

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

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Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Within USFWorks, you can manage your Benefits by reporting [Qualifying Events](#) to make coverage changes and viewing your Benefit Elections.

How to report Qualifying Events (general explanation)

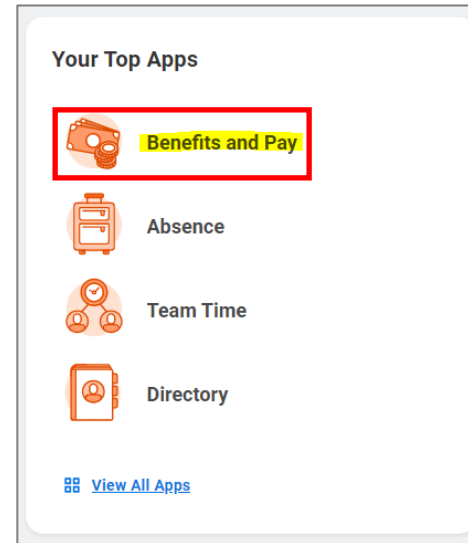
Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, divorce, or similar life event (known as [Qualifying Events](#)), you can change your Benefits to better fit your needs.

You need to make the change **within 30 days** of the Qualifying Event, otherwise you will need to wait until the next Open Enrollment period.

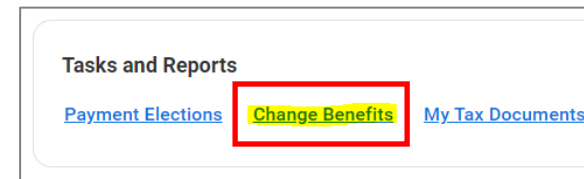
- If you are adding child dependents, please upload proof of birth or adoption for each child.
- If you are adding a spouse or registered domestic partner, please upload proof of marriage or registered domestic partnership.
- If you are dropping a dependent due to coverage elsewhere, you will need upload proof of other healthcare coverage.
- If you are dropping a dependent due to a divorce, you will need to upload proof of divorce/legal separation and change your dependent from spouse to ex-spouse (or domestic partner to ex-domestic partner) in the dependent worklet.

Follow these steps:

1. Log in to [USFWorks](#) and click **Benefits and Pay**.



2. On the next page, under **Tasks and Reports**, select **Change Benefits**.



3. On the next page:
 - a) Select the **Change Reason**
 - b) Enter the **Benefit Event Date** (e.g. date of birth of new child, date of marriage)
 - c) Attach required documents, if applicable
 - d) Click **Submit**.

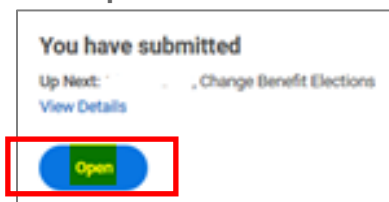
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The screenshot shows the 'Change Benefits' form. A red box highlights the 'Change Reason' dropdown menu with options: Beneficiary Change, Birth or Adoption (selected), Death of Dependent, Divorce/Dissolution of Registered Domestic Partnership, Emeriti - Employee, Gain Other Coverage Elsewhere, Loss of Other Coverage Elsewhere, and Marriage/Registered Domestic Partner. Another red box highlights the 'Date of Birth or Adoption' field with the date 02/28/2023. A third red box highlights the 'Select files' button in the attachments section. A fourth red box highlights the 'Submit' button at the bottom left of the form.

- Complete and continue through all required screens.
- Once you have done so, click **Review and Sign**.
- Check the **I Agree** checkbox, to provide an electronic signature, confirming your changes.
- Click **Submit**.
- On the next page, click **Done** to complete the task.

Adjunct faculty who are enrolled in the adjunct faculty Kaiser plan, please reach out to benefits@usfca.edu if you wish to make Qualifying Event change.

- A pop-up window will appear stating you have submitted. Click **Open**.



(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

- Complete and submit the task.

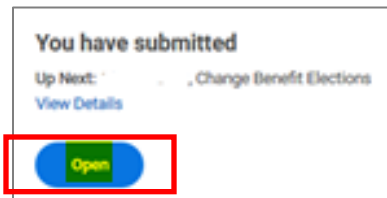
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Birth or Adoption of Child

Follow these steps:

1. On the **Change Benefits** page:
 - a) Select **Birth or Adoption** as the **Change Reason**
 - b) Enter the **Date of Birth or Adoption**
 - c) Attach proof of date of birth or adoption (required)
 - d) Click **Submit**.

2. A pop-up window will appear stating you have submitted. Click **Open**.



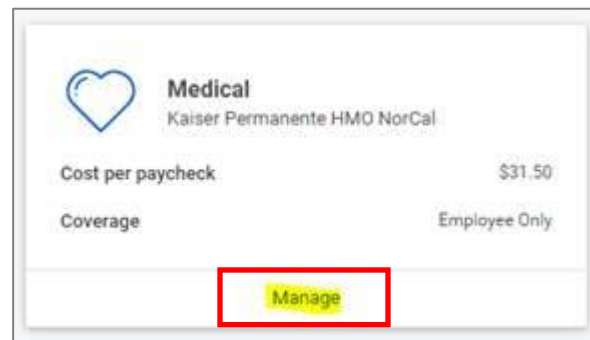
3. On the next page, click **Let's Get Started**.



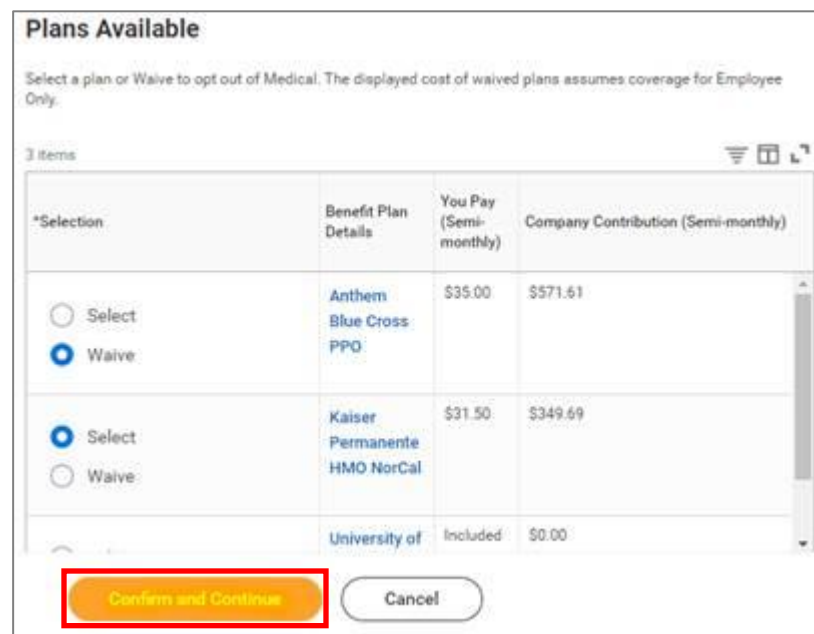
(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

4. On the page with the Benefit cards, go into each Benefit you wish to add your child to (Medical, Dental and/or Vision) in order to add them as a Dependent.

For example, Medical: Under the **Medical** card, click **Manage**.



5. Click **Confirm and Continue**.



6. On the next page:
 - If your plan is currently *Employee Only*, select *Employee Plus One* from the drop-down list.
 - If your plan is currently *Employee Plus One*, select *Employee Plus Family* from the drop-down list.

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- If your plan is currently *Employee Plus Family*, leave it as *Employee Plus Family*.
- If your plan is currently *Employee plus Domestic Partner*, select *Employee + Domestic Partner and Children*.

Then click **Add New Dependent**.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * United States of America

Plan cost per paycheck \$114.50

Add New Dependent

7. On the pop-up window, click **OK**.

Add My Dependent From Enrollment

Instructional Text
Click OK to add dependents.

OK Cancel

8. On the next page, fill in the following information about your child.

Add My Dependent From Enrollment

Name

Country * United States of America

Prefix

First Name *

Middle Name

Last Name *

Suffix

Allow Duplicate Name ☐

Personal Information

Relationship *

Date of Birth * MM/DD/YYYY

Age (empty)

Legal Sex * select one

Full-time Student ☐

Student Status Start Date

Student Status End Date

Disabled ☐

9. Scroll down to **National IDs** and click **Add**.

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Add

10. Enter the **Country**, **National ID Type** (SSN or ITIN if US), **ID number** (SSN or ITIN if US) and **Issued Date** (if known).

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National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Country *

National ID Type *

Current ID (empty)

Add/Edit ID *

Issued Date

Expiration Date

Issued By

Series

Verification Date 02/20/2023

Verified By Elena Nielsen

Remove

11. If you do not have the SSN/ITIN/foreign National ID for your child yet, enter all zeros (e.g. to substitute an SSN, enter 000-00-0000). You **must** add the SSN/ITIN/National ID once you receive it. See [here](#) for the job aid on how to do this.

12. Click **Save**.

Save

Cancel

13. On the next page, ensure the checkbox is checked next to your child's name and click **Save**.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage *

Plan cost per paycheck \$114.50

Add New Dependent

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Child	01/01/1980

Save

Cancel

14. You will then be taken back to the screen with the Benefits cards.

15. Repeat the same steps for Dental and/or Vision, if you wish to enroll your child in these plans (although your child will already appear as a Dependent in the list, so you won't need to add their details again – you just need to select the correct Coverage level from the drop-down list and check the checkbox next to their name).

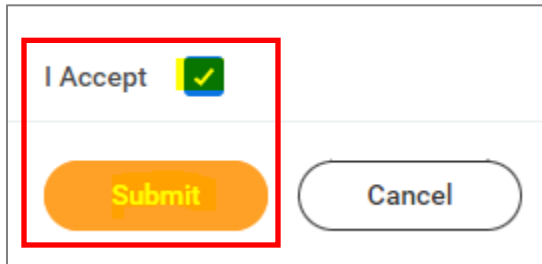
16. Once you are done, on the page with the Benefits cards, click **Review and Sign**.


Review and Sign

Save for Later

17. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.

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I Accept 

Submit Cancel

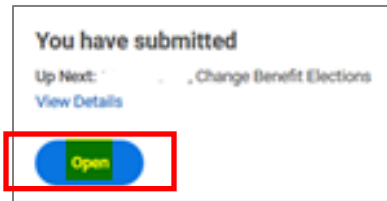
18. On the next page, click **Done**.
19. Your submission will be automatically routed to your HR Benefits partner for processing.

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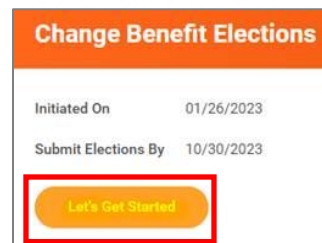
Marriage/Registered Domestic Partnership

Follow these steps:

1. On the **Change Benefits** page:
 - a) Select **Marriage/Registered Domestic Partner** as the **Change Reason**
 - b) Enter the **Date of Marriage or RDP Certification**
 - c) Attach proof of marriage / registration of registered domestic partnership (required)
 - d) Click **Submit**.
2. A pop-up window will appear stating you have submitted. Click **Open**.



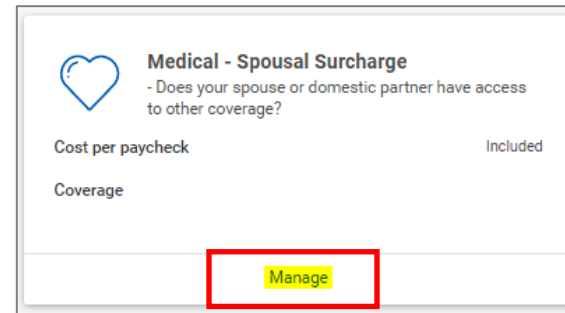
3. On the next page, click **Let's Get Started**.



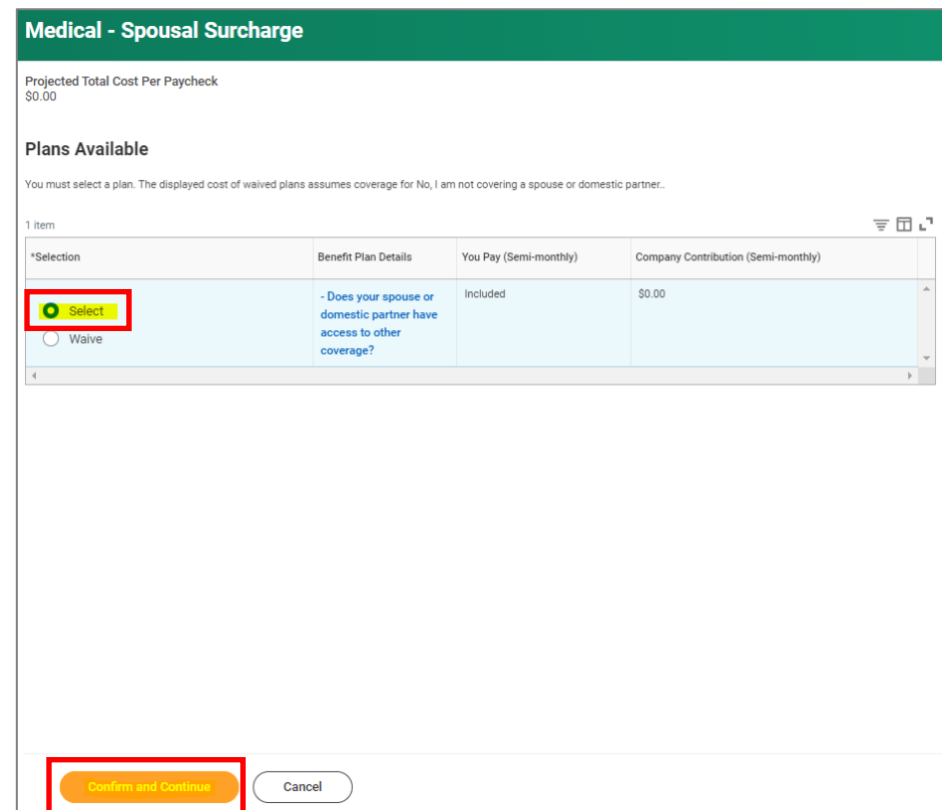
(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

4. On the page with the Benefit cards, if you are enrolling your

spouse/RDP on your Medical plan, you need to update your Medical Spousal Surcharge option first. Under the **Medical – Spousal Surcharge** card, click **Manage**.



5. Click **Select** (do not click Waive) and **Confirm and Continue**.



*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	- Does your spouse or domestic partner have access to other coverage?	Included	\$0.00

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6. On the next page, select the option which applies to you from the **Coverage** drop-down list and click **Save**.
- *No, my spouse or domestic partner does not have access to other coverage.*
 - *Yes, my spouse or domestic partner has access to other coverage (in this case, a \$75/month Spousal Surcharge applies)*

Medical - Spousal Surcharge - - Does your

Projected Total Cost Per Paycheck
\$0.00

Coverage *

Plan cost per paycheck

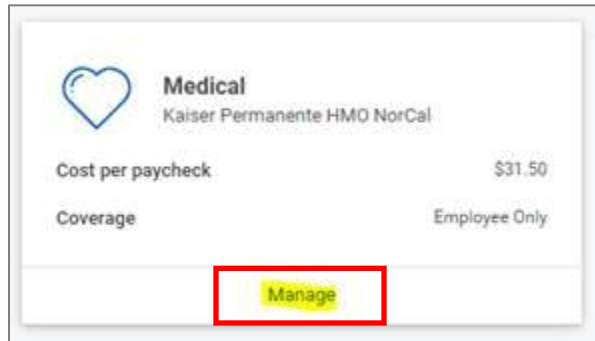
- ☐ No, I am not covering a spouse or domestic partner.
- ☒ No, my spouse or domestic partner does not have access to other coverage
- ☐ Yes, my spouse or domestic partner has access to other coverage
- ☐ I am not enrolling in a USF medical plan

Save Cancel

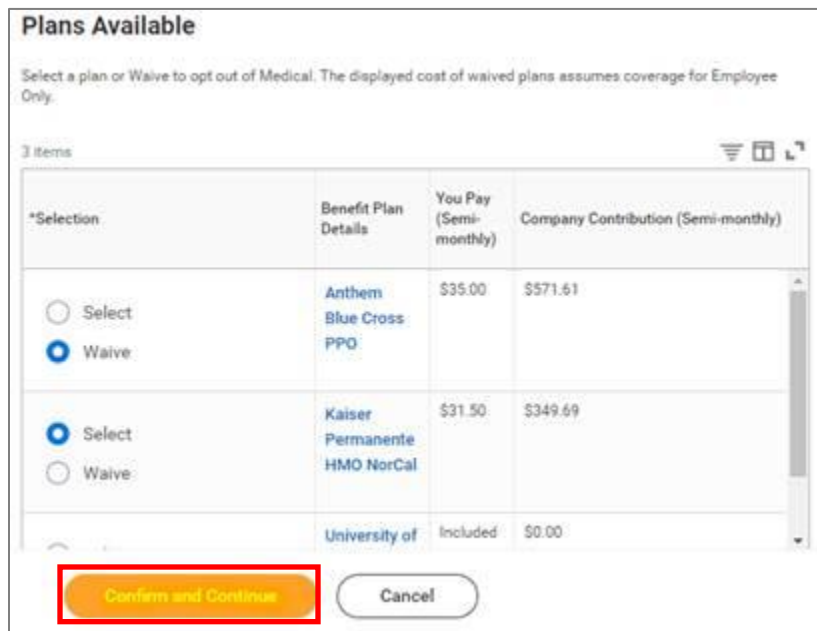
7. Then, go into each Benefit you wish to add your spouse/RDP to (Medical, Dental and/or Vision) in order to add them as a Dependent.

For example, Medical: Under the **Medical** card, click **Manage**.

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8. Click **Confirm and Continue**.



*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Anthem Blue Cross PPO	\$35.00	\$571.61
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Kaiser Permanente HMO NorCal	\$31.50	\$349.69
	University of	Included	\$0.00

9. On the next page, select:

If married:

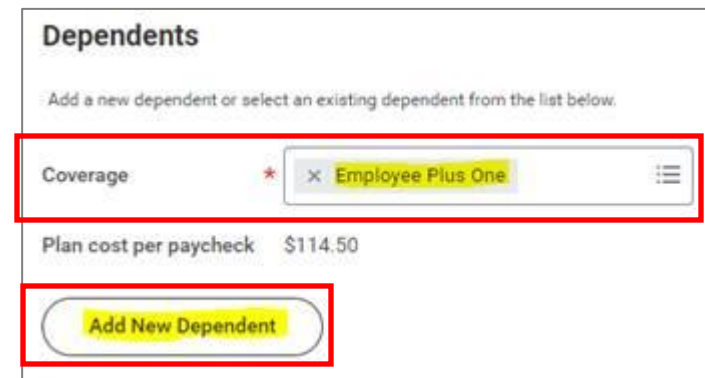
- If your plan is currently *Employee Only*, select *Employee Plus One* from the drop-down list
- If your plan is currently *Employee Plus One*, select *Employee Plus Family* from the drop-down list.

- If your plan is currently *Employee Plus Family*, leave it as *Employee Plus Family*.

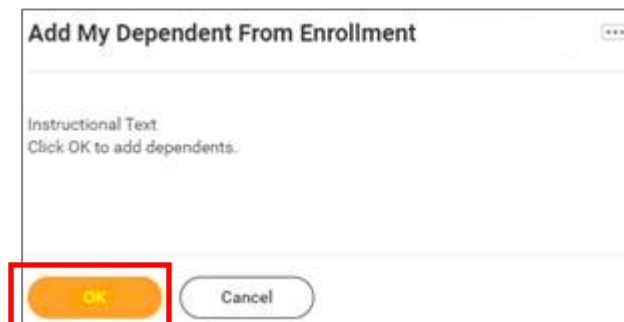
If in an RDP:

- If your plan is currently *Employee Only*, select *Employee plus Domestic Partner* from the drop-down list
- If your plan is currently *Employee Plus One* (you and your child), select *Employee + Domestic Partner and Children* from the drop-down list.
- If your plan is currently *Employee Plus Family* (you and your children), select *Employee + Domestic Partner and Children*.

Then click **Add New Dependent**.



10. On the pop-up window, click **OK**.



11. On the next page, fill in the following information about your spouse/RDP.

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Add My Dependent From Enrollment

Name

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

Allow Duplicate Name ☐

Personal Information

Relationship *

Date of Birth *

Age (empty)

Legal Sex *

Full-time Student ☐

Student Status Start Date

Student Status End Date

Disabled ☐

12. Scroll down to **National IDs** and click **Add**.

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

13. Enter the **Country**, **National ID Type** (SSN or ITIN if US), **ID number** (SSN or ITIN if US) and **Issued Date** (if known).

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Country *

National ID Type *

Current ID (empty)

Add/Edit ID *

Issued Date

Expiration Date

Issued By

Series

Verification Date 01/26/2023

14. Scroll down to enter your spouse/RDP's address and phone number, if needed.

Address

Use Existing Address

Country *

Address Line 1

Address Line 2

City

State

Postal Code

County

Phone & Email

Use Existing Phone

Country Phone Code

Phone Number

Phone Extension

Email Address

15. Click **Save**.

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16. On the next page, ensure the checkbox is checked next to your spouse/RDP's name and click **Save**.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Employee Plus One

Plan cost per paycheck \$114.50

[Add New Dependent](#)

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Spouse	01/01/1980

[Save](#) [Cancel](#)

17. You will then be taken back to the screen with the Benefits cards.
18. Repeat the same steps for Dental and/or Vision, if you wish to enroll your spouse/RDP in these plans (although your spouse/RDP will already appear as a Dependent in the list, so you won't need to add their details again – you just need to select the correct Coverage level from the drop-down list and check the checkbox next to their name).
19. Once you are done, on the page with the Benefits cards, click **Review and Sign**.

[Review and Sign](#) [Save for Later](#)

20. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click

Submit.

I Accept ☒

[Submit](#) [Cancel](#)

21. On the next page, click **Done**.
22. Your submission will be automatically routed to your HR Benefits partner for processing.

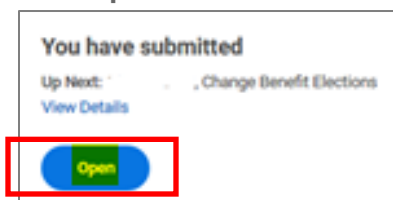
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Divorce/Dissolution of Registered Domestic Partnership

Follow these steps:

1. On the **Change Benefits** page:
 - a) **Divorce/Dissolution of Registered Domestic Partnership** as the **Change Reason**
 - b) Enter the **Date of Divorce or RDP Dissolution**
 - c) Attach proof of date of divorce / dissolution of registered domestic partnership (required)
 - d) Click **Submit**.

2. A pop-up window will appear stating you have submitted. Click **Open**.

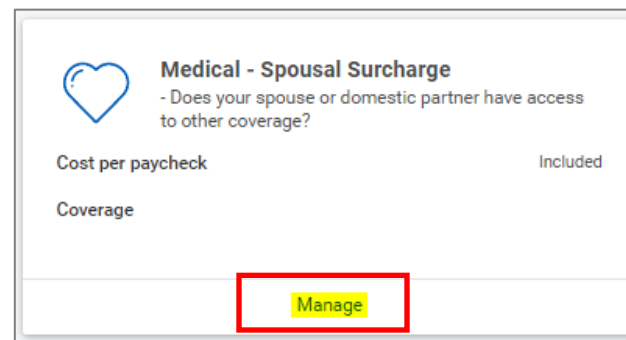


3. On the next page, click **Let's Get Started**.

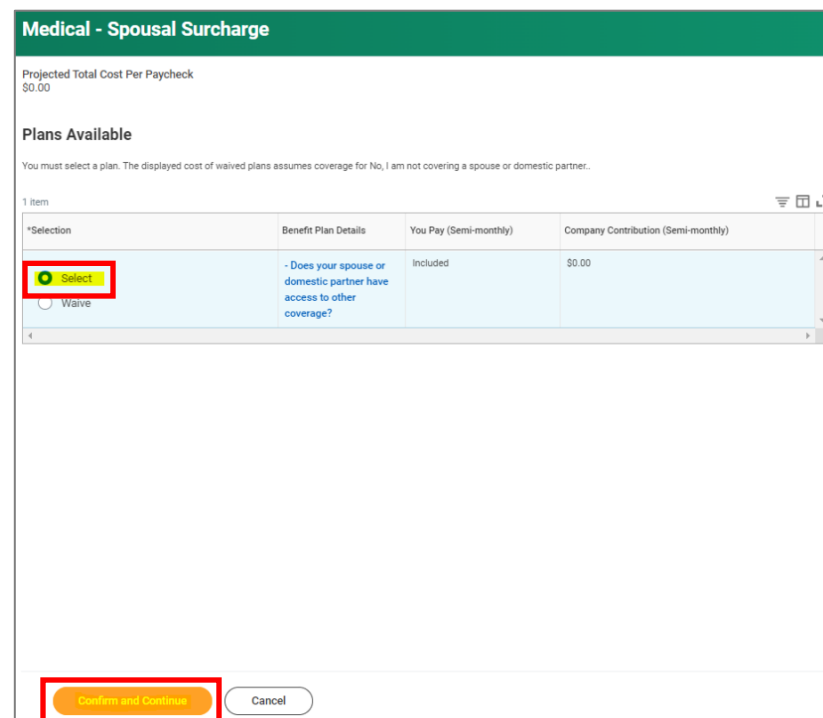


(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

4. On the page with the Benefit cards, if your ex-spouse/ex-RDP is currently enrolled in your USF Medical Plan, you will need to remove them. This also means that you will need to update the option which applies to you for the Spousal Surcharge. Under the **Medical – Spousal Surcharge** card, click **Manage**.



5. Click **Select** (do not click Waive) and **Confirm and Continue**.



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6. On the next page, select the option which applies to you from the **Coverage** drop-down list and click **Save**.

- *No, I am not covering a spouse or domestic partner.*

Please note:

If you are **not** enrolled in a USF Medical Plan, the selected option needs to be:

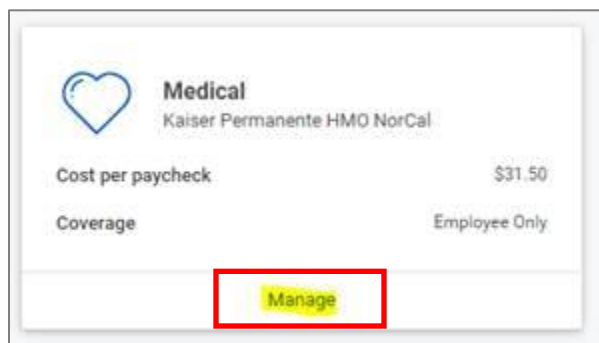
- *I am not enrolling in a USF medical plan.*

The screenshot shows a form titled "Medical - Spousal Surcharge - - Does your". Below the title, it says "Projected Total Cost Per Paycheck \$0.00". There is a "Coverage" dropdown menu with a search bar and a list of four options. The first option, "No, I am not covering a spouse or domestic partner.", is selected with a yellow radio button. The last option, "I am not enrolling in a USF medical plan", is also selected with a yellow radio button. The other two options are "No, my spouse or domestic partner does not have access to other coverage" and "Yes, my spouse or domestic partner has access to other coverage", both with unselected radio buttons. At the bottom of the form are "Save" and "Cancel" buttons.

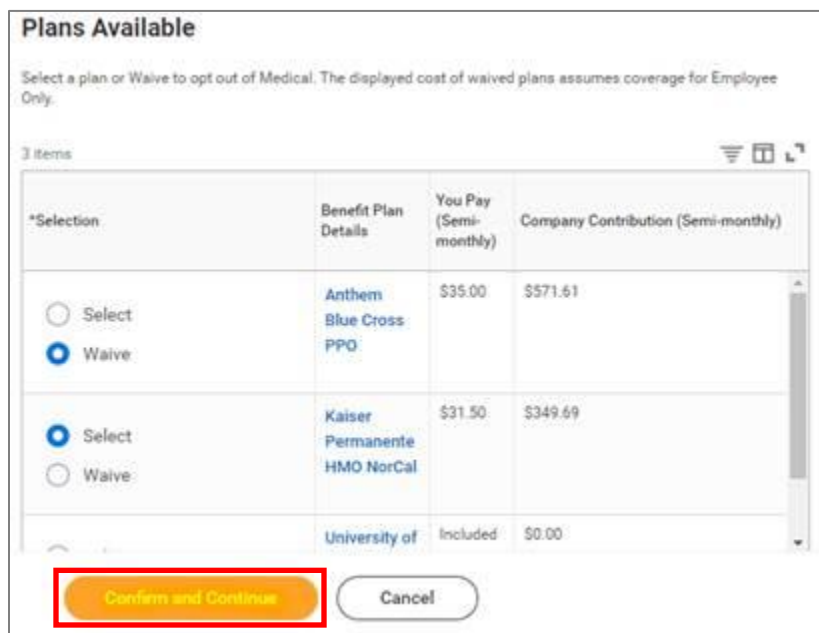
7. Then, go into each Benefit your ex-spouse/ex-RDP is currently a Dependent on (Medical, Dental and/or Vision) in order to remove them as a Dependent.

For example, Medical: Under the **Medical** card, click **Manage**.

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8. Click **Confirm and Continue**.



*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input type="radio"/> Select	Anthem Blue Cross PPO	\$35.00	\$571.61
<input checked="" type="radio"/> Waive	Kaiser Permanente HMO NorCal	\$31.50	\$349.69
<input type="radio"/> Select	University of	Included	\$0.00

9. On the next page, select:

To remove a former spouse:

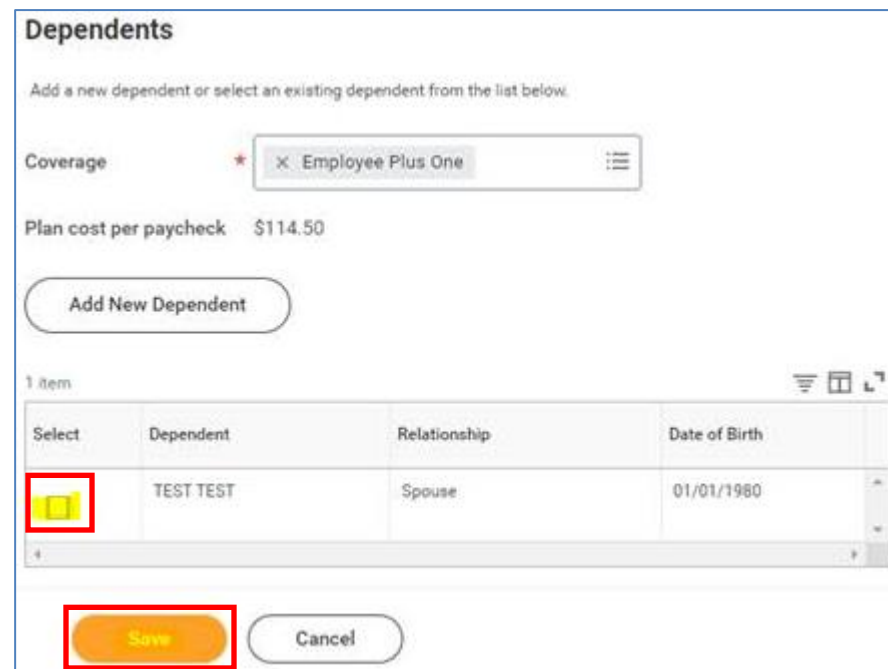
- If your plan is currently *Employee Plus One*, select *Employee Only* from the drop-down list.
- If your plan is currently *Employee Plus Family*, and removing your spouse would leave you and **one** child on

the plan, select *Employee Plus One* from the drop-down list.

To remove a former RDP:

- If your plan is currently *Employee plus Domestic Partner*, select *Employee Only* from the drop-down list.
- If your plan is currently *Employee + Domestic Partner and Children*, and removing your RDP would leave you and **one** child on the plan, select *Employee Plus One* from the drop-down list.
- If your plan is currently *Employee + Domestic Partner and Children* (you and your children), and removing your RDP would leave you and more than **one** child on the plan, select *Employee Plus Family* from the drop-down list.

10. Then **uncheck the checkbox** next to your ex-spouse/ex-RDP's name and click **Save**.



Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Spouse	01/01/1980

11. You will then be taken back to the screen with the Benefits cards.

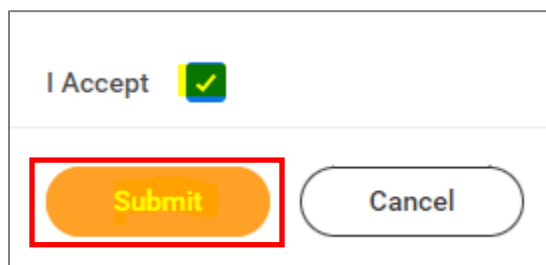


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12. Repeat the same steps for Dental and/or Vision, to remove your ex-spouse/ex-RDP from these, if enrolled.
13. Once you are done, on the page with the Benefits cards, click **Review and Sign**.



14. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.



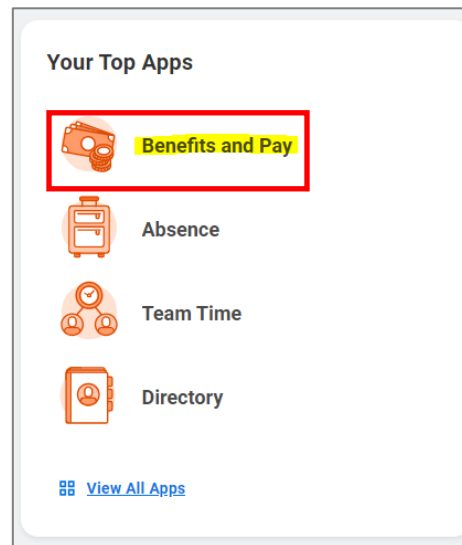
15. On the next page, click **Done**.
16. Your submission will be automatically routed to your HR Benefits partner for processing.

Change your ex-spouse/ex-RDP's relationship status

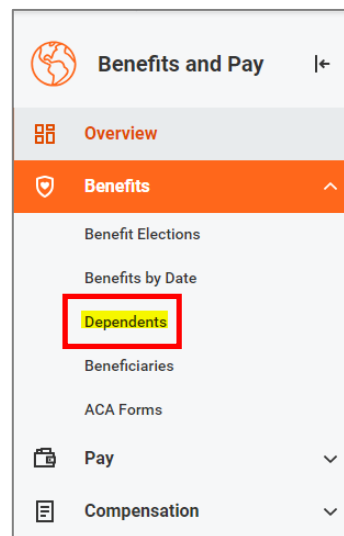
Please update your former spouse/RDP's relationship status to ex-spouse/RDP by following the steps below. (They are no longer a Dependent on your plans, but will remain on USFWorks as archived.)

Follow these steps:

1. Log in to **USFWorks** and click **Benefits and Pay**.



2. On the next page, click **Benefits** and then select **Dependents**.



3. On the next page, you will see a list of your Dependents (whether they are currently a Dependent on your Benefit plan[s] or not). Click **Edit** on the line for your ex-spouse/RDP.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

The screenshot shows a table with columns: Dependents, Relationship, Age, and Benefit Elections. The 'Benefit Elections' column contains a 'Check' button, which is highlighted with a red box.

- On the next page, under **Effective Date & Reason**, click the **pencil** symbol.

The screenshot shows the 'Effective Date & Reason' form. A red box highlights the pencil icon in the top right corner of the form.

- Then enter the date of divorce as the **Effective Date**, select the reason as **Change Dependent, Divorce**, and click the **check** symbol.

The screenshot shows the 'Effective Date & Reason' form. The 'Effective Date' field is set to 02/20/2023. The 'Reason' dropdown menu is open, showing 'Change Dependent > Divorce' selected. A red box highlights the 'Check' button in the top right corner.

- Scroll down to **Relationship** and click the **pencil** symbol.

The screenshot shows the 'Relationship' form. A red box highlights the pencil icon in the top right corner of the form.

- Select **Ex-Spouse / Ex-Domestic Partner** (whichever one

applies in your case) and click the **check** symbol.

The screenshot shows the 'Relationship' form. The 'Relationship' dropdown menu is open, showing 'Ex-Spouse' and 'Ex-Domestic Partner' options. A red box highlights these options.

- Click **Submit**.

The screenshot shows three buttons: 'Submit', 'Save for Later', and 'Cancel'. The 'Submit' button is highlighted with a red box.

IMPORTANT:

If your ex-spouse/RDP is or was a Beneficiary on your life insurance plans(s), please update the relationship status as a Beneficiary too. The process is very similar.

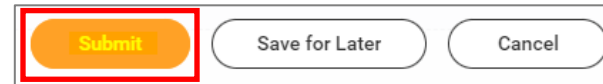
- Under the Benefits and Pay tab, click **Benefits** and then select **Beneficiaries**.

The screenshot shows the 'Benefits and Pay' menu. The 'Benefits' option is selected, and the 'Beneficiaries' sub-option is highlighted with a red box.

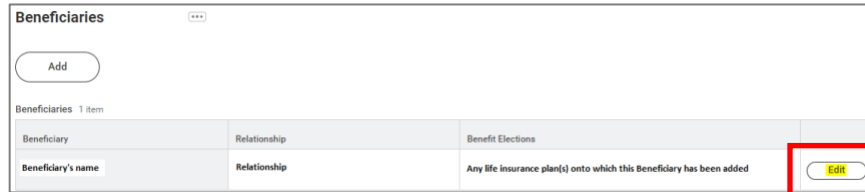


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- On the next page, you will see a list of your Beneficiaries (whether they are currently designated as a Beneficiary on your life insurance plan[s] or not). Click **Edit** on the line for your ex-spouse/RDP.



Submit Save for Later Cancel



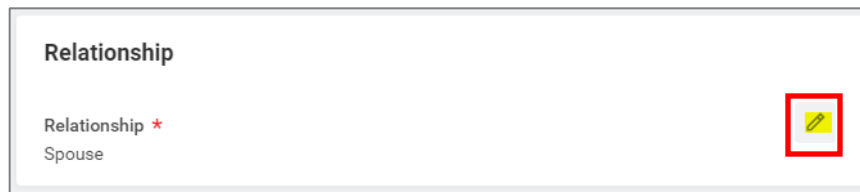
Beneficiaries

Add

Beneficiaries 1 item

Beneficiary	Relationship	Benefit Elections
Beneficiary's name	Relationship	Any life insurance plan(s) onto which this Beneficiary has been added Edit

- On the next page, scroll down to **Relationship** and click the **pencil** symbol.

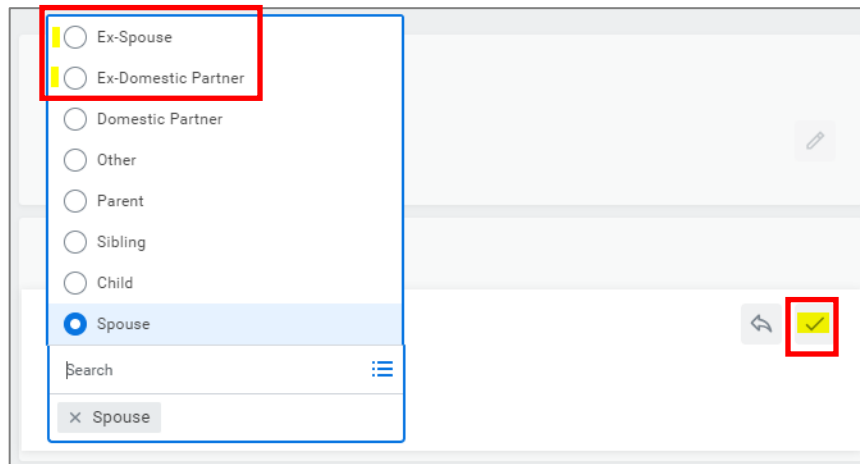


Relationship

Relationship *

Spouse

- Select **Ex-Spouse** / **Ex-Domestic Partner** (whichever one applies in your case) and click the **check** symbol.



☒ Ex-Spouse

☒ Ex-Domestic Partner

☐ Domestic Partner

☐ Other

☐ Parent

☐ Sibling

☐ Child

☒ Spouse

Search

x Spouse

- Click **Submit**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Dependent Gains Coverage Elsewhere

Follow these steps to remove the Dependent from your Benefit plans:

1. On the **Change Benefits** page:
 - a) Select **Gain Other Coverage Elsewhere** as the **Change Reason**.
 - b) Enter the **Date of When New Coverage Started**.
 - c) Attach proof of date of gain of coverage elsewhere.
 - d) Click **Submit**.

2. A pop-up window will appear stating you have submitted. Click **Open**.



3. On the next page, click **Let's Get Started**.

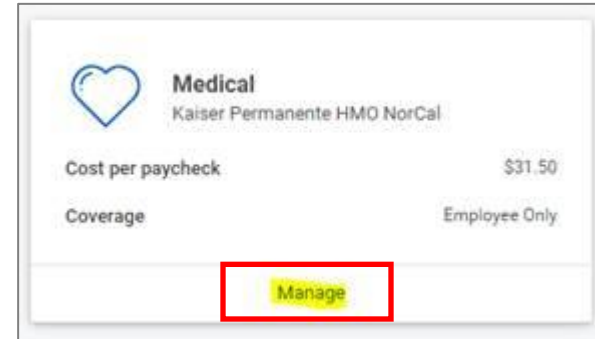


(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

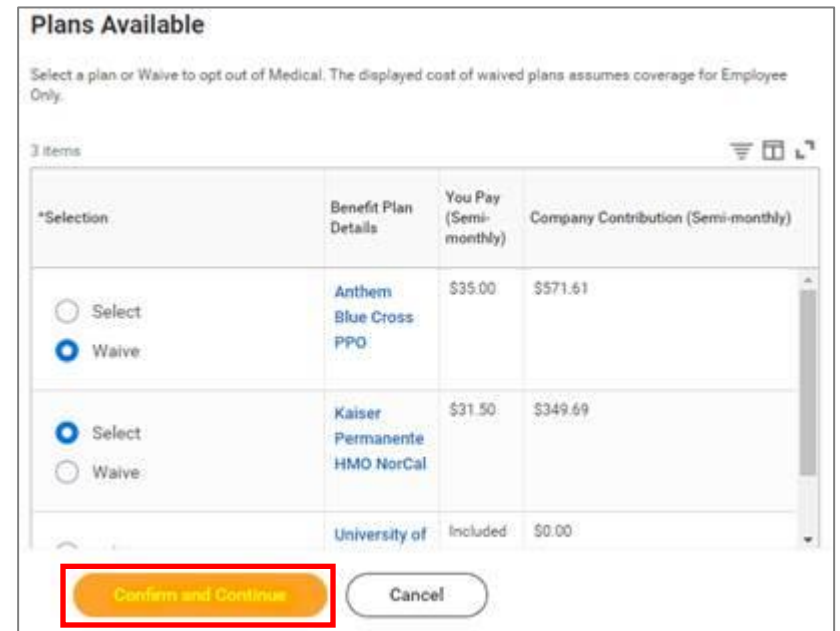
4. On the page with the Benefit cards, go into each Benefit you wish

to remove your Dependent from (Medical, Dental and/or Vision) in order to remove them as a Dependent.

For example, Medical: Under the **Medical** card, click **Manage**.



5. Click **Confirm and Continue**.



6. On the next page, change the **Coverage** level if necessary, **uncheck the checkbox** next to the Dependent's name and click **Save**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Medical - Anthem Blue Cross PPO

Projected Total Cost Per Paycheck
\$30.00

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Employee Only

Plan cost per paycheck \$30.00

[Add New Dependent](#)

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Child	01/01/2023

[Save](#) [Cancel](#)

- You will then be taken back to the screen with the Benefits cards.
- Repeat the same steps for Dental and/or Vision, if you wish to remove your Dependent from these.
- Once you are done, on the page with the Benefits cards, click **Review and Sign**.

[Review and Sign](#) [Save for Later](#)

- On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.

☒ I Accept

[Submit](#) [Cancel](#)


- On the next page, click **Done**.

- Your submission will be automatically routed to your HR Benefits partner for processing.

IMPORTANT:

If the Dependent you are removing is your spouse or registered domestic partner and you are removing them from your Medical plan, **before submitting the task**, you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

- On the page with the Benefit cards, if you are disenrolling your spouse/RDP from your Medical plan, under the **Medical – Spousal Surcharge** card, click **Manage**.

 **Medical - Spousal Surcharge**
- Does your spouse or domestic partner have access to other coverage?

Cost per paycheck Included

Coverage

[Manage](#)

- Click **Select** (do not click Waive) and **Confirm and Continue**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Medical - Spousal Surcharge

Projected Total Cost Per Paycheck
\$0.00

Plans Available

You must select a plan. The displayed cost of waived plans assumes coverage for No, I am not covering a spouse or domestic partner..

1 item

*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select	- Does your spouse or domestic partner have access to other coverage?	Included	\$0.00
<input type="radio"/> Waive			

Confirm and Continue **Cancel**

Medical - Spousal Surcharge - - Does your

Projected Total Cost Per Paycheck
\$0.00

Coverage * Search

Plan cost per paycheck

☒ No, I am not covering a spouse or domestic partner.

☐ No, my spouse or domestic partner does not have access to other coverage

☐ Yes, my spouse or domestic partner has access to other coverage

☐ I am not enrolling in a USF medical plan

Save **Cancel**

3. On the next page, select the following option from the **Coverage** drop-down list and click **Save**.
- No, I am not covering a spouse or domestic partner.*

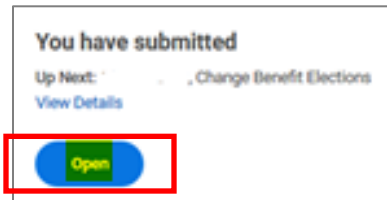
Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

You Gain Coverage Elsewhere

Follow these steps to disenroll yourself from your Benefit plans if you have gained coverage elsewhere:

1. On the **Change Benefits** page:
 - a) Select **Gain Other Coverage Elsewhere** as the **Change Reason**.
 - b) Enter the **Date of When New Coverage Started**.
 - c) Attach proof of date of gain of coverage elsewhere
 - d) Click **Submit**.

2. A pop-up window will appear stating you have submitted. Click **Open**.



3. On the next page, click **Let's Get Started**.



(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

4. On the page with the Benefit cards, go into each Benefit you wish

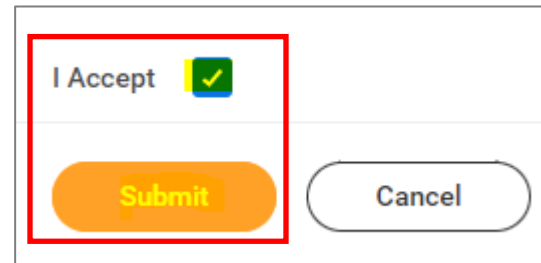
to disenroll yourself from (Medical, Dental and/or Vision) in order to do so.

If you are disenrolling from Medical because you have gained coverage elsewhere on a plan that is not an "individual market" plan, please select the **University of San Francisco Waiver** (also known as the 'Medical Waiver Plan'). Remember to also go into the **Medical – Spousal Surcharge** card and amend the option you have selected to 'I am not enrolling a USF Medical Plan'.

5. Once you are done, on the page with the Benefits cards, click **Review and Sign**.



6. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.



7. On the next page, click **Done**.

8. Your submission will be automatically routed to your HR Benefits partner for processing.

IMPORTANT:

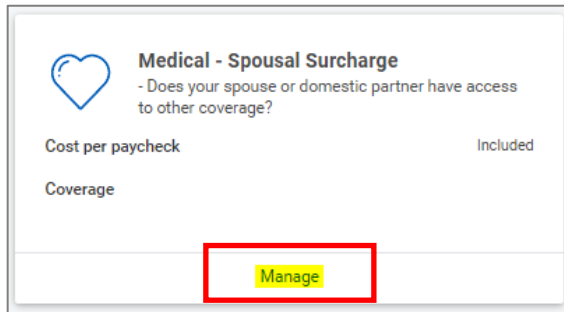
Medical Spousal Surcharge – amend selected option

Before submitting the task, if you have disenrolled yourself from your USF Medical Plan, you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

1. On the page with the Benefit cards, if you are disenrolling your spouse/RDP from your Medical plan, under the **Medical – Spousal**

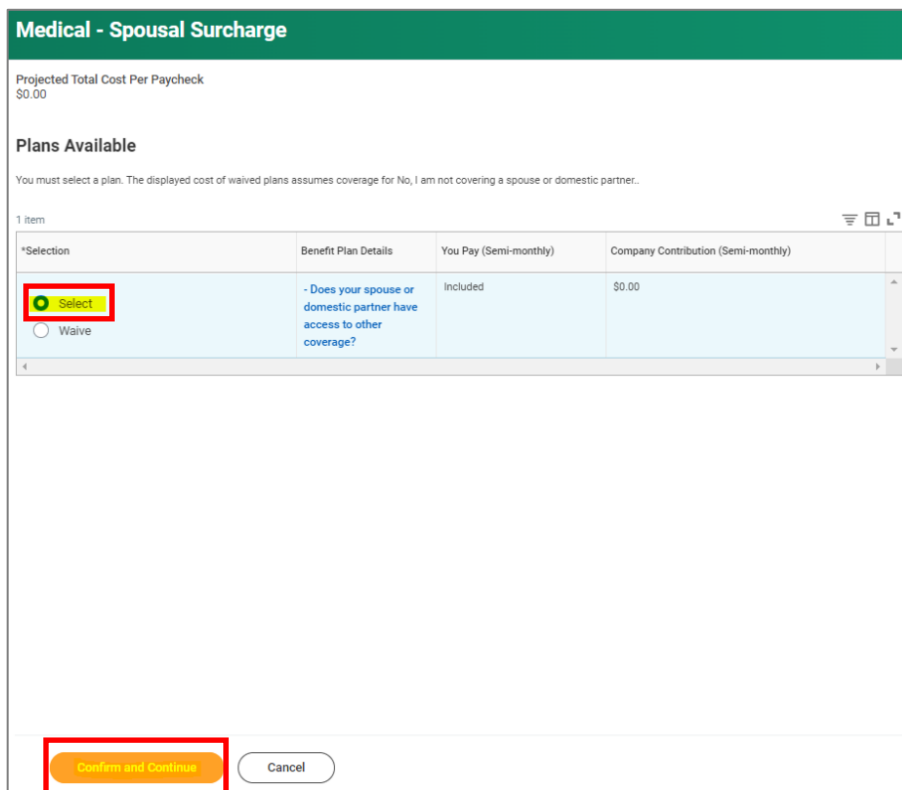
Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Surcharge card, click **Manage**.



The card displays a heart icon and the title "Medical - Spousal Surcharge". Below the title is the question: "- Does your spouse or domestic partner have access to other coverage?". The "Cost per paycheck" is listed as "Included". At the bottom, there is a yellow "Manage" button highlighted with a red rectangle.

- Click **Select** (do not click Waive) and **Confirm and Continue**.



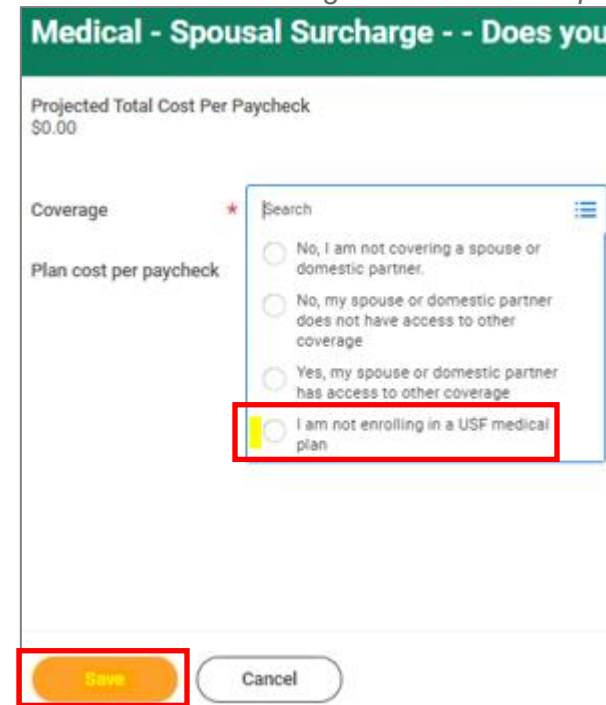
The screen shows the "Medical - Spousal Surcharge" section with a green header. Below the header, it states "Projected Total Cost Per Paycheck \$0.00". Under "Plans Available", a note says "You must select a plan. The displayed cost of waived plans assumes coverage for No, I am not covering a spouse or domestic partner." A table lists one item:

*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	- Does your spouse or domestic partner have access to other coverage?	Included	\$0.00

At the bottom, there is a yellow "Confirm and Continue" button highlighted with a red rectangle, and a "Cancel" button.

- On the next page, select the following option from the **Coverage** drop-down list and click **Save**.

- I am not enrolling in a USF medical plan.*



The screen shows the "Medical - Spousal Surcharge - - Does you" section with a green header. Below the header, it states "Projected Total Cost Per Paycheck \$0.00". Under "Coverage", there is a search bar and a list of options:

- ☐ No, I am not covering a spouse or domestic partner.
- ☐ No, my spouse or domestic partner does not have access to other coverage
- ☐ Yes, my spouse or domestic partner has access to other coverage
- ☒ **I am not enrolling in a USF medical plan**

The last option is highlighted with a red rectangle. At the bottom, there is a yellow "Save" button highlighted with a red rectangle, and a "Cancel" button.

Forms required if selecting the University of San Francisco Waiver

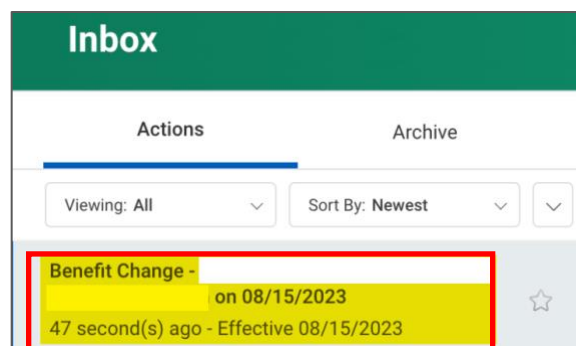
If you have disenrolled from a USF Medical Plan and you have selected the **University of San Francisco Waiver** (also known as the **Medical Waiver Plan**), once you have submitted your Qualifying Event task and it has been approved, you will receive **another task** in your USFWorks Inbox to complete.

- Once your Benefit Elections have been approved, go back to your USFWorks Inbox.



- Click the **Benefit Change** message.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff



The screenshot shows the 'Inbox' interface with a green header. Below the header are tabs for 'Actions' and 'Archive'. Under 'Actions', there are filters for 'Viewing: All' and 'Sort By: Newest'. A notification card is highlighted with a red border, showing 'Benefit Change - on 08/15/2023' and '47 second(s) ago - Effective 08/15/2023'.

to you. It is imperative that you return these forms as soon as possible.

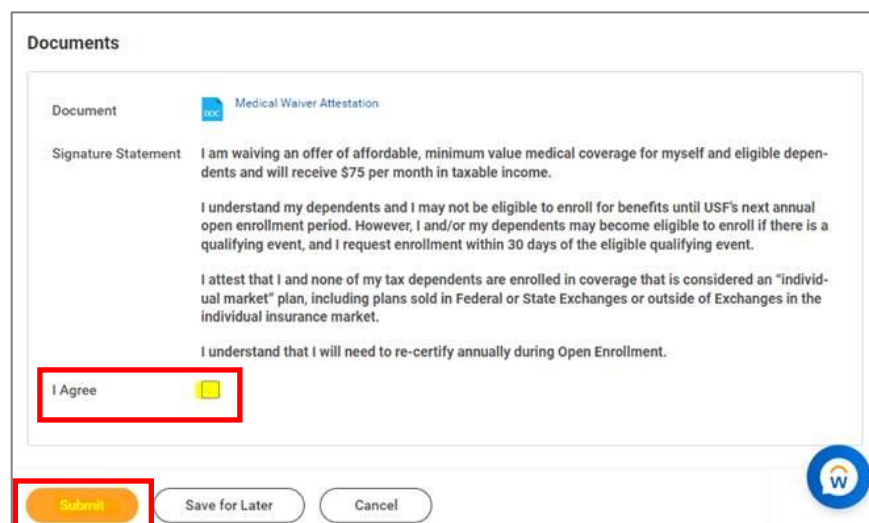
Important note:

If you do not see the Medical Waiver Attestation task in your USFWorks Inbox after submitting your Qualifying Event task and it is approved, this may be because your Qualifying Event task was returned to you for you to make corrections and resubmit.

The Medical Waiver Attestation task is not always generated after a resubmission and approval of a Qualifying Event task.

In this case, please reach out to the Benefits Team at benefits@usfca.edu who will send you a PDF version of the Medical Waiver Attestation to sign and return.

- On the right-hand side of the page next page, you will see the **Medical Waiver Attestation** to sign. Please **read the attestation**, **check the checkbox** next to *I Accept* and click **Submit**



The screenshot shows the 'Documents' section with a 'Medical Waiver Attestation' document. The document text includes a signature statement, a waiver of coverage, and a re-certification requirement. At the bottom, there is a red-bordered box containing the text 'I Agree' and a yellow checkbox. Below the document, there are three buttons: 'Submit' (highlighted with a red border), 'Save for Later', and 'Cancel'. A blue circular icon with a white 'W' is in the bottom right corner.

- The Benefits Team will then send you another form to fill in and return by email to benefits@usfca.edu:
 - San Francisco Healthcare Security Ordinance (SF HCSO) Waiver Form

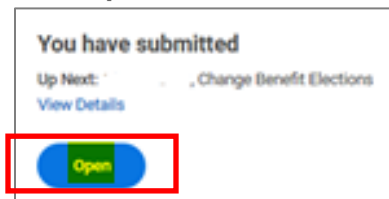
Full information about the form will be included on the email sent

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

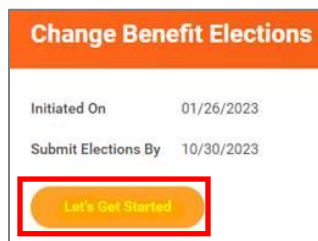
Dependent Loses Coverage Elsewhere

Follow these steps to add the Dependent to your Benefit plans:

1. On the **Change Benefits** page:
 - a) Select **Loss of Other Coverage Elsewhere** as the **Change Reason**
 - b) Enter the **Date of When Previous Coverage Ended**
 - c) Attach proof of date of loss of coverage elsewhere
 - d) **Attach proof of relationship** to the Dependent (e.g. marriage certificate, birth certificate), if we do not already have this on file
 - e) Click **Submit**.
2. A pop-up window will appear stating you have submitted. Click **Open**.



3. On the next page, click **Let's Get Started**.

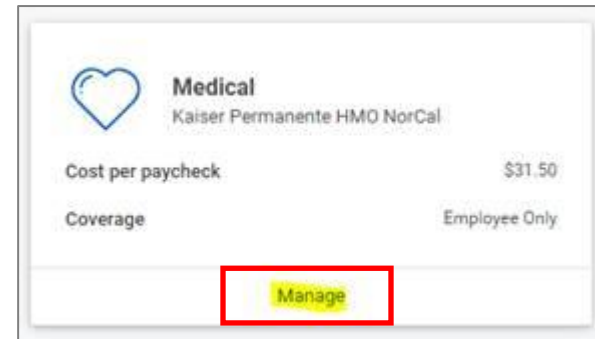


(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get**

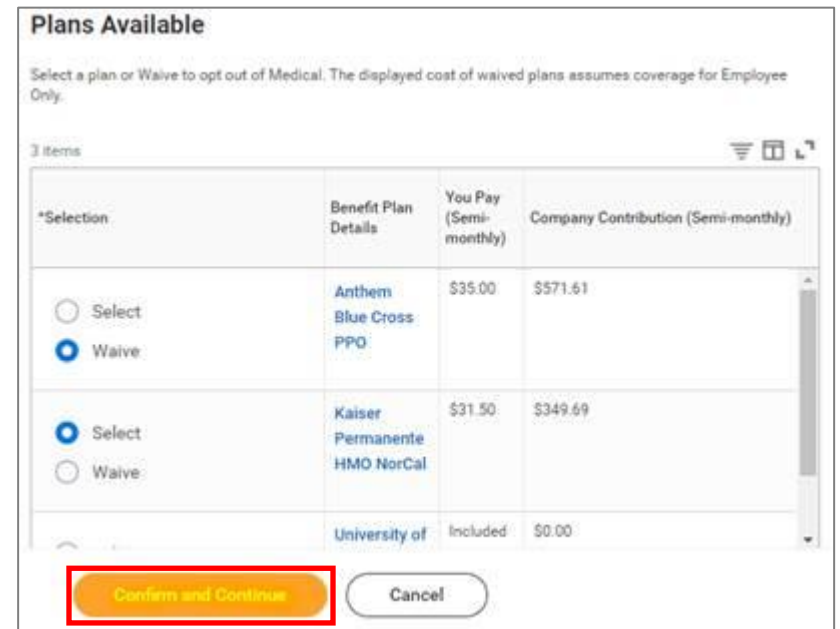
Started).

4. On the page with the Benefit cards, go into each Benefit you wish to add your Dependent to (Medical, Dental and/or Vision) in order to add them as a Dependent.

For example, Medical: Under the **Medical** card, click **Manage**.



5. Click **Confirm and Continue**.

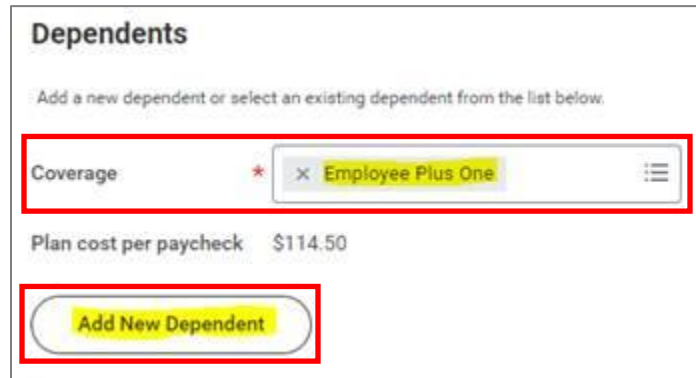


6. On the next page, change the **Coverage** level if necessary.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

If the Dependent has never previously been on one of your Benefit plans, click **Add New Dependent**.

If they have been previously, just **check the box next to their name**, click **Save** and skip to step 14.



Dependents

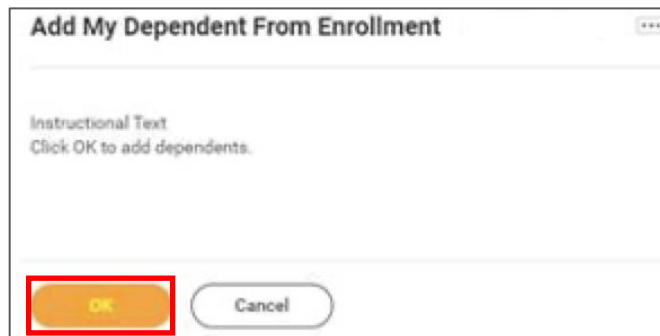
Add a new dependent or select an existing dependent from the list below.

Coverage
<input checked="" type="checkbox"/> Employee Plus One

Plan cost per paycheck \$114.50

Add New Dependent

7. On the pop-up window, click **OK**.



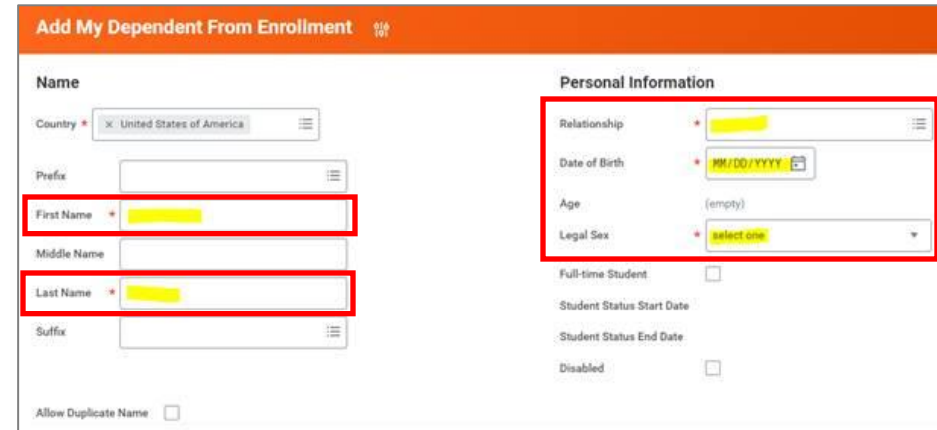
Add My Dependent From Enrollment

Instructional Text
Click OK to add dependents.

OK Cancel

8. On the next page, fill in first the following information about your Dependent.

If they are a full-time student, also check the **Full time Student** checkbox.



Add My Dependent From Enrollment

Name

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

Allow Duplicate Name ☐

Personal Information

Relationship *

Date of Birth *

Age (empty)

Legal Sex *

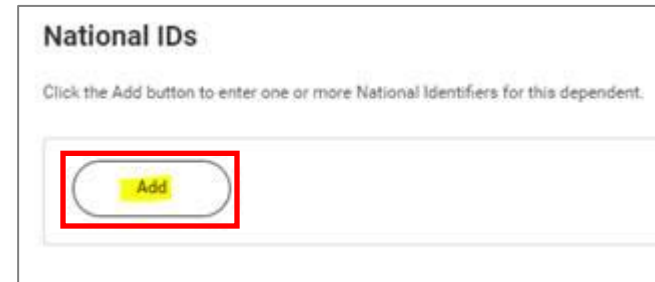
Full-time Student ☐

Student Status Start Date

Student Status End Date

Disabled ☐

9. Scroll down to **National IDs** and click **Add**.



National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Add

10. Enter the **Country**, **National ID Type** (SSN or ITIN if US), **ID number** (SSN or ITIN if US) and **Issued Date** (if known).

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Country *

National ID Type *

Current ID (empty)

Add/Edit ID *

Issued Date

Expiration Date

Issued By

Series

Verification Date 02/20/2023

Verified By Elena Nielsen

11. Click **Save**.

12. On the next page, ensure the checkbox is checked next to your child's name and click **Save**.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage *

Plan cost per paycheck \$114.50

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Spouse	01/01/1980

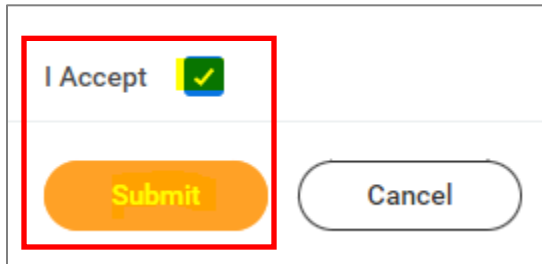
13. You will then be taken back to the screen with the Benefits cards.

14. Repeat the same steps for Dental and/or Vision, if you wish to enroll your Dependent in these plans (although your Dependent will already appear as a Dependent in the list, so you won't need to add their details again – you just need to select the correct Coverage level from the drop-down list and check the checkbox next to their name).

15. Once you are done, on the page with the Benefits cards, click **Review and Sign**.

16. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff



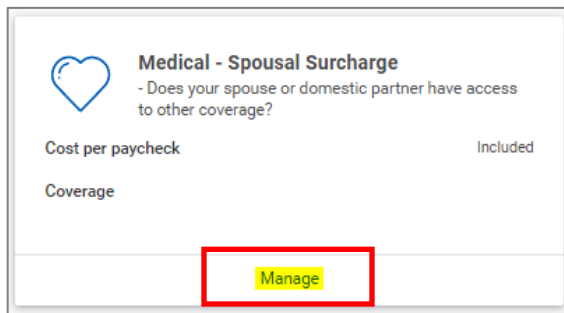
17. On the next page, click **Done**.

18. Your submission will be automatically routed to your HR Benefits partner for processing.

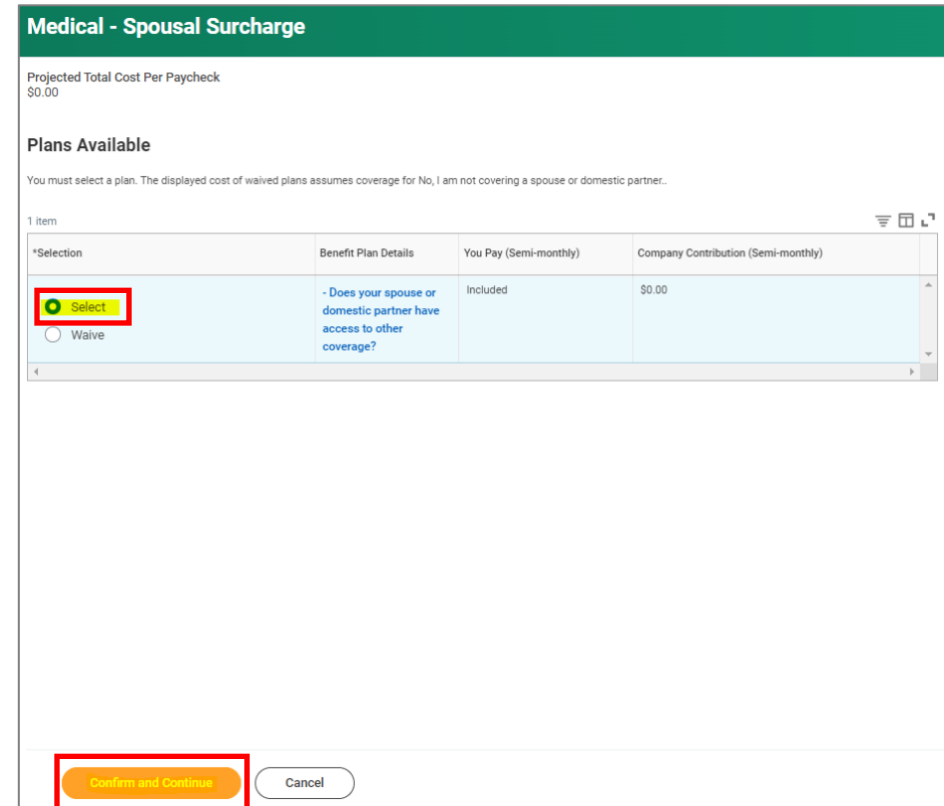
IMPORTANT:

If the Dependent you are adding is your spouse or registered domestic partner and you are adding them to your Medical plan, **before submitting the task**, you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

1. On the page with the Benefit cards, if you are enrolling your spouse/RDP on your Medical plan, under the **Medical – Spousal Surcharge** card, click **Manage**.



2. Click **Select** (do not click Waive) and **Confirm and Continue**.



3. On the next page, select the following from the **Coverage** drop-down list and click **Save**.
 - *No, my spouse or domestic partner does not have access to other coverage.*

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Coverage *

Plan cost per paycheck

Search

☐ No, I am not covering a spouse or domestic partner.

☒ No, my spouse or domestic partner does not have access to other coverage

☐ Yes, my spouse or domestic partner has access to other coverage

☐ I am not enrolling in a USF medical plan

Save Cancel

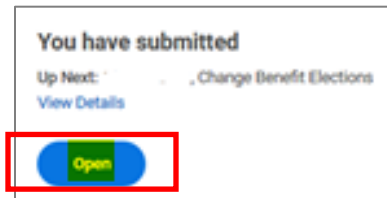
Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

You Lose Coverage Elsewhere

Follow these steps to enroll in USF Benefit plans:

1. On the **Change Benefits** page:
 - a) Select **Loss of Other Coverage Elsewhere** as the **Change Reason**
 - b) Enter the **Date of When Previous Coverage Ended**
 - c) Attach proof of date of loss of coverage elsewhere
 - d) If enrolling Dependents, **attach proof of relationship** to the Dependent (e.g. marriage certificate, birth certificate)
 - e) Click **Submit**.

2. A pop-up window will appear stating you have submitted. Click **Open**.



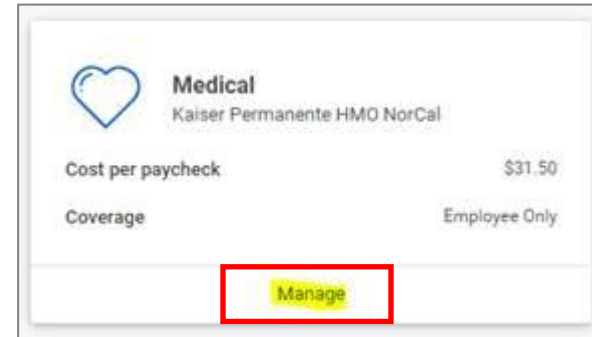
3. On the next page, click **Let's Get Started**.



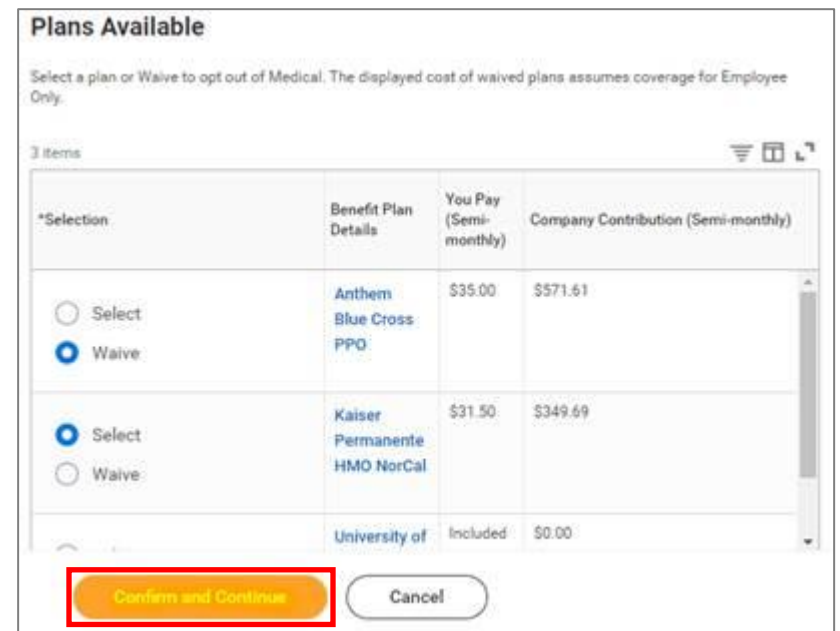
(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

4. On the page with the Benefit cards, go into each Benefit which in you wish to enroll yourself and any Dependents (e.g. Medical, Dental, Vision) in order to enroll in them.

For example, Medical: Under the **Medical** card, click **Manage**.



5. Click **Confirm and Continue**.

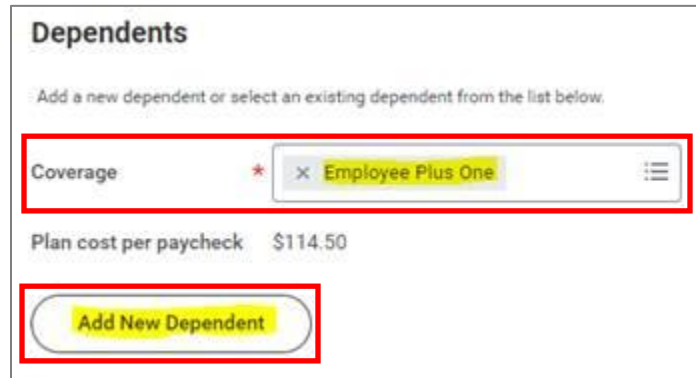


6. On the next page, select the relevant the **Coverage** level and add any Dependents.

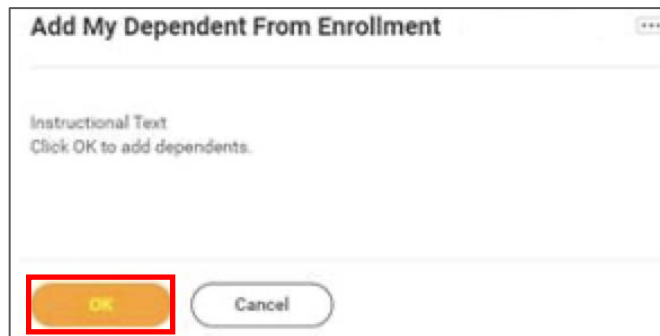
Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

If you had been previously enrolled in USF benefit plans and the Dependent had not been previously on one of your Benefit plans, click **Add New Dependent**.

If they had been previously, just **check the box next to their name**, click **Save** and skip to step 14.

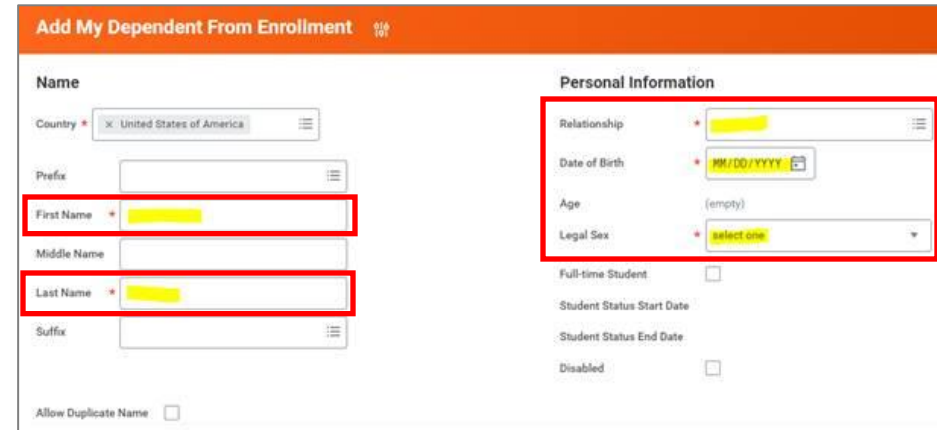


7. On the pop-up window, click **OK**.

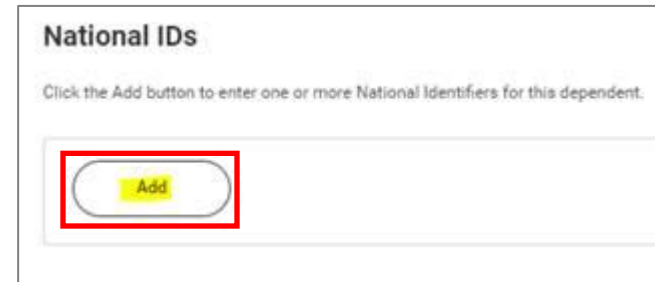


8. On the next page, fill in first the following information about your Dependent.

If they are a full-time student, also check the **Full time Student** checkbox.



9. Scroll down to **National IDs** and click **Add**.



10. Enter the **Country**, **National ID Type** (SSN or ITIN if US), **ID number** (SSN or ITIN if US) and **Issued Date** (if known).

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Country *

National ID Type *

Current ID (empty)

Add/Edit ID *

Issued Date

Expiration Date

Issued By

Series

Verification Date 02/20/2023

Verified By Elena Nielsen

11. Click **Save**.

12. On the next page, ensure the checkbox is checked next to your child's name and click **Save**.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage *

Plan cost per paycheck \$114.50

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Spouse	01/01/1980

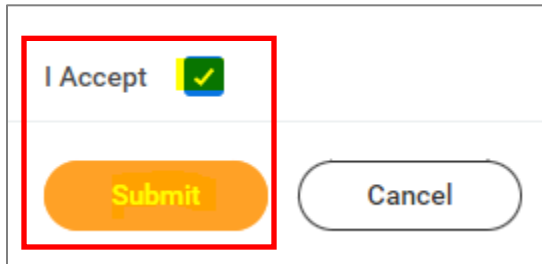
13. You will then be taken back to the screen with the Benefits cards.

14. Repeat the same steps for Dental and/or Vision, if you wish to enroll your and/or any Dependents in these plans (although your Dependent will already appear as a Dependent in the list, so you won't need to add their details again – you just need to select the correct Coverage level from the drop-down list and check the checkbox next to their name).

15. Once you are done, on the page with the Benefits cards, click **Review and Sign**.

16. On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff



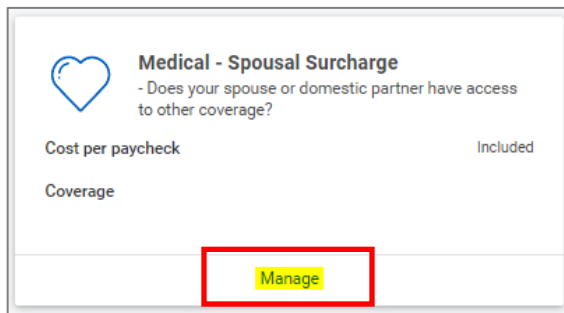
17. On the next page, click **Done**.

18. Your submission will be automatically routed to your HR Benefits partner for processing.

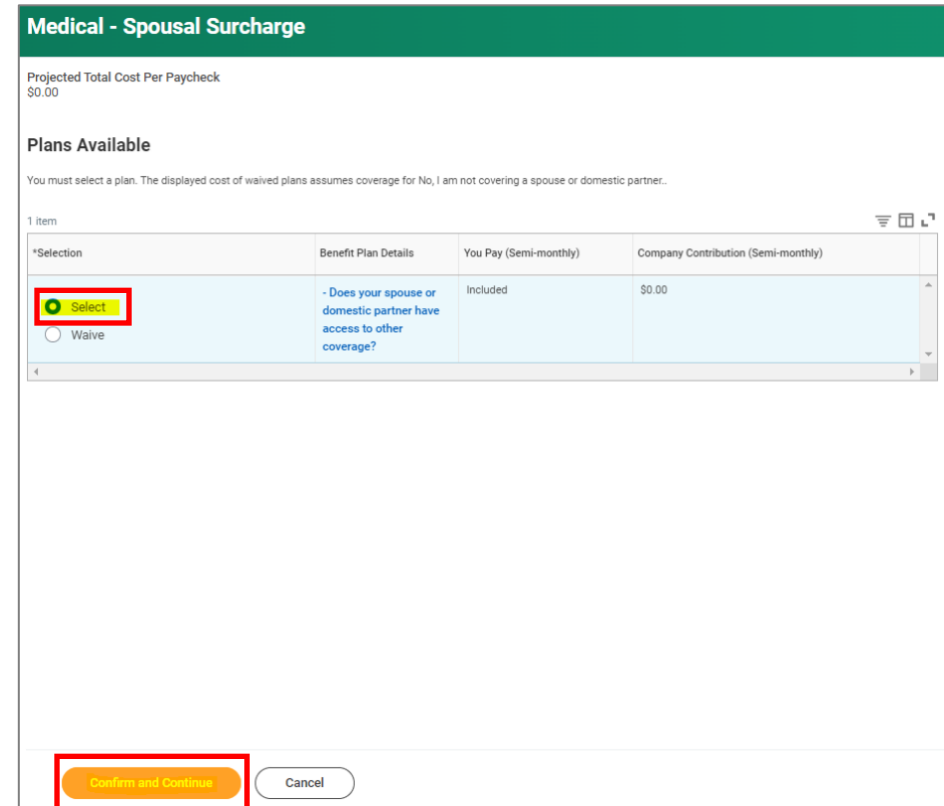
IMPORTANT:

If a Dependent you are adding is your spouse or registered domestic partner and you are adding them to your Medical plan, **before submitting the task**, you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

1. On the page with the Benefit cards, if you are enrolling your spouse/RDP on your Medical plan, under the **Medical – Spousal Surcharge** card, click **Manage**.



2. Click **Select** (do not click Waive) and **Confirm and Continue**.



3. On the next page, select the following from the **Coverage** drop-down list and click **Save**.

- *No, my spouse or domestic partner does not have access to other coverage.*

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Coverage *

Plan cost per paycheck

Search

☐ No, I am not covering a spouse or domestic partner.

☒ No, my spouse or domestic partner does not have access to other coverage

☐ Yes, my spouse or domestic partner has access to other coverage

☐ I am not enrolling in a USF medical plan

Save Cancel

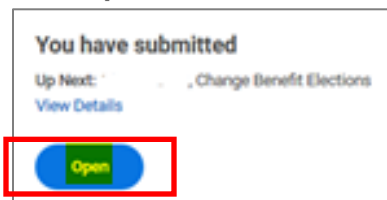
Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Dependent Passes Away

Follow these steps to remove the Dependent from your Benefit plans:

1. On the **Change Benefits** page:
 - a) Select **Death of Dependent** as the **Change Reason**
 - b) Enter the **Benefit Event Date** (date of death on the death certificate)
 - c) Attach a copy of the death certificate
 - d) Click **Submit**.

2. A pop-up window will appear stating you have submitted. Click **Open**.



3. On the next page, click **Let's Get Started**.

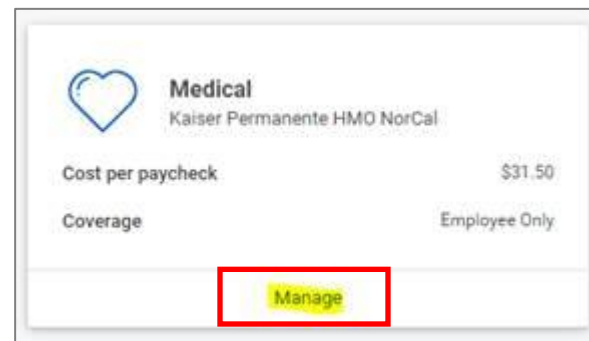


(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

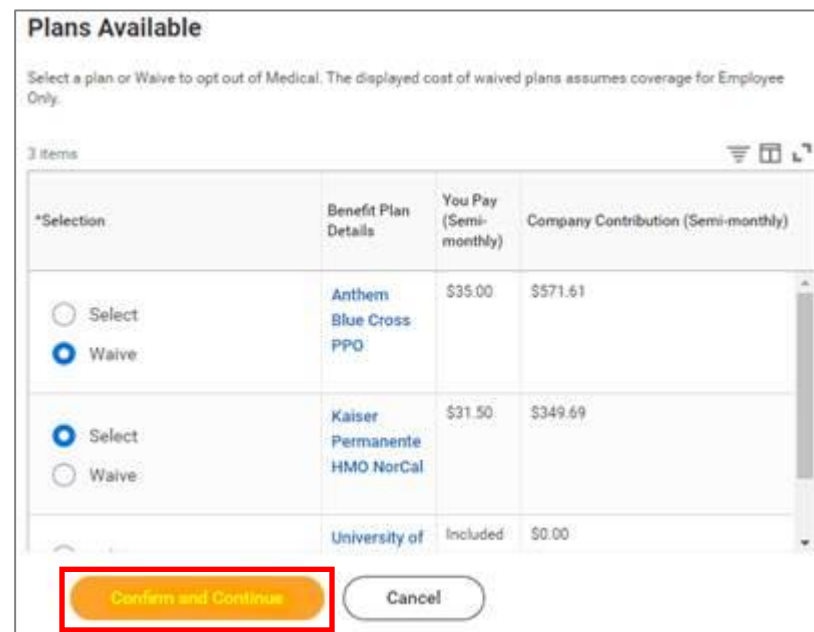
4. On the page with the Benefit cards, go into each Benefit you need

to remove your Dependent from (Medical, Dental and/or Vision) in order to remove them as a Dependent.

For example, Medical: Under the **Medical** card, click **Manage**.



5. Click **Confirm and Continue**.



6. On the next page, change the **Coverage** level if necessary, **uncheck the checkbox** next to the Dependent's name and click **Save**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Medical - Anthem Blue Cross PPO

Projected Total Cost Per Paycheck
\$30.00

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Employee Only

Plan cost per paycheck \$30.00

Add New Dependent

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	TEST TEST	Child	01/01/2023

Save Cancel

- You will then be taken back to the screen with the Benefits cards.
- Repeat the same steps for Dental and/or Vision, if you need to remove your Dependent from these.
- Once you are done, on the page with the Benefits cards, click **Review and Sign**.

Review and Sign Save for Later

- On the next page, review to make sure everything is correct, read the legal notice, **check the checkbox** next to *I Accept*, and click **Submit**.

I Accept ☒

Submit Cancel

- On the next page, click **Done**.

- Your submission will be automatically routed to your HR Benefits partner for processing.

IMPORTANT:

If the Dependent you are removing was your spouse or registered domestic partner and you are removing them from your Medical plan, **before submitting the task**, you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

- On the page with the Benefit cards, if you are enrolling your spouse/RDP on your Medical plan, under the **Medical – Spousal Surcharge** card, click **Manage**.

Medical - Spousal Surcharge

- Does your spouse or domestic partner have access to other coverage?

Cost per paycheck Included

Coverage Included

Manage

- Click **Select** (do not click Waive) and **Confirm and Continue**.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Medical - Spousal Surcharge

Projected Total Cost Per Paycheck
\$0.00

Plans Available

You must select a plan. The displayed cost of waived plans assumes coverage for No, I am not covering a spouse or domestic partner.

1 Item

*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select	- Does your spouse or domestic partner have access to other coverage?	Included	\$0.00
<input type="radio"/> Waive			

Confirm and Continue Cancel

Medical - Spousal Surcharge - - Does your

Projected Total Cost Per Paycheck
\$0.00

Coverage *

Search

Plan cost per paycheck

☒ No, I am not covering a spouse or domestic partner.

☐ No, my spouse or domestic partner does not have access to other coverage

☐ Yes, my spouse or domestic partner has access to other coverage

☐ I am not enrolling in a USF medical plan

Save Cancel

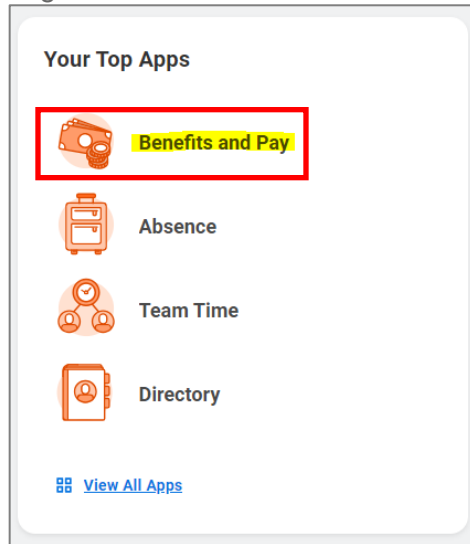
3. On the next page, select the following option from the **Coverage** drop-down list and click **Save**.
- No, I am not covering a spouse or domestic partner.*

View or amend retirement savings contributions – 403(b)

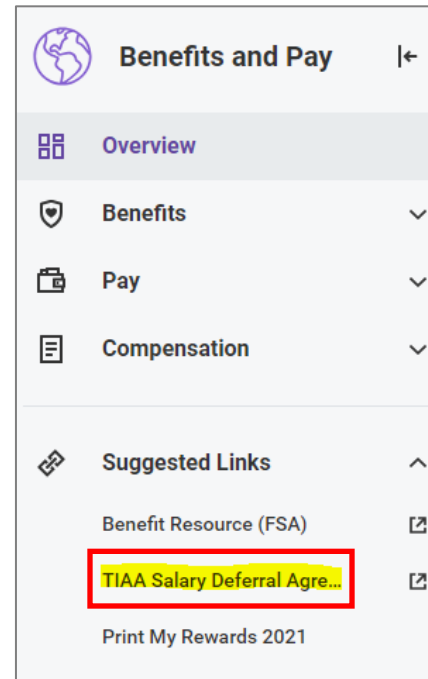
You can amend your 403(b) plan contributions **at any time**. You do **not** have to experience a Qualifying Event.

Follow these steps:

1. Log in to [USFWorks](#) and click **Benefits and Pay**.



2. On the next page, in the **Suggested Links** box, select **TIAA Salary Deferral Agreement**.



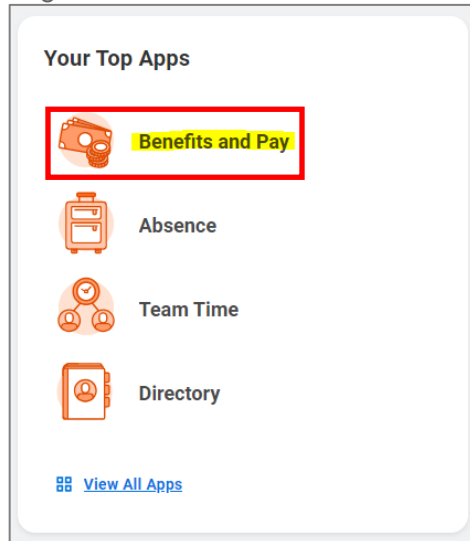
3. You will be logged into your TIAA retirement account. Please see [this guide](#) on myUSF, which contains further steps.

View existing Flexible Spending Accounts (FSA)

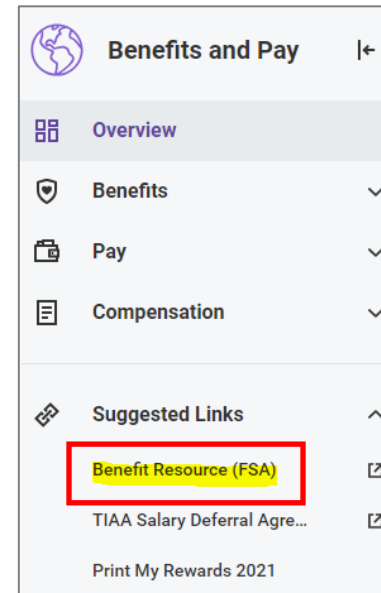
You can view your existing Flexible Spending Accounts (FSA) **at any time**. However, you cannot amend your election amount unless you experience a Qualifying Event.

Follow these steps:

1. Log in to [USFWorks](#) and click **Benefits and Pay**.



2. On the next page, in the **Suggested Links** box, select **Benefit Resource (FSA)**.



3. You will be logged in to your BRI account where you can manage your FSA account(s) and submit claims for reimbursement.

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

FSA enrollment due to a consistent Qualifying Event

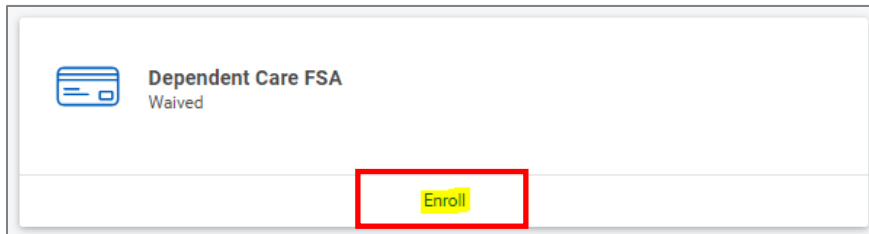
If you wish to **enroll** in FSA (Healthcare and/or Dependent Care), you do this on your New Hire event, or on your Open Enrollment event (Open Enrollment falls sometime Oct-Nov each year).

The **only** exception is if you experience a consistent **Qualifying Event** (e.g. birth of a child, marriage). You can enroll in or amend your FSA elections when submitting your Qualifying Event task.

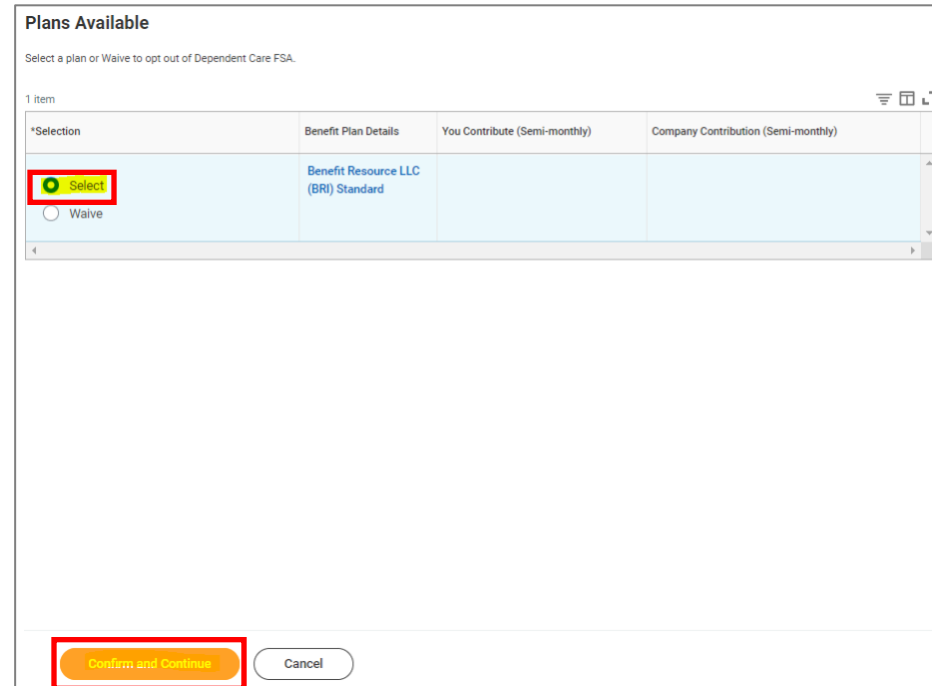
Follow these steps on the task:

To enroll in Healthcare FSA:

1. On the **Dependent Care FSA** Benefit card, click **Enroll**.



2. Click **Select** and click **Confirm and Continue**.



*Selection	Benefit Plan Details	You Contribute (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Benefit Resource LLC (BRI) Standard		

3. On the next page, enter either an **amount** (either per paycheck or the total annual amount) and click **Save**.

The annual limit for 2023 is \$5,000 (\$2,500 if married, filing separately).

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Contribute

Your estimated contributions made this year 0.00

Per Paycheck	<input type="text" value="0.00"/>	Annual	<input type="text" value="0.00"/>
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Minimum Annual Amount: \$100.00
Maximum Annual Amount: \$5,000.00

Summary

Total Annual Contribution \$0.00

Plans Available

Select a plan or Waive to opt out of Dependent Care FSA.


1 item

*Selection	Benefit Plan Details	You Contribute (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Benefit Resource LLC (BRI) Standard		

- On the next page, enter either an **amount** (either per paycheck or the total annual amount) and click **Save**.
The annual limit for 2023 is \$3,050.

To enroll in Dependent Care FSA:

- On the **Healthcare FSA** Benefit card, click **Enroll**.

**Healthcare FSA**
Waived

- Click **Select** and click **Confirm and Continue**.



Contribute

Your estimated contributions made this year0.00

Per Paycheck

0.00

Annual

0.00

Minimum Annual Amount: \$100.00

Maximum Annual Amount: \$3,050.00

Summary

Total Annual Contribution\$0.00

Save

Cancel

Benefits: Amending Your Benefit Elections Due To A Qualifying Event Faculty and Staff

Further Benefits information

You can find more information on USF benefits here on myUSF:

<https://myusf.usfca.edu/human-resources/benefits>

On that page, you can also find a link to the latest **Benefits Guide** in the **Quick Links** section:

Employee Benefits

The University of San Francisco offers a competitive and comprehensive benefits package for eligible faculty, staff, and their families through its 25+ benefits and wellness programs.

Contact the Benefits team at either benefits@usfca.edu or at (415) 422-2442.

What do we offer?

- Childcare Subsidy
- Commuter Benefits
- Disability Insurance
- Employee Assistance Program (EAP)
- Ergonomics Education
- Flexible Spending Account
- Life and Accident Insurance
- Long-Term Care Insurance
- Medical, Dental, and Vision Insurance
- Public Service Loan Forgiveness (PSLF)
- Rent and Relocation Reimbursement*
- Retirement and Financial Planning
- Time Away from USF
- Tuition Benefits
- SF Healthcare Security Ordinance (SFHCSO)**
- Wellness Benefits
- Workers' Compensation
- Additional Benefits***

HUMAN RESOURCES QUICK LINKS

- 2023 Benefits Guide**
- New Employees
- Managers
- Careers at USF
- About HR
- Payroll
- USFWorks

CONTACT HUMAN RESOURCES

Lone Mountain Main
Room 339
Currently operating remotely
Hours: BY APPOINTMENT ONLY

Benefits Team contact information

Please contact a USF Benefits Representative if you have further questions at benefits@usfca.edu or dial (415) 422-2442.

For inquiries concerning:

- a general HR issue, please email humanresources@usfca.edu
- leaves, please email leaves@usfca.edu
- payroll, please email payroll@usfca.edu
- retirement, please email retirementplan@usfca.edu
- Tuition Remission, please email tuitionremission@usfca.edu