


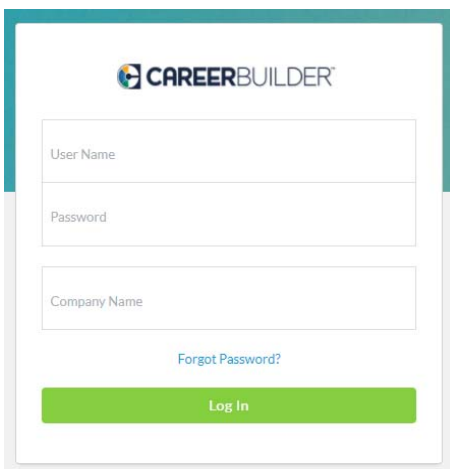
Employee Self Service for Milpitas USD

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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



1. Launch an Internet browser such as Google Chrome.
2. Disable any pop-up blockers.
3. Navigate to <https://workterra.net>
4. Enter the information below and click **Login**

User name: first character of employee’s first name, followed by the first 4 characters of employee’s last name, followed by the last four digits of the employee’s social security number.

(Example: if your name is John Smith and your last 4 of your SSN is 6789, your User ID is **jsmit6789**)

Password: Your password will be your entire last name followed by the first 3 digits of your social security number.

Company: Milpitas Unified School District (case sensitive)

5. Click Log In. If you need assistance, please contact WORKTERRA at: (888) 327-2770 Monday through Friday 8am to 5pm Pacific time.

Employee Usage Agreement and Legal Agreement

Agreement Acceptance

Instructions

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

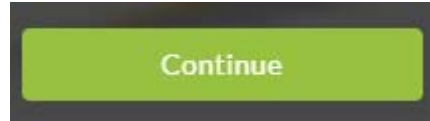
Employee Usage Agreement

Legal Agreement

Please read and accept the Employee Usage Agreement and Legal Agreement

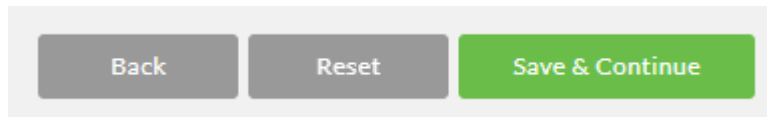
Welcome Page

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



Change Password

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



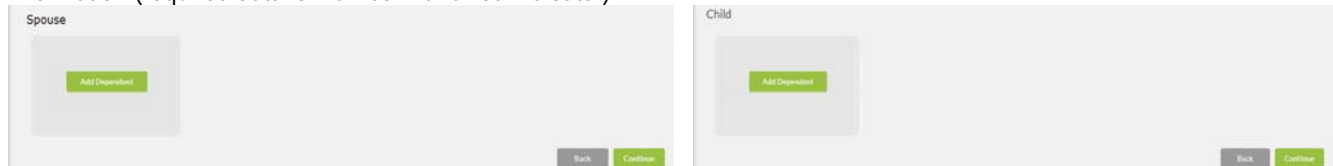
Demographics & Dependents

You will have an opportunity to review, add, or update your spouse, domestic partner or child 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).



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.

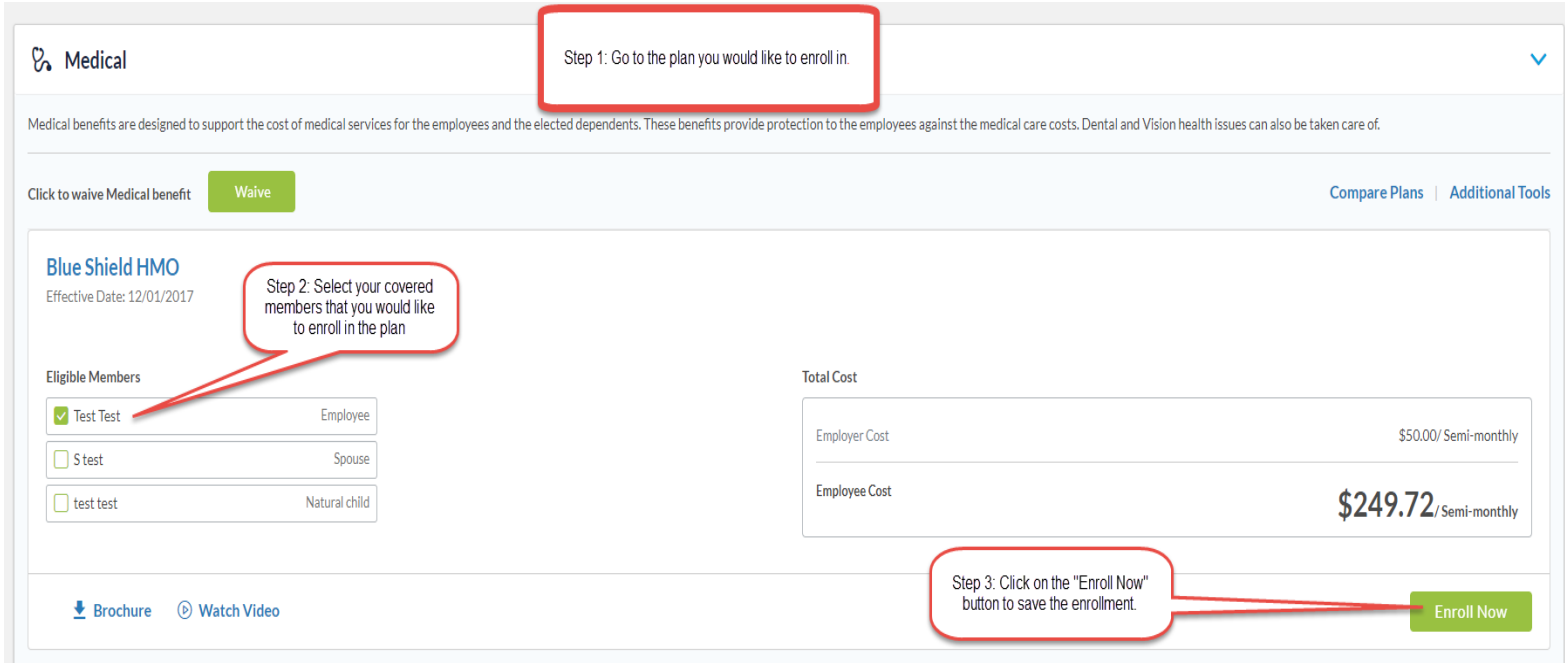
[If you do not have a spouse, domestic partner or child, click Continue to proceed to the next page.](#)

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.



Plan Elections

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".



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
Effective Date: 12/01/2017

Eligible Members

<input checked="" type="checkbox"/> Test Test	Employee
<input type="checkbox"/> S test	Spouse
<input type="checkbox"/> test test	Natural child

Total Cost

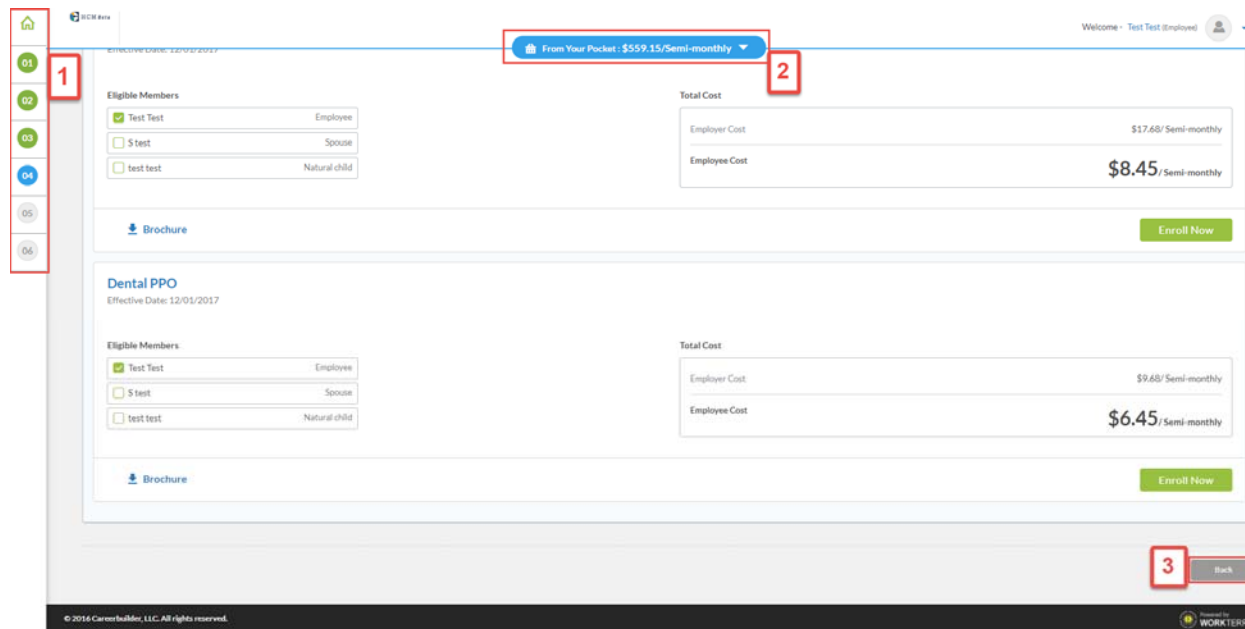
Employer Cost	\$50.00/ Semi-monthly
Employee Cost	\$249.72 Semi-monthly

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

Navigation

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



The screenshot displays the WorkTerra enrollment tool interface. On the left, a vertical slide-out menu bar contains numbered buttons (01-06). The main content area is divided into two sections: 'Medical' and 'Dental PPO'. Each section includes an 'Eligible Members' table with checkboxes for 'Test Test' (Employee), 'S test' (Spouse), and 'test test' (Natural child). To the right of each section is a 'Total Cost' summary table showing 'Employer Cost' and 'Employee Cost'. The 'Medical' section shows a total cost of \$8.45/Semi-monthly, and the 'Dental PPO' section shows a total cost of \$6.45/Semi-monthly. At the top center, a dropdown menu displays 'From Your Pocket: \$559.15/Semi-monthly'. At the bottom right, a 'Back' button is visible. Red boxes with numbers 1, 2, and 3 highlight the slide-out menu bar, the dropdown menu, and the 'Back' button, respectively.

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.

Confirmation Statement



Test Test

Date of Birth:
January 1, 1985 (32 years)

Gender:
Male

Address:
test

Social Security Number:
XXXXXX123

DC: ---
USA

Employee Review

EMPLOYEE REVIEW

Underwriting

Payroll

Demographics

Dependent Information

Last Recent Activity

Employment Status	Employment	Location ID
Full Time	Full Time	CA
New Field	Reason for Status Change	
3	---	
Current Job Title	Job Description	Supervisor
---	---	False
Officer Status	Company Stock Holdings %	
No	0	

To go directly to a specific section, click on an option you want to review using this panel.

Employee Review

Underwriting

Payroll

Demographics

Dependent Information

Last Recent Activity

Current Enrollment Summary

Future Enrollment Summary

Waived Benefits

PLAN NAME	COVERAGE	EMPLOYER COST	EMPLOYEE COST
 Blue Shield PPO (Pre-tax) Effective: 12/01/2017	Test Test (Employee) S test (Spouse)	\$261.06	\$609.15
 Flexible Spending Account (Post-tax) Effective: 12/01/2017	Annual Employee Coverage - \$0.00 Annual Employer Coverage - \$0.00	\$0.00	\$0.00
 Basic Life (Post-tax) Effective: 12/01/2017	Test Test (Employee)	\$0.00	\$0.00
Primary Beneficiary S test (Spouse)	100%		
 Supp Life (Post-tax) Effective: 12/01/2017	Test Test (Employee) Current Coverage \$20,000.00 Elected Coverage \$200,000.00 (LL cost \$19.00)	\$0.00	\$0.30
Primary Beneficiary S test (Spouse)	100%		

Please note "Elected Coverage" is the coverage that is pending for EOL.
Current Coverage \$20,000.00
Elected Coverage \$200,000.00
(EE cost \$19.00)

Once you have completed reviewing your elections, you can click "Finish" to complete the Enrollment process.

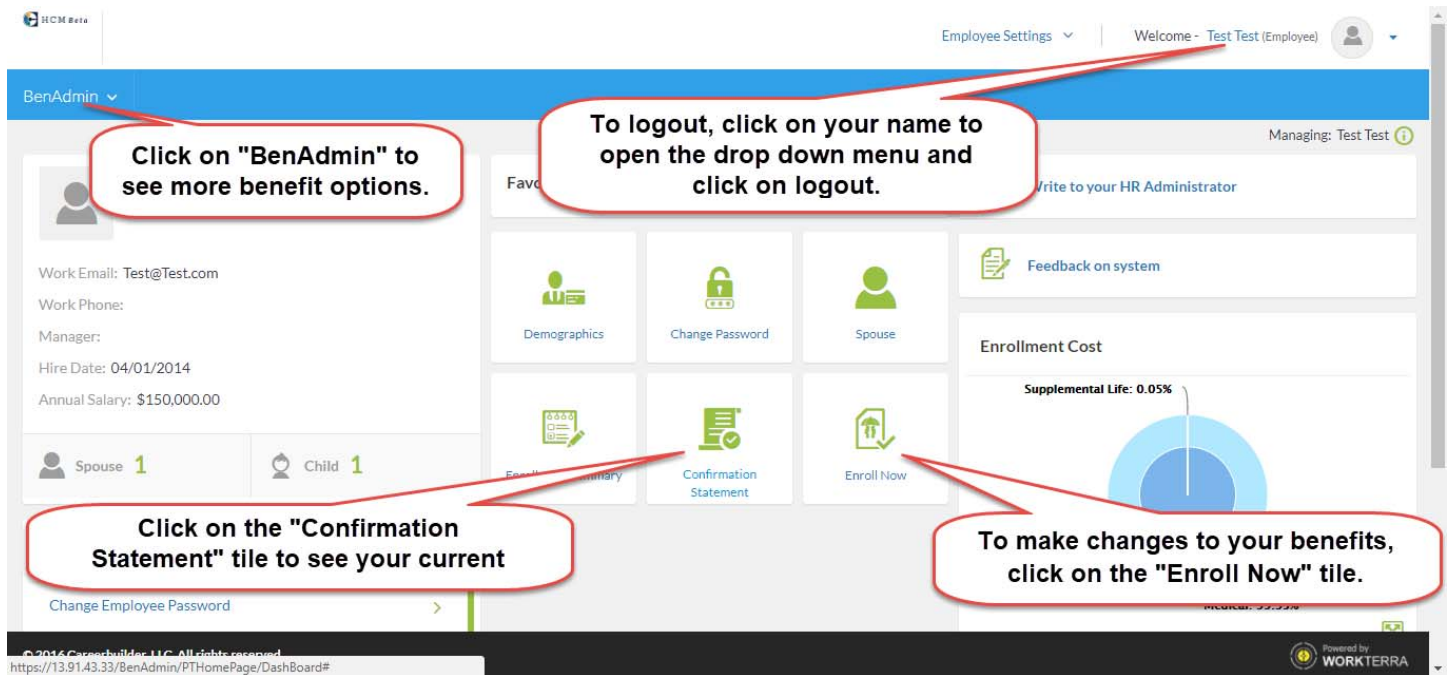


Year-round Access & Qualifying Events

(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.



The screenshot shows the Employee Home Page for a user named BenAdmin. The page includes a navigation bar with "Employee Settings" and "Welcome - Test Test (Employee)". The main content area features several tiles: "Demographics", "Change Password", "Spouse", "Enroll Now", "Confirmation Statement", and "Enroll Now". A "Feedback on system" tile is also present. The "Enrollment Cost" section shows "Supplemental Life: 0.05%".

Callout boxes provide the following instructions:

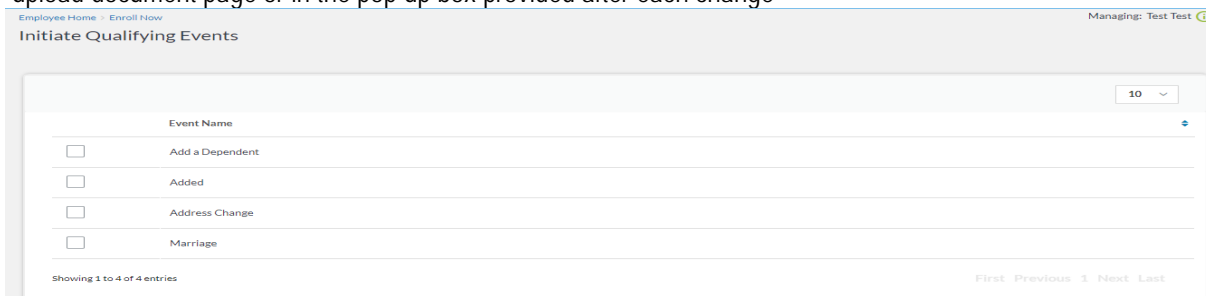
- Click on "BenAdmin" to see more benefit options.** (Points to the user name in the top left navigation bar)
- To logout, click on your name to open the drop down menu and click on logout.** (Points to the user name in the top right navigation bar)
- Click on the "Confirmation Statement" tile to see your current** (Points to the "Confirmation Statement" tile)
- To make changes to your benefits, click on the "Enroll Now" tile.** (Points to the "Enroll Now" 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 in the pop up box provided after each change



The screenshot shows the "Initiate Qualifying Events" page. It features a table with the following columns: "Event Name" and "Action". The table contains four rows of event types, each with a checkbox in the "Action" column:

Event Name	Action
Add a Dependent	<input type="checkbox"/>
Added	<input type="checkbox"/>
Address Change	<input type="checkbox"/>
Marriage	<input type="checkbox"/>

At the bottom of the page, it indicates "Showing 1 to 4 of 4 entries" and provides navigation links: "First", "Previous", "Next", "Last".