Employee Self Service for Tehama County

Workterra is a tool which allows you to directly access and update your employee information via the Internet. Using Workterra employee self service, you can review and/or update your demographic, dependents, and benefit elections.

- You can access Workterra from any computer with an internet connection

- Our secure (https) site uses the latest technology to ensure that the information entered is secure and adheres to industry security standards.

Logging In

CAREERBUILDER™

User Name

Password

Company Name

Forgot Password?

Log In

1. Launch an Internet browser such as Internet Explorer.

2. Navigate to https://workterra.net

3. Enter the information below and click **Login**

    User name: [Entire LastName, Entire First name]
    (Example: [John Smith – Smithjohn]

    Password: [First 4 of Last name, Last 4 of SSN]
    (Example: [Smit1234]

    Company: Tehama County

Employee Usage Agreement and Legal Agreement

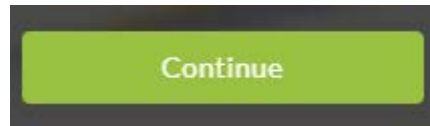**Agreement Acceptance**

ℹ️ **Instructions**
Please click on each of the links below to review and accept the agreements before proceeding through the enrollment tunnel.

☐ Employee Usage Agreement   ☐ Legal Agreement

Please read and accept the Employee Usage Agreement and Legal Agreement

Welcome Page

Please Read your Welcome Page Information and select **Continue**

[Continue]

Change Password

Please provide your security questions and answers as well as update your password. When finished select **Save & Continue.**

Please note your password must be:

- Password must be a minimum of 8 characters.

- Password must contain at least one numeric digit.

- Password must contain at least one special character.

- Password must contain at least one UPPERCASE letter.

[Back] [Reset] [Save & Continue]
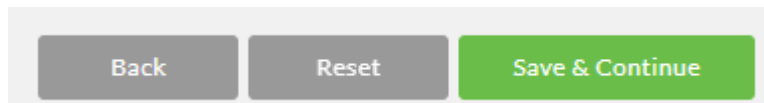
Demographics & Dependents

You will have an opportunity to review, add, or update your spouse, domestic partner or child information, as well as, your emergency contact Information on the next few pages.

Please note: Grayed out fields are considered "review only" fields. Please contact your HR administrator if any changes are needed to these fields.

Please ensure that all dependents that you would like to cover across any benefit (Medical, Dental, Spouse Life, Child Life, etc…) are entered within these pages.

To add a spouse or child, click Add. The Add Spouse/ Add Child screen will open for you to enter their demographic information (required data is marked with a red indicator).

Spouse [Add Dependent]   Child [Add Dependent]
[Back] [Continue]   [Back] [Continue]
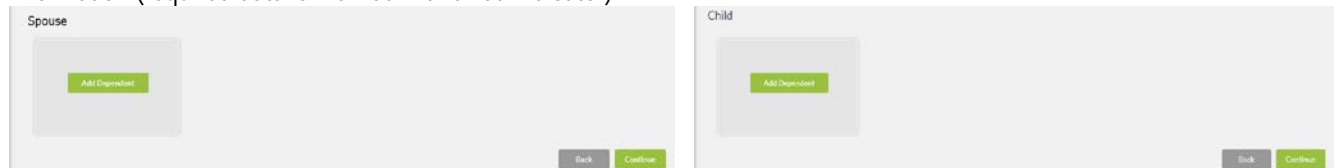
Click Save & Continue. If you have multiple children, select "Add Another Child" adding them one at a time and click "Save & Continue" once all are added.

If you do not have a spouse, domestic partner or child, click Continue to proceed to the next page.

For **Disabled Children**, please ensure that you classify the child as a "Disabled Child" in the Child relationship box as well as enter a "yes" in the Disabled child field.

Child Relationship *
Natural child
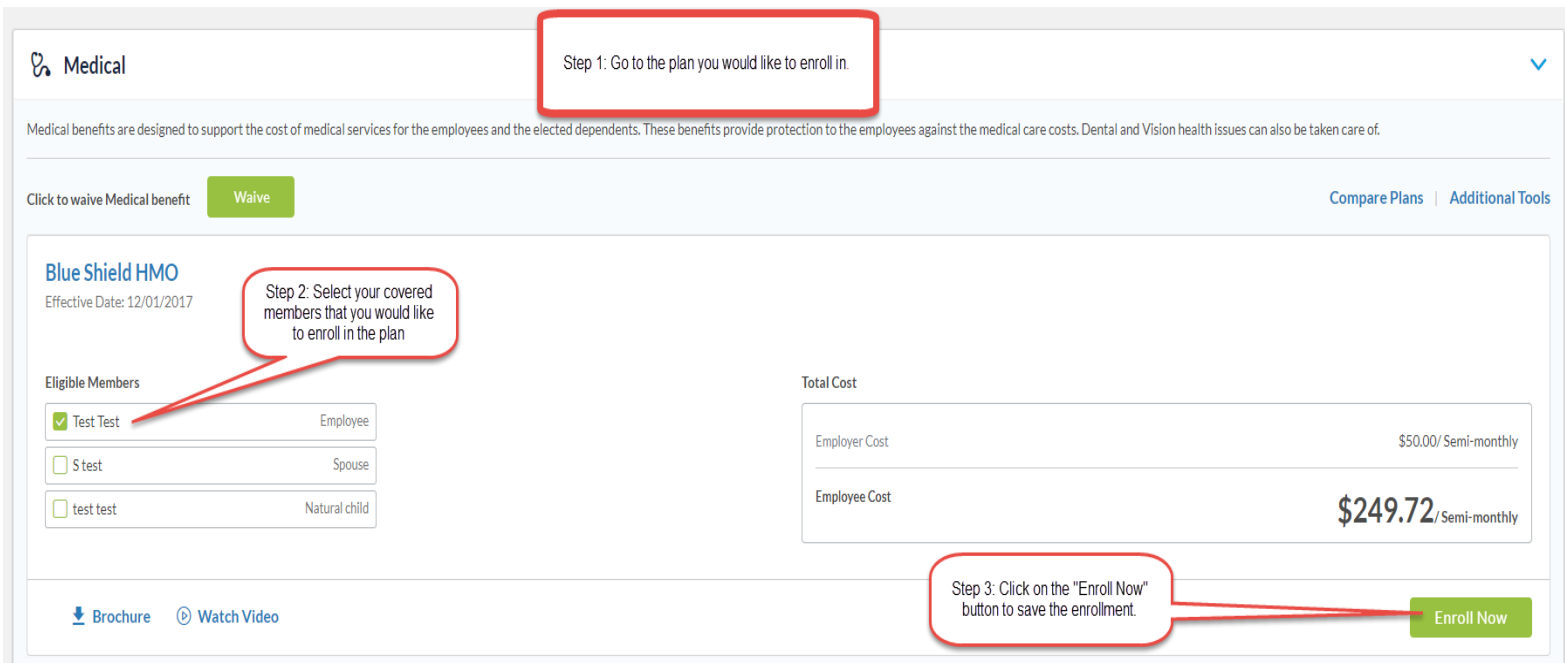
Health Details

Disabled Child
Yes
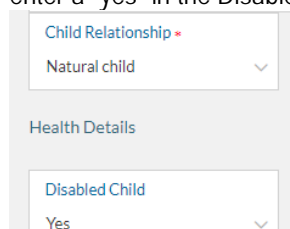
Follow the steps below to enroll in your benefit plans.
If you do not wish to enroll and would prefer to decline the benefit, select "Waive this benefit".

Please note that the following are available for additional information to assist you in choosing your benefits.
- Compare Plan – Click the Compare Plan box under each plan to open up a side by side comparison of the plans offered to you
- Additional Tools
  - o Learn about your Health benefits – This houses links to the plan summaries
  - o Paycheck Modeling – Allows you to calculate how much your benefits will cost
  - o Forms Library – This houses links to additional benefit information
- Brochure – This link contains plan information

Ω Medical   Step 1: Go to the plan you would like to enroll in.   ⌄

Medical benefits are designed to support the cost of medical services for the employees and the elected dependents. These benefits provide protection to the employees against the medical care costs. Dental and Vision health issues can also be taken care of.

Click to waive Medical benefit   **Waive**   **Compare Plans** | **Additional Tools**

Blue Shield HMO   Step 2: Select your covered
Effective Date: 12/01/2017   members that you would like
                                 to enroll in the plan

Eligible Members   **Total Cost**

✓ Test Test	Employee
S test	Spouse
test test	Natural child

| **Employer Cost** | $50.00/ Semi-monthly |
| **Employee Cost** | **$249.72**/Semi-monthly |

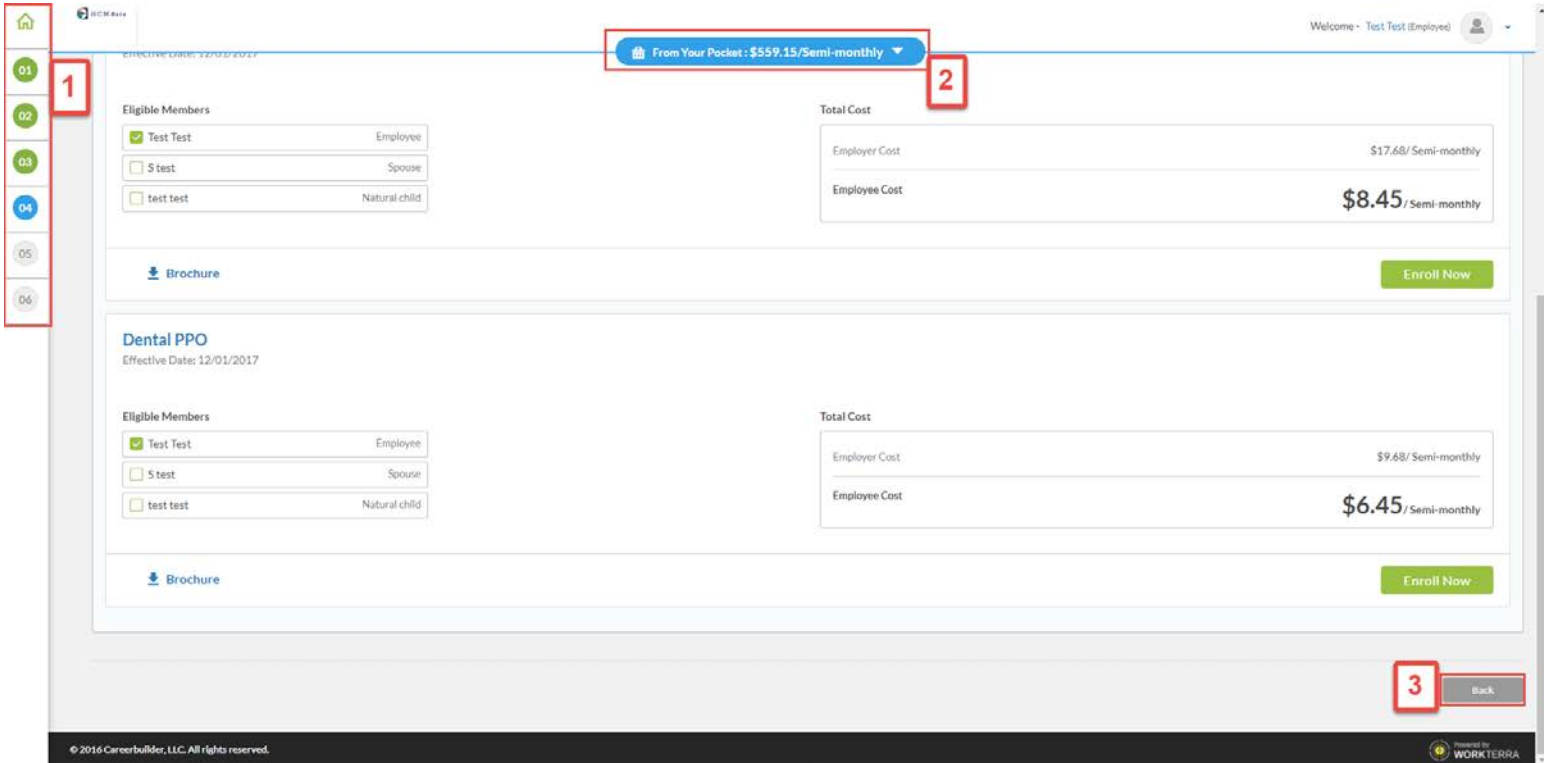   Step 3: Click on the "Enroll Now"
                                              button to save the enrollment.

⬇ **Brochure**   ▷ **Watch Video**   **Enroll Now**

Please be sure to use only the navigational buttons provided within the tool. <u>Do not use your browser's back button</u>.

You can navigate into previous pages using these three options:
1. The slide out menu bar will allow you to move back to any page that you have previously visited
2. To revisit a plan you may click on the benefit plan listed in the election summary
3. Use the back button provided by the tool

Adding a new beneficiary:
Your dependents (Spouse and children) that are already entered into OnlinEnroll will be in the beneficiary pool.

1. Select your first beneficiary:
   a. To select an existing dependent as a beneficiary, select their name in the drop down
   b. If you would like to add another beneficiary, select the applicable relationship in the drop down menu
      i. A pop up box will appear asking for more information on your new beneficiary. Complete the fields and click done.
2. Enter the percentage for this beneficiary in the "percentage" field

You may also add secondary (contingent) beneficiaries by clicking on the button "Add Secondary Beneficiary"

Best practices for choosing multiple beneficiaries:
- Use whole numbers when updating the percentage
- Percentages must equal 100
  - For example: 3 beneficiaries should have the percentage of 33, 33, 34

Other tips:
- To add multiple beneficiaries click on the [+] plus sign
- To remove a beneficiary, click on the [🗑] delete icon to the right of the beneficiary name.
- A beneficiary should not be used twice in the same plan.
  - For instance, on the basic life plan, do not have your spouse listed twice as a primary beneficiary.

Beneficiaries

ℹ **Instructions**
- Please assign beneficiaries for the benefit plans shown below.
  - Depending on the plan, you may be able to assign secondary beneficiary tier.
  - Within each tier, you may have one or more beneficiaries (as long as the total adds up to 100%).
  - You can either choose a beneficiary from your saved dependents or create new a beneficiary.
- Click on [?] for more information on how to manage your beneficiaries.

Beneficiary Details   [?] [🖨]

MetLife Basic Life - Basic Life   Save

Primary

Select Relationship   Percentage (%)   [+] [✏] [🗑]
--- Select Relationship ---   100

S test[Spouse]

test test[Child]

Business Associate   Add Secondary Beneficiary

Friend

Other   Back   Reset   Save & Continue

Other Relative

Completing the Enrollment Process

After completing all of your plan elections you will come to the Confirmation Page. Please review all of your elections for accuracy.

Please be sure to keep a copy of the confirmation statement for your records by clicking on the PDF button to download save & print

After you have clicked on finish, you will be taken to your Employee Home Page. Your enrollment process is now complete.

Year-round Access & Qualifying Events

(HOME PAGE NAVIGATION & MAKING QUALIFYING EVENT CHANGES)

Below is an example of your Employee Home Page.

If this is your first time logging into the site and you have not already updated your password, please update your password by clicking on "**Change Password**" tile.
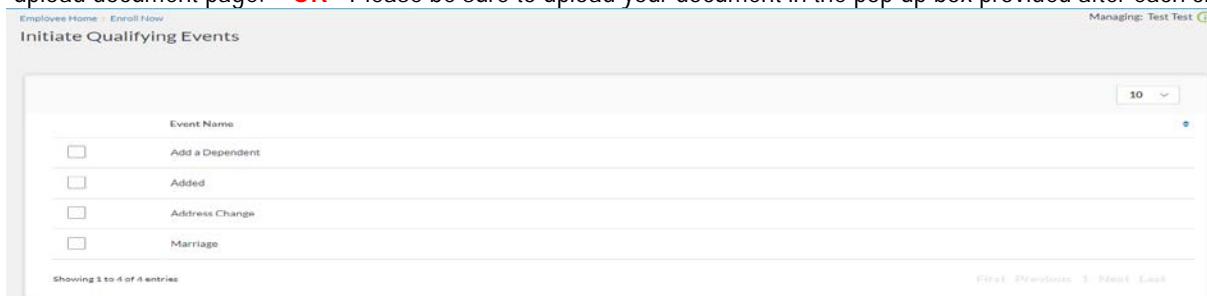

To begin a Qualifying Event (i.e. Marriage, Newborn, Divorce, etc.) click on the "Enroll Now" button found on the Home Page. If an event is not open you will see an option to open a Qualifying Event by clicking "OK."

Then select the Qualifying Event that applies to you, enter the date of the event, and click "Save". The system will now walk you through your personalized experience.

Please note the following in regards to Qualifying Events:

- To initiate a Qualifying Event, while still within your Open Enrollment period, go to: BenAdmin > Initiate Qualifying Events
- Please ensure the dependent relationship type is updated when processing a Qualifying Event, as this determines eligibility e.g. If processing a Divorce QE you must change your spouse relationship type from spouse to ex-spouse. This will ensure that the system will terminate the spouse's benefits and generate the notification for COBRA.
- During a Qualifying Event, Beneficiary designation will be available after your plan change is approved by the administrator. To view or change your Beneficiaries outside of an open window, go to: My Benefits > Beneficiary
- During a Qualifying Event, you will have the opportunity to upload the appropriate supporting documents (i.e. marriage certificate, birth certificate, etc.) for your HR Administrator approval. Please be sure to upload your document in the upload document page. – OR - Please be sure to upload your document in the pop up box provided after each change