

Guide to Family Status Change 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

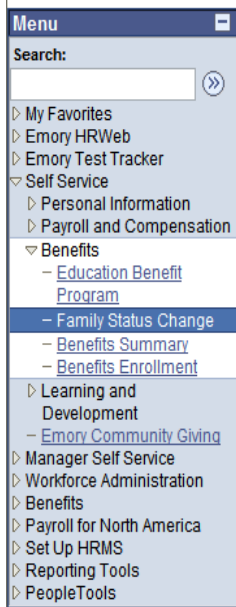
To enter your benefit elections click on **Benefits Information** under Employee Self Service. The Benefits home page will open with options for **Benefits Summary**, **Family Status Changes** and **Benefits Enrollment**.

Here is what you'll see:

The screenshot shows the Emory Self Service portal. The top navigation bar includes 'Home', 'Add to Favorites', and 'Sign out'. The left sidebar menu is expanded to 'Self Service', showing options like 'Personal Information', 'Payroll and Compensation', 'Benefits', 'Learning and Development', 'Careers', 'Emory Community Giving', and 'Emory Emergency Notify System'. The main content area is titled 'Self Service' and contains several service tiles: 'Careers', 'Emory Community Giving', 'Emory Emergency Notify System', 'Personal Information', 'Payroll and Compensation', 'Benefits', and 'Learning and Development'. The 'Benefits' tile 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 links 'Family Status Change', 'Benefits Summary', and 'Benefits Enrollment' within the 'Benefits' tile.

- 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 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](#)

**Click the ACCEPT button at the end to proceed. You will be walked through the rest
Of your FAMILY STATUS CHANGE**

**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.**

If you click on **Family Status**, the certification page opens:



Family Status Change Certification

Date: 07/22/2008

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

[How to complete a Family Status Change](#)

1. I certify that I have incurred the following Family Status Change and that I am within 31 days of the event:

(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 or Medicaid coverage
- Change in dependent care provider or cost for Dependent Care Flexible Spending Account

The following events require documentation. You cannot create any of these events on-line. 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

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.

2. Event Date

(Enter the date the event occurred)

07/22/2008 MM/DD/YYYY

Dates to use:

- 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.)

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

3. My dependent(s) meets 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

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

Please Note:

- Some dependent changes may require verification and proof relationship, i.e. dependents with different last names, Same-Sex Domestic Partners, and Overage Dependents age 19 to 25. If verification is requested and not provided by the deadline, coverage for that dependent will be terminated retro-active back to the event date. The Benefits Department will contact you if additional information is needed.
- 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 disable child.

4. I wish to do the following:

(Select the action you wish to take - action must be consistent with the Family Status Change selected above)

- 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 I may be asked for documentation at anytime supporting the changes that I have made have occurred with 31 days of the event and the persons listed on the coverages fall within Emory's definition of eligible dependents. If I choose not to certify the data above, I may click the browser Back button to exit this page.

Accept

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.

EMORY

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Birth and Adoption

Congratulations on the new addition to your family. This is a good time to reconsider your healthcare coverage, life insurance, tax withholdings, and other important information. On the following pages, you will have the opportunity to add or terminate coverage for qualified dependents.

If you experience difficulties navigating this site, please call the Benefits Department at (404) 727-7613 for assistance.

Click **Start** to begin or continue the life event process.

Start

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Dependent/Beneficiary Summary

The first step to adding coverage on your dependent is to add them to your Dependent/Beneficiary Summary. **This step does not enroll the dependent in any of your plans.** You must complete plan enrollment after you have prepared your Benefit Options and selected this event for Benefits Enrollment.

[Click Here to add a Dependent or Beneficiary to your Summary](#)

You have no dependent/beneficiary personal information on record.

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Dependent/Beneficiary Personal Information

Carnie Norris

Click Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Jul 21, 2008.

Personal Information

*First Name:

Middle Name:

*Last Name:

Name Prefix:

Name Suffix:

*Gender: Male

*Date of Birth:

SSN: (Social Security Number)

*Relationship to Employee:


Status Information


		As of:	<input type="text"/>
Student:	No <input type="button" value="v"/>	As of:	<input type="text"/>
Disabled:	No <input type="button" value="v"/>	As of:	<input type="text"/>
Smoker:	No <input type="button" value="v"/>	As of:	<input type="text"/>

Address and Telephone

Same Address as Employee

Country: United States

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Dependent/Beneficiary Personal Information

Carnie Norris

Dependent/Beneficiary's personal information as of Jul 21, 2008. Click Edit at the bottom of this page to update this information.

Personal Information

First Name: Spouse

Middle Name:

Last Name: Norris

Name Prefix:

Name Suffix:

Gender: Male

***Date of Birth:** 03/02/1960

SSN: (Social Security Number)

Relationship to Employee: Spouse

Status Information

Student: No

Disabled: No

Smoker: No

Address and Telephone

Same Address as Employee

Country: United States

Address: 1599 Clifton Rd
Atlanta, GA 30322

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Status Information

Student: No
Disabled: No
Smoker: No

Address and Telephone

Same Address as Employee

Country: United States
Address: 1599 Clifton Rd
 Atlanta, GA 30322

Same Phone as Employee

Phone:

Edit

[Return to Enrollment Dependent/Beneficiary Summary](#)

Return to Enrollment where you should see the added dependents

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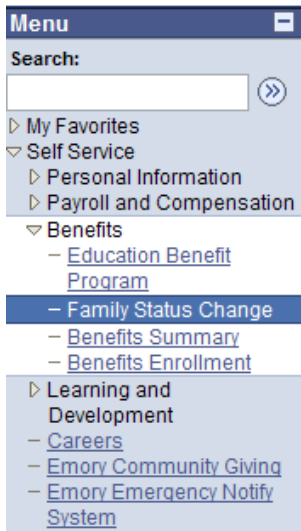
Personal Information

Save Confirmation

The Save was successful.

OK

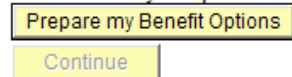
Click the OK button to move forward with the Family Status Change



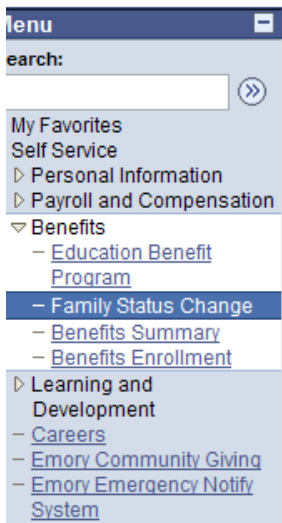
Please click this button only once, (it may take several moments to complete - you'll see a message when this is complete).

If you entered a new dependent, then your next step is to prepare your Benefit Options so that you can complete enrollment in the appropriate plans.

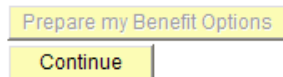
If you intended to add a dependent but did not do so on the prior page, go ahead and prepare your Benefit Options. You will be given the opportunity to add dependents again once you have selected the event and chosen to Edit one of your plans.




You will see the Prepare My Benefit Option button.




Please click the **Continue** button below to reach the Benefits Enrollment page.



Click the CONTINUE button to go to the Enrollment
This next area is where you will enroll your dependent in coverage or terminate them from coverage.

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Benefits Enrollment for Emory University

Carnie Norris

If you have a current event open for Benefits Enrollment it will be listed below and you may begin enrollment by clicking **Select**. After your initial enrollment, the only time you may change your benefit choices is during Annual Enrollment or a qualified Family Status Change (FSC).

Once you have selected the event, you must **Edit** each plan to add or terminate coverage on yourself or your dependents.

If your enrollment status is closed or if you have other problems entering your elections, please contact the Benefits Department at (404) 727-7613.

Benefits Enrollment

Event Description	Event Date	Event Status	Job Title	
Hire	07/21/2008	Open	Finance/Accounting Specialist	Select

Once you click **Select**, it will take a few seconds for your benefits enrollment information to load.

This site was written for Internet Explorer, version 6.028 or higher, with 128 bit encryption. To check what version of Explorer you have, click on Help on the toolbar above, and then click on About Internet Explorer. If you do not have the preferred version, you will need to get an update from your local computer support person. If you try to use Netscape or another browser, certain functions may not work and system speed may be much slower. Computers with Internet Explorer are available in the Benefits Department for your use.

If you see a link below to **Return to Dependent/Beneficiary Personal Information**, do not click it. You will have the opportunity to add dependents after you Select your event and click to Edit one of your benefit plans.

If there is a link here, **DO NOT CLICK IT!**

Click the **SELECT** button to proceed entering your dependents on your coverage.

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Benefits Enrollment

Medical

Carnie Norris

All medical choices promote wellness as part of their benefits and are available to protect you and your dependents should any of you become sick or injured. If you would like to see how the plan costs compare based upon your estimated use, please click on the link below.

[Health Plan Calculator](#)

After you've finished with the calculator, just X out of that window to return here.

Important: Dependents are not enrolled in this plan unless the Enroll box beside their name is checked at the bottom of this page. To terminate coverage on a dependent, uncheck the Enroll box.

In addition, the Emory BeneFlex Plan offers eligible employees a **special tax-saving opportunity**. Your healthcare premiums are withheld on a before-tax basis and that saves you money on taxes. Taxable income is reduced by the amount of your contribution and you pay no Federal, Georgia, or Social Security taxes on that amount. Other than during Annual Enrollment, your elections can only be changed if you report a qualified Family Status Change within 31 days of the event to the Emory Benefits Department. Your contributions for health and dental are required to be before-tax.

Same-Sex Domestic Partner (SSDP) enrollment requires a notarized Statement of Same-Sex Domestic Partnership to be on file with the Emory University Benefits Department. You may print a copy of the Statement of Same-Sex Domestic Partnership at the link below. Once you've signed and had the form notarized, return the original to Emory University, Human Resources, 1599 Clifton Road, Atlanta, GA 30322-0530. The employee and SSDP must enroll in the same medical plan and the employee must be enrolled for the partner to be covered. SSDP contributions are made on an after-tax basis, unless documentation is provided that the partner qualifies as a dependent under IRS guidelines. The portion of the premium paid by Emory for this benefit will be taxable to the employee. SSDP coverage levels and rates are determined by the employee's coverage level for themselves and IRS qualified dependents. Find the employee's coverage level in parenthesis below and see Your Costs for SSDP rates.

[Statement of Same-Sex Domestic Partnership](#)

Select an Option

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Select an Option

Please click on the button next to the plan you wish to elect for the coming year. If you do not elect a plan, coverage will be waived.

Select one of the following plans:

Aetna Healthfund(HRA)

The Aetna Healthfund(HRA) is a medical plan with a health reimbursement account (HRA) funded by Emory. HRA's give you more control over how you spend your health care dollars. You can use the funds in your HRA to pay for eligible medical expenses during 2008, as well as, earn money for your HRA by participating in various health programs.

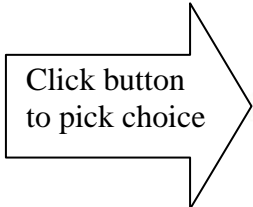
Coverage Level	Your Costs	Tax Class
Employee Only	\$35.00	Before-Tax
Employee + Spouse	\$135.00	Before-Tax
Employee + Child(ren)	\$105.00	Before-Tax
Employee + Family	\$205.00	Before-Tax

Domestic Partner rates are as follows. Parenthesis indicate the coverage level of the employee.

Coverage Level	Your Costs	Tax Class
SSDP Only (Single)	\$100.00	After-Tax
SSDP Child (Single)	\$70.00	After-Tax
SSDP + SSDP Child(Single)	\$170.00	After-Tax
SSDP w or w/o Ch(EE+ Children)	\$100.00	After-Tax
SSDP Child (Employee+Children)	\$0.00	After-Tax

Aetna POS

Aetna POS is a Point of Service plan (POS), meaning benefits are determined by where you choose to receive services. There are three levels of networks: core network, Aetna National network, and out of network. This plan offers maximum benefits when you visit



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Domestic Partner rates are as follows. Parenthesis indicate the coverage level of the employee.

Coverage Level	Your Costs	Tax Class
SSDP Only (Single)	\$82.00	After-Tax
SSDP Child (Single)	\$58.00	After-Tax
SSDP + SSDP Child(Single)	\$116.00	After-Tax
SSDP w or w/o Ch(EE+ Children)	\$58.00	After-Tax
SSDP Child (Employee+Children)	\$0.00	After-Tax

Waive or Terminate Medical Coverage

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, click Add/Review Dependents to determine why they are not eligible. You may also use this button to add new dependents to your list.

Only dependents with the following relationship to the employee are eligible for coverage: Spouse, Son, Daughter, Same-Sex Domestic Partner (SSDP), SSDP Son, and SSDP Daughter. Children must be under the age of 19, unless they are full time students between the ages of 19 and 25. If you have legal guardianship of a minor child with court documentation, have a child who has been placed in your home for adoption, or have your step child(ren) living in your home, you should list their relationship as Son or Daughter. Emory does not offer coverage to adult dependents other than spouses and same-sex domestic partners.

To enroll an eligible dependent for coverage under this plan, check the Enroll box next to the dependent's name. If you wish to terminate coverage on one of the dependents below, uncheck the Enroll box.

Dependent List

Add/Review Dependents

Continue

Click **Continue** to hold your choice until you are ready to submit your final enrollment on the Enrollment Summary.

How to Add Dependents you do not see in the list, Click the ADD/REVIEW Button

You will then see the following Screens to add a Dependent/Beneficiary:

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Dependent/Beneficiary Summary

The first step to adding coverage on your dependent is to add them to your Dependent/Beneficiary Summary. **This step does not enroll the dependent in any of your plans.** You must complete plan enrollment after you have prepared your Benefit Options and selected this event for Benefits Enrollment.

[Click Here to add a Dependent or Beneficiary to your Summary](#)

You have no dependent/beneficiary personal information on record.

Cancel

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Dependent/Beneficiary Personal Information

Carnie Norris

Click Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Jul 21, 2008.

Personal Information

*First Name:

Middle Name:

*Last Name:

Name Prefix:

Name Suffix:

*Gender: Male

*Date of Birth:

SSN: (Social Security Number)

*Relationship to Employee:

Status Information

		As of:	<input type="text"/>
Student:	No <input type="button" value="v"/>	As of:	<input type="text"/>
Disabled:	No <input type="button" value="v"/>	As of:	<input type="text"/>
Smoker:	No <input type="button" value="v"/>	As of:	<input type="text"/>

Address and Telephone

Same Address as Employee

Country: United States


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Personal Information

Save Confirmation

 The Save was successful.

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Dependent/Beneficiary Personal Information

Carnie Norris

Dependent/Beneficiary's personal information as of Jul 21, 2008. Click Edit at the bottom of this page to update this information.

Personal Information

First Name: Spouse

Middle Name:

Last Name: Norris

Name Prefix:

Name Suffix:

Gender: Male

***Date of Birth:** 03/02/1960

SSN: (Social Security Number)

Relationship to Employee: Spouse

Status Information

Student: No

Disabled: No

Smoker: No

Address and Telephone

Same Address as Employee

Country: United States

Address: 1599 Clifton Rd
Atlanta, GA 30322

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Status Information

Student: No
Disabled: No
Smoker: No

Address and Telephone

Same Address as Employee

Country: United States
Address: 1599 Clifton Rd
Atlanta, GA 30322

Same Phone as Employee

Phone:

Edit

[Return to Enrollment Dependent/Beneficiary Summary](#)

Return to Enrollment where you should see the added dependents

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Check the box to add dependents, uncheck to terminate coverage

SSDP Child (Employee+Children) \$0.00 After-Tax

Waive or Terminate Medical Coverage

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, click Add/Review Dependents to determine why they are not eligible. You may also use this button to add new dependents to your list.

Only dependents with the following relationship to the employee are eligible for coverage: Spouse, Son, Daughter, Same-Sex Domestic Partner (SSDP), SSDP Son, and SSDP Daughter. Children must be under the age of 19, unless they are full time students between the ages of 19 and 25. If you have legal guardianship of a minor child with court documentation, have a child who has been placed in your home for adoption, or have your step child(ren) living in your home, you should list their relationship as Son or Daughter. Emory does not offer coverage to adult dependents other than spouses and same-sex domestic partners.

To enroll an eligible dependent for coverage under this plan, check the Enroll box next to the dependent's name. If you wish to terminate coverage on one of the dependents below, uncheck the Enroll box.

Dependent List

<u>Enroll</u>	<u>Name</u>	<u>Relationship</u>
<input checked="" type="checkbox"/>	Spouse Norris	Spouse

Add/Review Dependents

Continue Click **Continue** to hold your choice until you are ready to submit your final enrollment on the Enrollment Summary.

Cancel Click **Cancel** to ignore all entries made on this page and return to the Enrollment Summary.

Click the continue to move through the benefits

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Carnie Norris

Your Choice

You have elected Aetna POS.

Cost

Payroll Deduction: \$186.00
Payroll Deduction for SSDP: \$0.00

Your Covered Dependents

Name	Relationship
Spouse Norris	Spouse

Notes

Once submitted, elections to add coverage are effective on the date of the event. For example, a newborn will be effective their date of birth. New Hires are effective the date of hire.

Elections to terminate coverage are always effective the last day of the month in which the qualifying event took place. An ineligible dependent who has a birthday in the middle of a month, will have coverage through the end of that month. If a spouse is dropped due to a divorce, their coverage will run to the end of the month.

Continue

Click **Continue** to store your choices.

Edit

Click **Edit** to go back and change your choices.

Click the continue to move through the benefits

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Benefits Enrollment

Hire

Carnie Norris

Welcome to Employee Self Service! Shown below are your current benefit elections (Current elections will show blank for new hire/rehire events). If you do not make any changes at this time, your coverage will remain the same and your next opportunity to change will be during the Open Enrollment period. Please remember that Before-Tax elections are regulated by IRS Section 125 and can only be changed with an approved IRS Family Status Change.

To enter elections for yourself or your dependents, please click on the **Edit** button beside the appropriate plan. After you have completed your edits, please click the **Continue** button at the bottom of this page. If you are not making any changes, please click **I Have No Changes!** at the bottom of this page.

Costs are on a per pay period basis. If you are paid monthly, then the monthly cost is displayed. If you are paid biweekly, then the biweekly cost is shown.

Enrollment Summary

Edit	Medical	Before-Tax	After-Tax
Current: NONE			
New: Aetna POS:EE + Spous			
		186.00	
SSDP Medical - Same-Sex Domestic Partner			
Current: NONE			
New: NONE			
Edit	Dental	Before-Tax	After-Tax
Current: NONE			
New: NONE			
SSDP Dental - Same-Sex Domestic Partner			
Current: NONE			

	<u>Before-Tax</u>	<u>After-Tax</u>	<u>Total</u>
Your Costs	186.00	0.00	186.00

These totals only include the cost for plans listed above. This page does not display all withholdings from your paycheck. You may be enrolled in other plans that are not open for this event or that are based upon a percentage.

Additional Benefits

Continue

 Before clicking on Continue, please use your browser's print feature to print a copy of this page for your records.

Important: Your enrollment will not be complete until you reach the **Submit Confirmation** page. Please click **Continue** on this page and **Submit** on the next page to send your elections to the Benefits Department.

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Search:

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 Emory Test Tracker
 Self Service

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 ▶ Payroll and Compensation

▼ Benefits
 – [Education Benefit Program](#)
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Manager Self Service
 Workforce Administration
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 Set Up HRMS
 Reporting Tools
 PeopleTools

Emory message

You have almost completed your enrollment. If you have no further changes, click **Submit** at the bottom of this page to finalize your benefit choices.

Cancel Click **Cancel** if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Important: If you need to make corrections to this election, you may click on **Cancel** below to return to the enrollment pages. To return to enrollment after you leave the site, go to the Benefits home page in Employee Self Service and click on **Benefits Enrollment**. If you do not find the event open under Benefits Enrollment, please contact the Benefits office at (404) 727-7613 to determine if you are still within the allowable time frame to report changes and they will re-open the event. Events may be changed up to 31 days from the event date.

Authorize Elections

By clicking **Submit**, I acknowledge that I have read all information contained below and I authorize Emory to deduct from my paycheck any contributions I have elected on prior pages.

If I elect health coverage, I hereby authorize all hospitals, physicians, medical service providers, pharmacists, employers, and all other agencies or organizations (including insurers and pre-paid health plans) to permit my choice vendor or its representatives to see or obtain a copy of all medical, prescribed drugs, HIV, and mental health diagnoses, and employment and insurance coverage records which pertain to me or any member of my family. This information will be used in connection with claims for benefits and utilization review and will be kept strictly confidential. This authorization shall remain valid for the term of this coverage. I understand that if a member is injured through the act or omission of another, the insurance vendor will require reimbursement for the benefits provided in an amount not to exceed any damages collected (where permitted by law).

Clicking **Submit** also confirms my life insurance elections and beneficiary(ies) as entered or reviewed on the Enrollment Summary page of this site.

Submit Click **Submit** to send your authorization and choices to the Benefits Department.

Cancel Click **Cancel** to return to the Enrollment Summary. If you cancel, your choices are held but not submitted. You must return to your benefits enrollment, hit select and review your choices. After you review your elections, return to click the submit button to send authorization to the Benefits Department.

Hit the submit button for your choices to go to the Benefits Department

Menu

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Benefits Enrollment

Confirmation Page

CONFIRMATION

You have successfully completed your Benefits Enrollment. Your choices have been saved and changes will be sent to the appropriate vendors. If you are adding health coverage, you will receive ID cards from the carrier in approximately 10 to 14 days.

If you need to return to the Benefits Enrollment pages to enter corrections or to view your elections, click **Return** and select Benefits Enrollment. To logoff, click **Sign Out** in the upper right hand corner of this page.

[Continue](#)

[Update Contact Data](#)

To ensure delivery of plan ID cards and confirmation statements, please click here to review your contact data. Family Status Changes may require updates to other fields as well.

- Address Change
- Telephone Number
- Emergency Contact

[Update Human Resource Data](#)

Family Status Events may involve a change in name. If so, you'll want to update your Human Resources information. Please consider:

- Name Change
- Social Security Name Change
- I-9 Records

When you submit your choices, you will see this confirmation page.