CIS-Connect Administrator Quick Guide

cis benefits
cisbenefits.org

Accessing CIS-Connect

To access the online enrollment system CIS-Connect, go to the CIS Benefits website www.cisbenefits.org and click on the CIS-Connect button. CIS-Connect can also be accessed from the Benefits Admin Portal page on the CIS website https://cisoregon.org/member/benefits/adminportal.

Administrator User Role

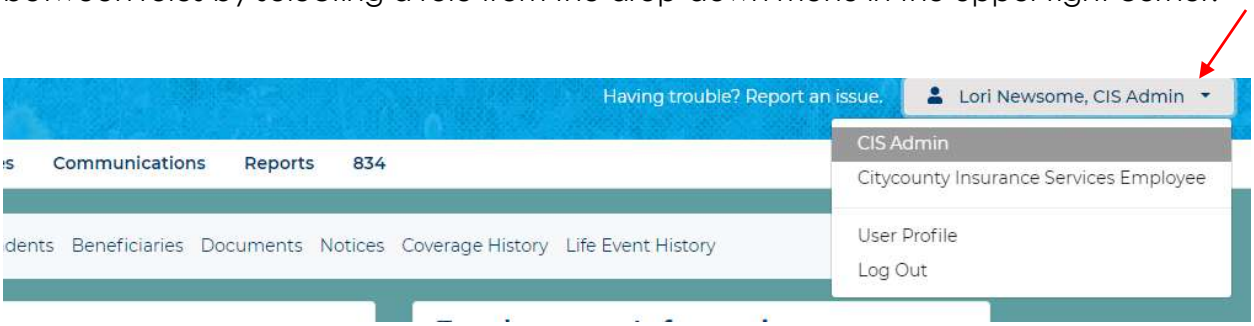
Each employer has been set up with one Primary Admin User. The Primary User was identified by a report CIS asked employers to review in March. If you are having problems accessing the system, it may be because you were not the person identified as the Primary Admin User. Please contact CIS to confirm who your designated Primary Admin User is.

The Primary Admin person is the only one that can add/delete Admin Users or Key Contacts. Admin Users are employees who should have access to the system and Key Contacts are those that should receive copies of member updates and other employer communications. Admin Users and Key Contacts are updated under the Employer Profile tab.

Each person provided access to CIS-Connect will have "User Roles" assigned to them. The roles are defined as follows:

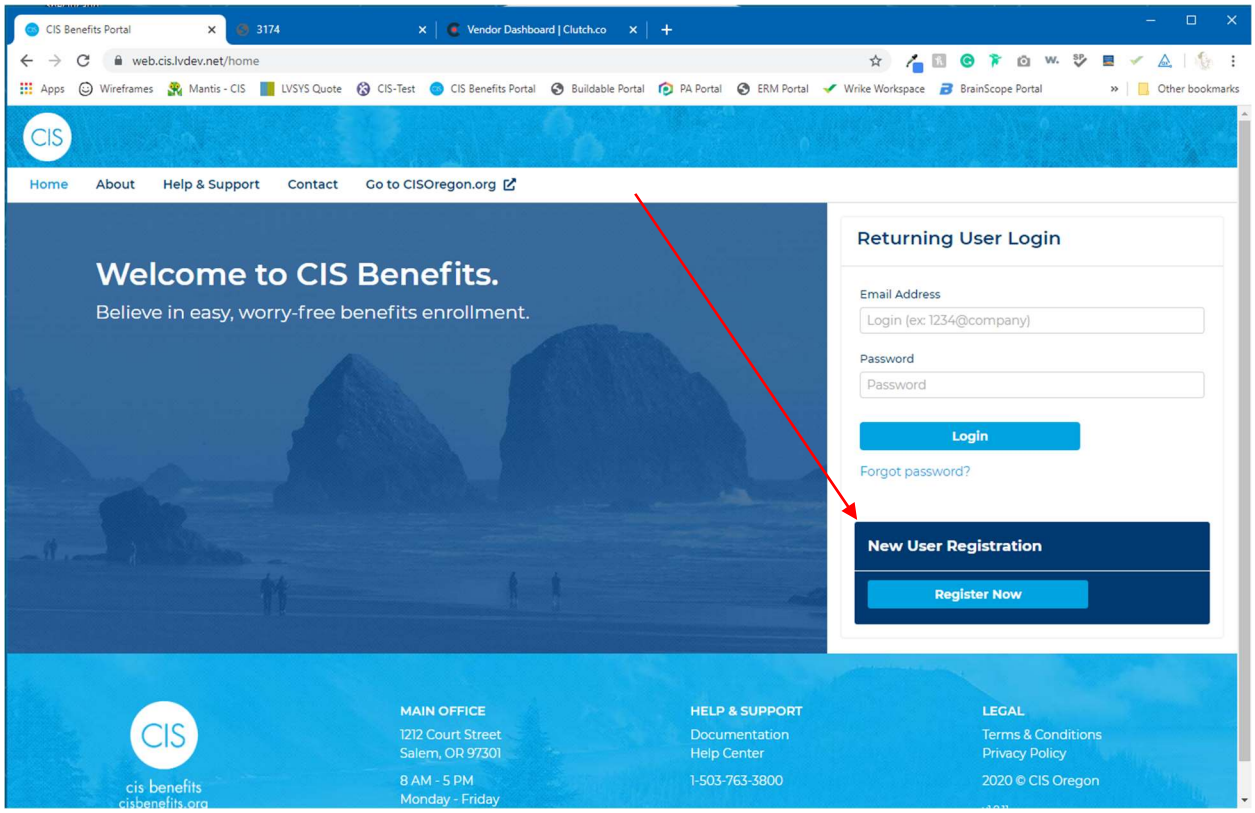
Admin - Edit	Full edit access for all screens
Admin – View Only	View only access for all screens
Finance	Access to Billing tab & billing Invoice (on home page)
Finance + View	Access to Billing tab, billing invoices (on home page) and view only access to employee records
Employee	All employees will default to this role unless changed to one of the other roles outlined above.

If you have more than one "User Role" (e.g., employee & Admin User), you can toggle between roles by selecting a role from the drop-down menu in the upper right corner.



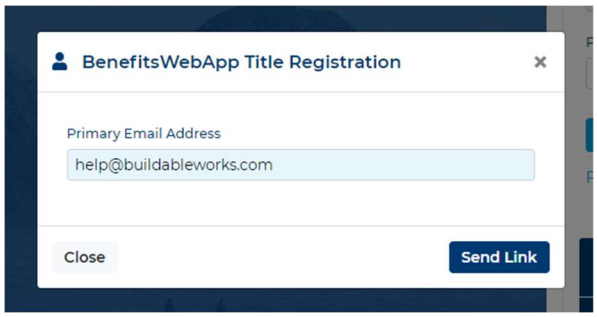
New User Registration Process

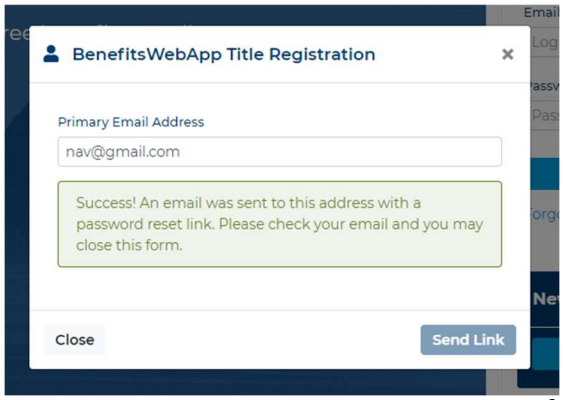
Once you've been added to the system by either CIS Admin or an Employer Admin, all users (including employees) will go through the same process to set-up their password and complete the dual-factor authentication process. All users must use the email address entered in the system by the employer or CIS.



Step 1 – Click the "Register Now" button under New User Registration.

Step 2 – A pop-up window will appear asking for the email address that was used to set up your account. For most people, this will be their work email address. Enter the Email Address and click "Send Link". A success message will appear if the email address is associated with an employee. If the email is not found, either the user has not yet been set up or the email address entered by the employer is different than what the employee is using.





Step 3 – Go to your email account to retrieve the registration email that was sent. Find the link in the body of the email and click on the link.

From: Benefits Web App <benefits@cisoregon.org>
Sent: Thursday, January 23, 2020 4:32 PM
To: Kelly Navari <knavari@buildableworks.com>
Subject: FW: BenefitsWebApp Title - Welcome

Hello Kelly Navari

This is an automated email from the BenefitsWebApp Title website.

You are receiving this email because you recently registered an account. Please click on the link below, or copy to your browser, to finish creating your account. This link will expire in 48 hours.

http://web.cis.lvdev.net/user/complete-registration/7ee399fe00a78fb42bc729dea7dc1ff6523ca3356727ff74dd0203b84

Thank you

Step 4 – The link will take you back to the system where you can enter your password. Enter your new password twice and click "Complete Registration".

New User Registration

Welcome to the BenefitsWebApp Title Portal! Please verify your information and create a new password below.

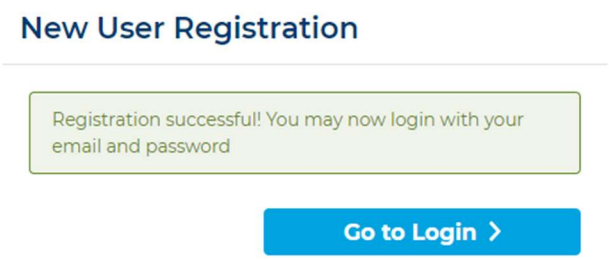
Email
knavari@buildableworks.com

New Password*

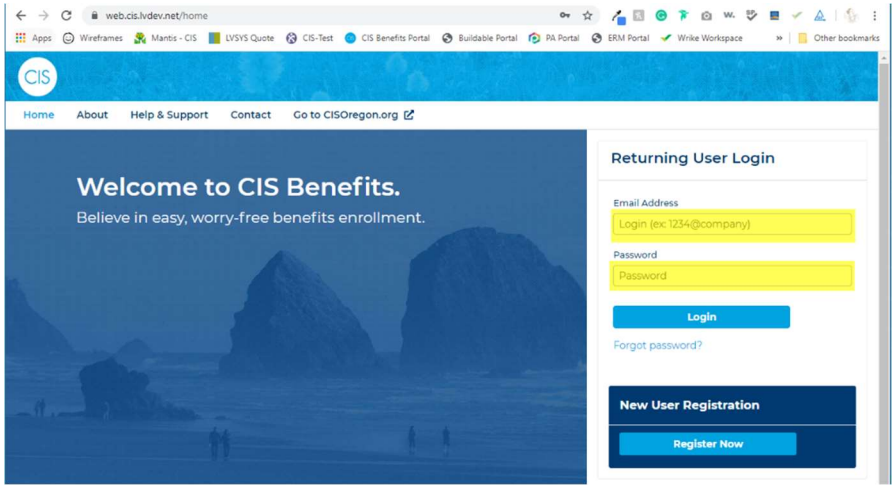
Confirm New Password*

Complete Registration

Step 5 – When your registration is successful, a green success message will appear along with a new button. Click the "Go to Login >" button to continue.

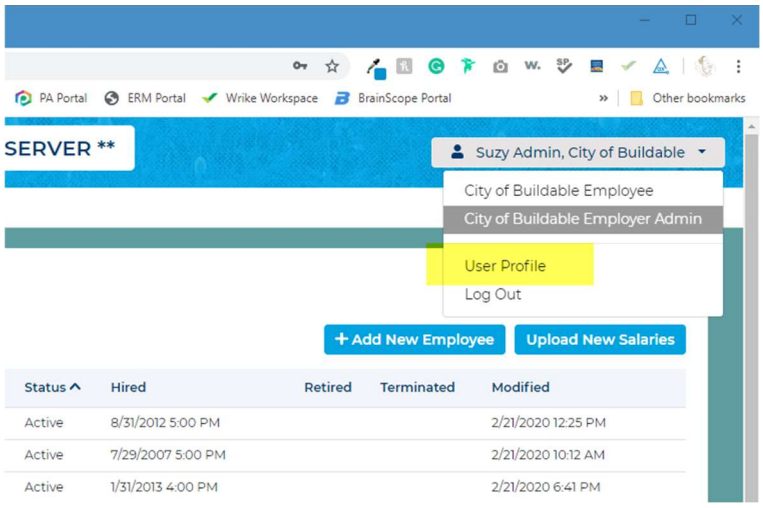


Step 6 – You will be returned to the home/login screen where you can now enter your "Email Address" and new "Password" and click "Login" to access the system for the first time.

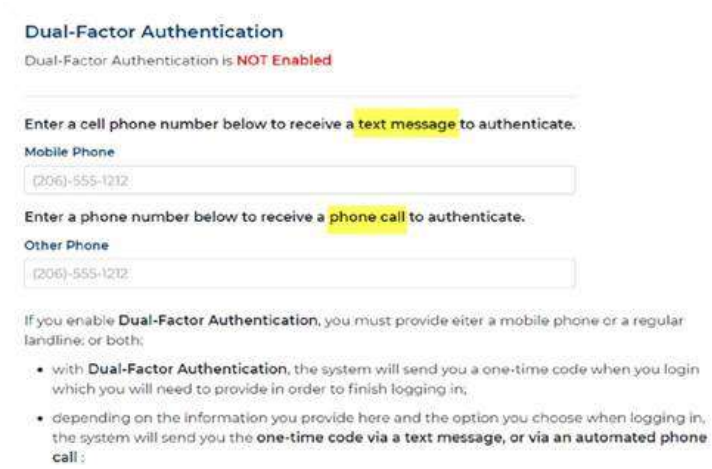


Dual-Factor Authentication

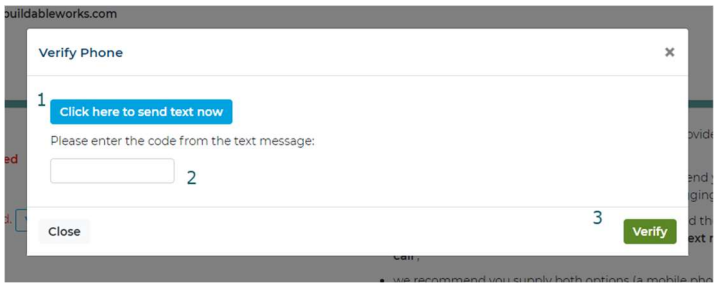
1. Click on the username in the top right-hand corner of the screen. Navigate to "User Profile".



2. Enter your cell phone number in the "Mobile Phone" field provided. Click "Verify now with a Text Message" or "Verify now with a phone call". Click to verify now.



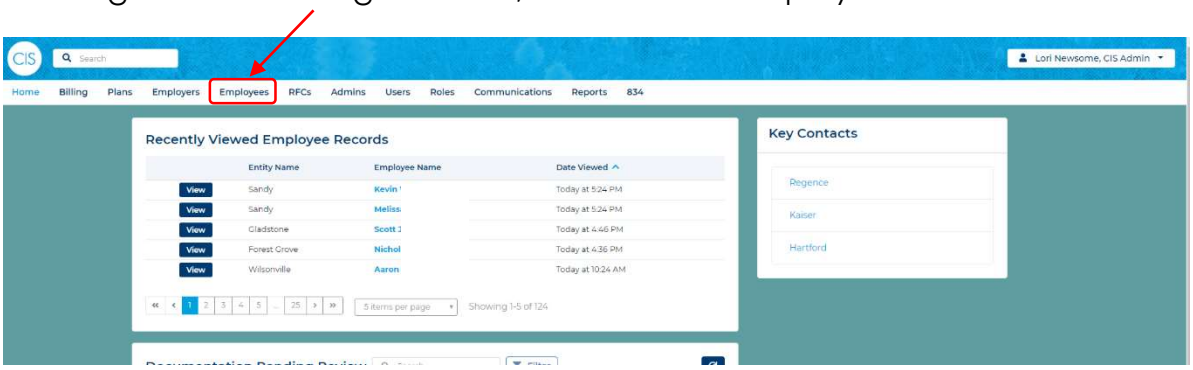
3. Click the button in the pop-up window to receive a code. Enter the code in the field provided and click "verify". This will take you back to the User Profile for Admin Screen.



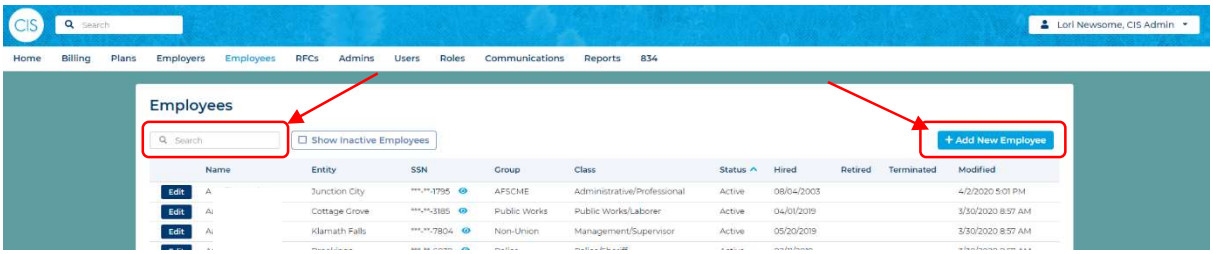
4. Click the "Enable Dual Factor Authentication" button and you'll receive a success message.

Adding A New Employee

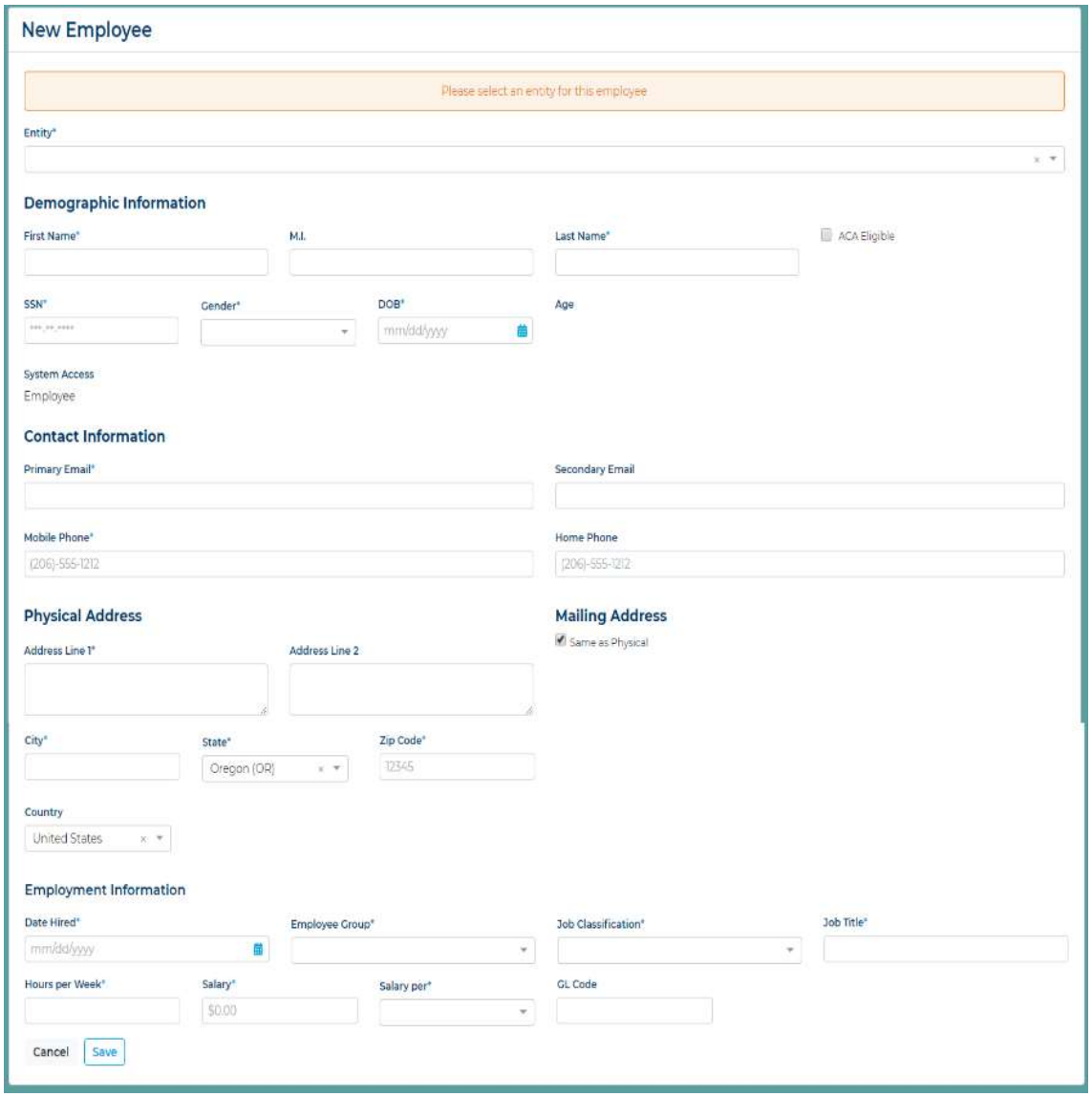
1. Using the Main Navigation bar, click on the "Employees" tab.



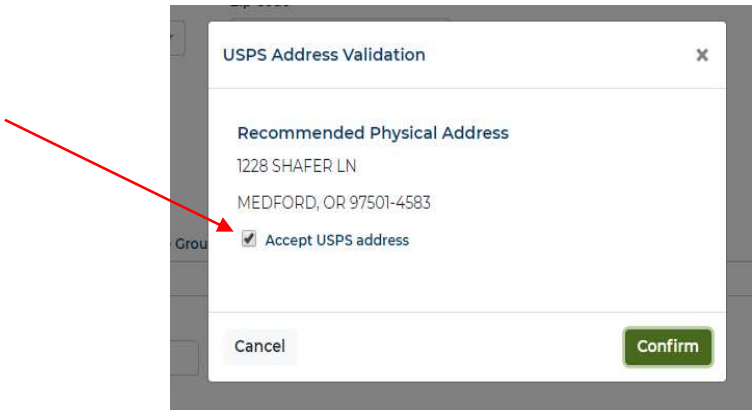
2. Try searching for the employee first to see if they are already in the system. If not, click on the "+Add New Employee" button.



3. Fill out the employee information (all fields with an * are required) and click "Save".



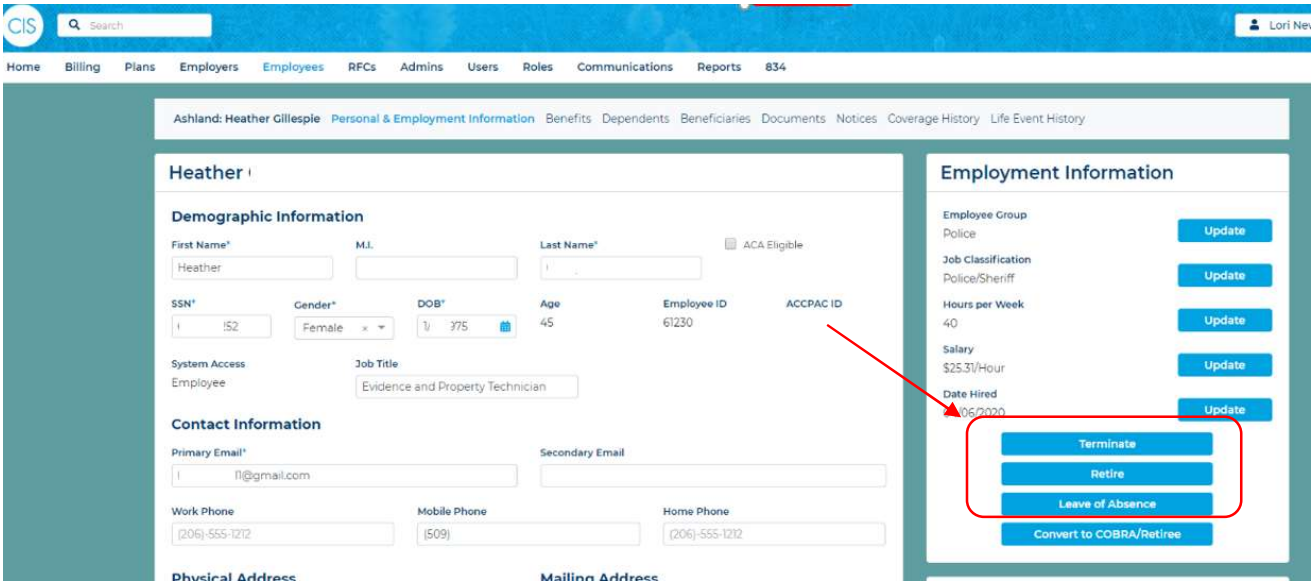
4. A US Postal Service address validation screen will pop-up. If the system can't find a match, a message will appear that says "We were unable to find an address that matches your input." You'll want to double-check the address. If it's correct, you can click "Confirm" to continue.



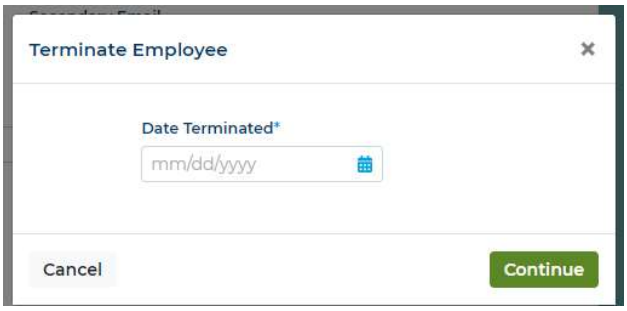
5. Once entered, the employee will receive an email with instructions on how to Register for access to CIS-Connect and complete the New Hire event.

Terminating or Retiring an Employee

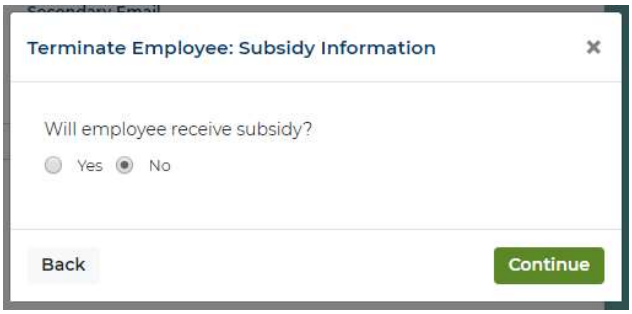
1. Once you have brought up the employee, click on either the "Terminate" or "Retire" button.



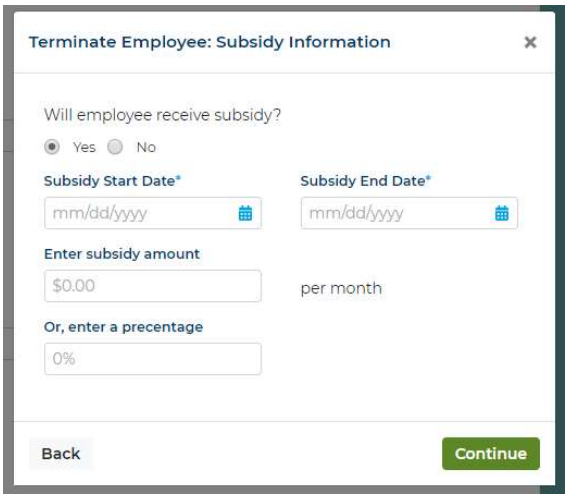
2. Enter the termination/retirement date and click the "Continue" button.



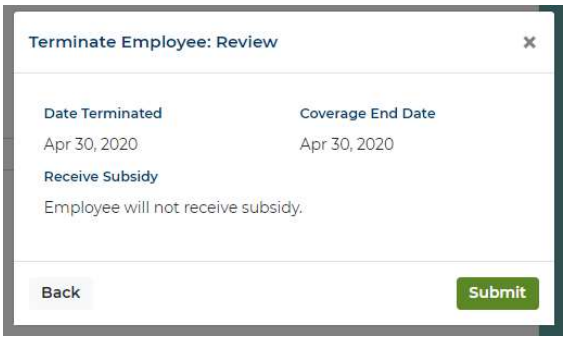
3. Subsidy Information:
   - If you are not adding a subsidy, click the "Continue" button.



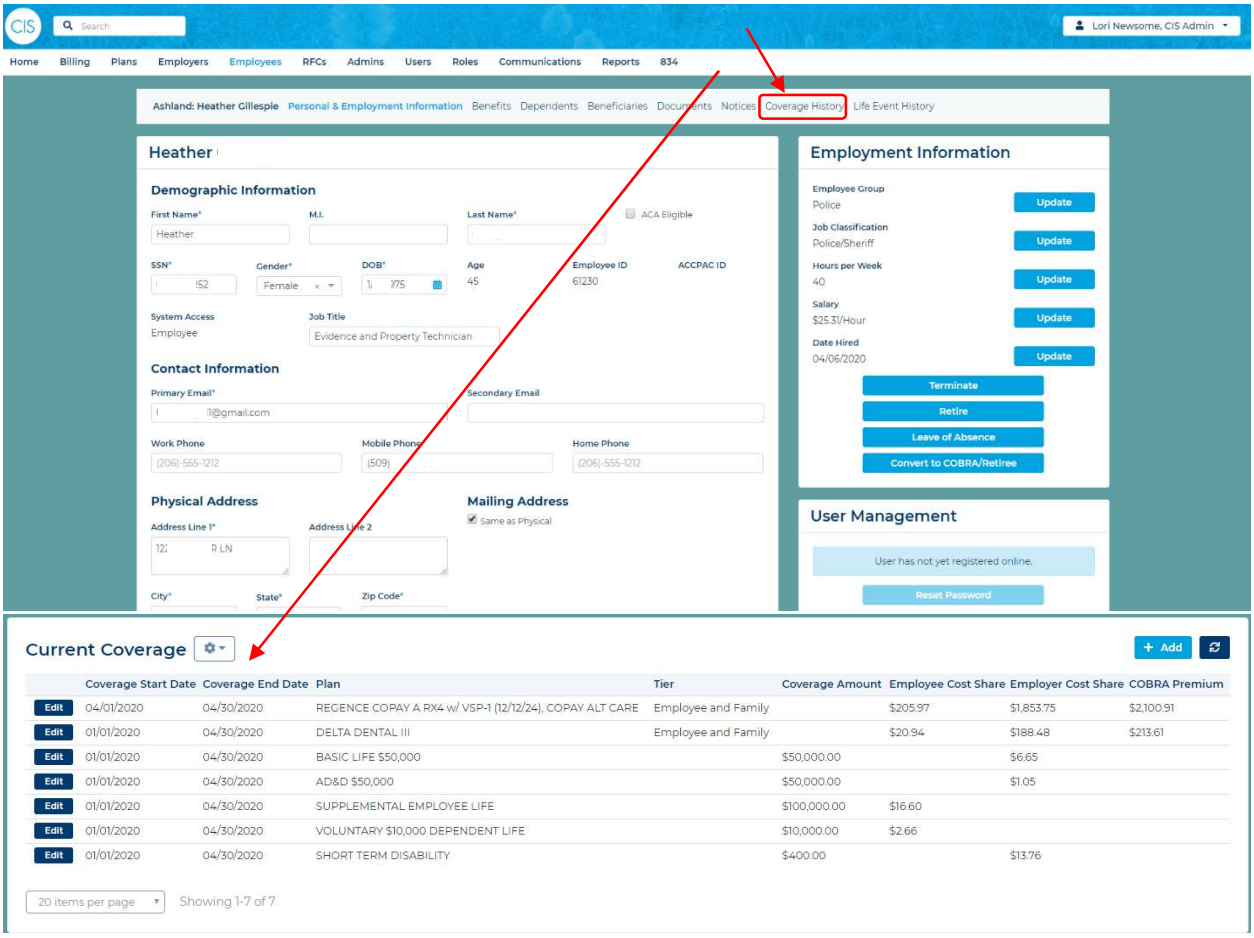
   - If adding a subsidy, click "Yes" and add in the start date, end date (if available), the percentage or flat amount and click the "Continue" button.



4. If all is correct on the review screen, click "Submit".

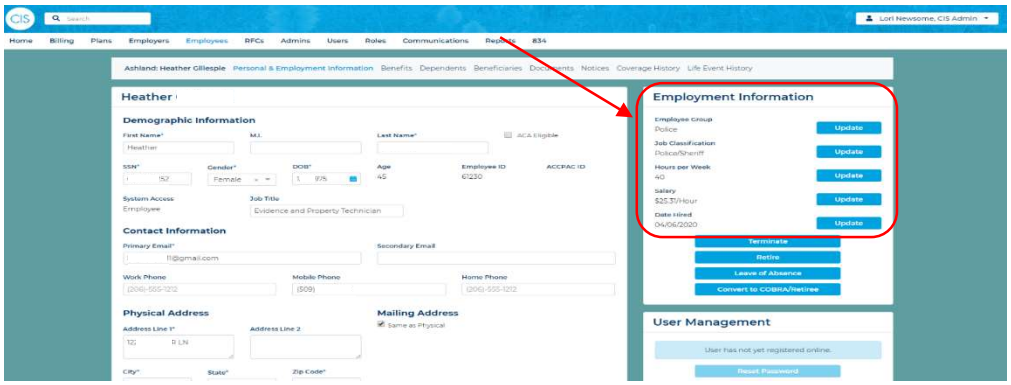


5. If the termination/retirement is a future date, you will see the Coverage End Date populated under the Current Coverage card on the employment page. If the coverage end date has already passed, click on the "Coverage History" page to view.

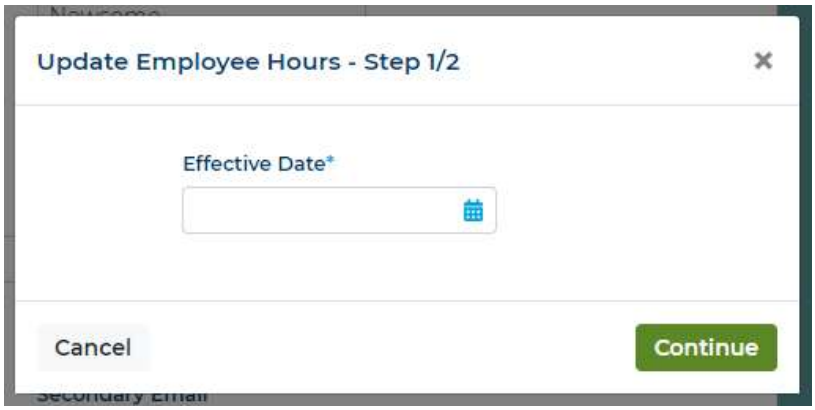


Change in Employment Information or Individual Salary

1. On the employee's page click on the button that corresponds to the change needed.



2. Enter the effective date and click the "Continue" button.



3. Enter the change and click the "Continue" button.

4. Review the changes and click "Back" to correct or "Continue". Please note this will be changing to "Submit" in future.

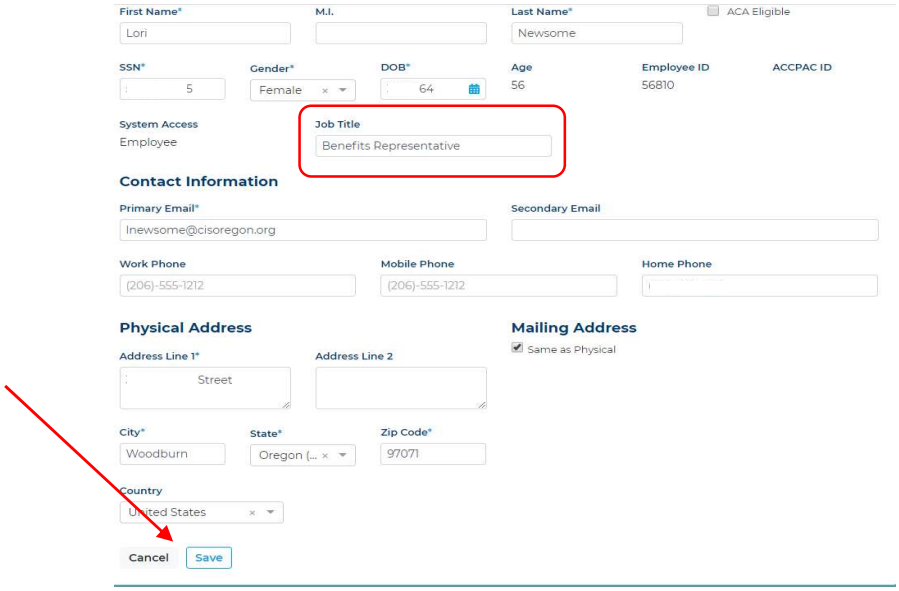
5. This will make any necessary changes for salary based Basic Life, AD&D, and LTD plans and will open an enrollment event for the employee if a change in Employee Group or Hours makes the employee eligible for benefits.

Leave of Absence

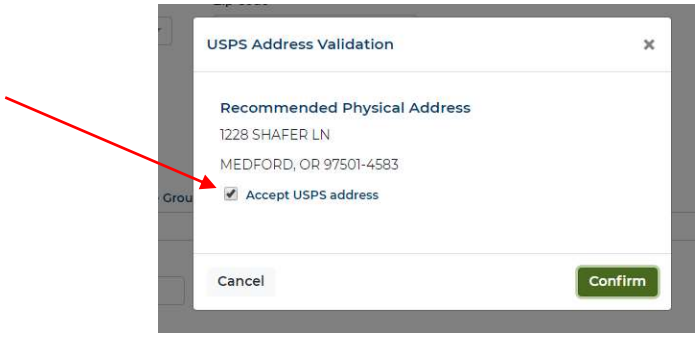
For now, please contact the Benefits Team when you have an employee going out for any type of leave.

Updating an Employee's Demographics

1. On the employee's screen just type over any field that you are making a change to and click "Save".
    - Note that the employee's Job Title is in this area and not in the Employment Information box.

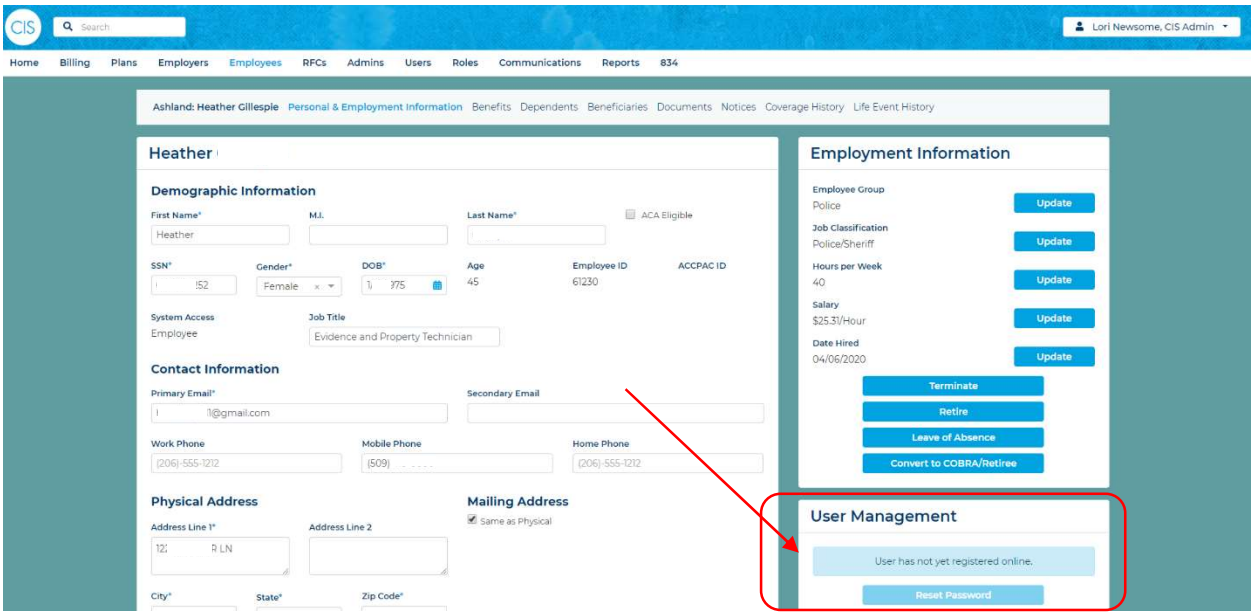


2. If making a change to the address, a US Postal Service address validation screen will pop-up. If the system can't find a match, a message will appear that says "We were unable to find an address that matches your input." You'll want to double-check the address. If it's correct, you can click "Confirm" to continue.



Resetting an Employee's Password

1. On the employee's page look in the User Management box.

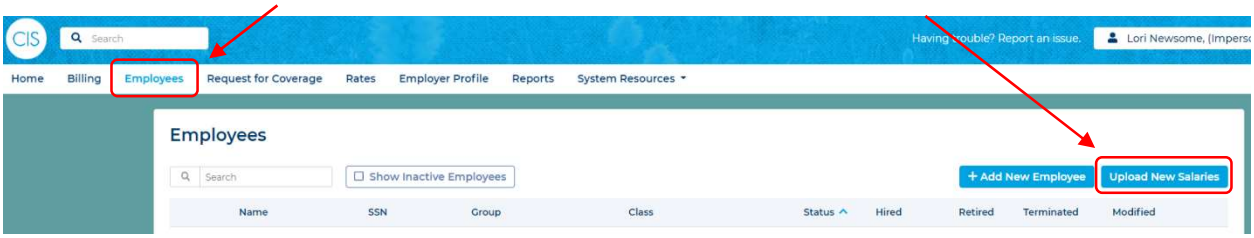


2. If the employee has registered, click on the "Reset Password". If the employee has not yet registered, direct the employee to the www.cisbenefits.org website to register.

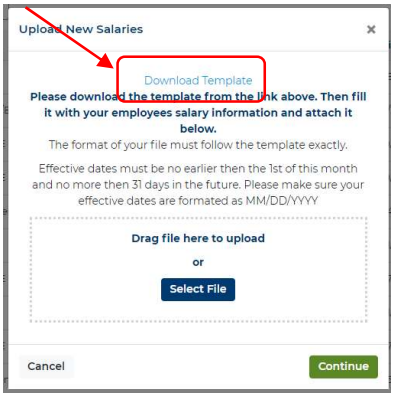
Mass Salary Changes

For individual salary change, see the **Change in Employment Information or Individual Salary** section.

1. From your home screen, click on the "Employees" tab, then click on the "Upload New Salaries" button.



2. In the Pop-Up screen, click on "Download Template".



3. Sort and remove any employees who will not have a salary change. Add the new salaries and the effective date:
    a. Effective date can be the first of the current month or the first of the following month using MM/DD/YYYY format.
    b. Frequency – remember to change the frequency if changing to a different frequency from what is in the system currently (e.g., Current salary is per Year but the new salary is per Hour).
4. Save the spreadsheet in .csv format, upload the spreadsheet, and click the "Continue" button.