

Benefits Administration App User Guide

Initial Setup

- After the “Benefits Administration App” package is installed in the Salesforce org, go to Setup -> App Manager and select “Benefits Manager” app and edit it to provide access to the app to additional profiles.
- Clone the profiles (except for the admin profile), which will have access to the “Benefits Manager” app. Edit the cloned profile and enable “Run Flows” permission under the “General User Permissions” section.
- In the cloned profile check “Visible” for “Benefits Manager (BenefitsAdmin__Benefits_Manager)” under Custom App Settings.
- In the cloned profile select “Default On” for following tabs under “Custom Tab Settings”
 - Benefits Events
 - Benefits Individuals
 - Coverage Types
 - Plans
 - Selected Offers
- Configure the “Custom Object Permissions” for the cloned profile as below. *It is very important to not provide additional permissions to these objects than required to these profiles.*
 - Benefits Events - Read, Create, Edit, Delete
 - Benefits Individuals - Read, Create, Edit, Delete
 - Coverage Periods - Read
 - Coverage Types - Read
 - Plans - Read
 - Selected Offers - Read, Create, Edit, Delete

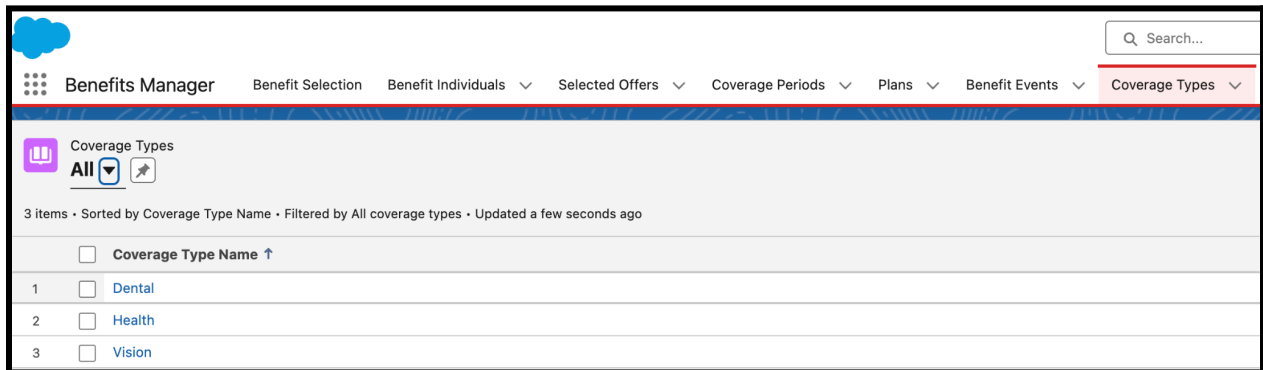
- In the Setup -> Object Manager, search for “Benefit Event”. In the fields and relationship menu item, click on the “Status” field and click on the “Set field-level security” button. For all the profiles to which this field is visible, except for Admin profile, check the read only checkbox as well. Similarly perform the same steps for “Enrollment Start Date” and “Enrollment End Date” fields. The rationale here is that only administrators should be able to update those fields.

Guide for Admin User

Admin user is responsible for setting up the initial data in the Benefits Administrator app. Let’s understand what each type of tab mean in a stepwise manner -

Coverage Types

Coverage type defines a specific type of coverage. Most commonly used coverage types are - Health, Dental, Vision, Legal etc. Start by adding all the coverage types offered by the organization.



	☐ Coverage Type Name ↑
1	☐ Dental
2	☐ Health
3	☐ Vision

Coverage Periods

Coverage period defines a specific coverage period during which the coverage is valid. Most commonly used coverage period is the calendar year. Define a coverage period as it is applicable to the organization.

While defining the coverage period, “Enrollment Period Start Date” and “Enrollment Period End Date” must be specified. These dates define the range during which a

user can enroll in a coverage. Once the enrollment period is over, no user is allowed to choose/change coverage unless there is a valid Event.

Coverage Period

Benefits Period 2025

Related

Details

Coverage Period Name

Benefits Period 2025

Coverage Start Date ⓘ

1/1/2025

Coverage End Date ⓘ

12/31/2025

Open Enrollment Start Date ⓘ

11/1/2024

Open Enrollment End Date ⓘ

11/30/2024

Description

Benefit enrollment for 2025

Plans

Plan defines a specific plan with details such as monthly cost to the employee, monthly cost to the employer etc. One important field in the plan is the “Coverage Level” which is a standard field for any type of plan. It signifies if the plan covers only employee, employee and spouse, or employee and all the dependents.

Plans						
Recently Viewed ⓘ						
3 items • Updated a few seconds ago						
Q Search this list...						
☐	Plan Name	Coverage Level	Description	Monthly Employee Cost	Plan Year Start Date	Plan Year End Date
1	PPO	Employee + Family		100.0000	1/1/2025	12/31/2025
2	PPO	Employee + Spouse		75.0000	1/1/2025	12/31/2025
3	PPO	Employee		50.0000	1/1/2025	12/31/2025

Benefit Events

Benefit event specifies a specific event pertaining to the user that may qualify the user to change benefits outside of the open enrollment period. Benefit event needs to be added by the user but the admin needs to approve the benefit event by changing the status of the event to “Approved”. Admin also needs to specify the

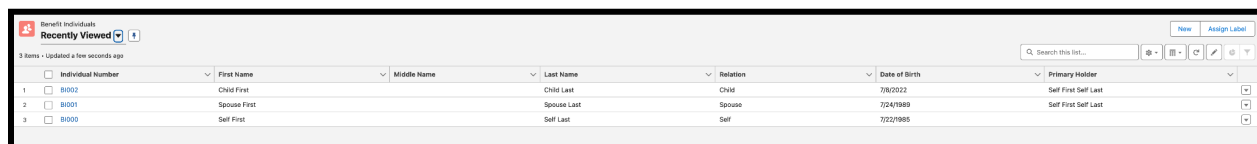
open enrollment start and end dates. Only when these steps are completed, users can change the benefits.

Guide for App User

Benefits Administration App users are responsible for adding themselves and their dependents in the app, choosing benefits and adding any eligible life events. Let's understand what each step mean -

Benefit Individuals

“Benefit individual” is any person (including the user!) that wants to be covered in the plans listed in the Benefits Administration App. Users must start by adding its own details with the relationship as “Self”. Later users can add their dependents and link them to its own benefit individual record. “National Identifier” is usually SSN or TIN. This field has validations like SSN. If SSN/TIN is not available, then 000-00-0000 can be put, *but it's the admin's responsibility to make sure users are followed up to put correct information.*



	Individual Number	First Name	Middle Name	Last Name	Relation	Date of Birth	Primary Holder
1	B1002	Child First		Child Last	Child	7/6/2022	Self First Self Last
2	B1001	Spouse First		Spouse Last	Spouse	7/24/1989	Self First Self Last
3	B1000	Self First		Self Last	Self	7/22/1985	Self First Self Last

Benefit Events

Benefit event specifies a specific event pertaining to the user that may qualify the user to change benefits outside of the open enrollment period. Unless admin changes the status of the benefit event to Approved and puts enrollment period dates, a user cannot change benefits outside of open enrollment period.

 Benefit Event

Birth of the child

Related

Details

Benefit Event Name

Birth of the child

Description

Status

Pending

Enrollment Start Date

Enrollment End Date

Event Date

7/3/2024

Primary Holder

[B1000](#)

Created By

 [benefitappuser1](#), 7/26/2024, 1:01 PM

Benefit Selection

Once the user is eligible to select benefits, the “Benefit Selection” tab opens up

 Benefits Manager

Benefit Selection

Benefit Individuals

Selected Offers

Coverage Periods

Plans

Benefit Events

Coverage Types

 Benefit Selection

Select Benefit

* Select Coverage Type

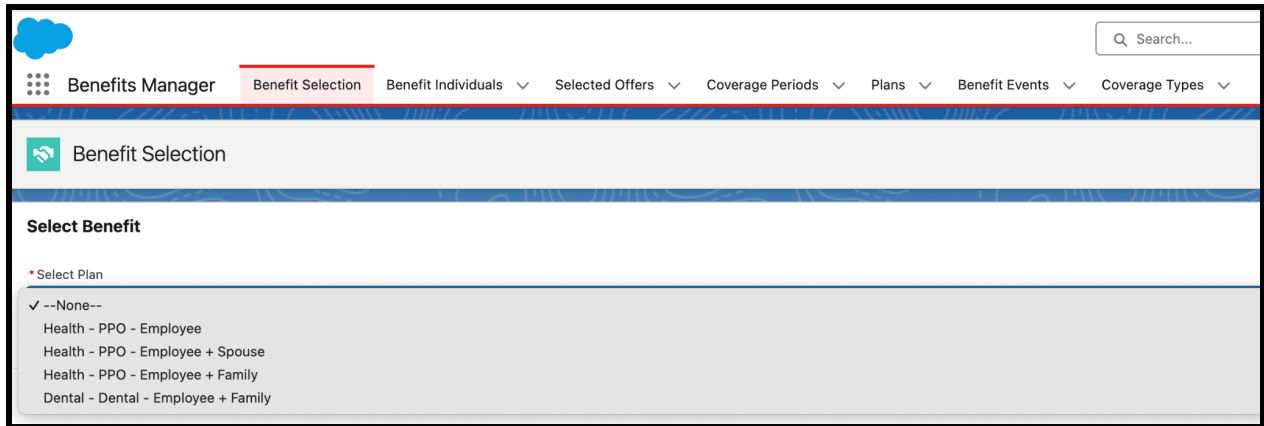
--None--

☒ Waive Coverage 

Initially the “Waive Coverage” checkbox is checked by default. If the user wants to waive a particular type of coverage, then that coverage type should be selected in

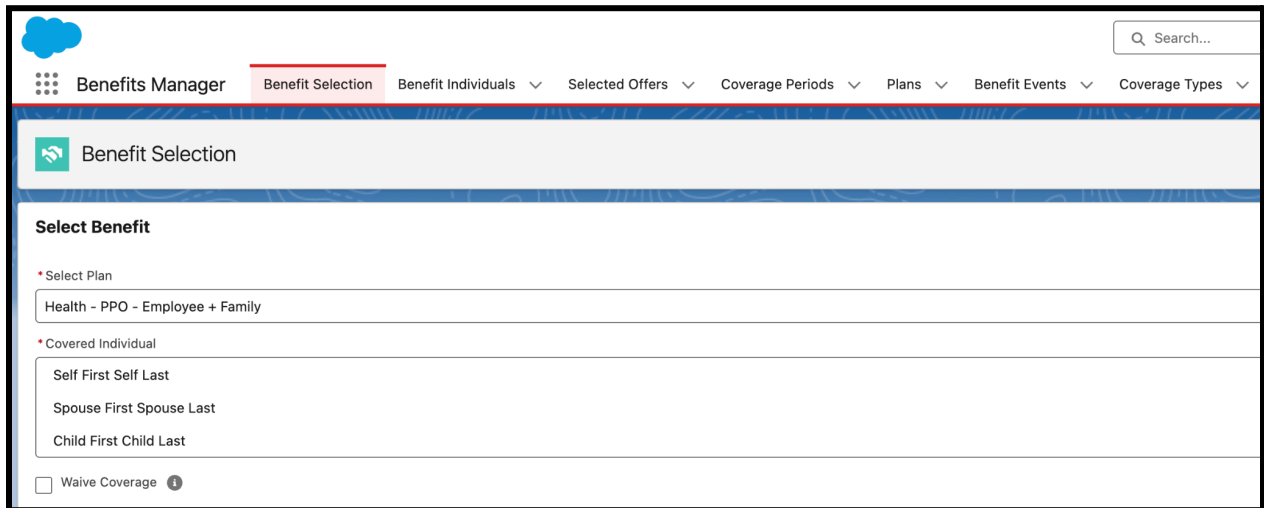
the dropdown and the user should click on next. Users will see a success message on screen confirming the coverage was successfully waived.

To enroll into a plan, the user should uncheck the “Waive Coverage” indicator, the screen then displays a dropdown with those plans that covers the current date between coverage period start and end date.



The screenshot shows the 'Benefits Manager' application interface. The top navigation bar includes a search bar and several tabs: 'Benefits Manager', 'Benefit Selection' (active), 'Benefit Individuals', 'Selected Offers', 'Coverage Periods', 'Plans', 'Benefit Events', and 'Coverage Types'. Below the navigation bar, the 'Benefit Selection' section is displayed. It features a 'Select Benefit' heading and a 'Select Plan' dropdown menu. The dropdown menu is open, showing a list of plan options: '--None--', 'Health - PPO - Employee', 'Health - PPO - Employee + Spouse', 'Health - PPO - Employee + Family', and 'Dental - Dental - Employee + Family'.

After selecting a plan, the app will then display another multi-select box that lists the dependents of that user along with its own record.



The screenshot shows the 'Benefits Manager' application interface after a plan has been selected. The 'Select Plan' dropdown is now closed, and the 'Covered Individual' dropdown is open. The 'Covered Individual' dropdown shows a list of options: 'Self First Self Last', 'Spouse First Spouse Last', and 'Child First Child Last'. At the bottom of the screen, there is a 'Waive Coverage' checkbox with an information icon.

After selecting all the individuals who are covered with this plan, and clicking on the next button, the user should see a success message on the screen. The user can click on the “Selected Offers” tab to see if the selection was successfully recorded by the app or not.

Selected Offers					
Recently Viewed					
3 items - Updated a few seconds ago					
	Selected Offer Number	Plan Start Date	Plan End Date	Covered Person	Employee Cost
1	☐ SO-002	1/1/2024	12/31/2024	Child First Child Last	100.0000
2	☐ SO-001	1/1/2024	12/31/2024	Spouse First Spouse Last	100.0000
3	☐ SO-000	1/1/2024	12/31/2024	Self First Self Last	100.0000

App Validations and Checks

Benefits Administrator App has following inbuilt validations

- Users must select their own record as a covered individual during selection.
- Users must choose a plan with plan type “Employee + Spouse” or “Employee + Family” to include spouse as covered individual
- Users must choose a plan with plan type “Employee + Family” to include a child as a covered individual.
- Any selection of a given coverage type (Health, Dental, Vision etc..) will override a user's previous selection of the same plan type during the same coverage period.
- Waiving the coverage will remove selection of plans for all covered individuals during the currently open coverage period.

Technical Details

- Custom Objects
 - Coverage Type
 - Coverage Period
 - Plan
 - Benefit Individual
 - Selected Offer
 - Benefit Event
- Flows
 - Select Benefit
- Apex
 - SelectedOfferCreateAction
 - SelectedOfferCreateUtil
 - SelectedOfferCreateUtilTest