

Employee benefits enrollment

ePortal Self-service user guide



This user guide provides instructions for using Metro’s ePortal Self-service for benefits enrollment. Instructions are for both new employees, and existing employees during open enrollment periods.

Make sure to complete enrollment within the timeframe provided.

Before you start: Gather information and documents

Birth dates, social security numbers and certain documents such as marriage licenses, affidavit of domestic partnerships are needed if you plan to enroll dependents such as a spouse, domestic partner or children. Beneficiary information will be needed for both Metro provided, and Employee paid life insurance plans.

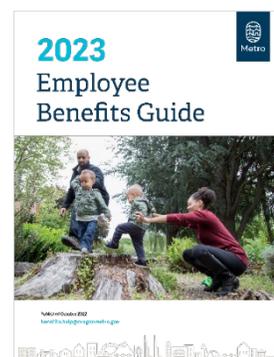
Enrollment deadline

Make sure to complete enrollment within the timeframe provided. You can log in and make updates throughout the enrollment period. You will not be able to make changes after the enrollment deadline.

Employee Benefits Handbook

View health plans, supplemental insurance plans, rates and other employee benefits: [MetroNet> My Employment>Benefits and Leaves>](#)

A listing of benefits as they appear in the self-enrollment tool is on page 10 of this guide.



Resources and support

Benefits information
[MetroNet> My Employment> Benefits and Leaves](#)
benefits.help@oregonmetro.gov
503-797-1850

ePortal Self-service
MetroNet: [ePortal Self-service resource page](#)
Password reset: helpdesk@oregonmetro.gov

Reminders

Health Savings Account required for high deductible plans

If you enroll in a high deductible health plan make sure to also enroll in a Health Savings Account (HSA).

Flexible Spending Plan enrollment required each year

If you want to participate in a Flexible Spending Plan, you must enroll every year to participate.

Opt Out of Coverage

If you opt out of coverage, you must submit proof of other group coverage, even if you have provided this in the past as well as an updated waiver form.

INSTRUCTIONS

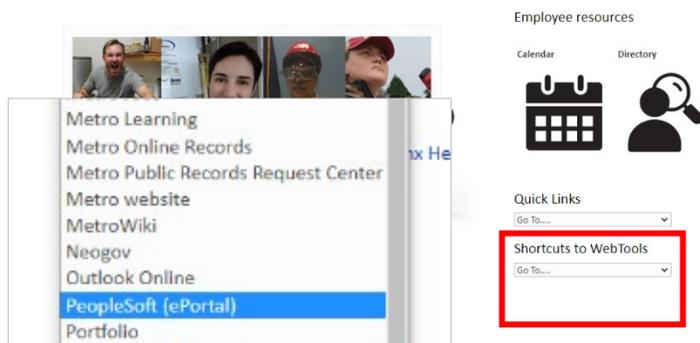
Log in: Benefits administration ePortal Self-service

1. Go to the MetroNet
metronet.oregonmetro.gov



2. Click on *Shortcut to WebTools*
Located on the right side of the homepage.

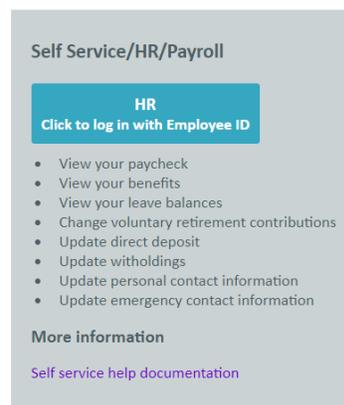
3. Select PeopleSoft ePortal.



4. Select Self-service/HR/Payroll

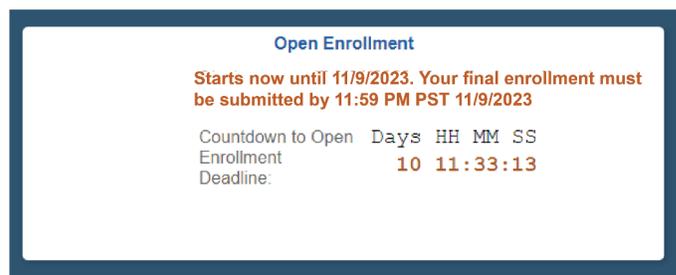
PEOPLESFT LOGIN

5. Complete Log in
Use your employee ID and password for ePortal.



6. Click the tile labeled “Benefits Enrollment” or “Open Enrollment”.

IMPORTANT: The enrollment period deadline will display on this tile. Make sure to update your benefits before the deadline. Users can log in and out of ePortal throughout the enrollment period. Access to the enrollment tool will close at midnight on the enrollment deadline.



OVERVIEW

Open enrollment home page

A menu of sections to review and complete will appear on the left-hand side of the tool. Once you have reviewed or updated information, the section status will change from *Not Started* to *Visited*. If you make changes to a section, the status will change to *Complete*.

Not all sections require a review or data entry to consider your enrollment complete.

★ **New employees and Annual enrollment**

Make sure to review and complete information under these sections:

- Personal information
- Dependent/Beneficiary Info
- Benefits Enrollment

★ **Personal information**

Enter or update your name, home and mailing addresses and contact information in this section.

★ **Dependent/Beneficiary Info**

Enter or update dependents such as spouse or domestic partner, or dependents such as children, as well as beneficiaries to Metro provided or supplemental life insurance coverage.

Benefits Summary

A summary of your current health and supplemental insurance coverage can be found in this section. You do not need to enter or update information in this section.

★ **Benefits Enrollment**

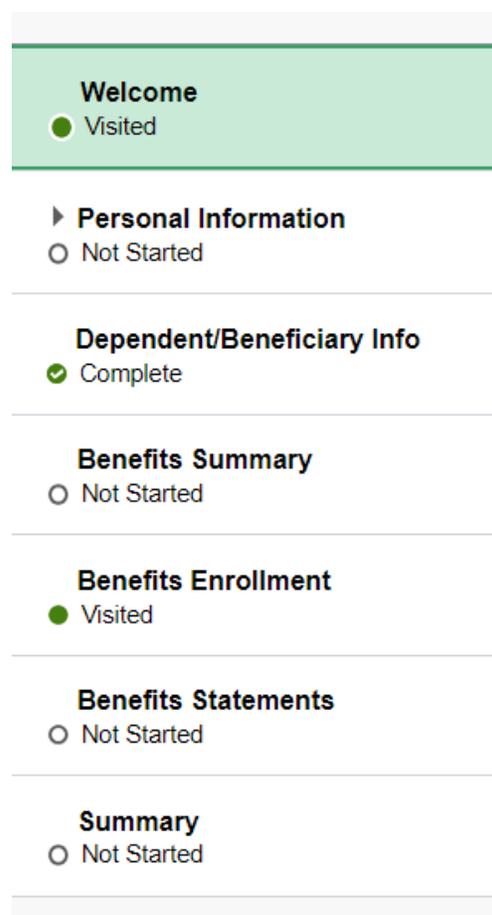
Add or change insurance options in this section.

Benefits Statements

This section is currently not available.

Summary

An overview of sections visited and completed is available in this section. You do not need to enter or update information in this section.



Welcome	<input checked="" type="radio"/> Visited
▶ Personal Information	<input type="radio"/> Not Started
Dependent/Beneficiary Info	<input checked="" type="radio"/> Complete
Benefits Summary	<input type="radio"/> Not Started
Benefits Enrollment	<input checked="" type="radio"/> Visited
Benefits Statements	<input type="radio"/> Not Started
Summary	<input type="radio"/> Not Started

Dependent/Beneficiary Info

If you have a spouse, domestic partner or child who should be part of your medical coverage, or a person who should be beneficiary to benefits like a life insurance policy, make sure they are listed in this section. Persons listed here will be used in other sections of the enrollment tool to add them to coverage or beneficiary information.

Dependent: a person who is eligible for health and some types of supplemental health insurance coverage. A dependent may be a spouse, domestic partner or child.

Beneficiary: a person that you designate to receive benefits from Metro paid life insurance or supplemental, employee paid policies.

In the example below all three people are listed as a Beneficiary, two are listed as a Dependent.

Dependent/Beneficiary Info

Add Individual				
Name	Relationship	Beneficiary	Dependent	
Joan Talbert	Child	✓	✓	>
Anna Jones	Parent	✓		>
Sara Talbert	Spouse	✓	✓	>

Add or update Dependent or Beneficiary information

Click on the arrow button following a name to update existing information. Click on Add Individual to add a new dependent or beneficiary.

Dependent/Beneficiary Info

Add Individual				
Name	Relationship	Beneficiary	Dependent	
Joan Talbert	Child	✓	✓	>

Benefits summary

This section provides a summary of *current* benefits you are enrolled in and those you are not. Click on these icons to change the view from tile to list.



To change or enroll in benefits, go to the Benefits Enrollment section.

A listing of different benefits is on page 10 of this guide.

Benefits you are enrolled in will list the plan name and which beneficiaries or dependents are included.

Medical

Plan Option 2: Regence Classic PPO
Coverage Family Regence
👤 2 Dependents

Review

Any benefits you are not enrolled in will list that benefit as *Waived*.

Supplemental AD and D

Coverage Waived

Benefits enrollment

Enrollment summary

New employees: you begin with no costs listed in the Enrollment Summary. As you enroll in benefits this amount will be updated to show deductions that will occur each pay period (each paycheck).

Existing employees: your current costs per pay period (each paycheck), are listed here this will be updated as you add or update benefits.

▼ Enrollment Summary

Your Pay Period Cost **\$0.00**

Status **Pending Review**

[Enrollment Preview Statement](#)

[Submit Enrollment](#)

Your Pay Period Cost **\$129.26**

Status **Pending Review**

[Enrollment Preview Statement](#)

[Submit Enrollment](#)

Benefit plans

This section is where you can add or update benefits. Click on these icons to change the view from tile to list.



A listing of different benefits is on page 10 of this guide.

Benefits available for enrollment will have a “Select” or “Review” listed. Benefits that do not have this listing or highlight are currently closed for enrollment or temporarily unavailable.

Selections will highlight when you hover over them, click on an item to make changes.

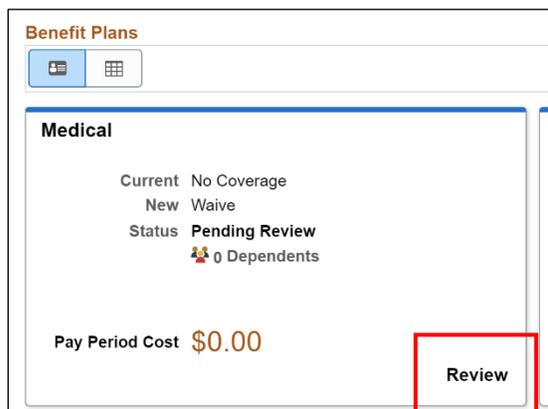
<p>Medical</p> <p>Current No Coverage New Waive Status Pending Review 👤 0 Dependents</p> <p>Pay Period Cost \$0.00</p> <p>Review</p>	<p>Dental</p> <p>Current No Coverage New Waive Status Pending Review 👤 0 Dependents</p> <p>Pay Period Cost \$0.00</p> <p>Review</p>	<p>Critical Illness</p> <p>Current No Coverage New Waive Status Pending Review 👤 0 Dependents</p> <p>Pay Period Cost \$0.00</p> <p>Review</p>
<p>Vision</p> <p>Current No Coverage New Waive Status Pending Review 👤 0 Dependents</p>	<p>Accidental Injury</p> <p>Current No Coverage New Waive Status Pending Review 👤 0 Dependents</p>	<p>Supplemental Life</p> <p>Current No Coverage New Waive Status Pending Review</p>

INSTRUCTIONS

Benefit enrollment and adding dependents

1. Select benefit type for enrollment

Click on Select or Review on the benefit “tile” you want to enroll.



Benefit Plans

Medical

Current No Coverage
New Waive
Status **Pending Review**
0 Dependents

Pay Period Cost **\$0.00**

Review

2. Enroll your dependents. If applicable:

- Add your spouse or dependent children.
- Click on “Add/Update Dependent”.
A marriage license or affidavit of domestic partnership is required when adding a spouse or domestic partner. If you are adding a domestic partner, you must contact benefits.help@oregonmetro.gov to complete this process.
- Click “Add Individual”
- Enter date of birth information
- Enter a social security number for each partner and dependent in the National ID field.
- Click “Save”
- Close the window once you added all dependents. Make sure that the dependent name is “checked” so they are enrolled.

▼ Enroll Your Dependents

Dependents that the employee has registered are listed here. Select the Add/Update Dependent button to view, update or add a new dependent.

	Dependents	Relationship
<input checked="" type="checkbox"/>	ann smith	Child
<input checked="" type="checkbox"/>	joe smith	Spouse

[Add/Update Dependent](#)

3. Enroll in benefits (Enroll in your plan)

If applicable, you will see the cost of the plan with dependents you added. Some plans, including medical, dental and many supplemental insurance plans, have different options available.

Review plan information in the Employee Benefits Handbook, so you can select the plan that meets the needs of your family and your budget. You can click on the “Overview of All Plans” buttons to see the costs of each plan based on who you are enrolling.

Below is an example of Medical insurance plans.

- A. Before tax cost: employee-paid portion of the benefit deducted from your earnings each pay period. This amount is deducted before taxes are withheld.
- B. After tax cost: any employee-paid portion of the benefit deducted from your earnings after taxes are withheld. This column is usually blank
- C. Employer cost: the amount Metro pays each pay period for the benefit.
- D. Pay period cost: the total of columns A and B.

▼ Enroll in Your Plan

The cost shown for each plan is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage costs for individual plans, select the help icon corresponding to each plan option.

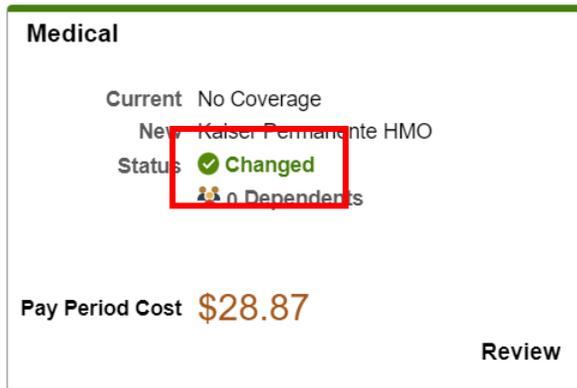
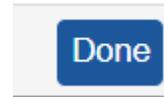
			A	B	C	D
	Plan Name		Before Tax Cost	After Tax Cost	Employer Cost	Pay Period Cost
Select	Option 1: Kaiser HMO		\$75.07		\$863.33	\$75.07
Select	Option 3: Kaiser High Deductib		\$50.17		\$576.99	\$50.17
Select	Option 2: Regence Classic PPO		\$95.21		\$1094.99	\$95.21
Select	Option 4: Regence High Deducti		\$67.06		\$771.26	\$67.06
Select	Waive					\$0.00
Select	Opt out of health insurance					\$0.00

- a. Click Select to pick the medical plan you want to enroll in. A checkmark will appear and your selection will be highlighted.

Select

✓ Option 1: Kaiser HMO

- b. Click Done in the upper right corner.
You will return to the Benefits Enrollment homepage.
The status of “Changed” will appear on the benefits tile you just completed.

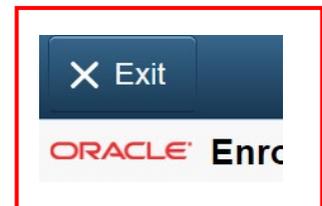


- c. Repeat the above steps to complete enrollment for available benefits.

Completing enrollment, leave tool and return to complete later

Click Exit in the upper left hand corner when you are done with updates and changes to benefit options , or to leave the tool and return later to complete enrollment.

Make sure to complete enrollment within the timeframe provided.



Review current and future benefits information

Employees can review their current and future benefits enrollment information in ePortal.

1. Log into the ePortal
2. Click on the Benefits Summary tile.



3. Your current benefits enrollment will appear on the screen.

4. To view future benefit selections enter in date in the My Benefits on field.

For annual enrollment enter the next plan year beginning in January. For example, 01/01/2024.

For new employees enter the following first day of the next month.

5. Click Refresh

Benefits Summary

To view your benefits as of another date, enter the date and select Refresh.

My Benefits on  [Refresh](#)

Benefit Plans

<p>Medical</p> <p>Plan Regence POS Coverage Family Regence 👤 2 Dependents</p> <p>Review</p>	<p>Dental</p> <p>Plan Oregon Dental Service Coverage Family 👤 2 Dependents</p> <p>Review</p>	<p>Critical Illness</p> <p>Coverage Waived</p>
<p>Vision</p> <p>Plan Vision Service Plan Coverage Family 👤 2 Dependents</p>	<p>Domestic Partner Medical</p> <p>Coverage Waived</p>	<p>Domestic Partner Dental</p> <p>Coverage Waived</p>

Benefit listing

The benefits listed in the ePortal Self-service tool for enrollment include medical, supplemental insurance, saving plans and flexible spending accounts (FSA).

Additional benefits such as PERS, 457/401K and paid time off (vacation, personal and sick leave) can be viewed in ePortal enrollment self-service tool but no enrollment actions are needed.

Medical <i>If you are in a domestic partnership and wish to add that dependent to your coverage, click on the tile labeled "Domestic Partner Medical".</i>	Employees can choose from four medical plans offered by Kaiser Permanente and Regence Blue Cross. High deductible plan options are available from each provider. Premium costs are shared by Metro (92%) and employees (8%). Option 1: Kaiser HMO Option 2: Regence Classic PPO Option 3: Kaiser High Deductible Option 4: Regence High Deductible
Dental <i>If you are in a domestic partnership and wish to add that dependent to your coverage, click on the tile labeled "Domestic Partner Dental".</i>	Dental coverage allows you and your dependents to have routine cleaning visits and receive services such as the installation of fillings and crowns. Premium costs are shared by Metro (92%) and employees (8%). Two dental plans are available and can be chosen regardless of who you chose for medical coverage. Option 1: Kaiser Option 2: Delta Dental
Vision <i>If you are in a domestic partnership and wish to add that dependent to your coverage, click on the tile labeled "Domestic Partner Vision".</i>	Vision coverage allows you and your dependents to see an ophthalmologist, optometrist, or optician to assist you with your eye care needs. Metro offers one option for vision benefits through VSP. Premium costs are shared by Metro (92%) and employees (8%).
Critical illness	Critical illness coverage is an employee-paid, supplemental insurance option. This coverage provides additional income if you or your dependent experience a critical illness or event.
Accident insurance	Accident Insurance provides a set benefit amount based on the type of injury you have and the type of treatment you need. It covers accidents that occur off the job. And it includes a range of incidents, from common injuries to more serious events. It can help you with out-of-pocket costs that your medical plan doesn't cover, like co-pays and deductibles.
Hospital care	Hospital care is an employee-paid, supplemental insurance option. This coverage provides additional income if you or your dependent becomes hospitalized.

Supplemental life insurance (employee)	Supplemental life insurance is an employee-paid insurance option that provides additional coverage. Note: as an employee, at no cost to you, Metro provides you basic life insurance benefits.
Supplemental spousal life Supplemental dependent life	Supplemental spousal and dependent life insurance is an employee-paid insurance option that provides coverage for your spouse or domestic partner or dependent. Employees must also be enrolled in supplemental Life insurance to enroll in spouse or dependent coverage. Enrolling employee is the beneficiary.
Supplemental AD and D insurance	Supplemental Accidental Death and Dismemberment (AD&D) insurance is an employee-paid insurance option that provides additional coverage. Note: as an employee, at no cost to you, Metro provides you basic AD&D insurance.
Supplemental AD and D child Supplemental AD and D spouse	Supplemental Accidental Death and Dismemberment (AD&D) child and spouse insurance is an employee-paid, insurance option that provides coverage for your spouse or domestic partner or dependent children.
Short-term disability insurance	Short-term disability insurance is an employee-paid, supplemental coverage options. This insurance provides cash benefits if you become disabled due to an off-the-job illness or injury, and you meet the plan's definition of disability.
Flex Spending Health – U.S.	A Healthcare Flexible Spending Accounts (FSA) lets you to set aside pretax dollars to cover the cost of a wide variety of medical expenses.
Flex Spending Dependent Care	Dependent Care Flexible Spending Account (FSA) lets you use your pretax dollars to pay for eligible expenses related to caring for your child, disabled spouse, elderly parent, or other dependent who is physically or mentally incapable of self-care, so you (or your spouse) can work, look for work, or attend school full time.
FSA Transportation	Transportation Flexible Spending Accounts (FSA)lets you to set aside pretax dollars to cover work related commuting costs which can also include parking.
Health Savings Account <i>Required when enrolled in a high-deductible health plan with Kaiser or Regence Blue Cross.</i>	<p>A Health Savings Account (HSA) is an account you must enroll in and use if you are enrolled in a High Deductible Health Plan (HDHP). Funds can be used for any out of pocket medical cost, medical insurance premiums at retirement, dental work, prescriptions, co-pays and some over the counter medications. The account helps you save and pay for qualified medical expenses now, and invest for long-term expenses. HSA funds rollover year-to-year, and they belong to you if you leave or retire from Metro.</p> <p>If you enroll in a HDHP with a HSA, Metro will fund your annual deductible (\$1,500 individual/\$3,000 family), and employees can invest additional, tax-free money in the HSA plan.</p>
Legal Services	Legal services with MetLife provides employees resources and support for a variety of legal needs including document preparation for wills and trusts, court representation, letters, traffic ticket assistance and more.