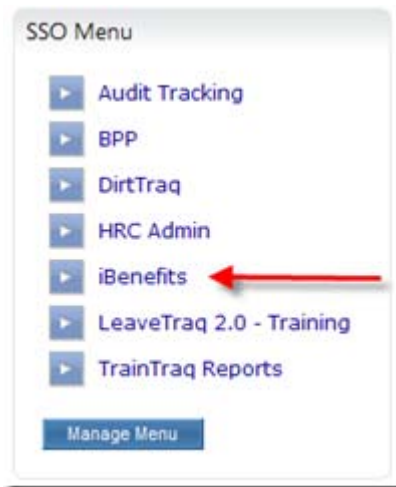


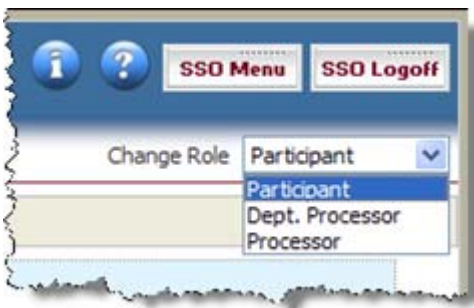
# How to Create a New Employee Document

---

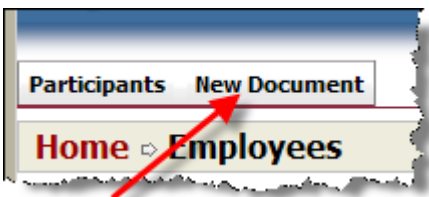
Log in to SSO and click iBenefits from the menu.



In the upper right hand corner of the screen, change your role to your Dept. Processor role.



In the upper left hand corner of the screen, click "New Document"



Enter the new employee's UIN and click Continue.

Documents **New Document** System

**Home** > **Employees** > **Create Document**

Creating a participant's document is a multi-step process.  
To begin, enter the UIN below and click the Continue button.

UIN

Choose "New Employee Default" from the drop-down. It should be the only option.

Documents **New Document** System

**Home** > **Employees** > **Create Document**

UIN

Name

Document Type

If there is currently an EPA for this employee you may select it from the list. Otherwise, you can enter the employee data manually. In Snow White's case, she does not have an EPA so we will enter all the data manually.

Documents **New Document** System

**Home** > **Employees** > **Create Document**

UIN

Name

Enter an EPA Document Number  
EPA Number:

Enter New Employee Data Manually

Here is an example of an employee with EPA documents - please keep in mind this data is fictional as are the employees.

Documents Participants AE Control Reports System

Home > Documents > Create Document

UIN 814000674

Name Dwarf, Grumpy A

Get New Employee Data From an EPA Document

	EPA Number	Comments
<input type="radio"/>	0000251	
<input type="radio"/>	0000351	afikjaskfj
<input checked="" type="radio"/>	0000413	This action make the grumpy dwarf less grumpy

Enter New Employee Data Manually

Back << Continue >>

Enter the employee's data according to their new position and click the "Create Document" button.

Documents New Document System Member S - Texas A&M System Offices

Home > Employees > Create Document

Uin 713008257 Employment Date 5/7/2009

First Name Snow A Employer Contrib Start Date First of Month After 90 Days

Last Name White Term Months 12.0

Birth Date 1/1/1960 % Effort 100

System Member S - Texas A&M System Offices Grad Student?  Yes  No

Adloc 01271200 - Enterprise Software Initiatives Pay Type Annual

Work Zip Code 77845-3424 Annual Pay 40000

<< Back Refresh From Bpp Create Document

Click the "Print Instructions" button to give the employee their instruction sheet. If you realize you have made a mistake, use the "Make Correction" button to make the adjustment.

Documents **New Document** System Member S - Texas A&M System Offices

**Home** > **Employees** > **Document Created**

**New Employee Default Document Created**

The new employee enrollment default coverage document for **White, Snow A** was created successfully.

Additionally, required training courses have been assigned to the employee.

To ensure that the employee can access SSO and HRConnect, print the Confirmation Report and provide it to him/her at the beginning of the orientation process.

Uin	713008257	Employment Date	5/7/2009
First Name	Snow A	Employer Contrib Start Date	First of Month After 90 Days
Last Name	White	Term Months	12.0
Birth Date	1/1/1960	% Effort	100 %
System Member	S	Grad Student?	No
Adloc	01271200	Pay Type	Annual
Dept Name	Enterprise Software Initiatives	Annual Pay	\$40,000
Work Zip Code	77845		

Make Correction Print Instructions

If you realize later that an adjustment is necessary, you can get back to the page above by doing a Participant Search for the employee and click on the "Employee Info" button.

Documents **New Document** System Member S - Texas A&M System Offices

**Home** > **Employees**

UIN  Name  Search

	UIN	Name	WorkStation	
<b>Employee Info</b>	713008257	White, Snow A	Texas A&M System Offices	01271200 - En