

## IBBP Online Benefit Enrollment/Change Guide for Administrators

This guide provides information about the following online procedures related to employee benefits that can be completed by logging in to the IBIS website as an administrator or as an employee.

- Online benefit enrollment for new employees (for use by administrators using the Administrator Log In)
- Online benefit changes (for use by existing employees using the Employee Self-Service Log In)

### Benefit Enrollment for NEW EMPLOYEES

Administrators and new employees can use online enrollment to enroll the new employees in the following Iowa Bankers Benefit Plan (IBBP) benefits:

- Health and/or Dental (an employee is automatically enrolled in the 105 Advantage Plan when they enroll in a 105 health benefit)
- Group Term Life and/or Disability
- Section 125 Advantage Plan

Note: Employees and/or dependents who do not enroll when first eligible and do not have a qualifying event must complete a paper application to enroll.

### Benefit Changes for EXISTING EMPLOYEES

Your existing employees can log in to the Employee Self Service website ([www.bankers-ins.com](http://www.bankers-ins.com)) to complete the following health and/or dental benefit procedures online:

- Add a spouse and/or dependent
- Indicate loss of other coverage
- Change of employment status (FT to PT & PT to FT)
- Identify student or over-age dependent status
- Change their health and/or dental plan tier (single, employee/child, employee/spouse, or family coverage)
- Change their health and/or dental plan with a qualifying event
- Change their health and/or dental plan during annual renewal—if participant for 12 months)
- Change their address
- Change name

Note: To add a dependent Social Security Number to the system, an employee must complete a paper Health/Dental Change Form

### You must have the following information to set up a NEW EMPLOYEE for online benefit enrollment:

(Information can be saved and completed at a later time)

1. Employee Name
2. Employee Social Security Number
3. Employee e-mail address (if available)
4. Title
5. Employee Class (officer or nonofficer)
6. Employment Type (FT/PT)
7. Weekly Hours
8. Date Hired
9. Annual Salary
10. Annual Bonus (if included in calculating life/disability benefits)
11. Qualifying Event
12. Date of Qualifying Event
13. Does the event date occur on the first business day of the month?
14. 125 Flex Spending (if you offer this benefit through IBIS)
  - a. Payroll Calendar
  - b. Number of Pay Periods will be identified
  - c. Date of first payroll deduction for 125 contribution

The "Online Employee Self Service Guide" provides step-by-step procedures for employees to log in to the Employee Self-Service website to make changes affecting employee benefits. The "IBBP Online Enrollment Guide for New Employees" provides a list of the information a new employee needs to complete their benefit enrollment online. Please review the instructions before providing it to your employee.

# Administrator IBBP Online Enrollment Guide (continued)

## Three-Step Process for Enrolling New Employees

### Administrator Set Up

1. Go to the IBIS website at [www.bankers-ins.com](http://www.bankers-ins.com).
2. Click on *Administrator Log In*.
3. Enter your username and click *Log In*.
4. Select your employer from the list that appears. Note: If your employer does not appear in the list, you did not enter the correct username.
5. Enter your password and click *Log In*. The IBIS Bank Administrator Menu appears.
6. Click on *Add New Employee* under the Manage Employees heading. The New Employee Setup screen appears.
7. Enter the information required for the employee. Refer to the first page of this guide for a list of the information needed to complete the New Employee Setup screen.
8. Click *Add This Employee*.
9. Print the *Online Employee Enrollment Instructions form* and provide to the new employee. The new employee should follow the instructions to log in to the Employee Self-Service website and complete the employee data entry part of the online enrollment process.
10. Click on *Return to Administrator Menu* to add another employee or return to the Main Menu.

### Employee Data Entry

After you have set up the new employee, the employee's name appears under the Pending Enrollments heading on the IBIS Bank Administrator Menu. After the employee completes the data entry and submits the enrollment, you will receive an email notification, and the employee name will then appear under the Awaiting Your Approval heading of the Administrator Menu.

The employee must print and provide you with a paper copy of the Online Application before you approve it online. You must fax a copy of the application to IBIS as soon as possible. We will not approve the enrollment until we receive the form.



### Administrator Approval

1. Log into the IBIS administrator website as described above. The IBIS Bank Administrator Menu appears.
2. Click on the employee's name under the Awaiting Your Approval heading.
3. Review the information.
4. If all the information is correct, click on Approve Changes. If the information is not correct and you wish to deny the changes, enter the reason and click "Deny Changes." A message appears: "All changes (Employee Name) will be denied." The employee name disappears from the Awaiting Your Approval list.
5. If you wish to cancel the new enrollment, click on the employee name under Pending Enrollments and then under Cancel New Enrollment, enter a reason and click on Cancel New Enrollment.
6. If approved, an email will be sent to notify IBIS the application has been submitted.

Note: If IBIS receives and approves the application four business days before the end of the month, the employee will appear on the next month's billing (with exceptions in the months of November and December). Please check your next month's bill to verify the enrollment is complete.