Office of Human Resources

Self-Service Benefits System User Guide

Contents

For Newly Hired Employees & Employees with Qualifying Life Events

Note: Please do not use this guide to make Open Enrollment changes.

Overview & Self-Service Benefits Menu

This guide provides the following information regarding Self-Service Benefits:

- How newly hired employees can make benefit elections during the first 60 days of employment.
- How current employees can make benefit election changes for qualifying life events within 60 days of the event (outside of Open Enrollment).

The highlighted column below mirrors the online menu options you will see in Self-Service Benefits and the applicable deadline. In addition to the various life events, there is an option to view your current benefits (see first row, *View Current Benefits*) and an option to return to the system to finish up a transaction (see last row, *Benefits Enrollment/Life Event In Progress)*.

What Do You Want Do?	What You Will Need to Select In the Self-Service Benefits System Menu	Deadline to Make Changes and Upload Any Required Documentation
View your current coverage and enrolled dependents.	**View Current Benefits**	Anytime
Enroll in coverage for the first time as a newly hired employee.	**New Hire: Request Coverage**	Within 60 days of date of hire
Add a newborn, adopted child, or child for which you just became the legal guardian. If you also need to add other dependents due to your life event, you can do that too.	**Newborn: Add Child**	Within 60 days of date of birth or adoption/placement date/legal guardianship
Add a spouse and/or make plan changes due to marriage. If you also need to add other dependents due to marriage (such as stepchildren), you can do that too.	**Marriage: Add Spouse**	Within 60 days of legal marriage
Remove a spouse and/or make plan changes due to divorce. If you also need to add/remove other dependents, you can do that too.	**Divorce: Remove Spouse**	Within 60 days of divorce becoming final
Remove a deceased dependent and/or make plan changes due to a dependent's death. If you also need to add/remove dependents, you can do so at this time.	**Death: Remove Dependent**	Within 60 days of the dependent's death
Request coverage for yourself or dependent(s) due to losing or experiencing significant coverage changes under a private plan, spouse's plan, or parent's plan.	**Qualifying Event: Request Coverage**	Within 60 days of qualifying event
Cancel coverage for yourself or dependent(s) due to gaining coverage elsewhere.	**Qualifying Event: Cancel Coverage**	Within 60 days of qualifying event
Enroll in coverage for the first time if you are a current employee who has become benefits-eligible due to a recent change in job position.	**Change in Job Position: Request Coverage**	Within 60 days of change to new position
If you did not finish or the system timed you out, you may return to complete your transaction before 11:59 pm on the same day. Instead of using the above life event again, select Benefits Enrollment (Life Event in Progress).	**Benefits Enrollment (Life Event In Progress)**	Only available until 11:59 pm on the same day you started your transaction for any of the life events above

Top Tips to Help You Make Your Online Changes

Before You Go Online:

- Review your health insurance options at **www.montgomerycountymd.gov/HI** (select *Active Employees* at the bottom of the webpage).
- Review the chart on page 2 of this guide to see which Self-Service Benefits System menu option applies to you; you will need to select that option once you access the system.
- Have your Access MCG Single Sign-On username and password handy. If you do not have your username or need help resetting your password, contact the IT Help Desk at 240-777-2828 (option 1).
- Review the applicable one-page life event instructions summary in this guide so that you are with familiar with the required steps before you go online.
- Gather any required documentation. If you are unsure what documentation is acceptable or need to order documentation, review **Required Documentation and Qualifying Life Events**. Save these documents to whatever device you plan to use for your transaction (e.g., your computer, tablet, smartphone) so that you will have them ready to upload as you make your online elections.

  Tip: If you don't have access to a document scanner, take a photo of your document on your smartphone and either email it to yourself to download to your computer / tablet, or use your smartphone to make your elections.

When You Go Online:

- At the end of the online process, be sure to download your confirmation statement. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.
- If you uploaded required documentation during the process (such as dependent or qualifying life event documentation), your elections will be marked Interim or Suspended. (See page 10 for an explanation.)
- To protect your information, click *Finish* and then *Logout* at top right.

After You Go Online:

- All new hire elections or mid-year changes will be suspended until OHR's Health Insurance Team reviews the requested changes and any required documentation. This generally take three business days. After that time, you should return to Self-Service Benefits menu and select *View Current Benefits* to see that any suspensions have been removed. (For details about Interim or Suspended coverage, see page 10.)

  Important: If your enrollment is still suspended, it usually means your documentation was incomplete and more information may be needed. Check your County email because OHR's Health Insurance Team will reach out to you to let you know next steps.

New Hires & Job Changes

► **Follow the steps below to enroll in coverage for the first time if you are a newly hired employee or if you are a current employee who has become benefits-eligible due to a recent change in job position.**

1. Log on to **AccessMCG ePortal.** (You can also visit **www.montgomerycountymd.gov** and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
2. Select *Employee Self-Service*.
3. Click the *Go to Employee Self-Service* blue button.
4. Open the *MCG HR Employee Self-Service* folder in the left-hand menu.
5. Select *Self-Service Benefits* in the left-hand menu.
6. If you are a new hire, select *New Hire: Request Coverage* from the left-hand menu. If you are newly eligible for benefits due to a change in job position, select *Change in Job Position: Request Coverage*.
7. Accept the legal disclaimer, then click *Next*.
8. Follow the prompts on the screen, which are also listed below and include important notes:
    - If enrolling dependents, you must add them first. Click *Add Another Person*, enter your dependent's information, and then click *Apply*. Once you return to the screen, repeat these steps if you need to add more dependents. (The *Benefits Coverage Start Date* is your Date of Hire.)
    - Click *Next* once all dependents have been added.
    - Click *Update Benefits*.
    - Select your desired plan and level of coverage (e.g., self+1 or self+family), then click *Next*.
    - Select which dependents to cover under each plan, then click *Next*.
    - Upload any required documentation by clicking *Add Attachment* at the bottom of the screen, and then click *Next*. (Tips: If you notice a Suspend Flag checkmark, refer to page 10. Also, if you cannot upload your documents, see page 10.)
    - Review your elections and click *Confirmation Statement* to download a record of your elections. You must download your confirmation first before finishing the transaction. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.

      Important: If you see that your coverage is marked Interim or Suspended, and that your Coverage Start Date shows as a prior year, see page 10 of this guide for an explanation.
    - Click *Finish*. To protect your information, log off the system by selecting *Logout* at top right.

Add a Child

► **Follow the steps below to add a newborn, adopted child, or child for which you have just became the legal guardian. If you also need to add other dependents due to this life event, you can do that too.**

1. Log on to [**AccessMCG ePortal.**]() (You can also visit [**www.montgomerycountymd.gov**]() and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
2. Select *Employee Self-Service*.
3. Click the Go to Employee Self-Service blue button.
4. Open the MCG HR Employee Self-Service folder in the left-hand menu.
5. Select Self-Service Benefits in the left-hand menu.
6. If you want to view your current elections before making changes, select View Current Benefits from the menu.
7. Select *Newborn: Add Child* from the left-hand menu.
8. Follow the prompts on the screen, which are also listed below:
   - Click *Add.*
   - Select your child's date of birth (or indicate their adoption/legal guardianship date) using the calendar, then click *Apply*.
   - Once the date of birth has been added, click *Continue*.
   - Review and click *Submit*.
   - Click B*enefits Enrollment*.
   - Accept the legal disclaimer, then click *Next*.
   - Click *Add Another Person* and enter your child's information, then click *Apply*. Once you return to the screen, repeat to add any other newly eligible dependents.
   - Once all of your newly eligible dependents have been added, click *Next*, then click *Update Benefits*.
   - Select your desired plan and level of coverage (e.g. self+1 or self+family), then click *Next*.
   - Select which dependents to cover under each plan, then click *Next*.
   - Upload any required documentation by clicking *Add Attachment* at the bottom of the screen, and then click *Next*. (Tips: If you notice a Suspend Flag checkmark, refer to page 10. Also, if you cannot upload your documents, see page 10.)
   - Review your elections and click *Confirmation Statement* to download a record of your elections. You must download your confirmation first before finishing the transaction. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.

     Important: If you see that your coverage is marked Interim or Suspended, and that your Coverage Start Date shows as a prior year, see page 10 of this guide for an explanation.
   - Click *Finish*. To protect your information, log off the system by selecting *Logout* at top right.

Add a Spouse

► **Follow the steps below to add a spouse and/or make plan changes due to marriage. If you also need to add other dependents due to marriage (such as stepchildren), you can do that too.**

1. Log on to **AccessMCG ePortal.** (You can also visit **www.montgomerycountymd.gov** and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
2. Select *Employee Self-Service*.
3. Click the *Go to Employee Self-Service* blue button.
4. Open the *MCG HR Employee Self-Service* folder in the left-hand menu.
5. Select *Self-Service Benefits* in the left-hand menu.
6. If you want to view your current elections before making changes, select View Current Benefits from the menu.
7. Select *Marriage: Add Spouse* from the left-hand menu.
8. Follow the prompts on the screen, which are also listed below:
   - Click *Add* to enter your marriage date.
   - Select your marriage date from the calendar and click *Apply.*
   - Review to make sure the correct marriage date was added and click *Continue*.
   - Review your marriage date and effective date and click *Submit.*
   - Click *Benefits Enrollment*.
   - Accept the legal disclaimer, then click *Next*.
   - Click *Add Another Person*, enter your new spouse's information, and then click *Apply*. Once you return to the screen, repeat to add any other newly eligible dependents.
   - Once all of your newly eligible dependents have been added, click *Next*, then click *Update Benefits*.
   - Select your desired plan and level of coverage (e.g. self+1 or self+family), then click *Next*.
   - Select which dependents to cover under each plan, then click *Next*.
   - Upload any required documentation by clicking *Add Attachment* at the bottom of the screen, and then click *Next*. (Tips: If you notice a Suspend Flag checkmark, refer to page 10. Also, if you cannot upload your documents, see page 10.)
   - Review your elections and click *Confirmation Statement* to download a record of your elections. You must download your confirmation first before finishing the transaction. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.

     Important: If you see that your coverage is marked Interim or Suspended, and that your Coverage Start Date shows as a prior year, see page 10 of this guide for an explanation.
   - Click *Finish*. To protect your information, log off the system by selecting *Logout* at top right.

Remove a Spouse

► **Follow the steps below to remove a spouse and/or make plan changes due to divorce. If you also need to add/remove other dependents, you can do that too.**

1. Log on to **AccessMCG ePortal.** (You can also visit **www.montgomerycountymd.gov** and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
2. Select *Employee Self-Service*.
3. Click the *Go to Employee Self-Service* blue button.
4. Open the *MCG HR Employee Self-Service* folder in the left-hand menu.
5. Select *Self-Service Benefits* in the left-hand menu.
6. If you want to view your current elections before making changes, select View Current Benefits from the menu.
7. Select *Divorce: Remove Spouse* from the left-hand menu.
8. Follow the prompts on the screen, which are also listed below:
   - Click *Add* to enter your divorce date.
   - Select your divorce date from the calendar and click *Apply*.
   - Review to make sure the correct divorce date was added and click *Continue*.
   - Review your divorce date and effective date and click *Submit*.
   - Click *Benefits Enrollment*.
   - Accept the legal disclaimer, then click *Next*.
     → Note: If you are enrolling any eligible dependents as a result of your life event, click *Add Another Person*, enter your dependent's information and then click *Apply*. Once you return to the screen, repeat to add any other new eligible dependents due to your life event.
   - Click *Update Benefits*.
   - Select your desired plans and level of coverage (e.g. self+1 or self+family), then click *Next*.
   - Uncheck the cover boxes for the dependent you are removing from your plans, then click *Next*. (If you are dropping from self+1 to self only coverage, simply click *Next*.)
   - Upload any required documentation by clicking *Add Attachment* at the bottom of the screen, and then click *Next*. (Tips: If you notice a Suspend Flag checkmark, refer to page 10. Also, if you cannot upload your documents, see page 10.)
   - Review your elections and click *Confirmation Statement* to download a record of your elections. You must download your confirmation first before finishing the transaction. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.

     Important: If you see that your coverage is marked Interim or Suspended, and that your Coverage Start Date shows as a prior year, see page 10 of this guide for an explanation.
   - Click *Finish*. To protect your information, log off the system by selecting *Logout* at top right.

Remove a Deceased Dependent

► **Follow the steps below to remove a deceased dependent and/or make plan changes due to the dependent's death. If you also need to add/remove dependents, you can do so at this time.**

1. Log on to **AccessMCG ePortal.** (You can also visit **www.montgomerycountymd.gov** and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
2. Select *Employee Self-Service*.
3. Click the *Go to Employee Self-Service* blue button.
4. Open the *MCG HR Employee Self-Service* folder in the left-hand menu.
5. Select *Self-Service Benefits* in the left-hand menu.
6. If you want to view your current elections before making changes, select View Current Benefits from the menu.
7. Select *Death: Remove Dependent* from the left-hand menu.
8. Follow the prompts on the screen, which are also listed below:
   - Click *Add* to enter your dependent's date of death.
   - Select the date of death from the calendar and click *Apply*.
   - Review to make sure the correct date was added and click *Continue*.
   - Review the requested change and click *Submit.*
   - Click *Benefits Enrollment*.
   - Accept the legal disclaimer, then click *Next*.
     - → Note: If you are enrolling any eligible dependents as a result of your life event, click *Add Another Person*, enter your dependent's information and then click *Apply*. Once you return to the screen, repeat to add any other new eligible dependents due to your life event.
   - To cancel coverage for your deceased dependent, click *Next* again.
   - Click *Update Benefits*.
   - Select your desired plans and level of coverage (e.g., dropping from family to self+1), then click *Next*.
   - Uncheck the cover boxes for the dependent you are removing from your plans, then click *Next*. (If dropping from self+1 to self, this will not apply).
   - Upload any required documentation by clicking *Add Attachment* at the bottom of the screen, and then click *Next*. (Tips: If you notice a Suspend Flag checkmark, refer to page 10. Also, if you cannot upload your documents, see page 10.)
   - Review your elections and click *Confirmation Statement* to download a record of your elections. You must download your confirmation first before finishing the transaction. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.

     Important: If you see that your coverage is marked Interim or Suspended, and that your Coverage Start Date shows as a prior year, see page 10 of this guide for an explanation.
   - Click *Finish*. To protect your information, log off the system by selecting *Logout* at top right.

Enroll / Change Due to Other Qualifying Events

► **Follow the steps below to either:**
- **Cancel coverage for yourself or dependent(s) due to gaining coverage elsewhere, or**
- **Request coverage for yourself or dependent(s) due to losing or experiencing significant coverage changes under a private plan, spouse's plan, or parent's plan.**

1. Log on to **AccessMCG ePortal.** (You can also visit **www.montgomerycountymd.gov** and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
2. Select *Employee Self-Service*.
3. Click the *Go to Employee Self-Service* blue button.
4. Open the *MCG HR Employee Self-Service* folder in the left-hand menu.
5. Select *Self-Service Benefits* in the left-hand menu.
6. If you want to view your current elections before making changes, select View Current Benefits from the menu.
7. If you want to cancel coverage, select *Qualifying Life Event: Cancel Coverage* from the left-hand menu. If you want to elect coverage, select *Qualifying Life Event: Request Coverage* from the left-hand menu.
8. Follow the prompts on the screen, which are also listed below:
   - Click *Add* to enter the life event date (e.g., the date you lost or gained new coverage).
   - Select the date of your life event from the calendar and click *Apply*.
   - Review to make sure the correct life event date was added and click *Continue*.
   - Review your life event date and effective date and click *Submit*.
   - Click *Benefits Enrollment*.
   - Accept the legal disclaimer, then click *Next*.
     - → If you are not enrolling any new dependents, click *Next* and then click *Update Benefits*.
     - → If you are enrolling newly eligible dependents, click *Add Another Person*, enter your dependent's information and the and click *Apply*. Once you return to the screen, repeat to add any other newly eligible dependents. Click *Next,* then click *Update Benefits*.
   - Select your desired plan and level of coverage (e.g. self+1 or self+family), then click *Next*.
   - Select which dependents to cover under each plan, then click *Next*.

- Upload any required documentation by clicking *Add Attachment* at the bottom of the screen, and then click *Next*. (Tips: If you notice a Suspend Flag checkmark, refer to page 10. Also, if you cannot upload your documents, see page 10.)
- Review your elections and click *Confirmation Statement* to download a record of your elections. You must download your confirmation first before finishing the transaction. This is your receipt for your transactions. If there is a discrepancy with your enrollment, you will be required to provide your confirmation statement as proof of your enrollment activity. Without proof, no changes will be permitted.

  Important: If you see that your coverage is marked Interim or Suspended, and that your Coverage Start Date shows as a prior year, see page 10 of this guide for an explanation.
- Click *Finish*. To protect your information, log off the system by selecting *Logout* at top right.

Troubleshooting

Before contacting the resources listed on the following page, please check to see if your question can be answered by reviewing the information below:

- **Cannot upload the required documentation**: If you are unable to upload the documentation through the Self-Service Benefits System, you may securely fax, email, or mail it to the OHR Health Insurance Team (see contact information on page 11). Your elections will take effect once the OHR Health Insurance Team receives all of the required documentation.
- **Interim or Suspended coverage shows on the final screen:** Until your required documentation is reviewed and approved by the OHR Health Insurance Team, your current benefit selections are recorded with an Interim status, which is the coverage you will have if you fail to provide the required documentation, or it is found to be invalid. Your requested changes are recorded with a Suspended status; the suspensions will be removed once OHR reviews and approves your documentation.
- **Coverage Start Date on the final screen seems incorrect:** If you changed plans or enrolled for the first time, your coverage start date will be shown as of the day you submit the transaction. Otherwise, the start date will be 01-Jan-2011 (the date the Self-Service System was introduced) or the last time you made a change to that benefit after the System was introduced (such as 01-Jan-2012). No start dates will reflect participation prior to 1-Jan-2011.
- **You did not finish or the system timed you out:** You may return to complete/change your transaction before midnight on the same day. Just select *Benefits Enrollment (Life Event in Progress)* from the *Self-Service Benefits* menu. This option should **only** be used if you were timed out or forgot to complete your transaction. If you need to come back into the system to correct/finish your transaction, you have until 11:59 pm on the same day. To do so, follow these steps:

  1. Log on to **AccessMCG ePortal.** (You can also visit **www.montgomerycountymd.gov** and then select Government in the top menu, then AccessMCG ePortal from the drop-down menu.)
  2. Select *Employee Self-Service*.
  3. Click the *Go to Employee Self-Service* blue button.
  4. Open the *MCG HR Employee Self-Service* folder in the left-hand menu.
  5. Select *Self-Service Benefits* in the left-hand menu
  6. Select *Benefits Enrollment (Life Event in Progress)* from the bottom of the left-hand menu.
  7. Follow the steps in the applicable life event outlined earlier in this guide.

Still stuck? If you need technical assistance with making changes online, open a service request via MC311 at 240-777-0311 (open Monday – Friday, 8 am – 5 pm).

Resources

What Do You Want Do?	Contact
Learn more about health insurance options	www.montgomerycountymd.gov/HI (Select *Active Employees* at the bottom of the webpage)
Ask questions about health insurance options and qualifying life events	Open a service request via MC311 240-777-0311 Monday – Friday, 8 am – 5 pm
Send any required documentation to the Health Insurance Team via mail, fax, or email. **Important:** Your elections will take effect once the OHR Health Insurance Team receives all of your required documentation.	Fax: 240-777-5131 Email: OHR.HITS@montgomerycountymd.gov (This email address is to be used solely for sending required documentation. For benefits questions, please open a service request via MC311 as described above.) OHR Health Insurance Team Office of Human Resources 101 Monroe St. – 7th Floor Rockville, MD 20850
Get technical assistance with making changes online	Open a service request via MC311 240-777-0311 Monday – Friday, 8 am – 5 pm
Get help with my AccessMCG Single Sign-On user ID and password	IT Help Desk 240-777-2828 (option 1) Monday – Friday, 8 am – 5 pm

This document provides general information about Montgomery County Government's Health Insurance Self-Service Benefits Enrollment System. If there is an inconsistency between the content of this document and any other documents, the applicable document will prevail (for example, the summary description, plan documents, law, regulation, procedure, or collective bargaining agreement).

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