

Adding a Benefit for an Employee

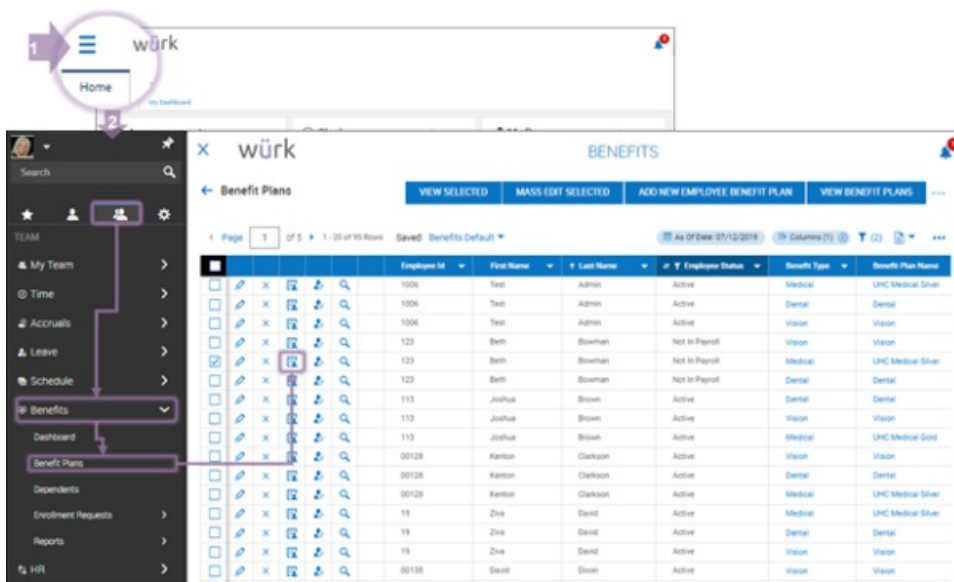
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These instructions guide you in manually adding a benefit to an employee, on systems upgraded to the latest Würk release. Your Admin Settings for onboarding new employees and for **Life Change** events can also trigger the automatic addition of benefits to the employee. Other factors in your company set up and in the rules for the benefit plan may affect whether the employee needs to take additional steps to activate the benefit; some companies require that the employee enroll or waive the plan after you add it to the profile. Rules within the benefit plan control whether you can add a plan for an employee. For details about your setup, please check with your administrator. Adding a benefit to an employee generally means they will see it under **My Info>Benefits>My Benefits**.

Menu items and on-screen options may vary depending on your configuration and Security Profile.

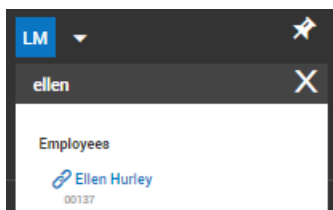
START HERE

1. From the Main Menu, click **Team>Benefits>Benefit Plans** and click the Employee Information icon next to the employee to whom you want offer the benefit.

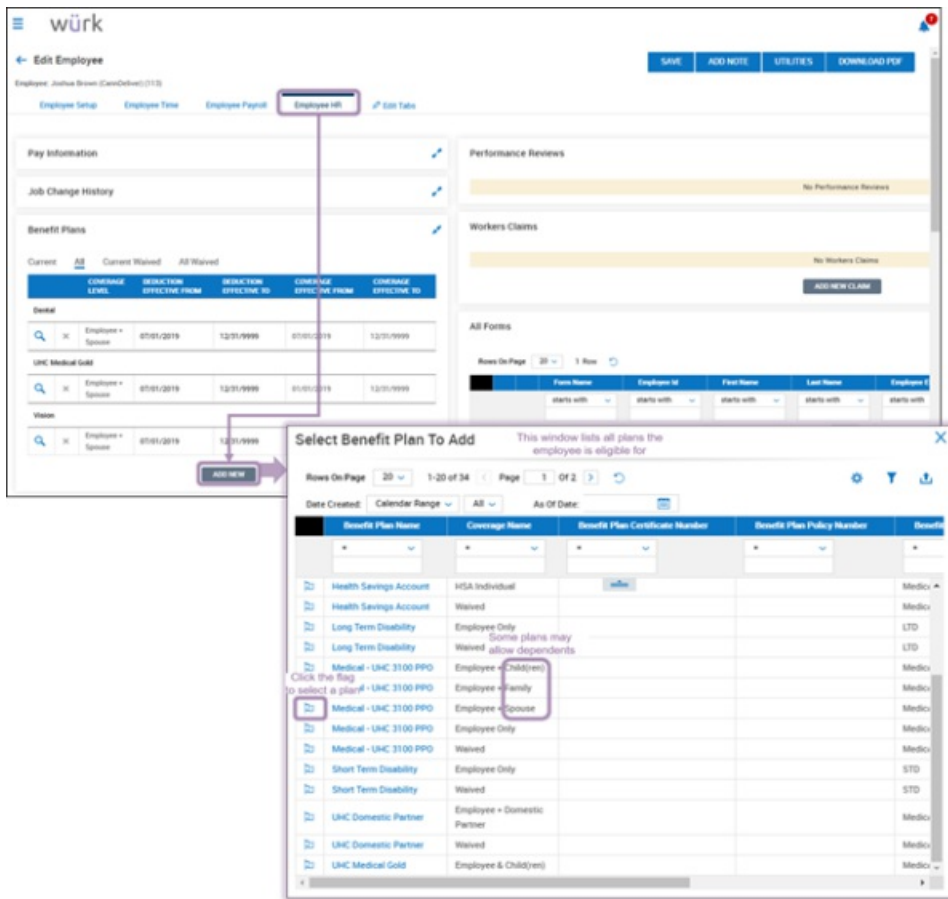


You can add the same benefit for more than one employee at once by clicking **Multiple** in the Employee field. This takes you to a screen where you can choose all the employees to whom you will grant the benefit. Once you have chosen the employees, click the **Use Filter**.

To quickly navigate to an employee record, you can search for them by name in the Search field at the top of the main menu.



2. On the screen that follows, click the **Employee HR** tab and then click **ADD NEW**. From the list of benefits, select the plan you want to offer to the employee and click the flag icon.



You may be prevented from adding a benefit if it overlaps with an existing one for the employee, for example, if you attempt to add a medical plan with effective dates that overlap one the employee already has. To enable the new plan to be added, you may need adjust the effective dates of the pre-existing plan. Additionally, if the Benefit plan has not been defined to include Spouses or Dependents, the **ADD SPOUSE** option will not show during this process (shown below). If you need to add these, be sure to choose a plan that includes them.

When viewing Benefit Plans, you can download PDF from the Actions **...** menu.

3. On the next screen, edit the benefit to set the correct effective dates, deduction and coverage timing, and to work with dependents.

Employee Benefit Plan

Make sure these dates are correct. These affect the employee's paycheck and coverage.

Benefit Plan Effective From: 01/01/2019 To: 12/31/9999
 Deduction #1 Effective From: 01/01/2019 To: 12/31/9999
 Coverage Effective From: 01/01/2019 To: 12/31/9999

Dependents/Beneficiaries

Identify Spouse (as Required)
 Identify Children (as Required)
 Identify Beneficiaries (as Required)
 Identify Contingent Beneficiaries (as Required)

SPOUSE: **ADD SPOUSE**

This option, when available, enables you to add a spouse (or other dependent) from the employee's profile to the plan.

All Employee Benefit Plans

COVERAGE LEVEL	COVERAGE EFFECTIVE FROM	COVERAGE EFFECTIVE TO
Dental	01/01/2019	12/31/9999
Vision	01/01/2019	12/31/9999
UHC Medical Gold	01/01/2019	12/31/9999

All Employee Deductions

DEDUCTION NAME	DEDUCTION EFFECTIVE FROM	DEDUCTION EFFECTIVE TO
Health	01/01/2019	12/31/9999
Health	01/01/2019	06/30/2019

You can work with dependents or beneficiaries in two ways:

1) ADD

ACCOUNT DEPENDENT enables you to add spouses, partners, children, and other dependents allowed by your company to the employee's profile, which in turn enables you to include them in eligible plans. The dependent must first be entered into Würk under the employee's profile in order for you to be able to add them to a benefit plan.

2) Buttons in the Dependents/Beneficiaries box, such as ADD SPOUSE and

ADD CHILD, enable you to select from the dependents defined above and include them in this plan. These appear depending on what the plan allows.

Adding Spouses and Dependents

4. If the benefit plan you are adding for an employee includes Spouses or Dependents, from the Add Benefit Plan screen, click ADD SPOUSE (or ADD CHILD, etc.).

Employee Benefit Plan

Benefit Plan Effective From: 01/01/2019 To: 12/31/9999
 Deduction #1 Effective From: 01/01/2019 To: 12/31/9999
 Coverage Effective From: 01/01/2019 To: 12/31/9999

Dependents/Beneficiaries

Identify Spouse (as Required)
 Identify Children (as Required)
 Identify Beneficiaries (as Required)
 Identify Contingent Beneficiaries (as Required)

SPOUSE: **ADD SPOUSE**

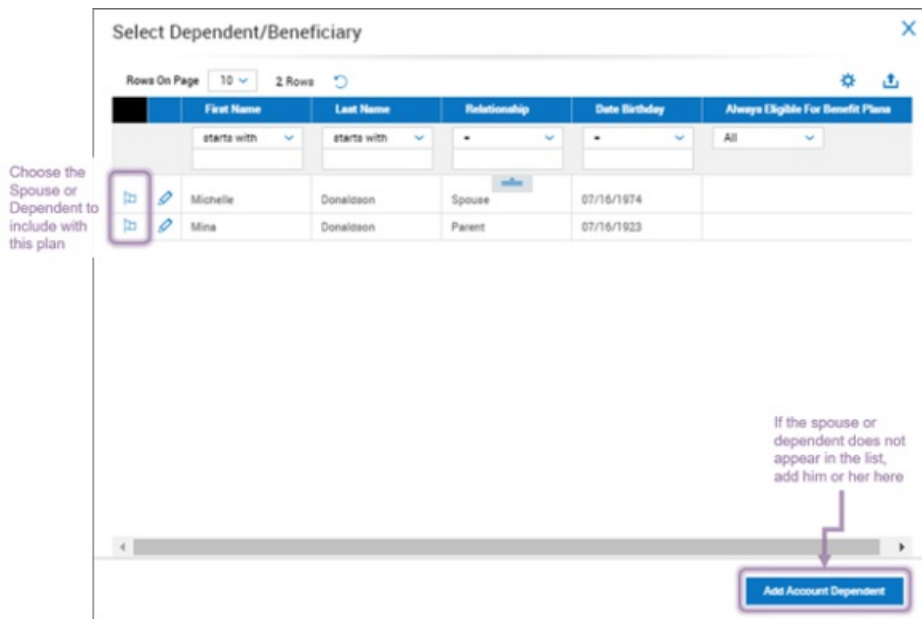
All Employee Benefit Plans

COVERAGE LEVEL	COVERAGE EFFECTIVE FROM	COVERAGE EFFECTIVE TO
Dental	01/01/2019	12/31/9999
Vision	01/01/2019	12/31/9999
UHC Medical	01/01/2019	12/31/9999

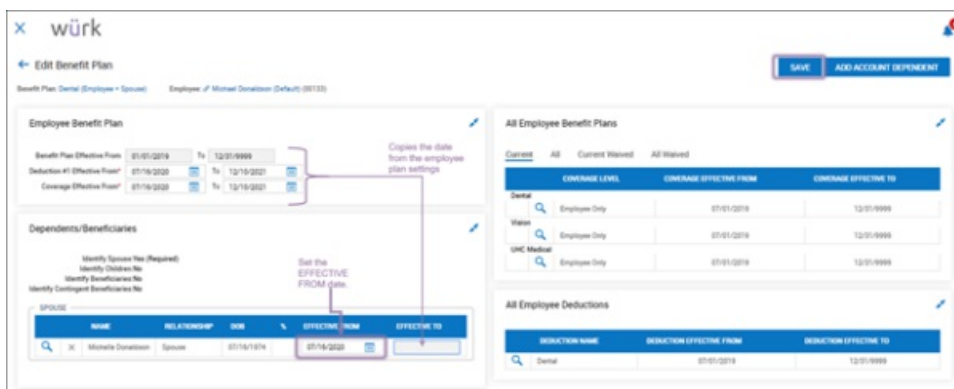
All Employee Deductions

DEDUCTION NAME	DEDUCTION EFFECTIVE FROM	DEDUCTION EFFECTIVE TO
Vision	01/01/2019	12/31/9999

5. To select someone to include with the plan, click the flag icon next to their name. If you do not see them listed here, they need to be added under the employee (click the Add Account Dependent button shown above). You will then see them added to the benefit plan.



6. Once the spouse or dependent shows under the benefit plan, specify the **EFFECTIVE FROM** date and click **SAVE**.



7. Final step: Once you're done adding the benefit to the employee, click **SAVE**. The system validates your entries, including checking that your addition does not conflict with other plans the employee has. Once all is complete, Confirm **YES** to finish. The employee will see the benefit (under **My Info>My Benefits>Benefit Plans**). The employee will have coverage on the date you set above in the Coverage Effective Date From field.