

Epicor Open Enrollment Instructions

#1 Logon to Epicor Self Service one of two ways: a) Click HR-Epicor at the top of the home page of the intranet. b) From outside the organization go to www.skagitregionalhealth.org Scroll to the very bottom of the home page and click "Employee Portal" under tools.

#2 Be sure your signature questions are set up under Account Maintenance. If there are not two questions displayed, click the pencil to the right to get them set up



#3 Navigate to the My Benefit Enrollment tab:



Click the Open Enrollment link on the right side of the page under Open Enrollment

#4 Click add/edit dependents under Actions (only if you anticipate adding a spouse and/or child to your medical or dental plans. If you are not adding a dependent, proceed to step #5)

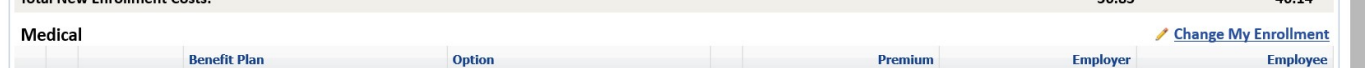


Review your dependent information for accuracy or add a new dependent if they are not shown by clicking New. Fill in their relationship to you, name, date of birth and SSN. Please note that there is a separate tab for the social security number labeled SSN. We need SSN for anyone you are adding to the medical plan. Click submit once you have made your additions/changes:



If you added any new dependents, please send Winetta an email at wbemis@skagitregionalhealth.org so that she can regenerate your choices from her end so that their names will show when you choose the enrollment choice you want. She will let you know when you can proceed.

5 Click “Change my Enrollment” to the right of the medical plan section:



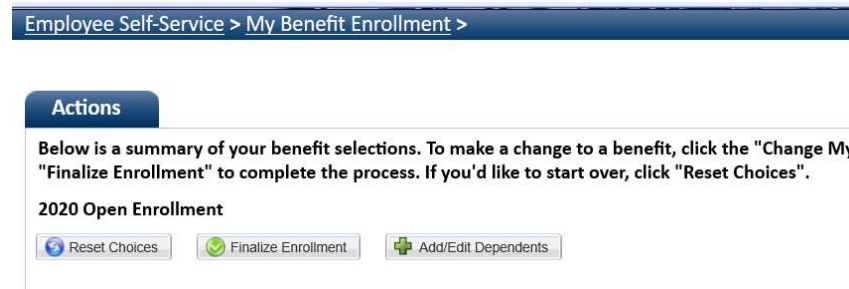
Choose the plan in which you wish to enroll and the tier of enrollment such as Employee Only, Employee + Spouse, Employee + Child(ren) or Employee + Family (includes spouse & child(ren))

Once you have made your selection, click Return to benefits selections on the right side.



#6 Follow the same procedure for Dental, AD&D and Flexible Spending.

#7 Once you have made all your selections, click finalize enrollment at the top under actions:



#8 After you click finalize enrollment, the system will ask you for the answers to your electronic signature questions. Complete the answers and click verify identity. If you cannot remember your answers, you can reset them under Account Maintenance tab.

#9 After you have verified your identity, a window will appear with a summary of your selections. After review, you finalize everything by clicking “Submit to HR” at the top of the page.

For Life Insurance and Long Term Disability, please review your current enrollments under “My Benefits” tab in Epicor. If you wish to make a change or addition, please contact Melissa Reed in HR at mreed2@skagitregionalhealth.org or 360-814-8285 and she will assist you with any change you wish to make. Adding additional life insurance coverage or increasing your Long Term Disability coverage requires paperwork and approval from the insurance companies so we don’t want you making the selection on Epicor and get charged for the upgrade before it is effective.

This is also a good time to verify that the information in your profile is correct. Please go to the My Information tab and make sure that your name, address, phone number, date of birth and social security number information is correct. Your address in Epicor is where your new insurance cards will be mailed.