

Guide to Benefits Enrollment

Whether you are enrolling in benefits due to a job related event such as hire or open enrollment, or if you have experienced a family status change such as marriage or birth and need to enroll dependents, Employee Self Service can walk you through the process.

Benefits Home Page

To enter your benefit elections click on **Benefits** under Employee Self Service. The Benefits page will open with options for **Benefits Summary**, **Family Status Changes** and **Benefits Enrollment**.

Here is what you'll see:

The screenshot shows the 'Self Service' main menu with a search bar and a list of categories. The 'Self Service' category is expanded, showing 'Personal Information', 'Payroll and Compensation', 'Benefits', 'Learning and Development', and 'Emory Community Giving'. The 'Benefits' section is highlighted. The main content area displays several sections: 'Emory Community Giving', 'Personal Information', 'Payroll and Compensation', 'Benefits', and 'Learning and Development'. The 'Benefits' section is highlighted with a red callout box that says 'Click on the underlined headings to select a process.' The callout box points to the underlined headings 'Benefits Summary', 'Family Status Change', and 'Benefits Enrollment' in the 'Benefits' section.

- **Benefits Summary** displays your current enrollment in the benefit plans, covered dependents and beneficiary data previously elected within self service. You may update beneficiary data for your life plans under this link. If you haven't elected beneficiaries within self service, we encourage you do so. You may also start, stop, and change 403b contributions on self service under 403(b) Savings Plan Elections. 457b plans are excluded from online entry. Please see the web site for information on changing 457b plans.
- The **Family Status Changes** link allows you to record events such as marriage, divorce, newborns, adoptions, changes in your spouse or dependent's employment status, or overage children who no longer qualify as dependents.
- **Benefit Enrollment** takes you directly into the enrollment panels for open events. Job related events like new hire or open enrollment will be opened by Human Resources. After Family Status Change has been created, you may regain access through Benefits Enrollment. This is also where you access Annual Enrollment each fall.

If you clicked [Benefits Summary](#), this is what you will see:

To view past or future enrollment, change date and hit Go.

Menu

Search:

- ▷ My Favorites
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- ▷ Emory Test Tracker
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 - [403\(b\) Savings Plan Election](#)
- ▷ Learning and Development
 - [MyEmory](#)
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 - [Emory Emergency Notify System](#)
 - [Emory Learning Management Sys](#)
 - [Exempt Leave Tracking](#)
 - [FMLA and Medical Leave](#)
- ▷ Manager Self Service
- ▷ Workforce Administration
- ▷ Benefits
- ▷ Payroll for North America
- ▷ Set Up HRMS
- ▷ Reporting Tools
- ▷ PeopleTools

To view your benefits as of another date, enter the date

[Guide to Life Beneficiary and 403\(b\) Changes](#)

| Type of Benefit | Plan Description | Coverage or Participation |
|--|-------------------------------|---------------------------|
| Medical | Aetna POS Value | Employee Only |
| Dental | Aetna Traditional | Employee Only |
| Life | Basic Life, Fulltime | \$10,000 |
| Supplemental Life | Supplemental Life Employee | \$200,000 |
| Personal Accident Insurance | AD and D Employee | |
| Spouse Personal Accident Ins. | AD and D Spouse | |
| Spouse Life | | |
| Child Life | | |
| Short-Term Disability | STD 21 Day | |
| Long-Term Disability | LTD w/COLA | 60% of Salary |
| Legal | | Waived |
| 403(b) Basic | Matched 403(b) Basic Vanguard | 2% Before Tax |
| Fidelity | Suppl 403(b) Fidelity | 1% Before Tax |
| Suppl 403(b) Roth Vanguard | Suppl 403(b) Roth Vanguard | 1% After Tax |
| ER 403b Basic | Employer Basic Vanguard | 6% ER Contribution |
| ER 403b Match | 3% Fidelity Match | Employer Match |
| Healthcare FSA | Healthcare FSA | \$650 Pledge |
| Supplemental Income Protection | | Enrolled |

The system displays your current elections.

[Click here to go to Emory University Benefits homepage...](#)

If you have any questions, please contact the Benefits Department at:(404)727-7613.

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Medical

To view your benefits as of another date, enter the date and click Go:

Medical

Plan Name: Aetna POS Value

Plan Provider: Aetna

Coverage: Employee Only

Group Number: 811221

Customer Service: 1.800.847.9026

Links to individual plans provide more detail information such as Group Numbers and Customer Service telephone numbers.

Ext

Covered Dependents

No dependent/beneficiary enrollments were found.

Additional Information

[Return to Employee Benefit Summary](#)

Menu

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[Guide to Life Beneficiary and 403\(b\) Changes](#)


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[Click here to go to Emory University Benefits homepage...](#)

If you have any questions, please contact the Benefits Department at (404)727-7613.

Clicking a life plan link will open a box with an edit option to update beneficiary data.

To view your benefits as of another date, enter the date and click Go:

04/26/2011 

Go

Life

Plan Name: Basic Life, Fulltime
Plan Provider: The Standard
Coverage Level: \$10,000
Group Number: EUV-647271, EHC-647272
Customer Service: 1.866.756.8118 Ext:

Covered Beneficiaries

Click Edit to change your current beneficiary allocations or to add a new beneficiary. For beneficiaries already listed, click the beneficiary's name to review the individual's personal information. You may update (Edit) personal information with the exception of Name, Date of Birth, and Social Security Number. Contact the Benefits Department at (404) 727-7613 to request changes to those fields.

Primary Beneficiaries are displayed. Click Edit to view Secondary Beneficiaries or to make changes to either allocation.

| Name | Relationship | Primary Allocation | Secondary Allocation |
|-------------------------|--------------|--------------------|----------------------|
| Michael | Spouse | 100% | |
| Sarah | Daughter | | 100% |

Change Current Beneficiaries and Allocations



To change the allocations for your current beneficiaries, enter the new percents in the New Primary and New Secondary Allocation columns. Each column must total to 100%. Percents must be entered in whole numbers without decimals. For example, three primary beneficiaries would have to be divided into 34%, 33% and 33%.

Primary beneficiary(ies) will receive total payment. Secondary beneficiary(ies) will receive payment only if no Primary beneficiary(ies) survives the insured. Beneficiaries in the same class will receive separate shares based upon the percents you designate. If no named beneficiary survives the insured or if the estate of the insured is named as beneficiary, payment will be made in one sum to the estate of the insured.

If you wish to name your estate as beneficiary, please add a new Dependent/Beneficiary record. Enter the First Name as "To the Estate of xxxxxx" and type your first name instead of xxxxxx. Enter The Last Name as your Last Name. If your estate is set up with a name that does not follow this naming convention or if you need to list the name of a Trust, you will need to complete a paper Life Insurance form.

The form may be downloaded and printed at the following web site:

[Life Insurance Enrollment Form](#)

Allocation Type

Enter Primary Allocations as: Percent

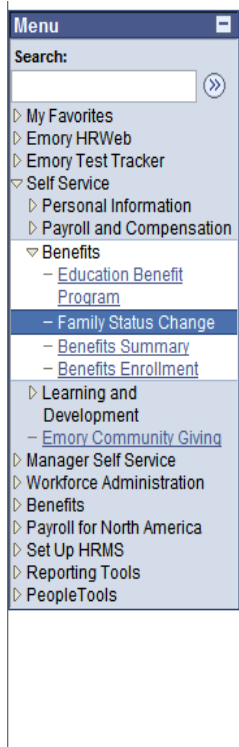
Enter Secondary Allocations as: Percent

| Name | Relationship | Current Primary Percent | Current Secondary Percent | New Primary Allocation | New Secondary Allocation |
|--|--------------|-------------------------|---------------------------|------------------------|--------------------------|
| | Spouse | 100 | | <input type="text"/> | <input type="text"/> |
| | Son | | 34 | <input type="text"/> | <input type="text"/> |
| | Daughter | | 33 | <input type="text"/> | <input type="text"/> |
| | Daughter | | 33 | <input type="text"/> | <input type="text"/> |
| <input type="button" value="Update Totals"/> | | | | 0 | 0 |

Enter New Allocations here. Primary Allocation must add up to 100% and must be entered as whole numbers without decimals. If you chose to list Secondary Beneficiaries, that allocation also needs to equal 100%.

[Add a New Beneficiary](#)

If you click on **Family Status**, the first page you see is the page to click into **Create New Family Status Change** or if you already have and want to make changes within the 31 days go to **Benefits Enrollment**:



Family Status Change

If you are making a change to a Family Status event you or the university created earlier, please access that event through the **Benefits Enrollment** link below.

[Create New Family Status Change](#)

[Go To Benefits Enrollment](#)

The Family Status Change Certification Page will come up next when you create a New Family Status Change.



Family Status Change Certification

Date: 02/07/2005

To begin enrollment, please complete sections 1, 2, 3, and 4 of the Certification form.

1. I certify that I have incurred the following Family Status Change:

(Please check one)

- Marriage
- Divorce, Legal Separation, or Annulment
- Newborn/Legal Guardian
- Adoption
- Death of Dependent
- Start or Termination of spouse or dependent employment
- Spouse has changed from Part-Time to Full-Time or Vice Versa
- Spouse has taken unpaid leave of absence
- Dependent has lost/gained Eligibility
- Significant change in coverage due to spouse's employment
- Spouse or dependent Open Enrollment Period
- Spouse or dependent gains or loses Medicare/Medicaid coverage
- Change in dependent care provider or cost for Dependent Care Flexible Spending Account

The following events require documentation.

Contact the Benefits Department at (404) 727-7613 to process one of these events.

- * Change in residence to an area in or out of plan network
- * Dependent loses state's SCHIP plan
- * Judgement, Decree, or Court Order to add dependent coverage
- * New Domestic Partner Agreement completed
- * Domestic Partner Termination

2. Event Date

(Enter the date the event occurred)

02/07/2005 MM/DD/YYYY

Examples: Newborn - Date of Birth

Adoption - Date Child is Placed in Home

Dependent loses Eligibility - Date they marry or no longer qualify as a dependent

(If losing student status, then date is their birth date in the current year. For example, a child born 6/2/1983 losing coverage in 2005, would have an event date of 6/2/2005.)

3. My dependent(s) meet one of Emory's definitions of an eligible dependent:

(Verify that your dependent qualifies)

- Legal Spouse
- Natural born Son or Daughter
- Legally adopted Son or Daughter
- Step Son or Step Daughter residing in my home
- Son or Daughter by court order Legal Guardianship
- Same-Sex Domestic Partner with notarized SSDP Agreement
- Same-Sex Domestic Partner's Son or Daughter with notarized SSDP Agreement

* Unmarried children are eligible up to age 19 or to age 25 if they are a full time student.

Contact the Benefits Department at (404) 727-7613 to establish eligibility for a disabled child.

4. I wish to do the following:

(Select the action you wish to take)

- Add dependents to my existing plan
- Terminate dependents from my existing plan
- Add new coverage on myself and eligible dependents
- Terminate myself and all dependents
- Change Dependent Care Flexible Spending Account election

Please Read Carefully

By clicking the Accept button below, I certify that all statements made above are true. I understand that falsifying healthcare and dependent records may result in my immediate dismissal from Emory University. If I choose not to certify the data above, I may click Cancel to exit this page.

Accept

Cancel

Read Carefully!

In Section 1, click on the type of event that best describes the change in your circumstance. If you have experienced one of the last 5 events, then you are required to provide documentation to the Benefits Department. You cannot create any of these enrollment events on-line.

The Event Date is the actual date the change occurred. For coverage dependents, that is their birthday, this year.

Although certain relatives may qualify as your financial dependent (mother/father), they may not meet Emory's definition of a qualified dependent.

Please click on the action that best describes how you want to change your plans.

Click Accept to continue the process or Cancel to exit without creating an event.

If you make an error, please do not add another event to try and correct. Call the Benefits Department at (404) 727-7613 for assistance.