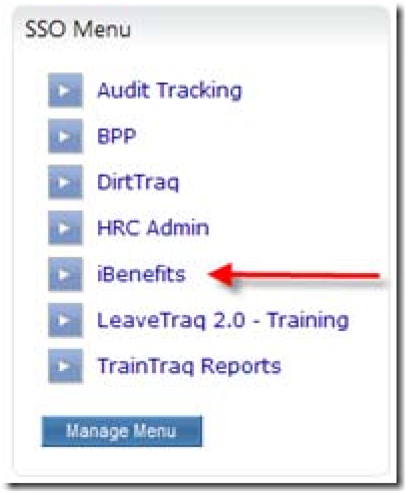
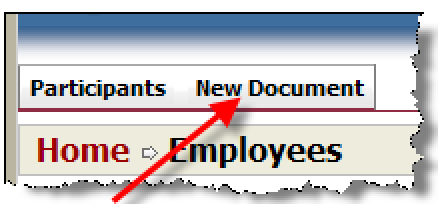
How to Create a New Employee Document

Log in to SSO and click iBenefits from the menu.



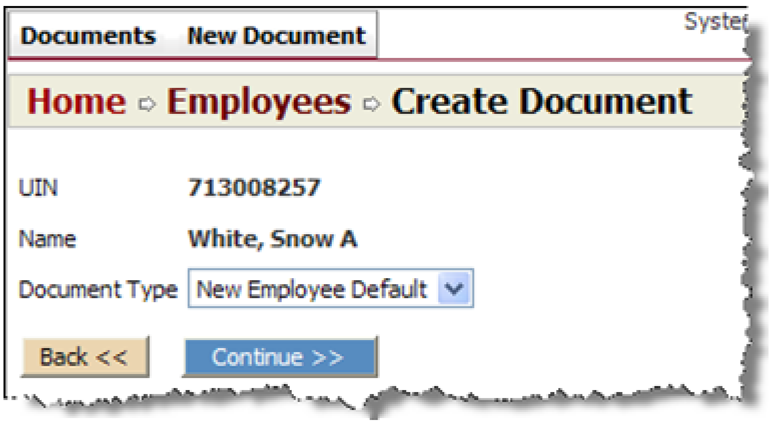
In the upper right hand corner of the screen, change your role to your Dept. Processor role.

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

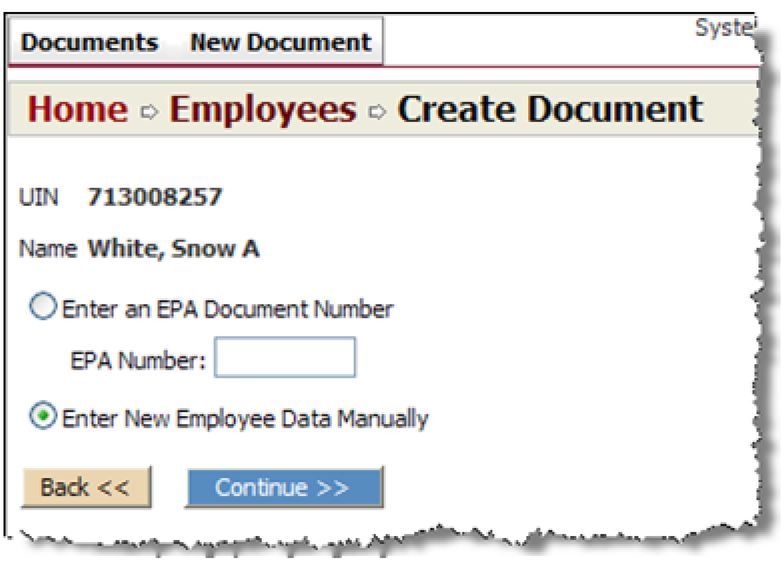


Enter the new employee's UIN and click Continue.

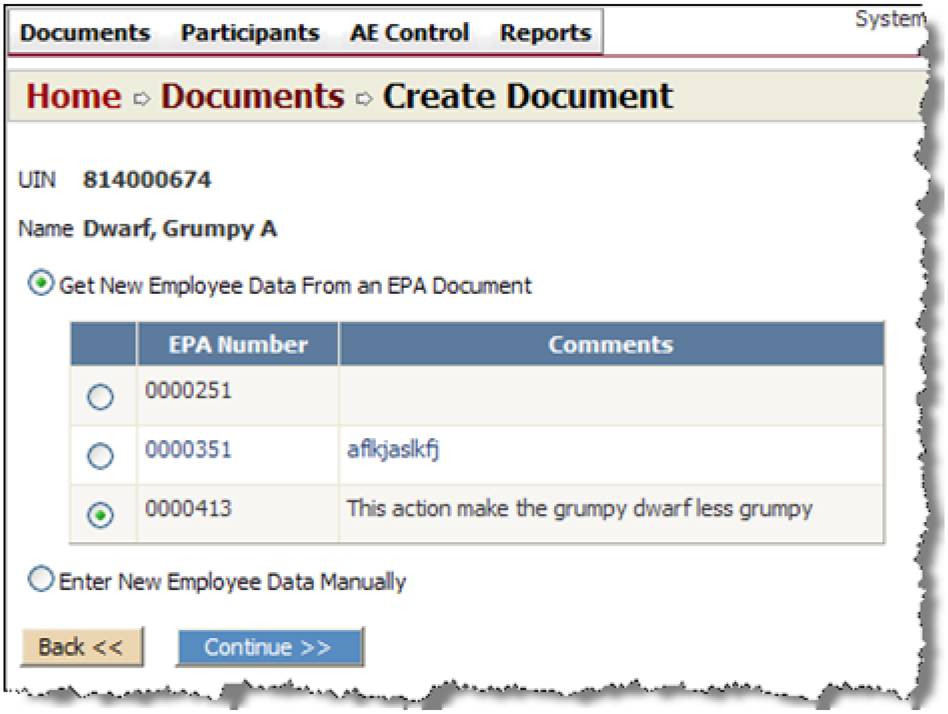
Choose "New Employee Default" from the drop-down. It should be the only option.



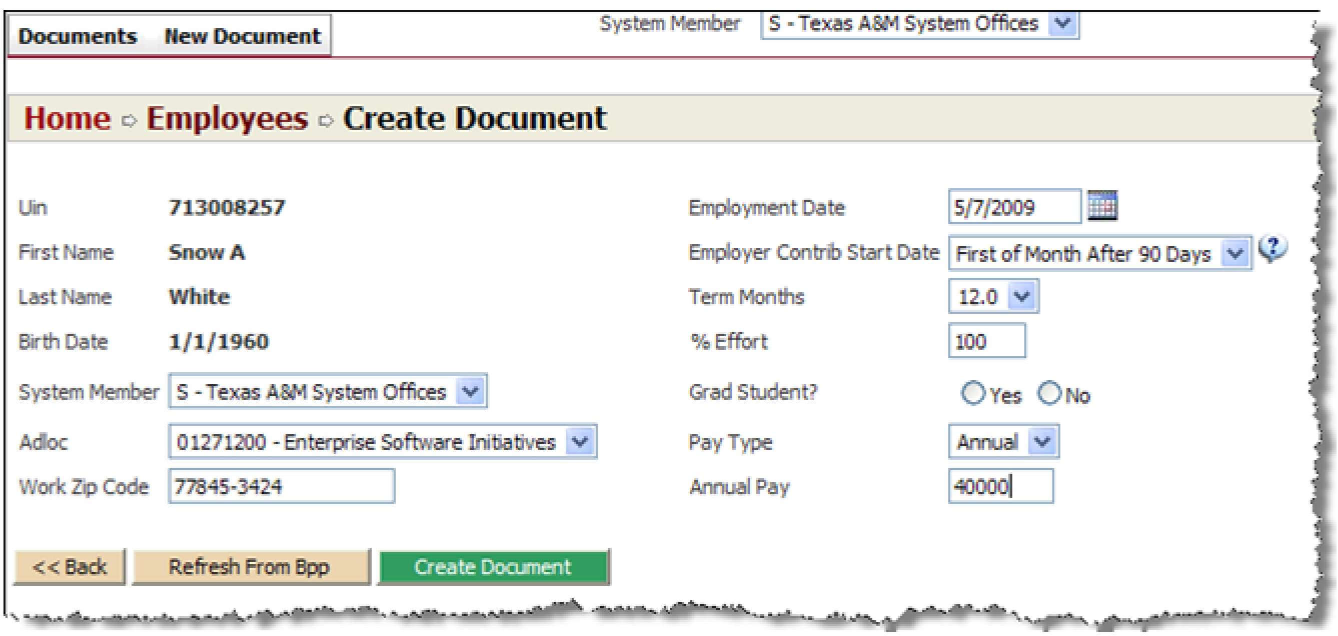
If there is currently an EPA for this employee you may select it from the list. Otherwise, you can enter the employee data manually. In Snow White's case, she does not have an EPA so we will enter all the data manually.



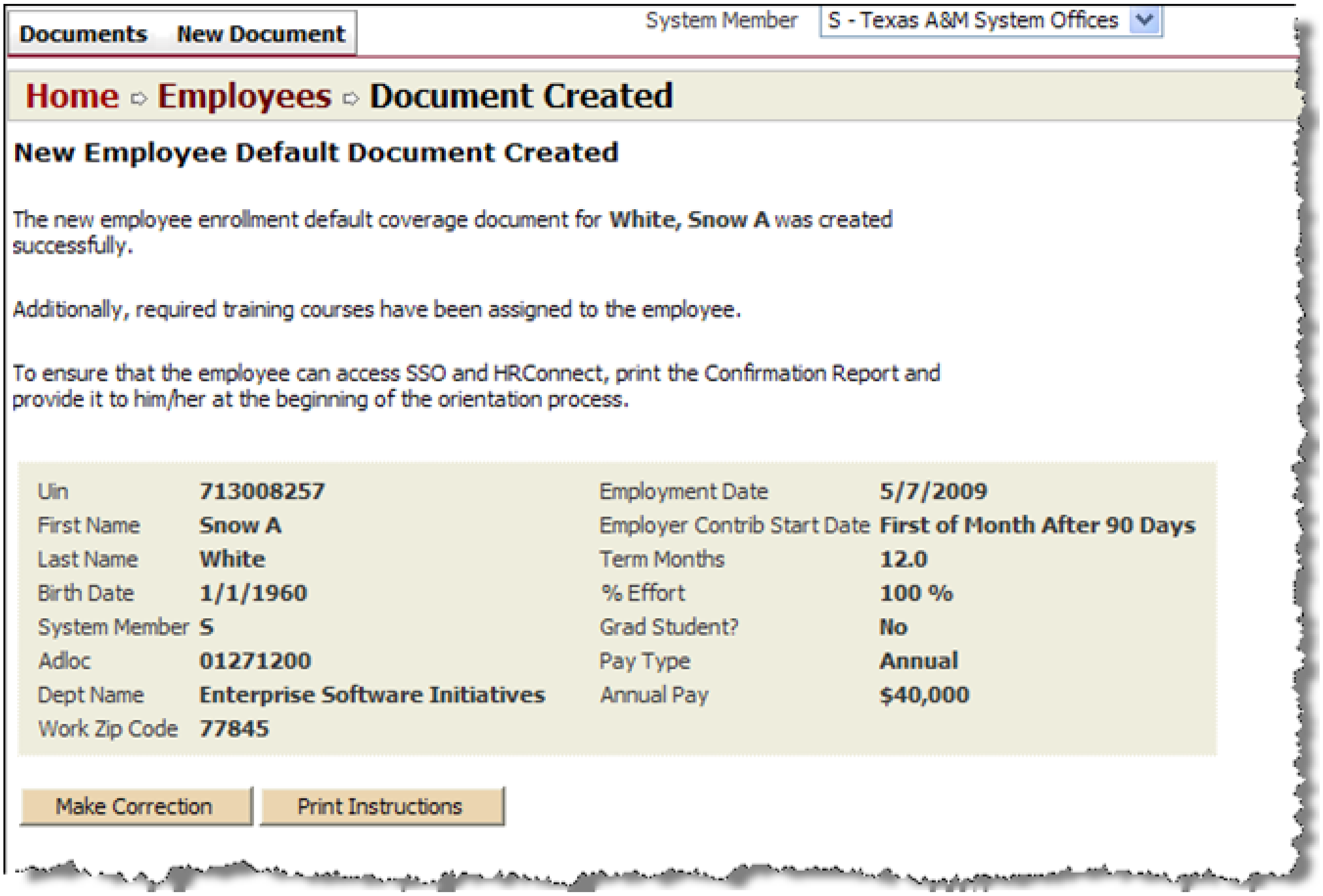
Here is an example of an employee with EPA documents - please keep in mind this data is fictional as are the employees.



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



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.



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.