Quick Reference Guide: Enrolling in Benefits

Keep in mind

- You have 31 days from the date of that you become benefits eligible to enroll in benefits.
- If not enroll within these 31 days, you will have to wait until Open Enrollment or until you experience a qualified life event to make changes to your benefit elections.
- You may not elect coverage as an employee and also receive coverage as a dependent (if both you and your spouse/partner are University employees).

Information Needed

- Supporting documentation (if necessary), includes the following:
  - Birth/Adoption - birth certificate or adoption documents
  - Marriage - marriage certificate
  - Civil Union or Domestic Partnership - civil union or domestic partnership documents.
- Please note that if you are adding beneficiaries or dependents you must provide social security numbers, dates of birth and addresses for those individuals.
- Please visit humanresources.uchicago.edu/benefits for more information about benefit plan(s) in which you would like to enroll.

Steps to Enroll in Benefits:

1. From the Home page, click on the inbox icon in the top right corner of the screen.

2. Select the Benefit Change – Hire task.
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3. If applicable, make updates to your Health Care Elections by selecting the radio button next to “Elect” for the Health Care plans you would like to enroll in. Also indicate the coverage level (i.e. Employee Only, Employee + Spouse, etc.) by selecting the prompt icon 📌 in the Coverage column.

If you are covering dependents, use the Prompt Icon 📌 under the Enroll Dependents column to create and add your dependents to your election.

4. Click to proceed to the next step.
5. If you would like to enroll in a Health Savings Account (HSA) click the "Elect" button.

6. Click [Continue] to proceed to the next step.

Health Savings Account (HSA) elections are only available if the Maroon Savings Choice plan has been selected. Employees may not elect both an HSA and a Healthcare Flexible Spending Account (HFSA).
7. If you would like to enroll in a Spending Account click the “Elect” button for the various offerings.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare FSA - Conexis</td>
<td>Elect/Waive</td>
<td>Your number of remaining payroll deductions for the year 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Your estimated contributions made this year 0:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute for the total year? 0:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute per paycheck (Monthly)? 0:00</td>
</tr>
<tr>
<td>Dependent Care FSA - Conexis HCE</td>
<td>Elect/Waive</td>
<td>Your number of remaining payroll deductions for the year 10</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Your estimated contributions made this year 0:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute for the total year? 0:00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute per paycheck (Monthly)? 0:00</td>
</tr>
</tbody>
</table>

8. Click **Continue** to proceed to the next step.
9. Select the radio button next to “Elect” for the Insurance plans you would like to enroll in. Also indicate the coverage level (i.e. 1x Salary, 2x Salary, etc.) by selecting the prompt icon in the Coverage column.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Coverage Level</th>
<th>Covers Dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Life Insurance - Sun Life To a Maximum of 50,000 (Employee)</td>
<td>Elect, Waive</td>
<td>1 X Salary</td>
<td></td>
</tr>
<tr>
<td>Supplemental Life Insurance - Sun Life (Employee)</td>
<td>Elect, Waive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spouse Life Insurance - Sun Life (Spouse)</td>
<td>Elect, Waive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Child Life Insurance - Sun Life (Child(ren))</td>
<td>Elect, Waive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Personal Accident Insurance - Sun Life (Employee)</td>
<td>Elect, Waive</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10. Click to proceed to the next step.
11. If you would like to contribute to the Supplemental Retirement Plan, enter a percentage amount in the **Employee Contribution – Percent** or enter a dollar amount in the **Employee Contribution - Amount (Monthly)** field as shown below.

   **Bi-weekly paid employees:** The amount you designate for SRP will be deducted each and every pay period. Please ignore the monthly indicator.

   ![Employee Contribution Table]

12. Enter your **SRP** contribution allocation in the **Employee Contribution Allocation** field(s).

   ![Employee Contribution Allocation Table]

   The total Employee Contribution Allocation must equal 100%.
13. If you would like to designate a Beneficiary for the Insurance plans previously elected, click the plus sign to enter the required information.

14. Review the additional benefits provided by The University at no cost to you. You will not be able to make changes on this screen.

15. Click the **Continue** to proceed to the next step.
16. Review your **Elected Coverages, Waived Coverages, Attach Dependent Documentation** (if applicable) and click the **I Agree** check box to confirm your selections.

Electronic Signature

I hereby apply for participation in the University of Chicago’s benefits plan(s) for those benefits for which I am or may become eligible under the terms and conditions of said plan and any present or future amendments thereto, and subject to acceptance of my enrollment.

By selecting the **I AGREE** button, you certify that:

- You authorize the University of Chicago to deduct from your earnings the required contributions, if any, toward the cost of the plan(s); and
- You cannot change any of your elections for medical, dental, vision, or health and/or dependent care flexible spending accounts or health savings accounts until the next open enrollment period, unless you have a qualified life event. Proof of the life event is required and must be submitted within 31 days of the life event effective date.

17. Click on the **Submit** button to submit this task.

18. Scroll to the bottom of the screen and click the **Print** button to print a paper copy of your benefits for your personal records or click **Done** to exit.

💡 The process will route to a Benefits Partner for approval. Once approved, you will be able to view your updated benefits elections the day they become effective.
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Viewing/Printing Benefits Statement

After a benefit change has been successfully completed you are able to print a benefit statement at any time by following the steps outlined below.

1. From the Home Page, click on your name and select the View Profile hyperlink.

2. From the Related Actions Icon, navigate to Benefits to select View My Benefit Statement.
3. Select the desired Benefit Event and the statement will open to print.