

Welcome to Processing an Open Enrollment in Sage ESS



Before we begin, please locate the following items in the GoTo Webinar panel:

- Handouts
- Questions - Your phones are muted, please use the Question panel to post any questions

Note: Your computer speakers or a headset will be used for the **audio** portion of this webinar. There is no call-in telephone number.

Processing an Open Enrollment in Sage ESS

With

Lynn Clee, Clay Stauffer and Robin Wright

September 24, 2020



Welcome



GoTo Webinar Panel:

- Handout
- Questions (phones are muted)

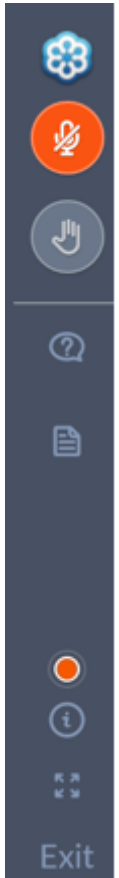
Additional Information:

- Access a recording of today's webinar in approximately 2 weeks at

<https://www.sage.com/en-us/cp/hrmslearningseries/>

Questions →

Handout →



Flow of Processing Open Enrollment



Prior to creating an Open Enrollment period in ESS:

- Add any new benefit plans in Sage HRMS
- Review/update existing HRMS OE benefits
- Review OE Setup in ESS
- Benefit Calculator

Today we will:

- Create a new OE in ESS
- Benefit Updates including:
 - Process Enrollment & Notification
 - Approve & Auto Approve Enrollment
 - Update Enrollment
 - Reports


Administrator
Benefit Setup
Election Codes
Plan Group
Benefit Elections
Enrollment Questions
Benefit Eligibility
Life Events
Open Enrollment
Benefit Calculator
Benefit Updates
Process Enrollment
Enrollment Notification
Approve Enrollment
Auto Approve Enrollment
Update Enrollment
Approve Life Event

Let's get started!

Polling Questions

Links and helpful information



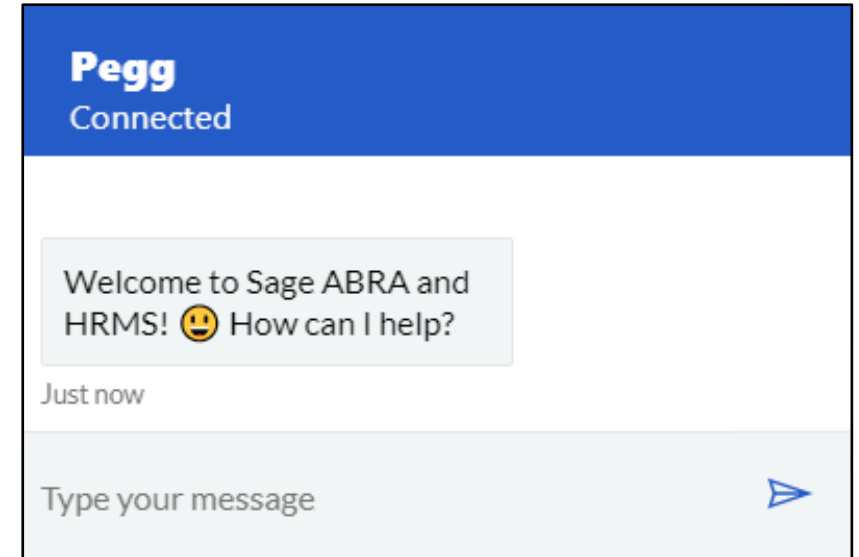
Topic	Description	Link
HRMS Learning Series	Register for live webinars, access on demand recordings and handouts, questions and answers	https://www.sage.com/en-us/cp/hrmslearningseries/
Sage University	Sage University (Training). Helpdesk: Telephone: 1-855-724-3864 Email: SageUniversity@sage.com	https://www.sageu.com/hrms
Grad Caps 	Icon inside Sage HRMS takes you to Sage University to browse for related training.	
10% off	Use discount code HRMSresource when registering for Sage HRMS instructor-led training on Sage University	
Sage City Forums	Access Sage City Forums Training and Announcements, News and Alerts	https://www.sagecity.com/support_communities/sage_hrms/f
Sage City Global Resources	New page in Sage City for Online Support Resources. Explore Sage University, register for the free webinars, access our training forum, view documentation, read product news and alerts, chat with a support representative and more!	https://www.sagecity.com/global-resources

Contacting Sage HRMS Support



The way you contact Sage HRMS Support is getting faster!

- After June 19th, calling HRMS Support is no longer an option
- Open Help Menu and choose “Sage Live Chat”
PEGG ➔ Chat ➔ Schedule a call back



- Bookmark [SageCity.com/Resources](https://www.sagecity.com/resources) for fast access to help anytime

Questions and Answers



With Clay Stauffer

A summary of Q&A will be available at:

Sage City HRMS Forum:

www.sagecity.com/support_communities/sage_hrms/

Learning Series Registration Page:

<https://www.sage.com/en-us/cp/hrmslearningseries/>

HRMS – Sage Employee Self Service (ESS) Benefit Enrollment: From Start to Finish



Learn how to navigate an Open Enrollment using the Benefits Enrollment module from Employee Self Service. By attending this virtual, instructor-led course, you will be able to prepare for your Open Enrollment by updating the Benefit Plan information in Sage HRMS, ensure the information is correct, and then build the Open Enrollment correctly in the Employee Self Service Benefits Enrollment module!

This course is a must have for anyone who will be running an Open Enrollment and has the Benefits Enrollment module!

After completing this course you will be able to:

- Identify Sage HRMS Benefit setup changes
- Process the steps to accurately set up Benefits
- Run the Duplicate Key report to eliminate potential errors
- Select Benefit Plans for ESS Benefits Enrollment
- Identify the steps for setting up an Open Enrollment from the Election Codes to defining the Open Enrollment parameters
- Recognize Life Events and how to use them
- Set up and approve Life Events
- Identify Life Event and Benefit Plan changes
- Follow the process for managing Rate Tables for the new year
- Run an Open Enrollment
- Run Benefits Enrollment Reports
- Identify the different report elements

To register, go to sageu.com/hrms and use discount code HRMSResource for 10% off

What's New in Sage HRMS Q3 2020 Product Update

When: Join us on **October 1st**, from **10-11 AM Pacific Time | 1-2 PM Eastern Time**.

Who should attend: Anyone that is interested in learning more about the changes in the Q3 2020 product update. The main focus will be changes affecting U.S. employers.

Suggested Prerequisites: Participants should have a cursory knowledge of Sage HRMS.

Other upcoming webinars :

Processing Payroll 101 – Part 3: Calculate Payroll through Creating an EFT - October 19th | October 28th

SAP Crystal Reports: Linking Tables (Intermediate Level) - November 17th | November 30th

Processing Payroll 101 – Part 4: Balancing Your Payroll and Making Adjustments - December 21st | January 7th

Generating W-2's using Aatrix - January 12th | January 20th

To register, go to <https://www.sage.com/en-us/cp/hrmslearningseries/>

Need training? Have questions? Want advice?

- **Engage with Sage—online:**



Sage University



Sage Knowledgebase



Sage City

Visit www.SageCity.com/Resources to learn more!