



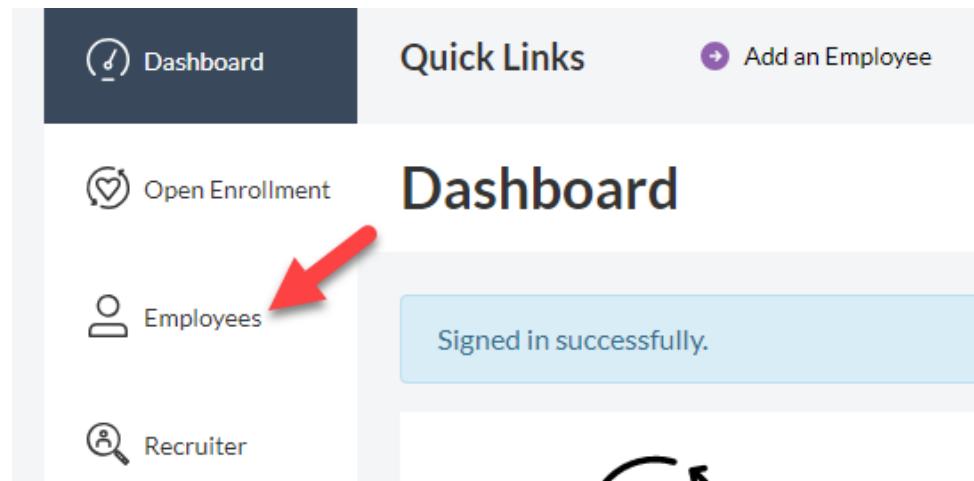
TRAINING

how to:

Administrative Life Events Feature

How the Administrative Life Events (ALE) Feature Works

- Log into your Decisely portal.
- Click on 'employees' in the left navigation panel.



- Click on the name of the employee with the Qualifying Life Event.

The screenshot shows a table of employees. The first row is highlighted with a red arrow pointing to the 'Last Name' column. A callout box says: 'You may click on the employee's name to access the employee's record'. The last column of the table has a red arrow pointing to the edit pencil icon. A callout box says: 'You may also access the employee's record by clicking on the edit pencil to the right of the employee's name'.

Last Name	First Name	Employee Class	Hire Date	Last Signed In	On-Board
Morrison	Steven	Full time	01/01/2017	2018-06-13 03:04 PM	<input checked="" type="checkbox"/>
		Full time	04/01/2016	2018-06-13 03:04 PM	

- If you are adding a new dependent to the employee's benefits due to a Qualifying Life Event, you will need to first add the new dependent by expanding the Dependents section within the employee's record and then clicking the ADD DEPENDENT button.



- Once you have added any necessary dependents in the Dependent section, expand the Benefits section within the employee's record and click on the "Life event" button.



- Once you click on the Life event button, you will then be brought to a page where you will select from a dropdown box the event and then you will enter the exact date the event occurred. For example, if a baby was born on 07/04/2018, that is the date you will enter.

Steven Morrison

What caused the need to change benefits?

Birth

Event date (marriage, birth, lost coverage etc...)

07/04/2018



- You will notice that once you have entered the event and the exact date of the event, the page will populate with the employee's current benefits and provide an opportunity for you to make the appropriate adjustments regarding plan changes and effective dates.

- Once you have completed making the appropriate adjustments to the employee's benefits, you can click the Preview button at the bottom of the screen to Preview the benefits you have just adjusted or added.



- If the Preview screen looks the way you intended, click Save at the bottom of the page. If you need to make more adjustments, click Cancel to go back and start over.



Have more questions?

If you have more questions about this process or if you would like a walk-through of this new functionality in your Decisely portal, please contact your Relationship Manager or your Client Services Specialist. We are happy to help!