USER GUIDE

BENEFITS PROCESSING

WHEN TO USE THE BENEFIT PROCESS FORM AND CREATING THE ACTION................................................................. 2

STAND-ALONE BENEFITS ACTION ............................................................................................................................................. 3

The first tab to be completed is the Transaction Information Tab: ................................................................................................. 3
The next tab to be completed is the Employee Information Tab: ................................................................................................. 4
Using the CAP HR Lookup feature to auto-populate the Employee Information Tab: ............................................................ 5
Information about the data from Capital HR ........................................................................................................................................ 5

ACTIONS CREATED FROM CSD APPOINTMENT ACTIONS ................................................................................................. 6

Transaction Information Tab: .................................................................................................................................................. 6
Employee Information Tab: .................................................................................................................................................. 7

ACTIONS CREATED FROM CSD SEPARATION ACTIONS ................................................................................................. 8

Transaction Information Tab: .................................................................................................................................................. 8
Employee Information Tab: .................................................................................................................................................. 8
Benefits Enrollment Information: .................................................................................................................................................. 9
FEHB ........................................................................................................................................................................................................... 10
FEGLI .......................................................................................................................................................................................................... 10
TSP -1 ......................................................................................................................................................................................................... 10
TSP – Catch Up .................................................................................................................................................................................................. 10
FEGLI / FERS / Unpaid Compensation Beneficiary Designation ...................................................................................... 10

COMMUNICATING WITH EMPLOYEES USING THE ROUTING MENU .............................................................................. 11

REMINDER EMAILS........................................................................................................................................................................ 13

Reminder to Log Into Onboarding Manager and Submit Benefit Forms .................................................................................... 13
Check Benefit Forms in Onboarding Manager .................................................................................................................................. 14
Employee Waives or Declines Benefits Coverage ......................................................................................................................... 15
Employee Receipt of Forms .......................................................................................................................................................... 16

MOVING / COMPLETING THE ACTION ................................................................................................................................. 17
When to Use the Benefit Process Form and Creating the Action

The **Benefits** workflow is used to track the processing of new employee benefit enrollments, as well as benefit inquiries and benefit change requests. The Benefits workflow operates in two ways: (1) as a stand-alone actions created by BPLB staff, and (2) as a sub-process of the CSD’s Appointment and Separation processes.

- **You can create or open these actions in one of two ways:**
  1. You can initiate the action by clicking on the checkbox next to “Benefits” in the BPLB Process Initiation Bizcove and clicking on “Start”.

  ![BPLB Process Initiation](image1)

  2. If the action is generated as a sub-process from a CSD-initiated Appointment or Separation, it will appear as an item in your worklist.

  ![BPLB Worklist](image2)
Stand-Alone Benefits Action

The first tab to be completed is the Transaction Information Tab:

All fields on the Transaction Information Tab are mandatory and must be completed, except for the ‘Comments’ box. The remaining sections are to be completed based on the type of activity being carried out.

The “WiTS #”, “Action Type”, “Date Received in BPLB”, and “Date Entered” fields are auto-populated. You will need to enter the Proposed Effective Date and select the Benefits Specialist and Benefits Assistant who will be working on the item.

- Select the Benefits Event:

Benefits Event: From the drop-down menu, choose the reason for the benefits processing.
- Inquiry: if the employee has asked for information
- LWOP: Leave Without Pay
- Name Change: the employee has changed his/her name
- New Hire: the employee is a new hire
- Open Season: action is being processed during open enrollment season
- Transfer (in): the employee has transferred to the NIH
- Qualifying Life Event: action is being processed as a result of an employee’s QLE
- Reemployed Annuitant: the employee is a reemployed annuitant
- Reinstatement (Rehire): the employee has been rehired
- Separation: the employee has been separated
- Status/Coverage Change: the employee is changing benefits coverage/status
- Other: a reason other than one listed above

The next tab to be completed is the Employee Information tab:

• **Current NIH Employee?** Before completing the Employee Information tab, indicate if the action is for a current NIH Employee (i.e., their record is active and processed in Capital HR). For a majority of actions, this will be ‘Yes.’ In cases where you are handling actions for new hires, whose appointment action has not been processed yet, you may need to select ‘No.’

**WITS Tip:** Before determining if an employee is active in Capital HR, select ‘Yes’ on the ‘Current NIH Employee’ field first. If you cannot locate the employee, it most likely means they are no longer in Capital HR. In these cases, you will have to select ‘No’ and type the employee’s information manually.
Using the Cap HR Lookup Feature to auto-populate the employee information tab

1. Click on the Cap HR Lookup link under the ‘Employee Last Name’ field.
2. Type in part or all of the employee’s last name and then click the ‘Search’ button. To further narrow the list of names returned, you can also add the employee’s first name.
3. Locate the employee in the ‘Select User’ field and then click the ‘Select’ button. The employee’s title and administrative code will be displayed to assist you with your selection.

WiTS Tip: Use the Cap HR Lookup feature. It is the only way to generate the ‘Employee ID.’ WiTS uses the ‘Employee ID’ to relate other WiTS actions to a specific employee. If you cannot locate the employee using the Cap HR Lookup, please try again using the employee’s legal last name (as listed in Capital HR). If you still encounter issues, please contact HR Systems Support.

Information about the data from Capital HR

- The WiTS Team downloads processed job, position, employee, and pay data from Capital HR on a bi-weekly basis at the beginning of each pay period.
- The WiTS Team downloads employee information from NED (e.g., email address) on a bi-weekly basis at the beginning of each pay period.
- The WiTS Team downloads the data as-is from Capital HR and NED. Questions regarding the authenticity or integrity of the data should be directed toward the appropriate division or branch in the Office of Human Resources. Questions regarding the employee’s email address should be directed to the Administrative Officer.
If you cannot locate the employee using the Capital HR lookup, then select ‘No’ for the ‘Current NIH Employee’ field. You will have to enter the First and Last Name along with the Employee’s ID (in Capital HR) before completing the form.

**Transaction Information Tab:**

- **WITS #:** 30421
- **Action Type:** Benefits Processing
- **Institute/Center**: Test
- **Proposed Effective Date:** 04/11/2014
- **Benefits Event**: New Hire
- **Benefits Specialist**: Nuran Davis, Ann
- **CSD Branch Chief**: Imala, Madhu
- **CSD HR Specialist**: Verge, Terrye
- **CSD SPA**: Kerr, Ken
- **Date Entered:** 04/11/2014 11:51 AM
- **Date Rec’d in BPIB**: 04/11/2014
- **Effective Date:** 04/14/2014
- **Benefits Assistant**: Verge, Terrye
- **CSD Team Leader**: D’Andrea, Mike
- **CSD HR Assistant**: Belmont, Courtney
- **Comments (Limit 3000 characters)**: 

Last Updated: 5/13/2015
All of the information on the Transaction Information tab will be locked upon receipt in BPLB with the exception of the ‘Benefits Specialist’, ‘Benefits Assistant’, ‘Benefits Event’ and ‘Comments’ fields.

- **Benefits Specialist**: The Benefits Specialist defaults to the staff member assigned to the employee’s IC. This may be changed if needed.
- **Benefits Assistant**: The Benefits Specialist defaults to the staff member assigned to the employee’s IC. This may be changed if needed.
- **Benefits Event**: The Benefits Event field will default to either New Hire, Transfer In or Reinstatement (Rehire) based on the NOAC selected by the CSD rep on the Appointment form, but may be changed if needed.
- **Comments**: If applicable, enter any comments related to the action.

### Employee Information tab:

<table>
<thead>
<tr>
<th>Transaction Information</th>
<th>Employee Information</th>
<th>Benefits Enrollment Information</th>
</tr>
</thead>
</table>

#### Employee Information

- **First Name**: Dustin
- **Last Name**: Padroza
- **Employee Email Address**: vegers@od.nih.gov

#### Position and Pay Information

- **Position Title**: Red Sox Second Baseman
- **Series**: 1212
- **Step**: 7
- **Job Code**: 23432124
- **CAN**: 23432124
- **Basic Pay**: 5.00
- **Adjusted Basic Pay**: 5.00

All of the information on the Employee Information tab will be locked upon receipt in BPLB with the exception of the ‘Employee Email Address’ field.

- The Employee Email Address will contain the email address that was entered by the CSD rep on the Appointment form. If the employee has an NIH email address, you may change it to that if you like.
Actions Created From CSD Separation Actions

Transaction Information Tab:

- All of the information on the Transaction Information tab will be locked upon receipt in BPLB with the exception of the ‘Benefits Specialist’ and ‘Comments’ fields.
  - Select the appropriate ‘Benefits Specialist’ and, if applicable, enter any comments related to the action.

Employee Information tab:

- All of the information on the Employee Information tab will be locked upon receipt in BPLB with the exception of the ‘Employee Email Address’ field.
  - If the employee is no longer at NIH, you can change their email to their personal address if you wish to use the Communicating with Employees options explained later in this guide.
The “Benefits Enrollment Information” tab captures information related to the benefits action being processed for the employee. This section of the guide applies to both Stand-Alone Benefit Actions and Appointment and Separation Actions created by CSD.

<table>
<thead>
<tr>
<th>Transaction Information</th>
<th>Employee Information</th>
<th>Benefits Enrollment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form # SF-2809 (FEHB)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of FEHB Action Requested:</td>
<td>Date Received:</td>
<td>FEHB Effective Date:</td>
</tr>
<tr>
<td>Form # SF-2817 (FEGLI)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of FEGLI Action Requested:</td>
<td>Date Received:</td>
<td>FEGLI Effective Date:</td>
</tr>
<tr>
<td>Form # TSP-1 (TSP-1)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of TSP-1 Action Requested:</td>
<td>Date Received:</td>
<td>TSP-1 Effective Date:</td>
</tr>
<tr>
<td>Form # TSP-1-C (TSP-Catch Up)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Type of TSP-Catch up Action Requested:</td>
<td>Date Received:</td>
<td>TSP-Catch up Effective Date:</td>
</tr>
<tr>
<td>Form # SF-2823 (FEGLI Beneficiary Designation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Received:</td>
<td></td>
<td>Date Sent to eOPF:</td>
</tr>
<tr>
<td>Form # SF-3102 (FERS Beneficiary Designation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Received:</td>
<td></td>
<td>Date Sent to eOPF:</td>
</tr>
<tr>
<td>Form # SF-1152 (Unpaid Compensation Beneficiary Designation)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Received:</td>
<td></td>
<td>Date Sent to eOPF:</td>
</tr>
<tr>
<td>Form # DG-60 (Federal Employees Health Benefits Program Premium Conversion Waiver/Election Form)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Received:</td>
<td></td>
<td>Date Sent to eOPF:</td>
</tr>
<tr>
<td>Form # SF-2022 (Request for Insurance Federal Employees Group Life Insurance Program)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applicable?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Date Received:</td>
<td></td>
<td>Date Sent to eOPF:</td>
</tr>
</tbody>
</table>

**WITS Tip:** For all of the forms listed, you will need to indicate if they are applicable to the employee. Your choice here will dictate whether or not the related fields are mandatory. For actions where the Benefits Event is Separation, all forms except the SF-2809 (FEHB) will be defaulted to ‘No’. 

Last Updated: 5/13/2015
**FEHB**

- **Type of FEHB Action Requested:** Indicate whether the request is to start, change, or stop enrollment, or the employee is not enrolled or if the request is for Temporary Continuation of Coverage (TCC).
  - If ‘Not Enrolled’ is selected, choose the reason (*Employee Declined or Form Not Submitted*).
  - If TCC is selected, enter the date the package was sent to the employee and the date sent to NFC.
- **Date Received:** Enter the date the form/request was received in BPLB.
- **FEHB Effective Date:** Enter the effective date.
- **Date Sent to eOPF:** Enter the date the form was transmitted to eOPF.

**FEGLI**

- **Type of FEGLI Action Requested:** Indicate whether the request is to start, change, stop or waive enrollment.
- **Date Received:** Enter the date the form/request was received in BPLB.
- **FEGLI Effective Date:** Enter the effective date.
- **Date Sent to eOPF:** Enter the date the form was transmitted to eOPF.

**TSP -1**

- **Type of TSP - 1 Action Requested:** Indicate whether the request is to start, change, stop or decline enrollment.
- **Date Received:** Enter the date the form/request was received in BPLB.
- **TSP - 1 Effective Date:** Enter the effective date.
- **Date Sent to eOPF:** Enter the date the form was transmitted to eOPF.
- **TSP – Catch Up**

- **Type of TSP – Catch Up Action Requested:** Indicate whether the request is to start, change, or stop enrollment.
- **Date Received:** Enter the date the form/request was received in BPLB.
- **TSP – 1 Catch Up Effective Date:** Enter the effective date.
- **Date Sent to eOPF:** Enter the date the form was transmitted to eOPF.

**FEGLI / FERS / Unpaid Compensation Beneficiary Designation**

For each applicable designation type, enter:
- **Date Received:** Enter the date the form(s) were received.
- **Date Sent to File Room:** Enter the date the form was given to the file room to be scanned in eOPF.
Federal Employees Health Benefits Program Premium Conversion Waiver/Election Form

- **Date Received**: Enter the date the form(s) were received.
- **Date Sent to File Room**: Enter the date the form was given to the file room to be scanned in eOPF.

Request for Insurance Federal Employees Group Life Insurance Program

- **Date Received**: Enter the date the form(s) were received.
- **Date Sent to eOPF**: Enter the date the form was given to the file room to be scanned in eOPF.

Notice of Change in Health Benefits Enrollment

- **Date Completed in HR**: Enter the date the action was completed by OHR.
- **Action Type**: Select either Date of Termination, Transfer In, Reinstatement, name Change of Enrollee
- **Effective Date**: Enter the date the change will be effective.
- **Date Sent to eOPF**: Enter the date the form was given to the file room to be scanned in eOPF.

Communicating with Employees Using the Routing Menu

The next two emails are sent when the appropriate selection is made from the routing menu:

- **Send FEHB Pro’d Email to Employee**: Sends an email to the employee informing him/her that the benefit form has been received. Note: you will need to complete the ‘FEHB Effective Date’ field before sending this email.

---

The Benefits and Payroll Liaison Branch, Workforce Relations Division, Office of Human Resources, has processed your health benefit enrollment and reported to the carrier. The effective date of the enrollment is 09/14/2011.

For more information about FEHB, please visit OPM’s website at: [http://www.opm.gov/insure/health/index.asp](http://www.opm.gov/insure/health/index.asp)
- **Send FEHB TCC Conf Email**: Sends an email to the employee informing him/her that their FEHB TCC form has been received by the BPLB and sent to the NFC.

The Benefits and Payroll Liaison Branch, Office of Human Resources has received your health benefit form to continue enrollment through the Temporary Continuation of Coverage provisions. After we confirm eligibility, the form will be forwarded to the National Finance Center for processing. A copy of the form, along with additional information, will also be mailed to your home address.

Reminder Emails
Throughout the benefits process, WiTS sends reminder emails to HR staff as well as to the employee. These emails are intended to keep the processes moving in a timely fashion and to help establish communication lines.

With the exception of the ‘Check Benefit Forms in Onboarding Manager Email’, all of the emails listed below are sent at approximately 6:00am (ET) every morning (including weekends and holidays). The ‘Check Benefit Forms in Onboarding Manager Email’ is sent on the second Wednesday of every pay period.

**Reminder to Log into Onboarding Manager and Submit Benefit Forms**
WiTS sends the following notification to the appointee’s primary NIH email address 45 days after the Effective Date where the Benefits Event is ‘New Hire’ or ‘Reinstatement (rehire)’ and the FEHB, FELGI, and TSP-1 forms have not been received. *If the employee’s primary email address has not been updated in NED, the email is sent to their address on the Benefits form.*

BPLB uses this email to remind the new employee to submit their benefit forms.

**Email Notes:**
- It is sent from the Benefits Assistant
- It is only sent for active actions created from the CSD Appointment process
- It is sent for FEHB, FELGI, and TSP-1 forms where the ‘Date Received’ is not complete
- It is only sent for new hires who attend orientation (Full Orientation or Presentation Only)
- It is sent if the ‘Applicable’ field is ‘Yes’ or blank
- It is NOT sent if the ‘Applicable?’ field = ‘No’

---

**Subject: Reminder to Log into Onboarding Manager and Submit Benefit Forms**

Hello George Bailey,

You are receiving this email because you were recently hired into a new appointment and attended the NIH New Employee Orientation on 10/20/2014.

If you haven’t already, please log into the [Onboarding Manager](#) system and submit the below benefit related form(s) related to your appointment as a(n) Philanthropist GS-0301-15.

- SF-2809 – Federal Employees Health Benefits
- SF-2817 – Federal Group Life Insurance
- TSP-1 – Thrift Savings Plan

Please disregard this email if you did not receive access to Onboarding Manager or if you are not eligible to enroll or change your benefit related forms.

Thank you and please contact me if you have questions.
**Check Benefit Forms in Onboarding Manager**

WiTS sends the following notification to the HR Assistant on the second Wednesday of every pay period for active Benefit actions where the Benefits Event is ‘New Hire’, ‘Reinstatement (rehire)’, or ‘Transfer (in)’ and the FEHB, FELGI, and TSP-1 forms have not been received.

BPLB uses this email to remind the Benefits Assistant to login to Onboarding Manager to check whether the new hire has submitted their benefit forms.

**Email Notes:**
- It is sent from WiTS to the Benefits Assistant
- It is only sent for active actions created from the CSD Appointment process
- It is sent for FEHB, FELGI, and TSP-1 forms where the ‘Date Received’ is not complete
- It is sent if the ‘Applicable’ field is ‘Yes’ or blank
  - Exception is for Transfer (in), where ‘Applicable’ must be ‘Yes’
- It is NOT sent if the ‘Applicable?’ field = ‘No’
- The email stops 91 days after the Effective Date of the Appointment action

---

**Subject:** Check Benefit Forms in Onboarding Manager (HWT# 30726) Hank Goldberg (Benefits Event: New Hire)

Hello Terrye,

Please be reminded to log into the [Onboarding Manager](#) system and check on the status of the submission of the following forms(s) for Hank Goldberg whose Appointment was effective on 04/30/2014 as a(n) Health Science Administrator GS-0610-14 in the Test.

- SF-2809 – Federal Employees Health Benefits
- SF-2817 – Federal Group Life Insurance
- TSP-1 – Thrift Savings Plan

Thank you.
**Employee Waives or Declines Benefits Coverage**

WITS sends the following notification to the appointee’s email address on the Benefits form the day after the Benefits Assistant completes the form where the Benefits Event is ‘New Hire’ or ‘Reinstatement (rehire)’ and the employee has waived/declined health, life, or TSP coverage.

BPLB uses this email to communicate the employee’s decision to waive or decline coverage to them.

**Email Notes:**
- It is sent from the Benefits Assistant to the employee’s email address on the Benefits form
- It is only sent for actions created from the CSD Appointment process
- It is sent the day after the Benefit action is completed
- It is sent for FEHB, FELGI, and TSP-1 forms where the Applicable field = ‘Yes’ AND
  - The Type of FEHB Action Requested is ‘Not Enrolled’, OR
  - The Type of FEGLI Action Requested is ‘Waived Coverage’, OR
  - The Type of TSP-1 Action Requested is ‘Declined Enrollment.’
**Employee Receipt of Forms**

WiTS sends the following notification to the appointee’s email address on the Benefits form the day after the Benefits Assistant updates the related benefit fields for each form received.

BPLB uses this email to inform the employee that their benefit forms have been received.

**Email Notes:**

- It is sent from the Benefits Assistant to the employee’s email address on the Benefits form
- The email applies to all benefit forms and benefit events
- It is sent the day after the related benefit fields for each form received. The receipt of a benefits form is only communicated to the employee once.
  - The email is sent only when the form is marked ‘Applicable’ AND Date Received, Effective Date and Date Sent to eOPF are not complete.
    - **One exception: when Type of FEHB Action Requested = TCC, then the email will be sent when the Date Received and Effective Date are complete.**
- An email is not sent for benefit forms when
  - Type of FEHB Action Requested = Not Enrolled
  - Type of FEGLI Action Requested = Waived Coverage
  - Type of TSP-1 Action Requested = Declined Enrolled
Moving / Completing the Action

You may move the action forward by selecting an option from the drop-down response menu at the top left side of the form:

- **Send to Benefits Specialist**: Sends the action to the assigned Benefits Specialist.
- **Completed**: Indicates that all tasks for the action have been completed. The action is marked complete in the database, and is moved to Archives. This response should be chosen only when all associated tasks have been done.
- **Cancel**: Cancels the transaction. This should be used to cancel transactions initiated in error.