

Medical HMO Plan

Options

<input type="radio"/> Employee + Child(ren)	\$55.00
<input type="radio"/> Employee + Spouse	\$50.00
<input type="radio"/> Employee Only	\$40.00
<input type="radio"/> Family	\$60.00
<input type="radio"/> None	\$0.00

Medical HMO Plan Plan Information
This is the Medical HMO plan.

Medical PPO Plan
\$40.00 Biweekly

Options

<input type="radio"/> Employee + Child(ren)	\$65.00
<input type="radio"/> Employee + One	\$50.00
<input type="radio"/> Employee + Spouse	\$60.00
<input checked="" type="radio"/> Employee Only	\$40.00
<input type="radio"/> Family	\$60.00
<input type="radio"/> None	\$0.00

Medical PPO Plan Plan Information
This is the PPO plan.

Employee Only Option Information
If you select this option, you will enroll yourself with no dependents.

Physicians

	Physician name	ID
Peter M Waibel	<input type="text" value="Dr. Smith"/>	<input type="text"/>

To enroll in a plan:

1. Select or decline plan(s).

Note:

Select the Draft button to enter and save information now and then continue the election at a later time. When you return to complete your elections, the About Life Events or About Open Enrollment page appears.

2. Depending on how the deduction/benefit plans are configured, additional fields may appear. Complete the following:
 - Enter a flat amount or percent, if applicable. UltiPro displays an amount based on the plan configuration as well as employee pay frequency.
 - Select a benefit option such as employee only, employee plus one, or family, if applicable. Enter additional required information (for example, you may need to enroll dependents and enter dependent information).
 - Enter additional information.

- For a medical plan type, you may be required to enter physician information.
- For a flexible spending plan type, you may be required to enter a goal amount. Once the amount is reached, the deduction is stopped.
- For a plan configuration with beneficiaries, you may be required to enroll applicable beneficiary information as well as percentages for primary and secondary beneficiaries.

Note:

Primary beneficiaries must total 100%; secondary beneficiaries must total 100%.

Depending upon the plan configuration, when you decline a plan, you may be required to enter a decline reason; a disclaimer message may appear.

3. Select the dependents to be enrolled in the plan.
4. Select Next.

Reviewing and Submitting Elections

Review the election information on the Confirm Your Changes page. This page contains personal information as well as benefits selected and declined. You can compare current benefits to the newly selected benefits. Selected plan details include covered family members, pay period cost, and beneficiaries, when applicable.

Confirm Your Elections or Changes

← back | → next | ✓ submit | 📄 draft | ↺ reset | ⊘ cancel | 🖨 print | ❓ help

This page shows a summary of the changes you are about to make. Please verify your changes carefully before submitting. If you need to make any edits you can do so by selecting the plan type or plan description hyperlink to return to the election page. When you are satisfied with your changes, please click the Submit button on the toolbar. Effective 01/01/2014

Personal Information

Name	Peter M Waibel	Home phone	Private
Address	44 Greenbriar Ave Spring Valley, NY 07675	Work phone	(201) 841-7400
		Work extension	124
		E-mail	pmwaibel@anotherworld.com

▶ **Current Benefits - As Of 12/31/2013** Estimated Total Cost: \$120.00 ?

▼ **New Benefits - As Of 01/01/2014** Estimated Total Cost: \$652.50 ?

Plan Type	Plan Details	Your Bi-Weekly Cost
Deferred Compensation	401K Def Comp \$ Contribution Goal Amount: \$16,500.00 Covered Family Members Peter M Waibel	\$600.00

To review and submit elections:

1. From the Confirm Your Changes page, review the selected and declined benefit type and plan details including covered family members, plan beneficiaries, and cost information.
2. Return to the applicable page to make any changes, if needed.
3. Select Draft to continue the election at a later time or select Submit to complete your elections now. If you select Submit, you cannot make any changes without the assistance of your Benefits Administrator. You can print the Confirm Your Changes page. If you select OK, the Confirmation page appears.
4. Select Print to print a summary of your elections.
5. Select Close.

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