Change Benefit Elections
QUICK REFERENCE GUIDE

PROCESS STEPS:

The example in the quick reference guide is for the birth or adoption of a child.

1. From the Homepage, click the Inbox icon.

2. View to ensure the Benefit Change - Employee task is selected.

3. On the right side, click the double arrows to expand the screen. Start with Step 1 of 4.

4. On the Change Benefits Election page, benefits that have been elected are indicated with a blue Elect radio button. Benefits that have been waived are indicated by a blue Waive radio button.

5. For each benefit plan, either Elect or Waive the plan.

6. If you wish to add a dependent to the elected plan, go to the Enroll Dependents column.

7. Click in the Enroll Dependent column to view the prompt drop down icon.
8. Click the prompt and select **Existing Dependents** to add the dependent from the list. If the dependent is not already listed, select **Add Dependent**.

8. Click the prompt and select **Existing Dependents** to add the dependent from the list. If the dependent is not already listed, select **Add Dependent**.

9. On the **Add Dependent** page, click the **New Dependent** radio button. **DO NOT** select anything else on this screen. Click the **OK** button.

10. On the **Add Dependent** page, click the prompt in the **Relationship** field and select a relationship.

11. Enter the date of birth and gender in the **Date of Birth** and **Gender** fields.

12. Scroll down the page towards the bottom. Enter the child’s first and last name in the **First Name** and **Last Name** fields.

13. Next, click the **Contact Information** sub-tab. On the **Contact Information** page, click the **Add** button under Address.
14. To add the employee’s existing address to the dependent, click the prompt in the Use Existing Address field.

15. Click All on the drop down and the radio button next to the address. The address attributes will auto populate the address fields.

16. Click the prompt in the Type field and select address type. Click the OK button.

17. You will be returned to the elections page. You will now see the newly added dependent listed.

18. Once you have added the dependent to a benefit plan, click the prompt to select Existing Dependent and select the dependent from the list to add to any other benefit plans.
19. At the bottom of the screen you have three options:

- Select **Continue** to continue selecting elections.
- Select **Save for Later** if you want to come back and complete your elections at a later time.
- Select **Go Back** to return to the previous page.

20. Click the **Continue** button.

21. If you did not enter a **social security number** for the dependent the next screen will appear. If the dependent does not have a social security number click the **Reason ID is not available** radio button and enter a reason in the blank field.

22. Click the **Continue** button.

23. Continue completing elections for **Spending Account**, and **Life Insurance** Elections following the above steps to add the dependent.

24. The last page is the **Benefit Election Review** page. Review the elections to ensure all elections are correct and include any applicable dependents.

25. Scroll down to the **Electronic Signature** page. Read the **Electronic Signature** and click the **I Agree** box.

26. Click the **Submit** button.

27. Click the **Print** button to print a copy of the elections.

**STOP:** The task will go to the **Central Benefits Partners** (EBD) for approval. Once approved, the benefits will be active.