



Task Sheet

# Open Enrollment

## CATEGORY

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**Department:** Benefits  
**Type:** Employee Resource

## OVERVIEW

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Tilson proudly provides a digital experience for benefits enrollment. The following is a guide to help provide assistance and instruction with benefits enrollment.

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## 1.0 Getting Started

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### 1.1 Access Online HR Portal

Go to [tilsonhr.com](http://tilsonhr.com), then select "Login".

The page will refresh; select "Employee Portal" to be directed to the online HR portal.

### 1.2 Sign-In

Type in Username and Password.

Select "Sign in".

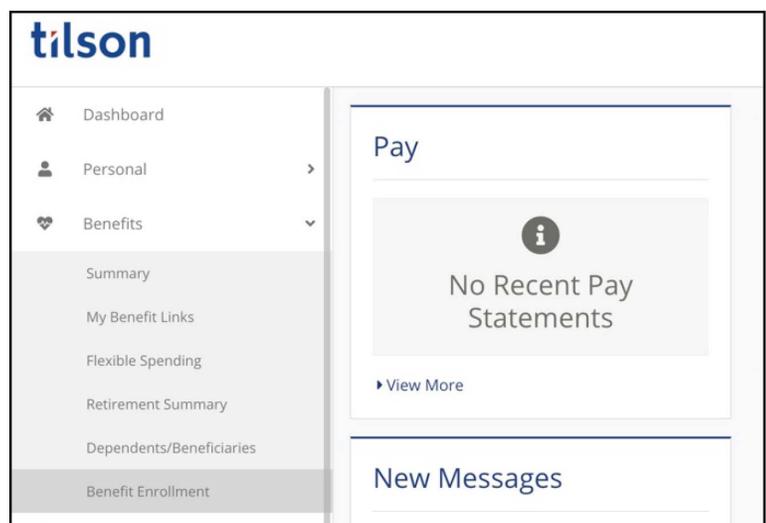


The screenshot shows the tilson login page. At the top center is the tilson logo. Below it are two input fields: "Username" and "Password". Below the password field is a blue button labeled "Sign in".

### 1.3 Access Benefit Enrollment

The page will redirect to your online HR portal dashboard. Select the "Benefits" tab from the menu bar. A drop-down list will appear.

Select "Benefit Enrollment".



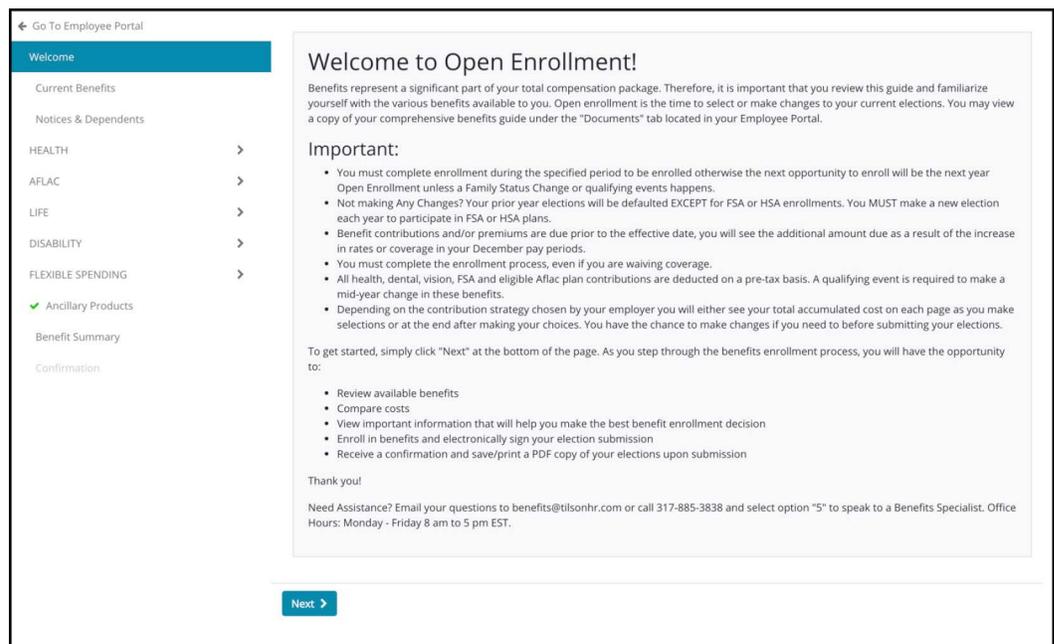
## 2.0 Open Enrollment

### 2.1 Welcome to Open Enrollment

The page will redirect to the online Benefits Enrollment portal.

Read through the "Welcome to Open Enrollment" message before starting the enrollment process.

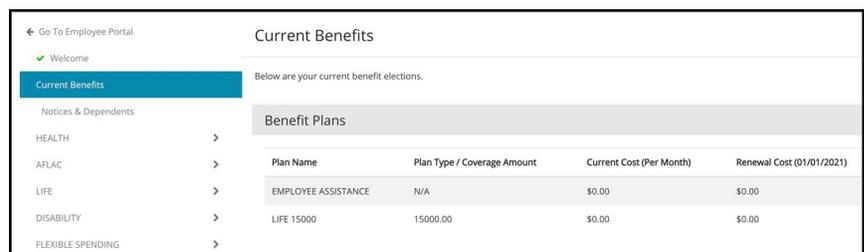
Select "Next".



### 2.2 Current Benefits

The screen will refresh to display the "Current Benefits" page.

Review the current benefit elections, then select "Next".

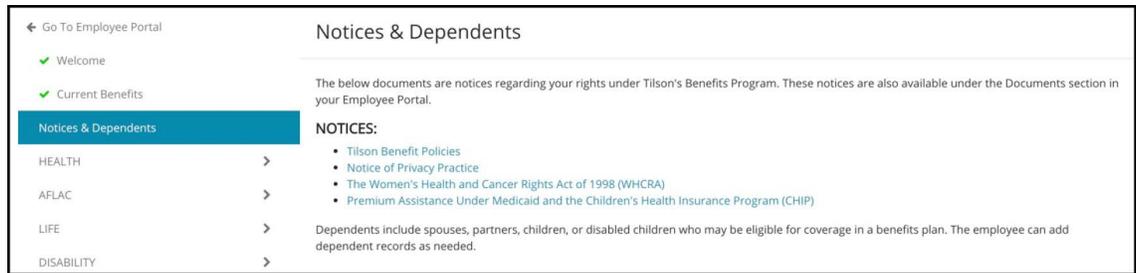


### 3.0 Notices & Dependents

#### 3.1 Access/Review Notices

The screen will refresh to display the "Notices & Dependents" page.

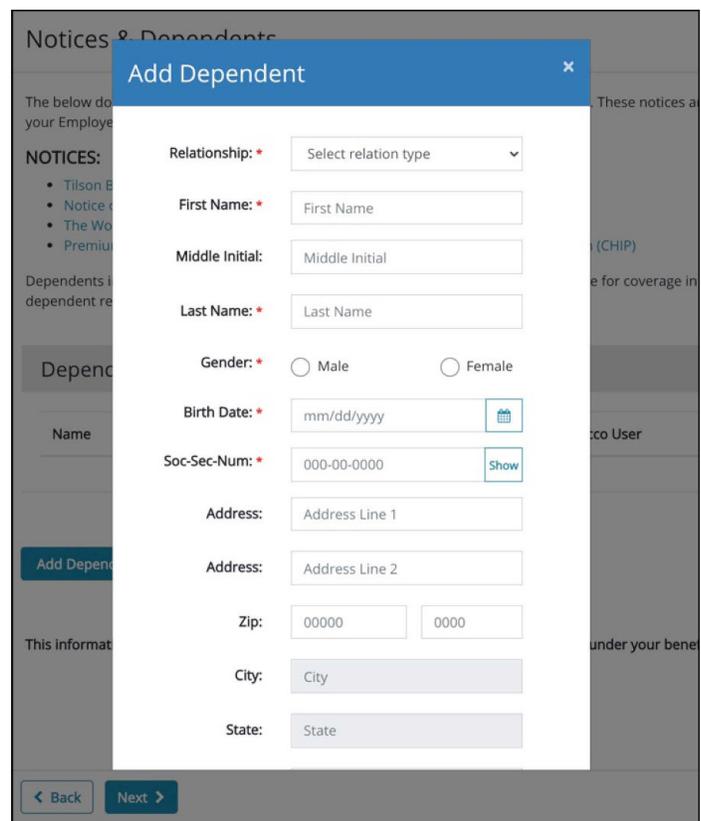
To review the notices, select the document by title from the list.



#### 3.2 Add Dependents

If applicable, add dependents (spouse, partner, children, or disabled children) to your plan by selecting "Add Dependent".

A pop-up form will appear. Follow the prompts to complete the form.



### 3.0 Notices & Dependents

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The page will refresh to display the newly added dependent.

Continue adding dependents until the list accurately depicts your dependent record.

Review the information for accuracy, then select "Next".

#### Notices & Dependents

The below documents are notices regarding your rights under Tilson's Benefits Program. These notices are also available under the Documents section in your Employee Portal.

**NOTICES:**

- [Tilson Benefit Policies](#)
- [Notice of Privacy Practice](#)
- [The Women's Health and Cancer Rights Act of 1998 \(WHCRA\)](#)
- [Premium Assistance Under Medicaid and the Children's Health Insurance Program \(CHIP\)](#)

Dependents include spouses, partners, children, or disabled children who may be eligible for coverage in a benefits plan. The employee can add dependent records as needed.

#### Dependent List

Name	Relationship	Age	Gender	Tobacco User	Disabled	Student
Ollie Alexander	Son	< 1	Male	No	No	No

[Add Dependent](#)

This information is intended to be a brief overview of the dependents that are available under your benefits eligibility.

[← Back](#) [Next >](#)

### 4.0 Health - Medical

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#### 4.1 Select Enrollees

The screen will refresh to display the benefits open enrollment health plan section: Medical.

Read and review the content on the page, including the introduction, resources, and the enrollment process instructions.

## 4.0 Health - Medical

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen medical plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage.*

The screenshot shows the 'Medical' enrollment page. On the left is a navigation menu with 'Medical' selected. The main content area includes a 'Running Total: \$0.00', a welcome message, and an 'Enrollment Process' section with instructions. Below this is the 'Enrollees' section, which contains a table:

Name	Relationship	Covered	Spouse Waive Reason
Richard Alexander	Myself	<input checked="" type="checkbox"/>	
Ollie N Alexander	Son	<input checked="" type="checkbox"/>	

### 4.21 Select Medical Plan

**Important:** If you do not intend to enroll in medical benefits, skip to section 4.22 on how to waive medical benefits.

To select a medical plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

The screenshot shows the medical plan selection screen. It features a grid of plan options, each with a cost per period and a 'Select' button. The first plan, 'HUMANA HDHP 3000', is highlighted in green and has a checkmark, indicating it is selected. Below the grid is a 'Waive Benefits' section with a checkbox for 'I agree to waive Medical benefits'.

Plan Name	Cost Per Period	Status
HUMANA HDHP 3000	\$159.00	Selected (Green)
HUMANA HDHP 5000	\$147.25	Not Selected (Blue)
HUMANA PREMIER 1000	\$203.75	Not Selected (Blue)
HUMANA PREMIER 1500	\$184.50	Not Selected (Blue)
HUMANA PREMIER 2500 / PREMIER 2000	\$175.50	Not Selected (Blue)
HUMANA PREMIER 5000 / PREMIER 4000	\$158.50	Not Selected (Blue)

## 4.0 Health - Medical

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### 4.22 Waive Medical Benefits

To waive Medical benefits, scroll down to the "Waive Benefits" section.

In the provided space, select "I agree to waive Medical benefits".

To continue, select "Next".

## 5.0 Health - Dental

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### 5.1 Select Erollees

The screen will refresh to display the benefits open enrollment health plan section: Dental.

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen dental plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage.*

### 5.21 Select Dental Plan

**Important:** If you do not intend to enroll in dental benefits, skip to section 5.22 on how to waive dental benefits.

To select a dental plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 5.22 Waive Dental Benefits

To waive Dental benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Dental benefits".

To continue, select "Next".

## 6.0 Health - Vision

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### 6.1 Select Enrollees

The screen will refresh to display the benefits open enrollment health plan section: Vision.

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen Vision plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage.*

### 6.21 Select Vision Plan

**Important:** If you do not intend to enroll in vision benefits, skip to section 6.22 on how to waive medical benefits.

To select a vision plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 6.22 Waive Vision Plan

To waive Vision benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Vision benefits".

To continue, select "Next".

## 7.0 Aflac - Accident

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### 7.1 Select Enrollees

The screen will refresh to display the benefits open enrollment Aflac insurance section: Aflac Accident.

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen Aflac Accident plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage*

## 7.0 Aflac - Accident

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### 7.21 Select Aflac Accident Plan

**Important:** If you do not intend to enroll in Aflac Accident benefits, skip to section 7.22 on how to waive Aflac accident benefits.

To select an Aflac accident plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 7.22 Waive Aflac Accident Plan

To waive Aflac accident benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Aflac accident benefits".

To continue, select "Next".

## 8.0 Aflac - Critical Illness

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### 8.1 Select Aflac Critical Illness Plan

The screen will refresh to display the benefits open enrollment Aflac insurance section: Aflac Critical Illness.

**Important:** If you do not intend to enroll in Aflac critical illness benefits, skip to section 8.2 on how to waive Aflac critical illness benefits.

To select a Aflac critical illness plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 8.2 Waive Aflac Critical Illness Plan

To waive Aflac accident benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Aflac critical illness benefits".

To continue, select "Next".

## 9.0 Life - Basic Life

### 9.1 Select Basic Life Plan

The screen will refresh to display the benefits open enrollment Lincoln Financial section: Basic Life.

To select a Lincoln Financial basic life plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

### 9.2 Update Beneficiaries

The default beneficiaries will be based upon your listed enrollees. If you desire to add additional beneficiaries, select "Add Beneficiary", then follow the prompts accordingly. *Note: The newly added beneficiary will appear under the list of beneficiaries.*

### 9.3 Primary Amount

Once all beneficiaries have been properly added, follow the prompts to add the Primary Amount per beneficiary. Do this for each beneficiary until all Primary Amounts have been entered.

To continue, select "Next".

Current Benefits

Notices & Dependents

HEALTH

- Medical
- Dental
- Vision

AFLAC

- Aflac Accident
- Aflac Critical Illness

LIFE

- Basic Life**
- Voluntary Life

DISABILITY

FLEXIBLE SPENDING

Ancillary Products

Benefit Summary

Confirmation

**\$0.00** Per Period

**LINCOLN FINANCIAL**  
TILSON ER PAID LIFE 15000

Plan Effective Date: 01/01/2021  
Coverage Amount \$15000.00

View Compare

Compare 0/1

**Beneficiaries**

Name	Relationship	Primary Amount	Contingent Amount
Ollie Alexander	Son	100 %	%

[Add Beneficiary](#)

You will need to select a percentage to each beneficiary. If you elect more than one, you will also need to enter a Primary Amount or Contingency Amount percentage for each beneficiary.

[Back](#) [Next](#)

## 10.0 Life - Voluntary Life

### 10.1 Select Voluntary Life Plan

**Important:** If you do not intend to enroll in Lincoln Financial voluntary life plan, skip to section 10.4 on how to waive voluntary life benefits.

To select a Lincoln Financial voluntary life plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

### 10.2 Coverage Amount

Follow the prompt to add the coverage amount.

### 10.3 Update Beneficiaries

The default beneficiaries will be based upon your listed enrollees. If you desire to add additional beneficiaries, select "Add Beneficiary", then follow the prompts accordingly. *Note: The newly added beneficiary will appear under the list of beneficiaries.*

### 10.4 Coverage Amount

Follow the prompts to add the Primary Amount per beneficiary. Do this for each beneficiary until all Primary Amounts have been entered.

To continue, select "Next"

### 10.5 Waive Voluntary Life Benefits

To waive voluntary life benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Voluntary life benefits".

To continue, select "Next".

## 11.0 Short Term Disability (STD)

### 11.1 Select STD Plan

The screen will refresh to display the benefits open enrollment Disability section: Short Term Disability (STD).

**Important:** If you do not intend to enroll in STD benefits, skip to section 11.2 on how to waive STD benefits.

To select a short term disability plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 11.2 Waive STD Benefits

To waive short term disability benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Short Term Disability benefits".

To continue, select "Next".

Short-term Disability insurance pays out a portion of your income if you are temporarily unable to work because of a medical condition (including pregnancy). Short-term Disability is also known as Temporary Disability Income Benefit. The Short-term Disability plan option(s) offered below are selected by your employer.

**Resources:**

- Click the SBC icon to view summary information on a benefit plan.
- Glossary of Terms
- What you Need to Know about Short-term Disability

**Enrollment Process:**

- To select a benefit plan, click "select".
- To unselect a plan, click the green area on the benefit plan.
- To waive this plan, select "I choose to waive benefits" in the Waive Benefits panel.
- The benefit plan's effective date is located in the middle of the benefit plan box.

Cost	Plan Name	Effective Date	Coverage Amount
\$13.20 Per Period	LINCOLN FINANCIAL TILSON VOLUNTARY STD 15	01/01/2021	\$480.00
\$9.60 Per Period	LINCOLN FINANCIAL TILSON VOLUNTARY STD 30	01/01/2021	\$480.00

Compare 0/2

**Waive Benefits**

I agree to waive Short Term Disability benefits

< Back   Next >

## 12.0 Long Term Disability (LTD)

### 12.1 Select LTD Plan

The screen will refresh to display the benefits open enrollment Disability section: Long Term Disability (LTD).

**Important:** If you do not intend to enroll in LTD benefits, skip to section 12.2 on how to waive LTD benefits.

To select a long term disability plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 12.2 Waive LTD Benefits

To waive long term disability benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Long Term Disability benefits".

To continue, select "Next".

Go To Employee Portal

- Welcome
- Current Benefits
- Notices & Dependents
- HEALTH
  - Medical
  - Dental
  - Vision
- AFLAC
  - Aflac Accident
  - Aflac Critical Illness
- LIFE
  - Basic Life
  - Voluntary Life
- DISABILITY
  - Short Term Disability
  - Long Term Disability**
- FLEXIBLE SPENDING
  - Ancillary Products

Benefit Summary

Long-term Disability insurance replaces a portion of your income during an extended period of a disabling illness or accident. By providing a steady stream of income while you are unable to work, Long-term Disability insurance helps you meet your financial obligations when you are not able to work. The Long-term Disability plan option(s) offered below are selected by your employer.

Resources:

- Click the SBC icon to view summary information on a benefit plan.
- Glossary of Terms
- What you Need to Know about Long-term Disability

Enrollment Process:

- To select a benefit plan, click "select".
- To unselect a plan, click the green area on the benefit plan.
- To waive this plan, select "I choose to waive benefits" in the Waive Benefits panel.
- The benefit plan's effective date is located in the middle of the benefit plan box.

Compare 0/1

**\$3.12** LINCOLN FINANCIAL  
Per Period TILSON VOLUNTARY LTD

Plan Effective Date: 01/01/2021  
Coverage Amount \$2100.00

View Compare

**Waive Benefits**

I agree to waive Long Term Disability benefits

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## 13.0 Health Savings Account (HSA)

### 13.1 HSA Annual Contribution

The screen will refresh to display the benefits open enrollment Flexible Spending section: Health Savings Account (HSA).

**Important:** If you do not intend to enroll in HSA benefits, skip to section 13.2 on how to waive HSA benefits.

Follow the prompt to add the annual contribution. *Note: The plan will turn green and a checkmark will appear on the HSA widget to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 13.2 Waive HSA Benefits

To waive HSA benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Health Savings Account benefits".

To continue, select "Next".

Go To Employee Portal

- Welcome
- Current Benefits
- Notices & Dependents
- HEALTH
  - Medical
  - Dental
  - Vision
- AFLAC
  - Aflac Accident
  - Aflac Critical Illness
- LIFE
  - Basic Life
  - Voluntary Life
- DISABILITY
  - Short Term Disability
  - Long Term Disability
- FLEXIBLE SPENDING
  - Health Savings Account
  - Flexible Spending Account

Resources:

- Enrollment Form
- Understanding a Health Savings Account
- What You Need to Know about Health Savings Accounts
- HSA Eligible Expenses
- HSA Ineligible Expenses
- HSA Pros and Cons

**Health Savings Account**  
 HSA  
 \$76.92  
 Per Period  
 Coverage Effective: 01/01/2021 - 12/31/2021  
 Annual Contribution: 2000  
 View Limits

Estimated deductions are based on per period amount. Actual Flexible Spending contributions are calculated by the remaining pay period schedule and may vary when payroll processing occurs.

**Waive Benefits**

I agree to waive Health Savings Account benefits

This information is intended to be a brief overview of the benefits available under this Plan. It does not provide costs, limitations, exclusions and terms under which the coverage may be kept in force. The Plan is subject to state filing and approval, and may vary slightly, or not be available by jurisdiction in accordance with applicable laws and regulations.

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## 14.0 Flexible Spending Account (FSA)

### 14.1 FSA Annual Contribution

The screen will refresh to display the benefits open enrollment Flexible Spending section: Flexible Spending Account (FSA).

**Important:** If you do not intend to enroll in FSA benefits, skip to section 14.2 on how to waive FSA benefits.

Follow the prompt to add the annual contributions. *Note: The plan will turn green and a checkmark will appear on the FSA widget to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 14.2 Waive FSA Benefits

To waive HSA benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Health Savings Account benefits".

To continue, select "Next".

## 15.0 Commuter

### 15.1 Commuter Monthly Contribution

The screen will refresh to display the benefits open enrollment Flexible Spending section: Commuter.

**Important:** If you do not intend to enroll in Commuter benefits, skip to section 15.2 on how to waive Commuter benefits.

Follow the prompt to add the monthly contributions. *Note: The plan will turn green and a checkmark will appear on the widget to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

### 15.2 Waive Commuter Benefits

To waive Commuter benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Commuter benefits".

To continue, select "Next".

The screenshot displays the employee portal interface. On the left is a navigation menu with categories like HEALTH, AFLAC, LIFE, DISABILITY, FLEXIBLE SPENDING (expanded to show Health Savings Account, Flexible Spending Account, and Commuter), Ancillary Products, Benefit Summary, and Confirmation. The main content area shows 'The 2020 maximum contributions are:' and 'The 2021 maximum contributions are:', both listing Mass Transit and Parking at \$270 per month. Below this are two 'Flexible Spending Account' widgets for Mass Transit and Parking, each showing a balance of \$92.31 and a 'Monthly Contributor' field set to 200. A 'Waive Benefits' section at the bottom contains an unchecked checkbox for 'I agree to waive Commuter benefits' and a disclaimer. Navigation buttons for 'Back' and 'Next' are at the bottom.

## 16.0 Ancillary Products

### 16.1 Ancillary Products

The screen will refresh to display the benefits open enrollment Flexible Spending section: Ancillary Products.

Review the provided material.

To continue, select "Next"

Go To Employee Portal

Ancillary Products Running Total: \$280.23

- ✓ Welcome
- ✓ Current Benefits
- ✓ Notices & Dependents
- HEALTH**
  - ✓ Medical
  - ✓ Dental
  - ✓ Vision
- AFLAC**
  - ✓ Aflac Accident
  - ✓ Aflac Critical Illness
- LIFE**
  - ✓ Basic Life
  - ✓ Voluntary Life
- DISABILITY**
  - ✓ Short Term Disability
  - ✓ Long Term Disability
- FLEXIBLE SPENDING**
  - ✓ Health Savings Account
  - Flexible Spending Account
  - Commuter

Everyone needs help dealing with life challenges from time to time. Because you are valued and your well-being is important, your employer offers an employee assistance program (EAP). You and your family can get help that is easy, convenient, and confidential and is provided at no additional cost. Centerstone Solutions counselors are available 24 hours a day, seven days a week, and their Work/Life website brings a variety of resources to your fingertips, covering topics such as caregiving, personal well-being, relationships, communication, health and wellness, employee effectiveness, parenting, education and other areas that affect your daily work or personal life. Interactive learning and resource tools, including self-assessments, audio clips, health tools, financial calculators, and skill builders, are also available to meet your work/life needs.

**Resources:**

- [Brochure](#)
- [Flyer](#)

**EMPLOYEE ASSISTANCE**

Plan Effective Date: 01/01/2021

It can be frustrating when personal and/or work related problems happen and it is unclear where to turn for help. When troubles arise from stress, marital or family issues, parenting challenges, depression, anxiety, substance use, or other emotional concerns, it's comforting to have someone to talk to. The employee assistance program provides confidential, professional assistance with identifying and resolving problems that you and your family face. Some of the services provided by the EAP include: Family issue / Anxiety / Stress/ Marital issues / Work related issues / Health issues/ Grief and loss / Legal matters / Financial issues/ Alcohol or drug / Child adolescent issues / Depression

[View Details](#)

[Back](#) [Next](#)

## 17.0 Flexible Spending Review

### 17.1 Flexible Spending Review

The screen will refresh to display the benefits open enrollment Flexible Spending section: review

Review the provided material.

To continue, select "Submit"

Go To Employee Portal

Good Work! Now it's time to review your choices.  
Click 'Submit' to continue to the last step of the enrollment process.

**Benefit Summary** Running Total: \$503.31

Please review your selected benefits.

Notices & Dependents

Name	Relationship	SSN	Date of birth
Ollie N Alexander	Son	xxx-xx-3333	09-01-2020

Medical

Policy	Covered	Primary Care Physician	Effective date	Cost
HDHP 3000	Richard Alexander (EE)		01/01/2021	\$159.00

Dental

Policy	Covered	Primary Care Physician	Effective date	Cost
TILSON DENTAL	Richard Alexander (EE)		01/01/2021	\$10.24

Vision

Policy	Covered	Primary Care Physician	Effective date	Cost

[Back](#) [Submit](#)

## 18.0 Confirmation

### 18.1 Complete Enrollment

The screen will refresh to display the benefits open enrollment Confirmation section: Benefit Enrollment Terms and Conditions.

Review the provided material.

In the provided space, select "I acknowledge that my benefit elections have been completed for the current plan year and I agree to the corresponding payroll deductions as indicated."

In the provided space, type in your full name.

To complete the enrollment process, select "Complete Enrollment".

**FINAL NOTE:** Upon submitting, your Benefit Confirmation Statement will appear. We advise that you print this for your records. You may also view your Benefit Confirmation Statement one day after completing enrollment on your Employee Portal by selecting the Benefits tab then Confirmation Statement from the drop down.

*Important: Because benefit contributions and/or premiums are due prior to the effective date, you will see the additional amount due as a result of the increase in rates or coverage in your December pay periods.*