# Contents

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)

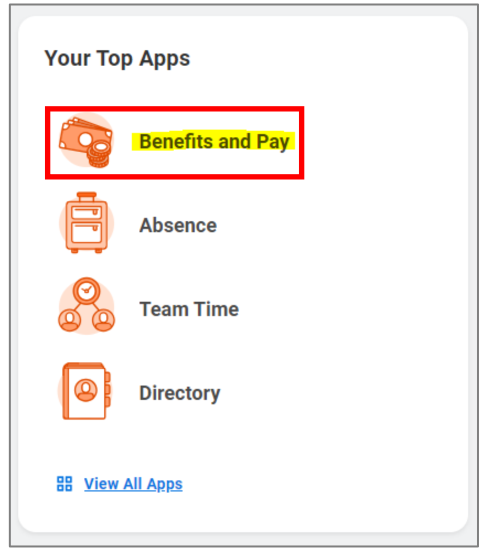
Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, divorce, or similar life event (known as Qualifying Events), you can change your Benefits to better fit your needs.

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.

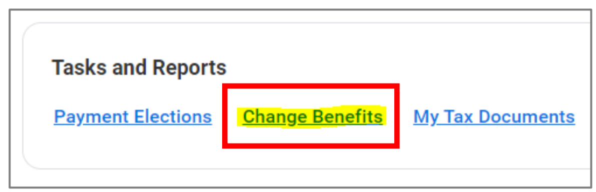
- If you are adding child dependents, please upload proof of birth or adoption for each child.
- If you are adding a spouse or registered domestic partner, please upload proof of marriage or registered domestic partnership.
- If you are dropping a dependent due to coverage elsewhere, you will need upload 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**.



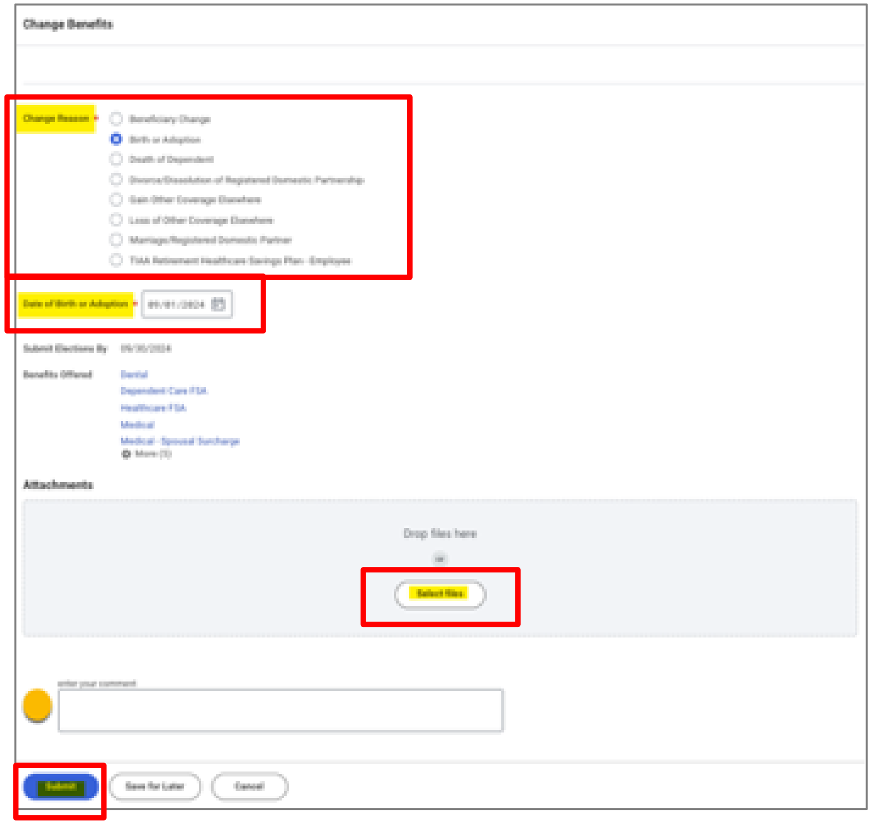

3. On the next page:

   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**.




4. 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**).

5. Complete and submit the task.
   a) Complete and continue through all required screens.
   b) Once you have done so, click **Review and Sign**.
   c) Check the **I Agree** checkbox, to provide an electronic signature, confirming your changes.
   d) Click **Submit**.
   e) 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](mailto:benefits@usfca.edu) if you wish to make Qualifying Event change.*

## 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**.

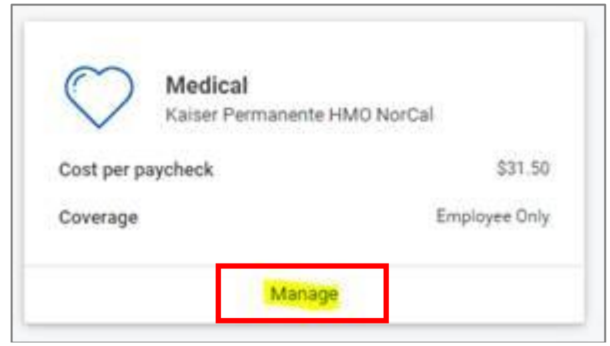
2. A pop-up window will appear stating you have submitted. Click **Open**.


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

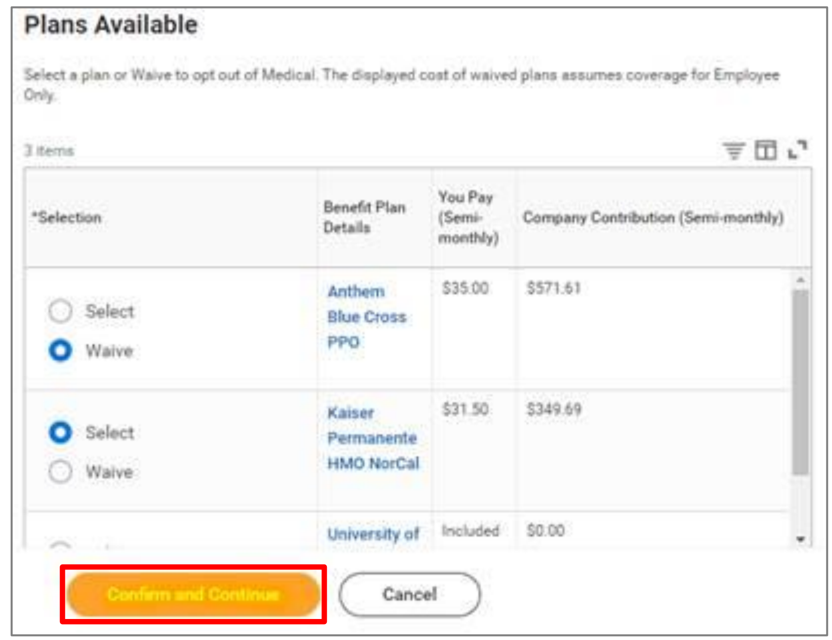

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

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**.



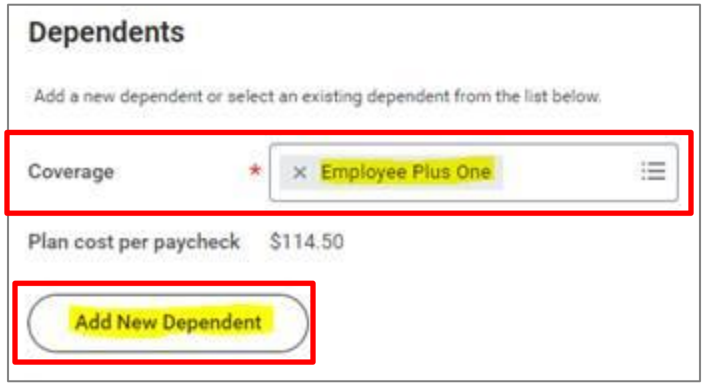

5. Click **Confirm and Continue**.



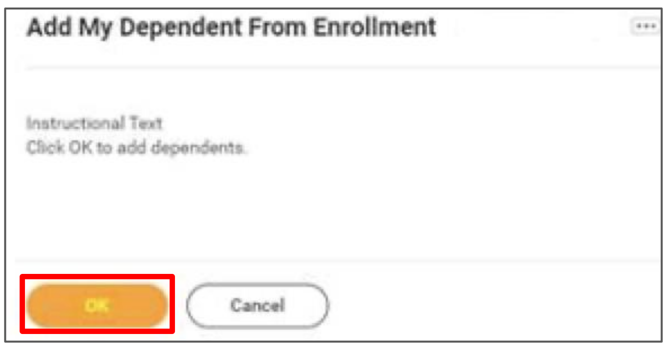

6. On the next page:
   - If your plan is currently *Employee Only*, select *Employee Plus One* from the drop-down list.
   - If your plan is currently *Employee Plus One*, select *Employee Plus Family* from the drop-down list.

- 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*.

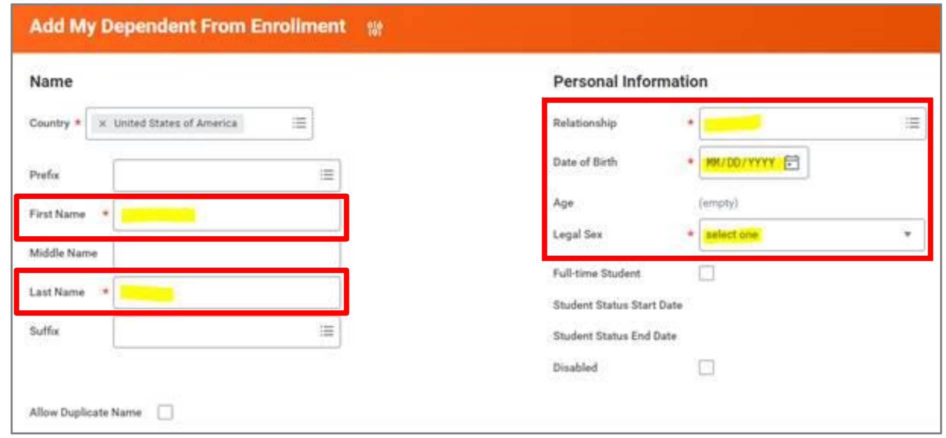
Then click **Add New Dependent**.




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

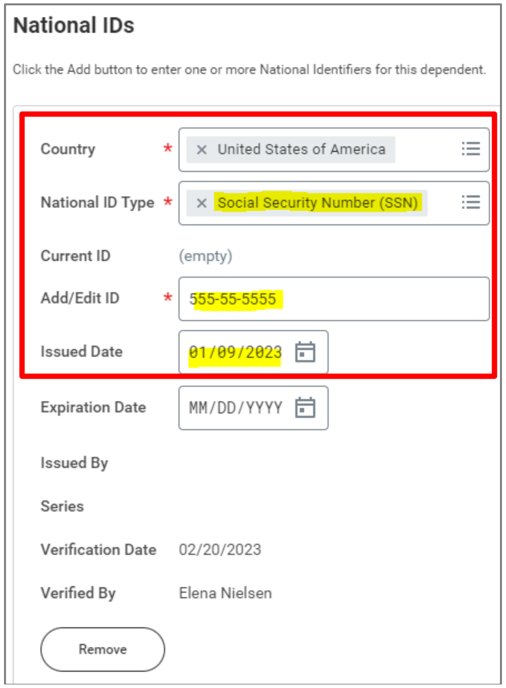



8. On the next page, fill in the following information about your child.



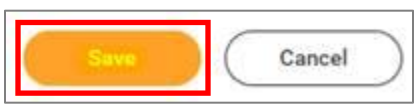

9. Scroll down to **National IDs** and click **Add**.


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

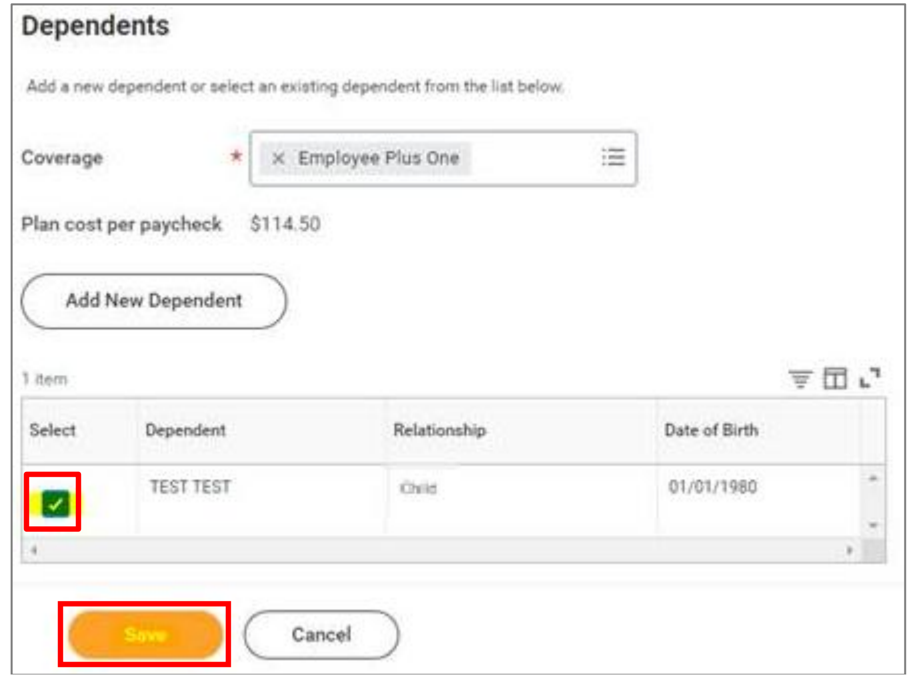



11. If you do not have the SSN/ITIN/foreign National ID for your child yet, enter all zeros (e.g. to substitute an SSN, enter 000-00-0000). You **must** add the SSN/ITIN/National ID once you receive it. See here for the job aid on how to do this.

12. Click **Save**.




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

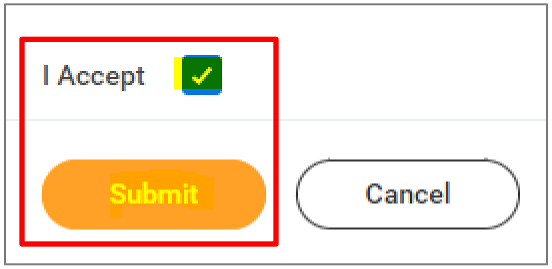



14. You will then be taken back to the screen with the Benefits cards.

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**.


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**.




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

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

## Marriage/Registered Domestic Partnership

**Follow these steps:**

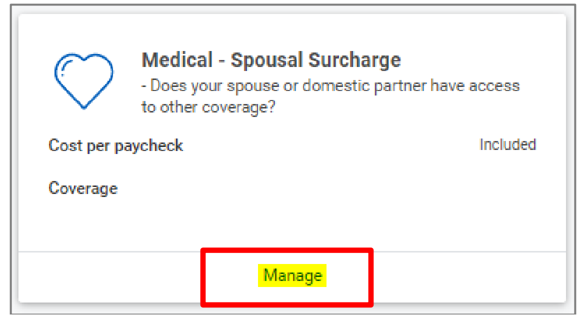
1. On the **Change Benefits** page:
   a) Select **Marriage/Registered Domestic Partner** as the **Change Reason**
   b) Enter the **Date of Marriage or RDP Certification**
   c) Attach proof of marriage / registration of registered domestic partnership (required)
   d) Click **Submit**.

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

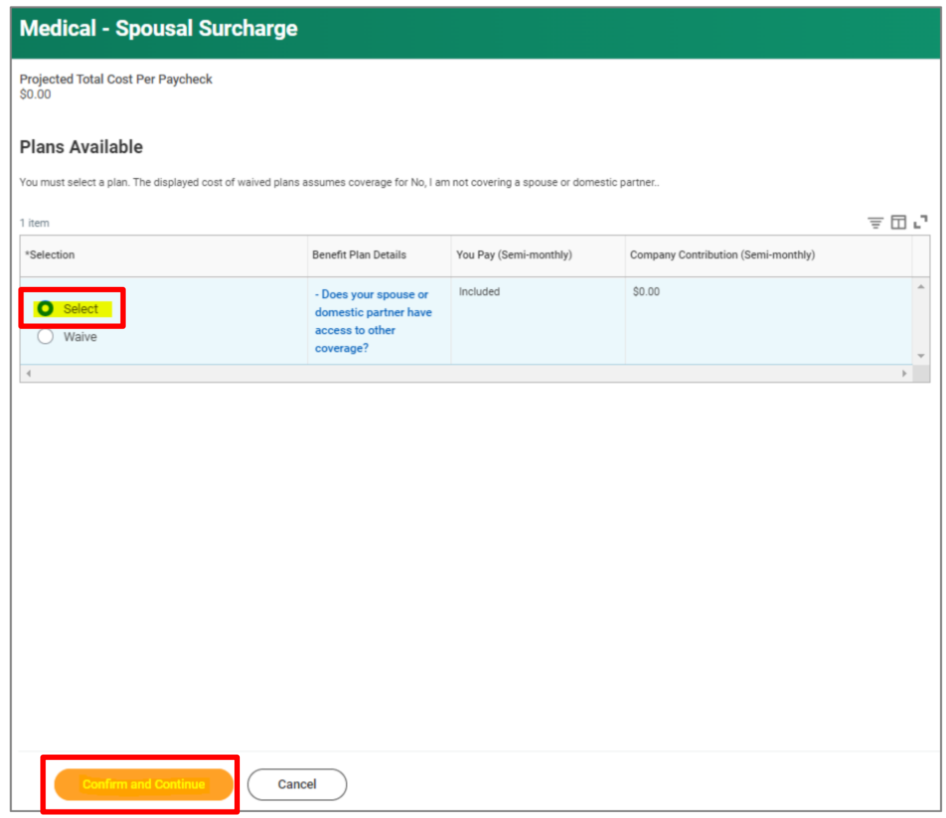

3. On the next page, click **Let's Get Started**.


(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.**

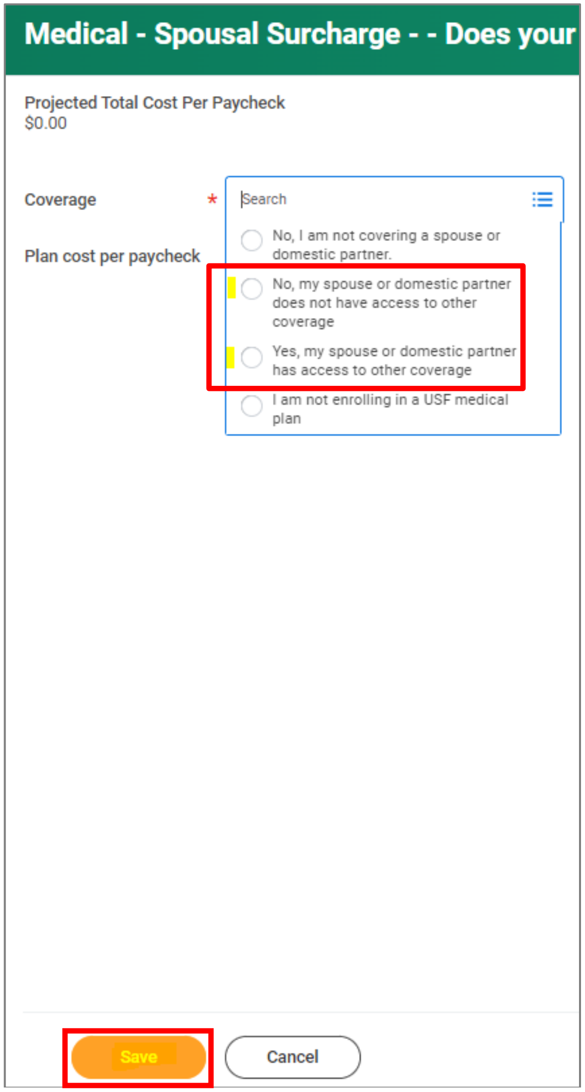



5. Click **Select** (do <u>not</u> click Waive) and **Confirm and Continue**.



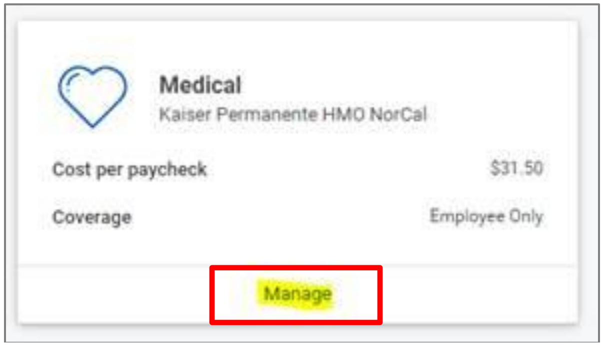
6. On the next page, select the option which applies to you from the **Coverage** drop-down list and click **Save**.

    - *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)

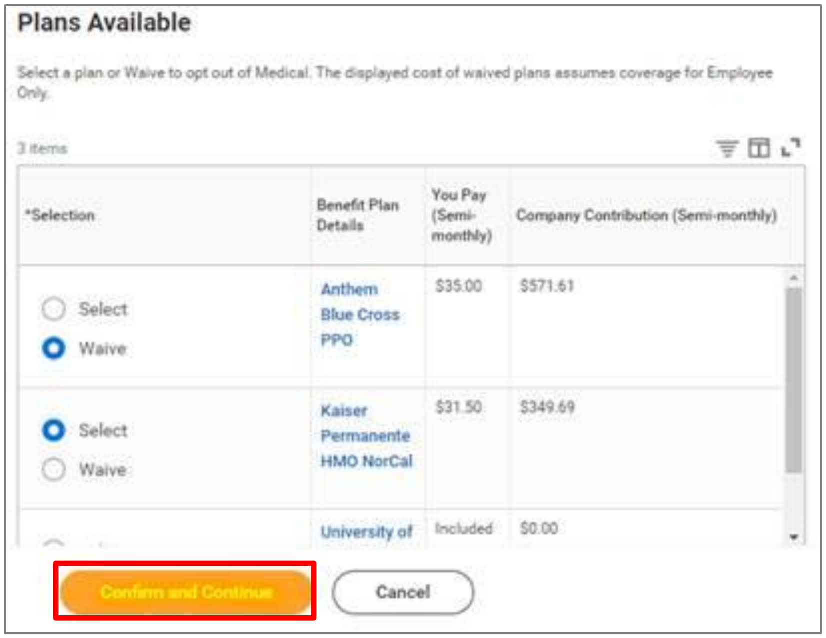



7. Then, go into each Benefit you wish to add your spouse/RDP to (Medical, Dental and/or Vision) in order to add them as a Dependent.

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




8. Click **Confirm and Continue**.




9. On the next page, select:

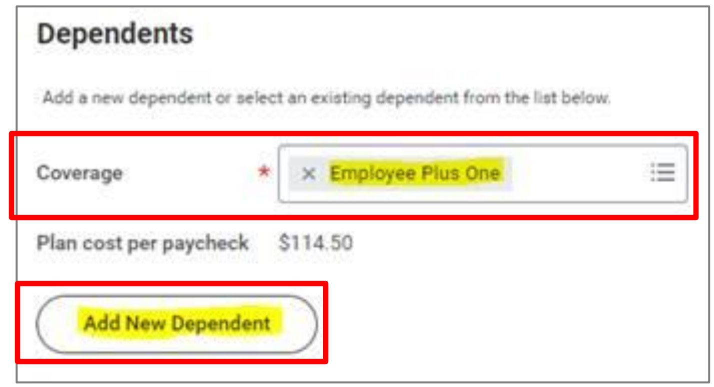
If married:

- 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*.

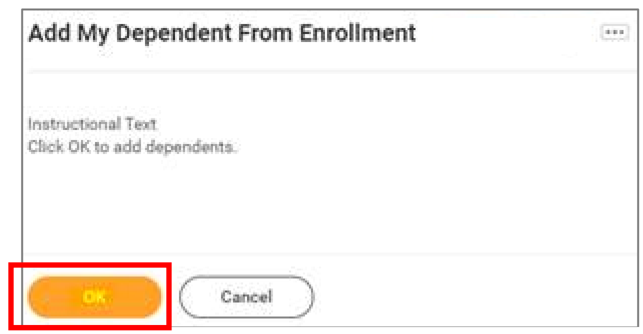
If in an RDP:

- 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*.

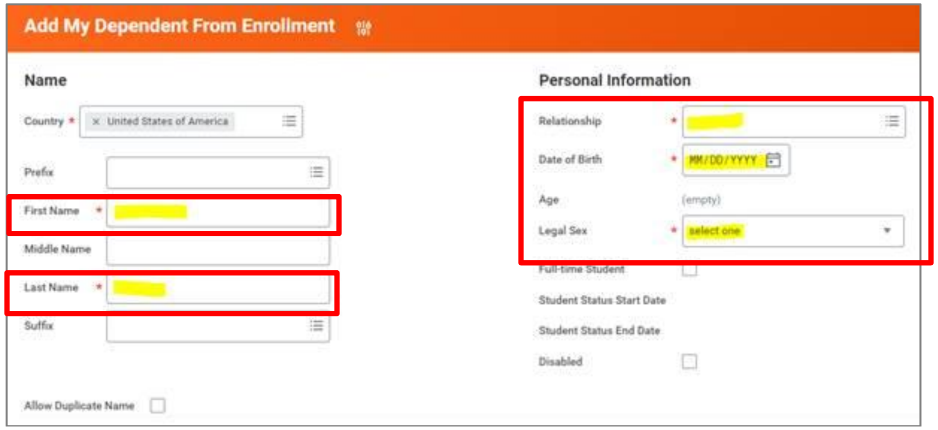
Then click **Add New Dependent**.




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

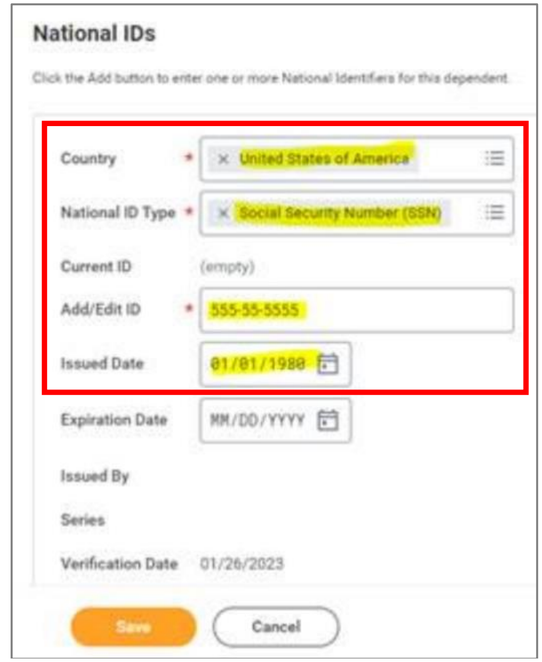



11. On the next page, fill in the following information about your spouse/RDP.

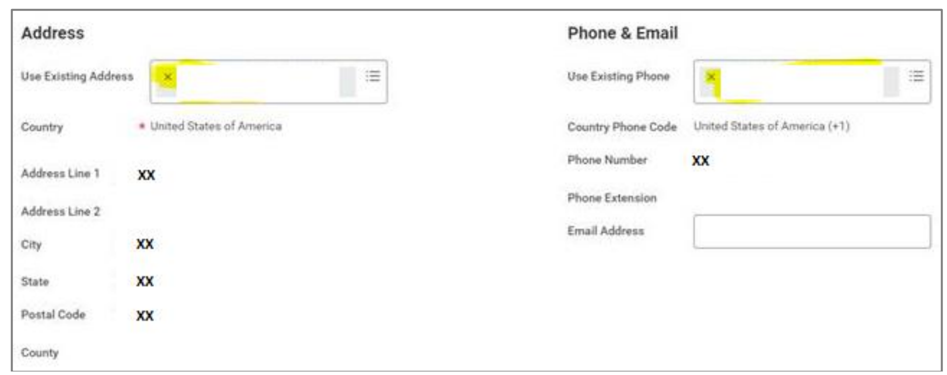



**12.** Scroll down to **National IDs** and click **Add**.


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

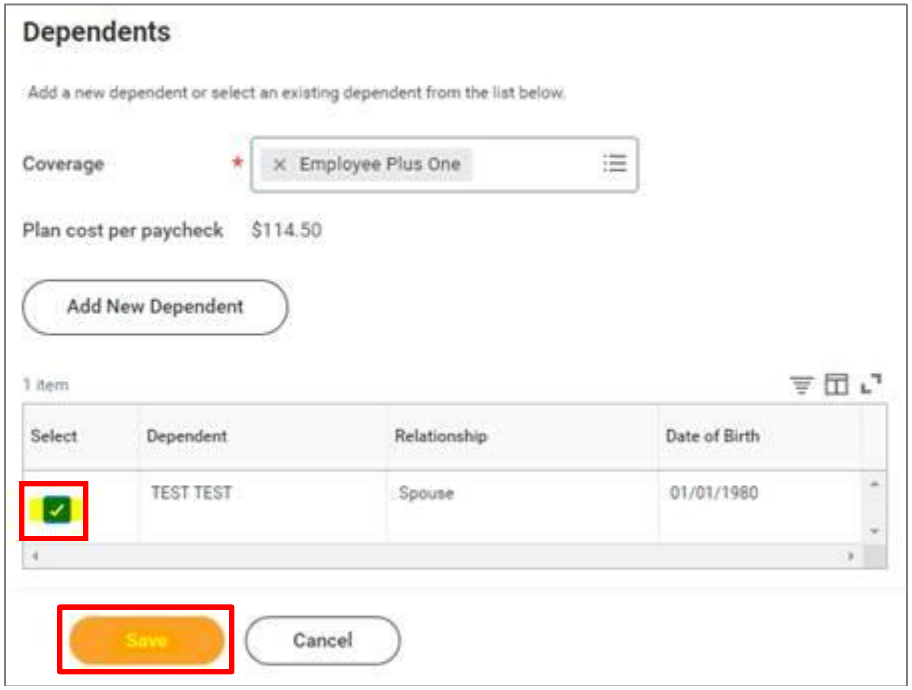



**14.** Scroll down to enter your spouse/RDP's address and phone number, if needed.




**15.** Click **Save**.

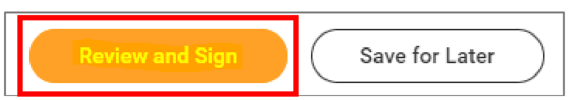
16. On the next page, ensure the checkbox is checked next to your spouse/RDP's name and click **Save**.



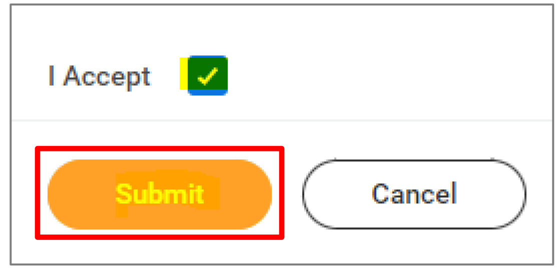

17. You will then be taken back to the screen with the Benefits cards.

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**.




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**.



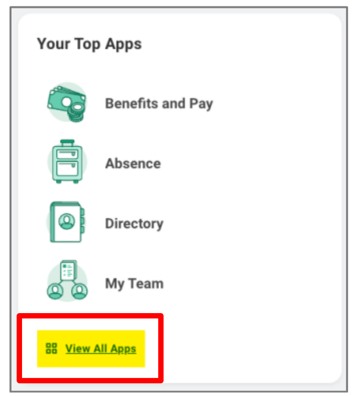

21. On the next page, click **Done**.

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

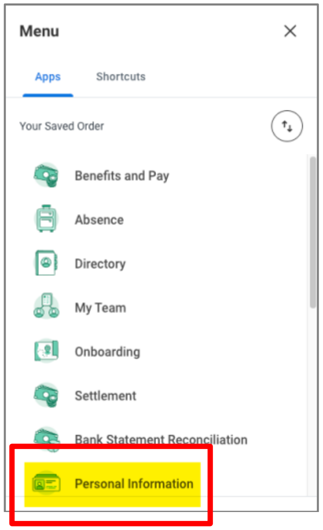
## Update your marital status

You will now need to update your marital status in USFWorks.

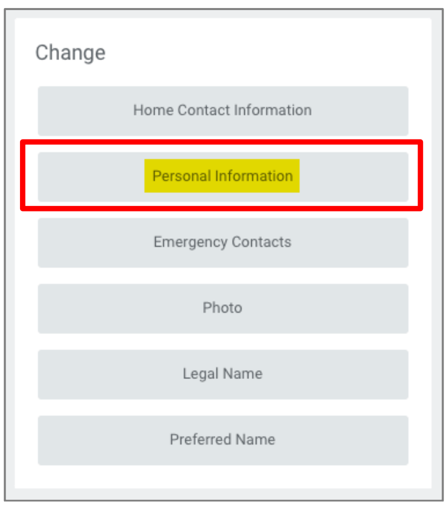
1. Log in to USFWorks and click **View All Apps**.



2. On the next page, click **Personal Information**.

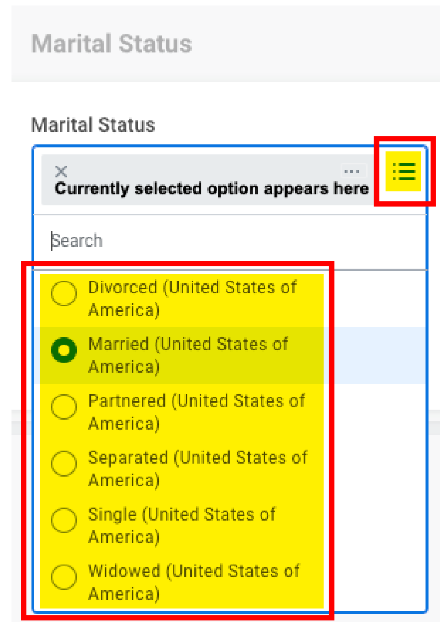



3. On the next page, in the **Change** box, click **Personal Information**.

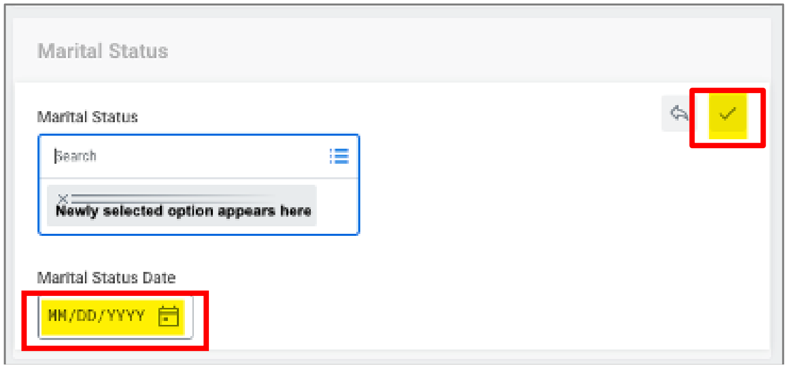



4. On the next page, scroll down to the **Marital Status** section and click the **pencil** symbol.

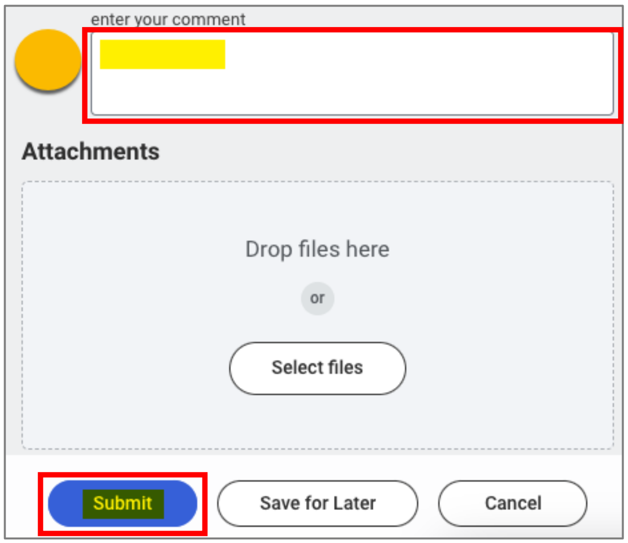

5. Click the drop-down menu and **select your new marital status**.




6. Then, enter the **date of the marital status change** and click on the **check** symbol.




7. Scroll down to the bottom of the page, **enter a comment** if you wish, and then click **Submit**.



## Divorce/Dissolution of Registered Domestic Partnership

**Follow these steps:**

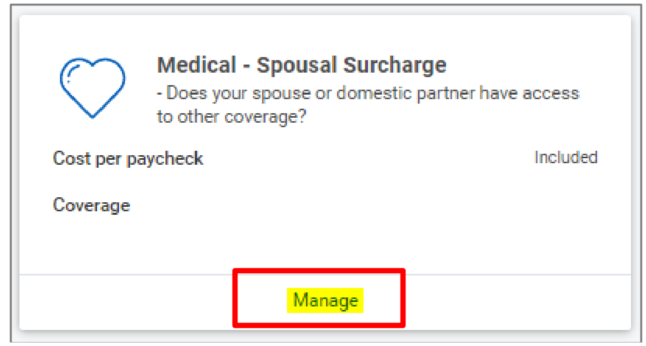
1. On the **Change Benefits** page:
   a) **Divorce/Dissolution of Registered Domestic Partnership** as the **Change Reason**
   b) Enter the **Date of Divorce or RDP Dissolution**
   c) Attach proof of date of divorce / dissolution of registered domestic partnership (required)
   d) Click **Submit**.

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

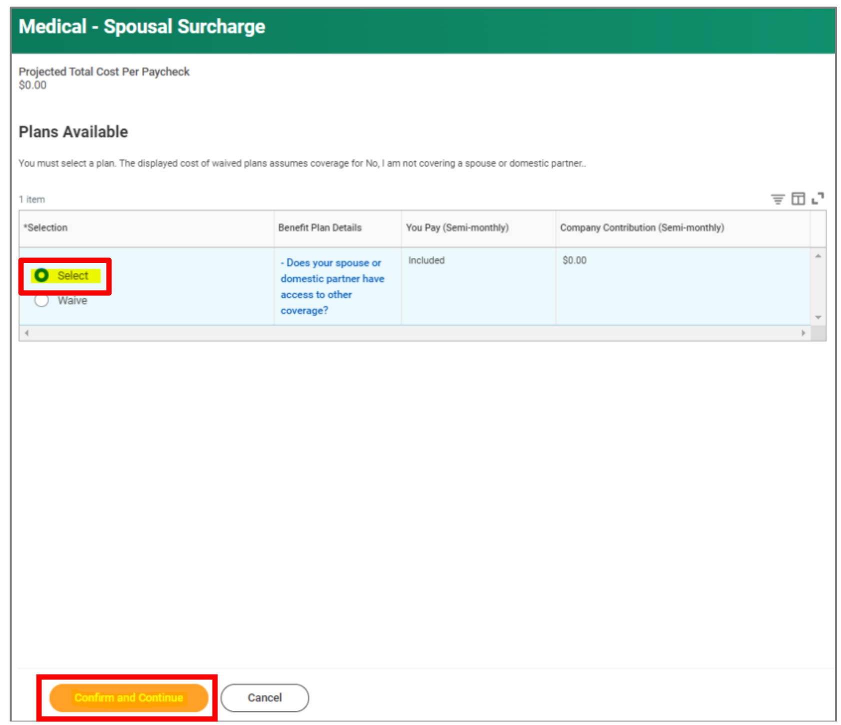

3. On the next page, click **Let's Get Started**.


(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 <u>not</u> click Waive) and **Confirm and Continue**.



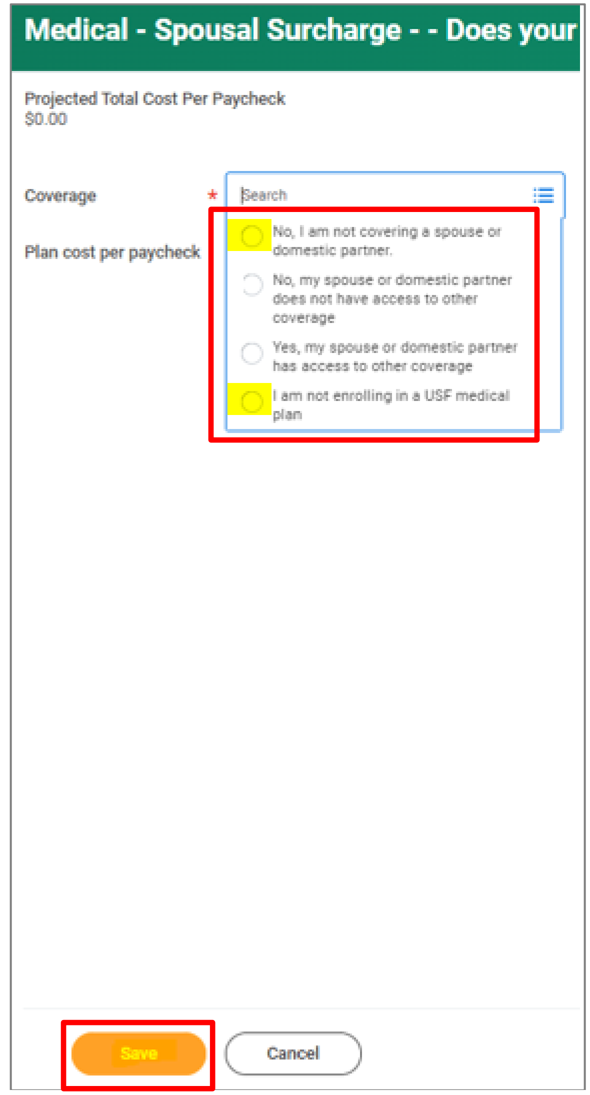
6. On the next page, select the option which applies to you from the **Coverage** drop-down list and click **Save**.

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

**Please note:**

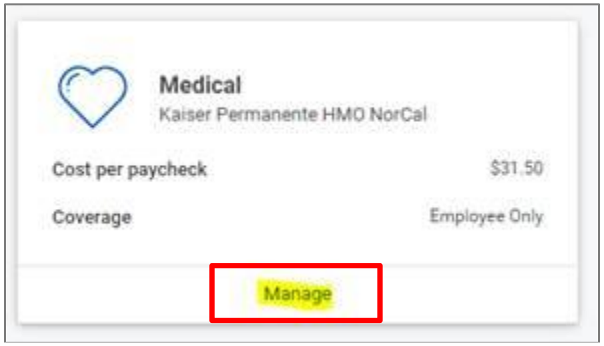
If you are **not** enrolled in a USF Medical Plan, the selected option needs to be:

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

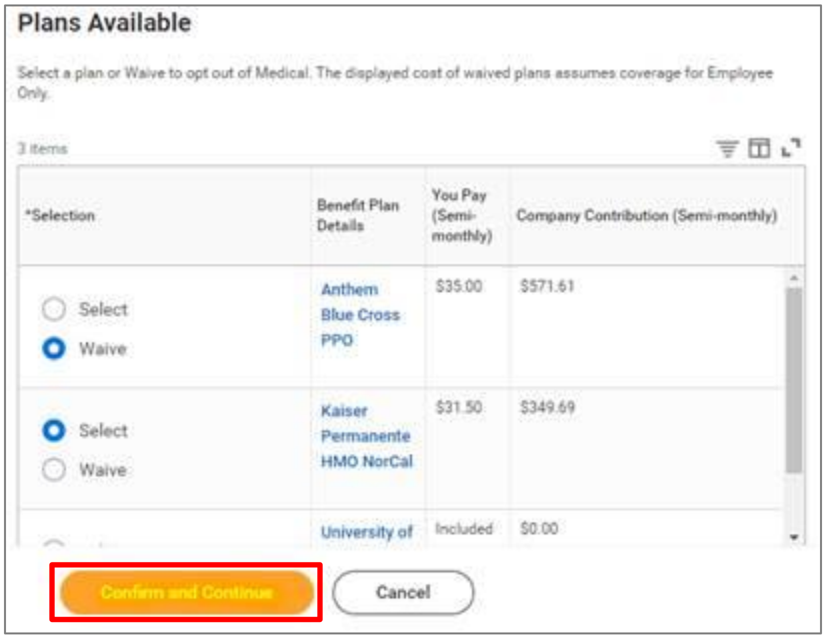



7. Then, go into each Benefit your ex-spouse/ex-RDP is currently a Dependent on (Medical, Dental and/or Vision) in order to remove them as a Dependent.

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




8. Click **Confirm and Continue**.




9. On the next page, select:

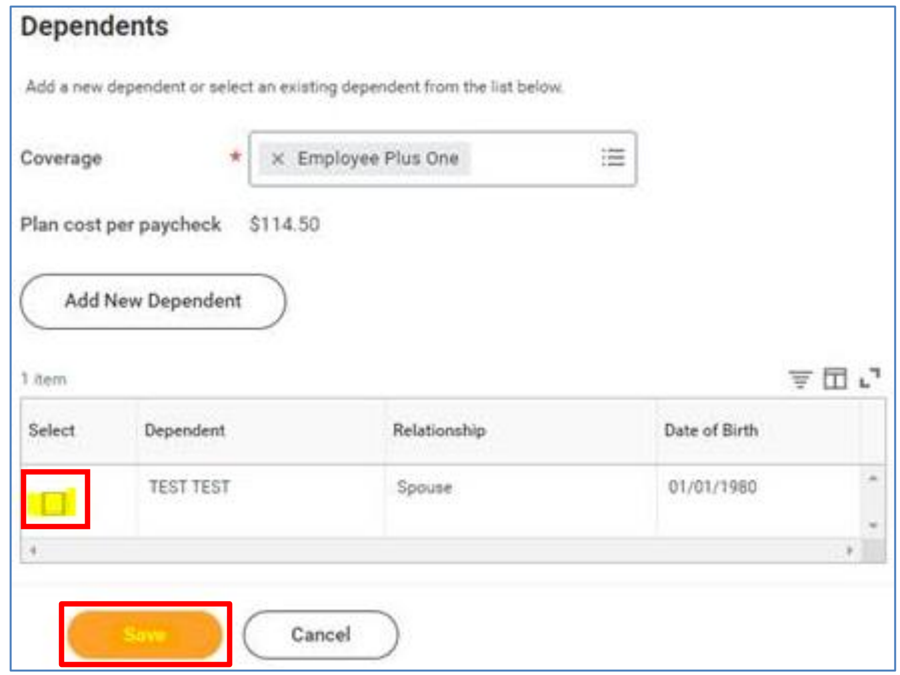
To remove a former spouse:

- 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.

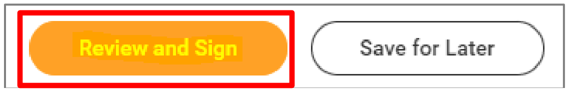
10. Then **uncheck the checkbox** next to your ex-spouse/ex-RDP's name and click **Save**.



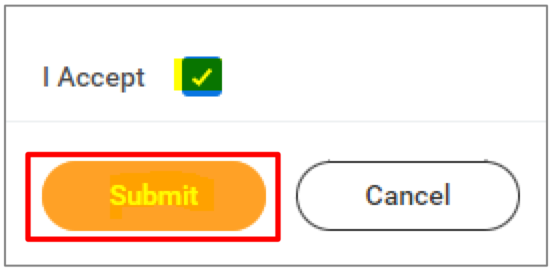

11. You will then be taken back to the screen with the Benefits cards.

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**.

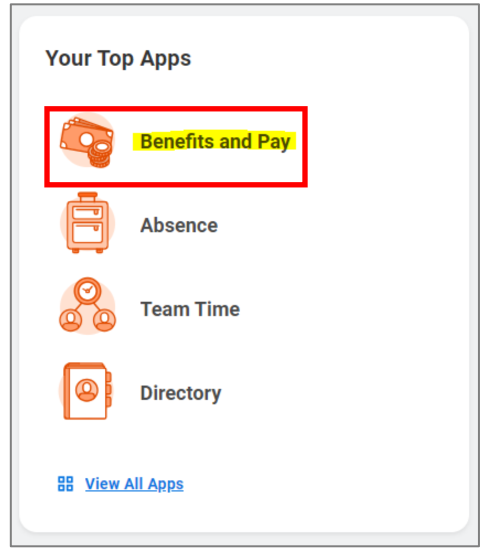
16. Your submission will be automatically routed to your HR Benefits partner for processing.

## Change your ex-spouse/ex-RDP’s relationship status

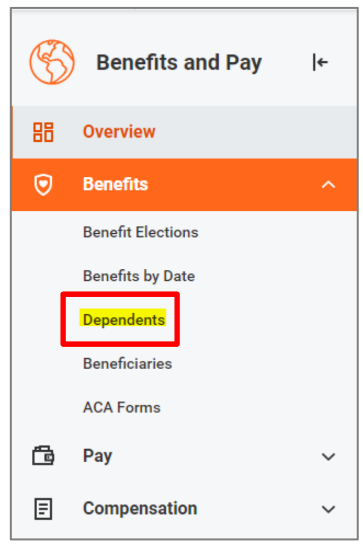
Please update your former spouse/RDP’s relationship status to ex-spouse/RDP by following the steps below. (They are no longer a Dependent on your plans, but they will remain on USFWorks as archived.)

### Follow these steps:

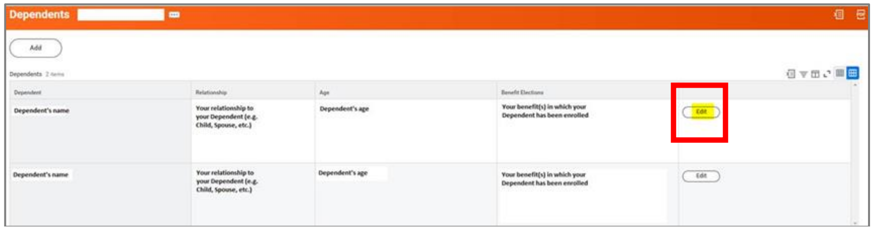
1. Log in to USFWorks and click **Benefits and Pay**.




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

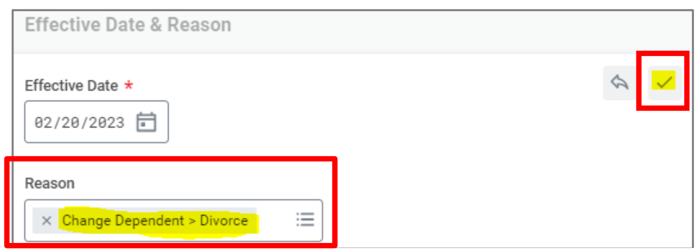



3. On the next page, you will see a list of your Dependents (whether they are currently a Dependent on your Benefit plan[s] or not). Click **Edit** on the line for your ex-spouse/RDP.



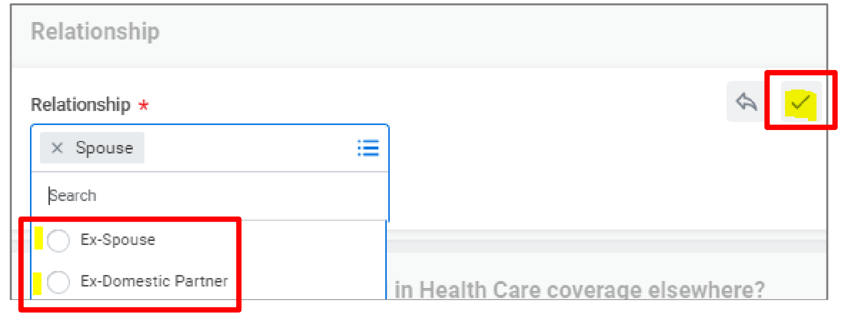

4. On the next page, under **Effective Date & Reason**, click the **pencil** symbol.


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

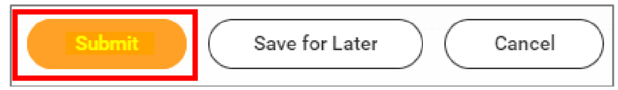



6. Scroll down to **Relationship** and click the **pencil** symbol.


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



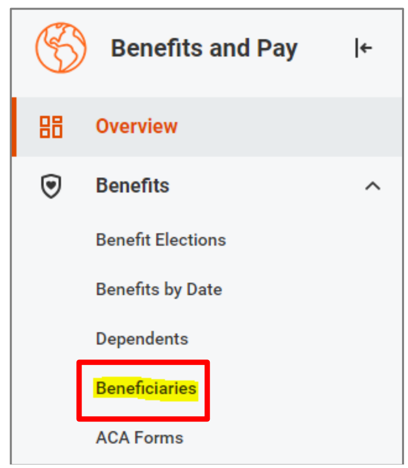

8. Click **Submit**.




**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.

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

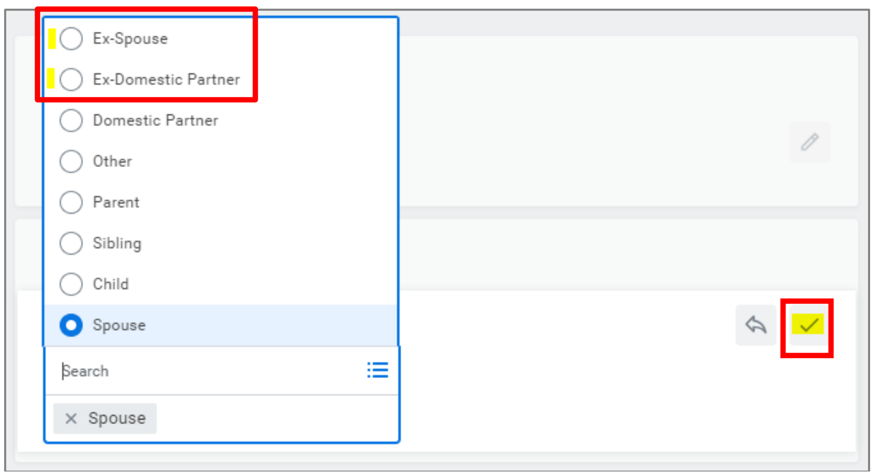



2. On the next page, you will see a list of your Beneficiaries (whether they are currently designated as a Beneficiary on your life

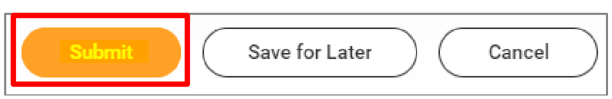
insurance plan[s] or not). Click **Edit** on the line for your ex-spouse/RDP.


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


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



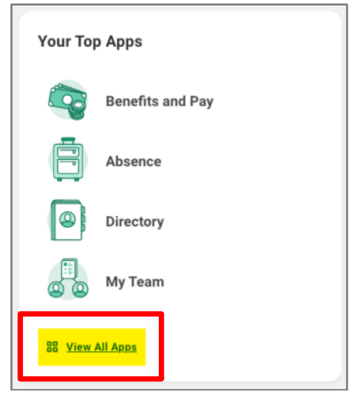

5. Click **Submit**.



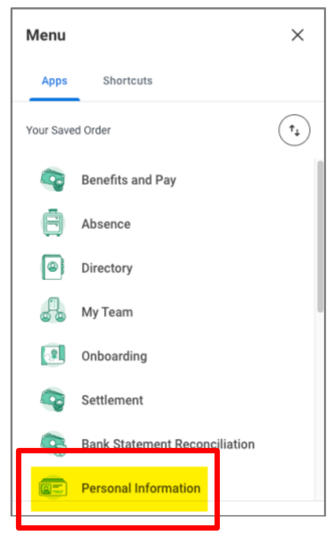

## Update your marital status

You will now need to update your marital status in USFWorks.

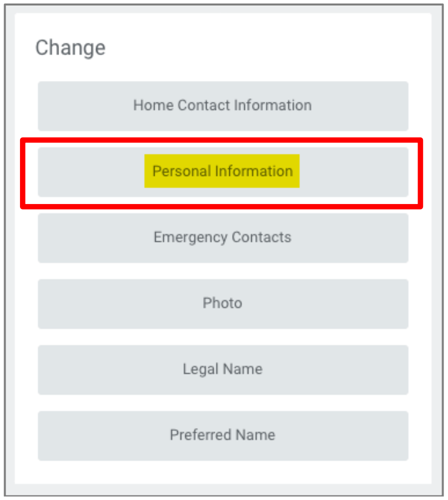
1. Log in to USFWorks and click **View All Apps**.




2. On the next page, click **Personal Information**.

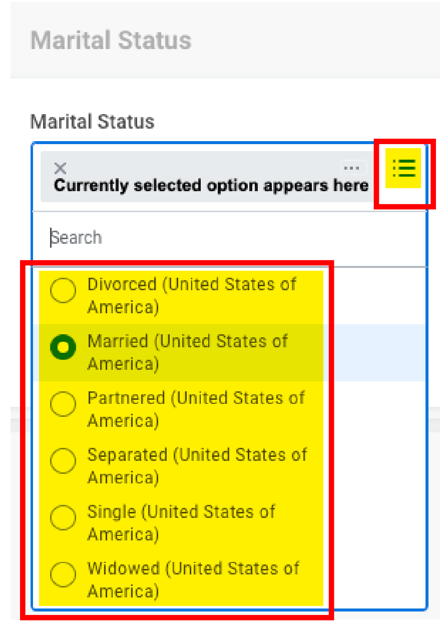



3. On the next page, in the **Change** box, click **Personal Information**.

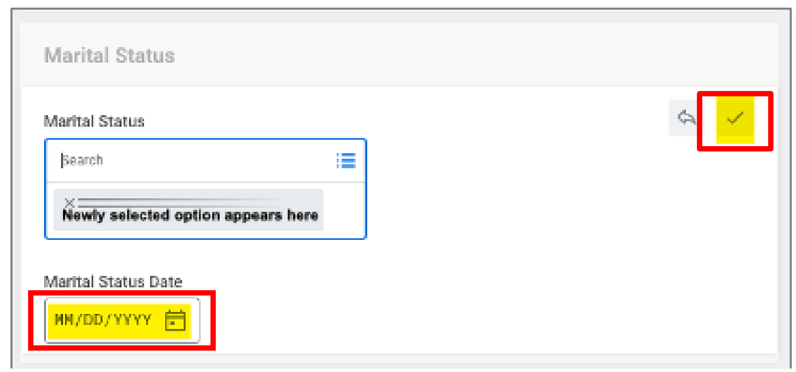



4. On the next page, scroll down to the **Marital Status** section and click the **pencil** symbol.

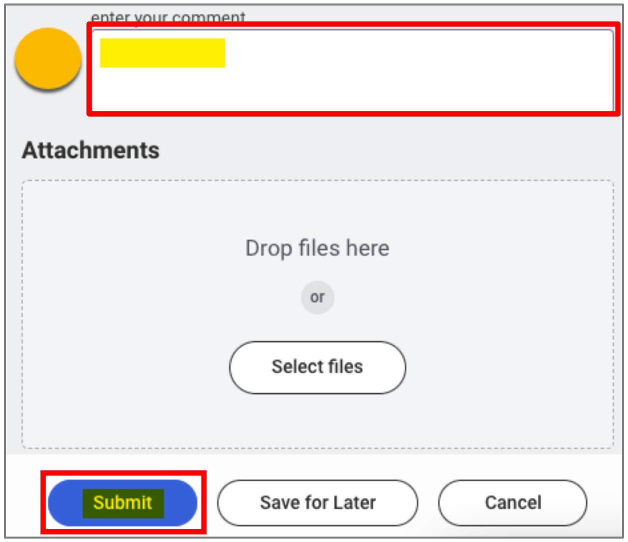

5. Click the drop-down menu and **select your new marital status**.




6. Then, enter the **date of the marital status change** and click on the **check** symbol.




7. Scroll down to the bottom of the page, **enter a comment** if you wish, and then click **Submit**.


enter your comment
Attachments
Drop files here
or
Select files
Submit
Save for Later
Cancel

## 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**.

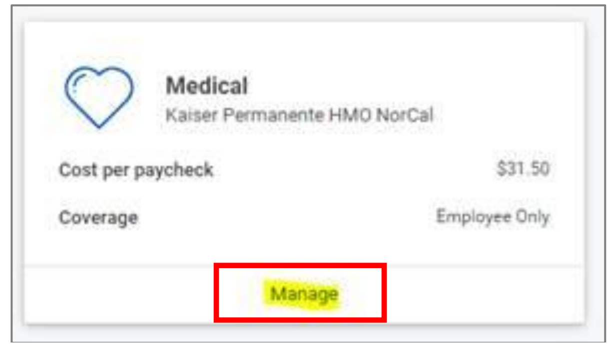
2. A pop-up window will appear stating you have submitted. Click **Open**.


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

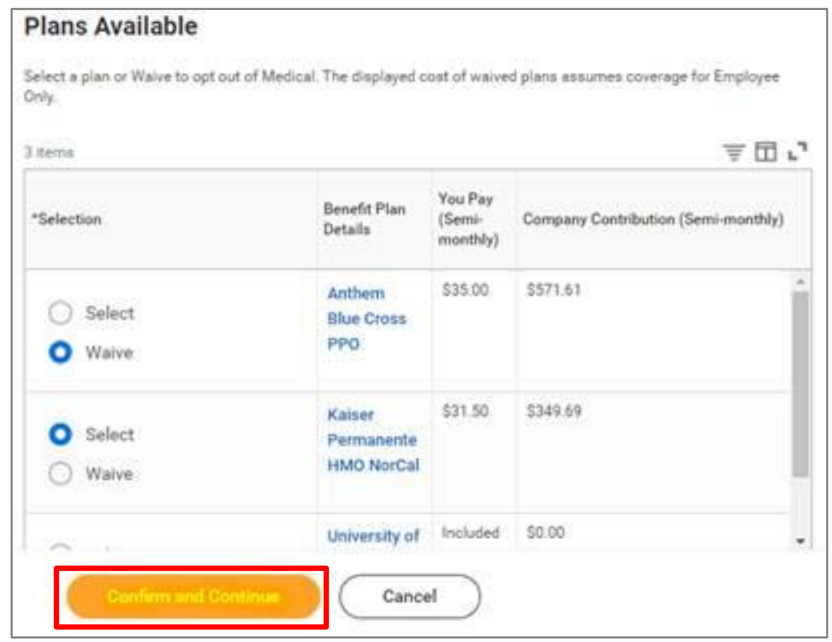

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

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.

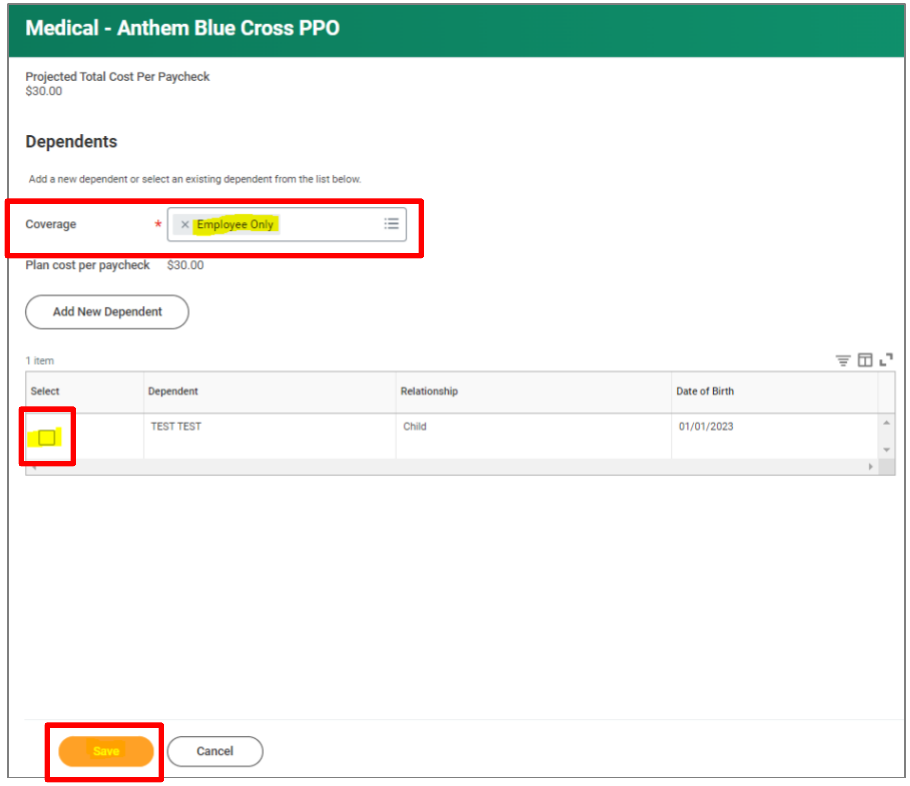
For example, Medical: Under the **Medical** card, click **Manage**.



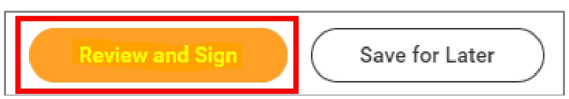

5. Click **Confirm and Continue**.



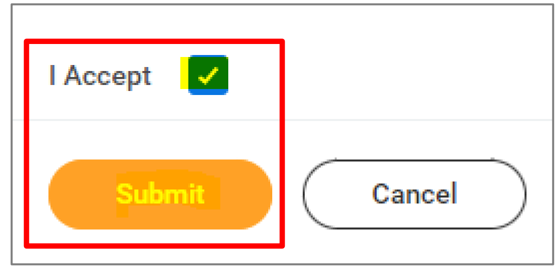

6. On the next page, change the **Coverage** level if necessary, **uncheck the checkbox** next to the Dependent's name and click **Save**.




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




10. 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**.

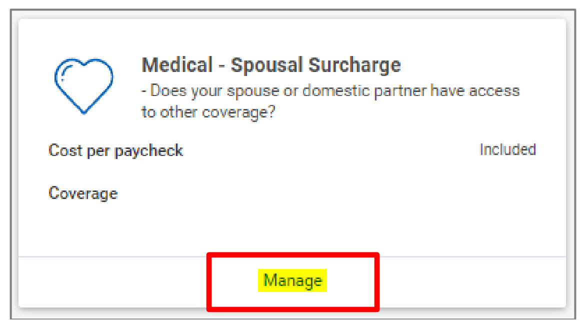



11. On the next page, click **Done**.
12. Your submission will be automatically routed to your HR Benefits partner for processing.

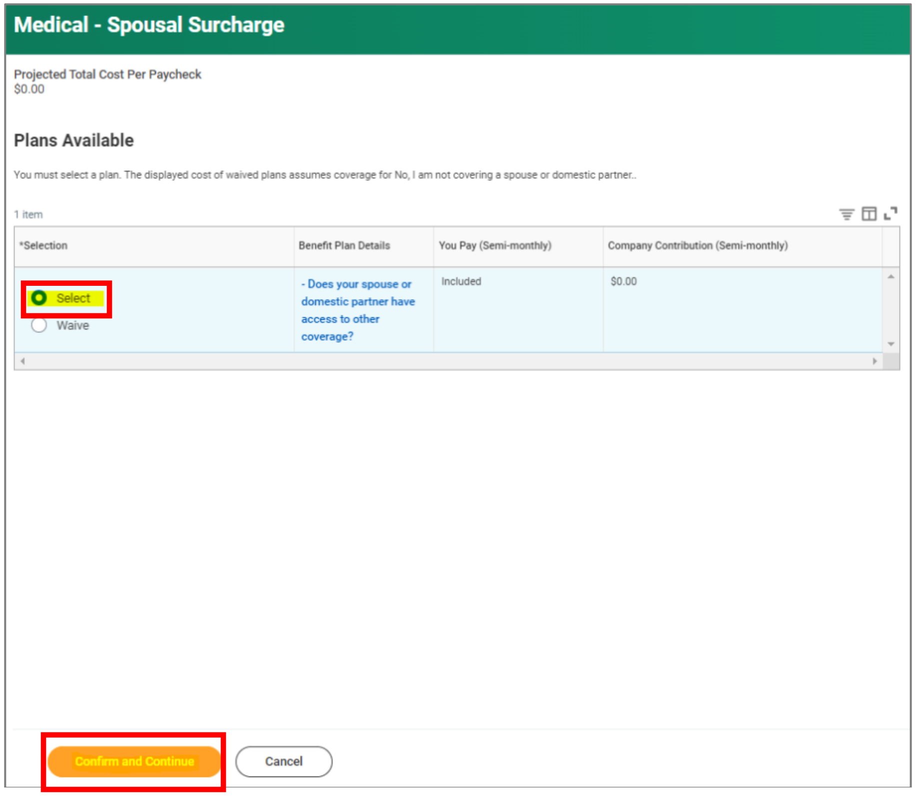
**IMPORTANT:**

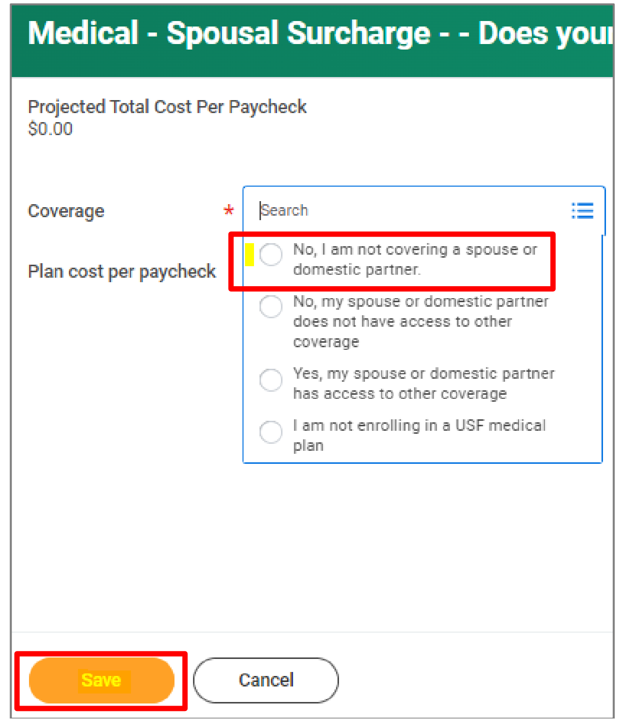
If the Dependent you are removing is your spouse or registered domestic partner and you are removing them from your Medical plan, **before submitting the task,** you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

1. 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**.




2. Click **Select** (do <u>not</u> click Waive) and **Confirm and Continue**.




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*.

## 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**.

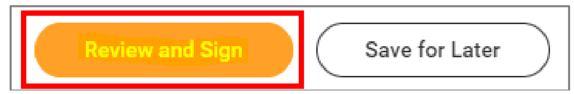

3. On the next page, click **Let's Get Started**.


(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**).

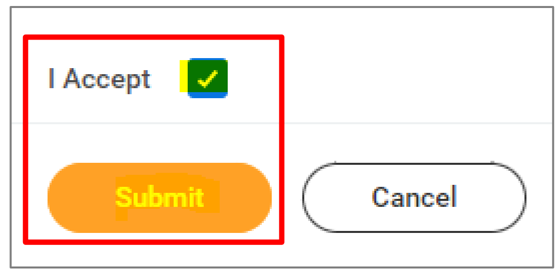
4. On the page with the Benefit cards, go into each Benefit you wish to disenroll yourself from (Medical, Dental and/or Vision) in order to do so.

   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.

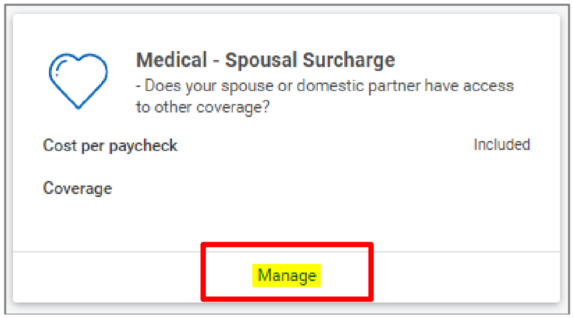
**IMPORTANT:**

### Medical Spousal Surcharge – amend selected option

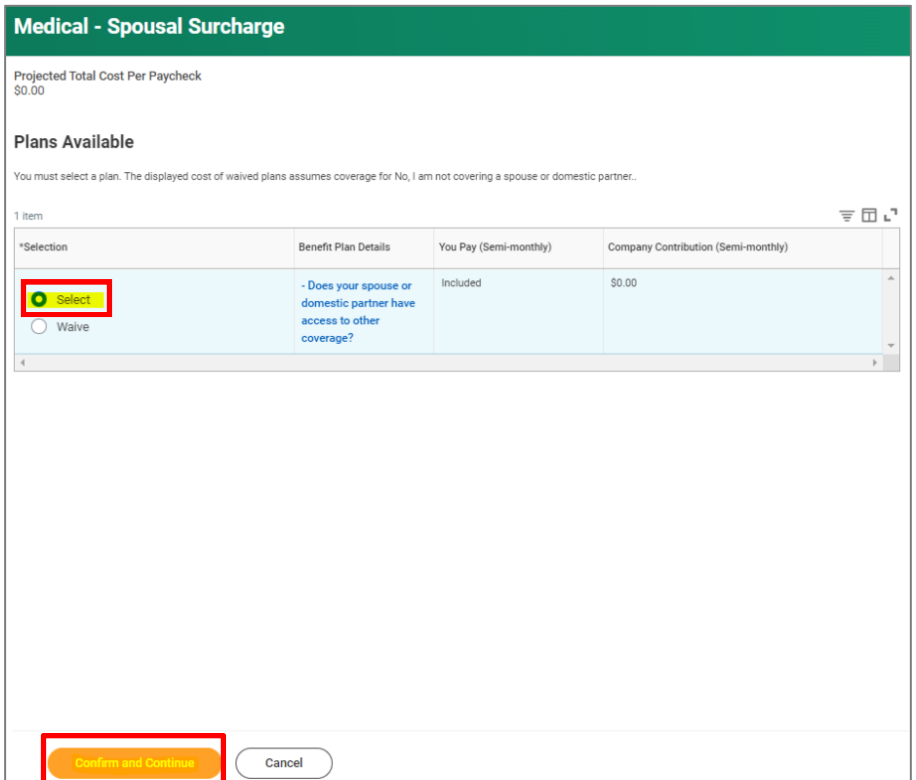
**Before submitting the task,** if you have disenrolled yourself from your USF Medical Plan, you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

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

**Surcharge** card, click **Manage**.

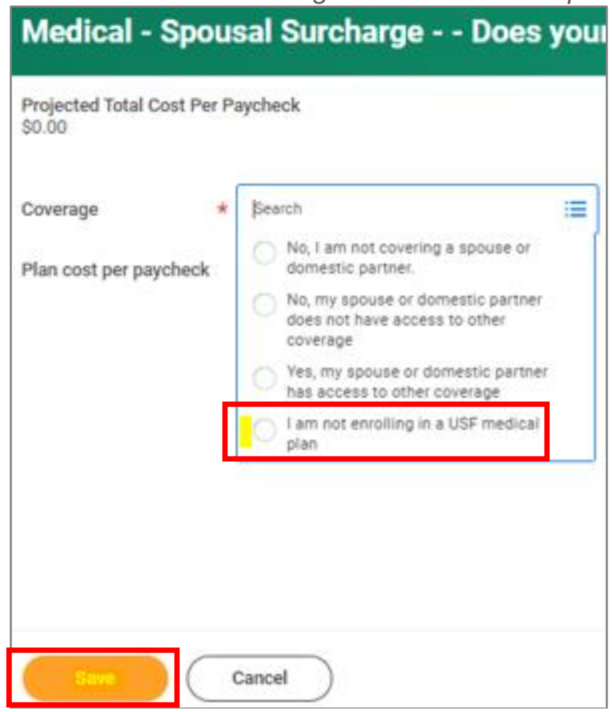



2. Click **Select** (do <u>not</u> click Waive) and **Confirm and Continue**.




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

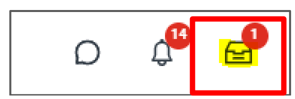
- *I am not enrolling in a USF medical plan*.



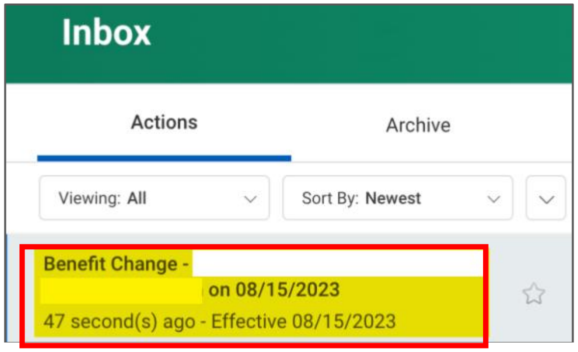

## Forms required if selecting the University of San Francisco Waiver

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.

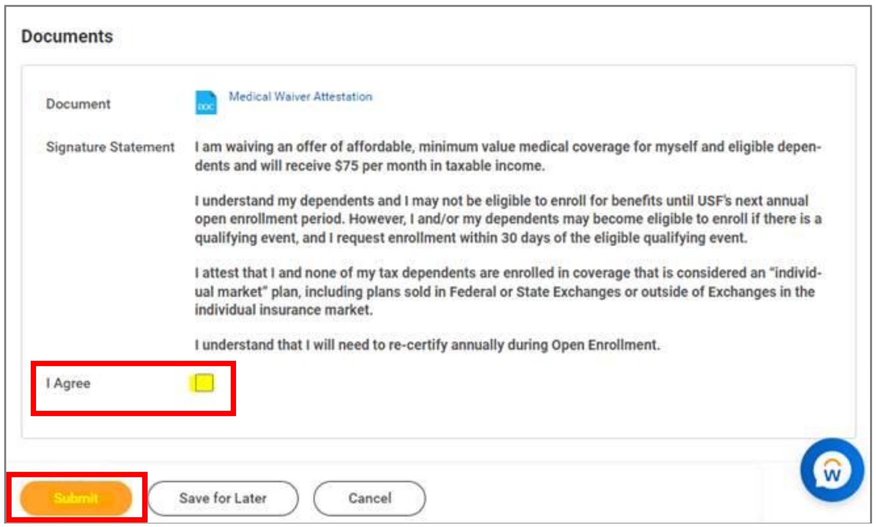
1. Once your Benefit Elections have been approved, go back to your USFWorks Inbox.




2. Click the **Benefit Change** message.




3. 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**




4. 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 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.

## 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**.

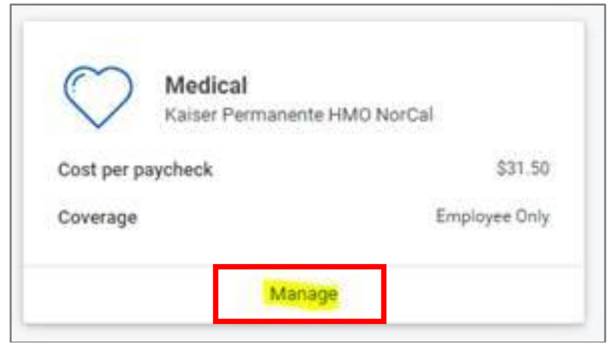
2. A pop-up window will appear stating you have submitted. Click **Open**.


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

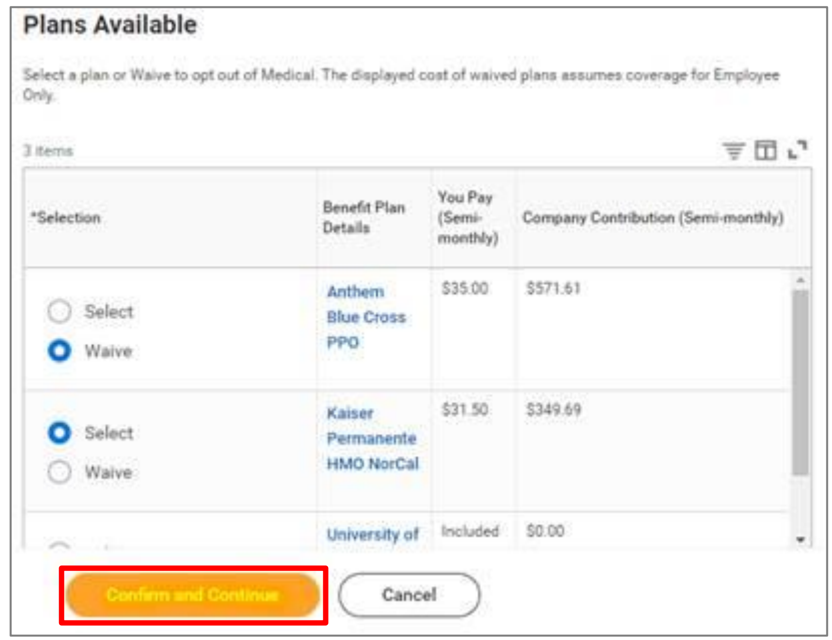

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

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**.



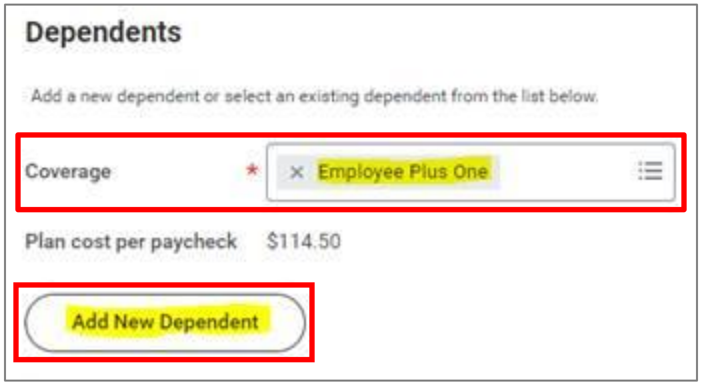

5. Click **Confirm and Continue**.




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

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

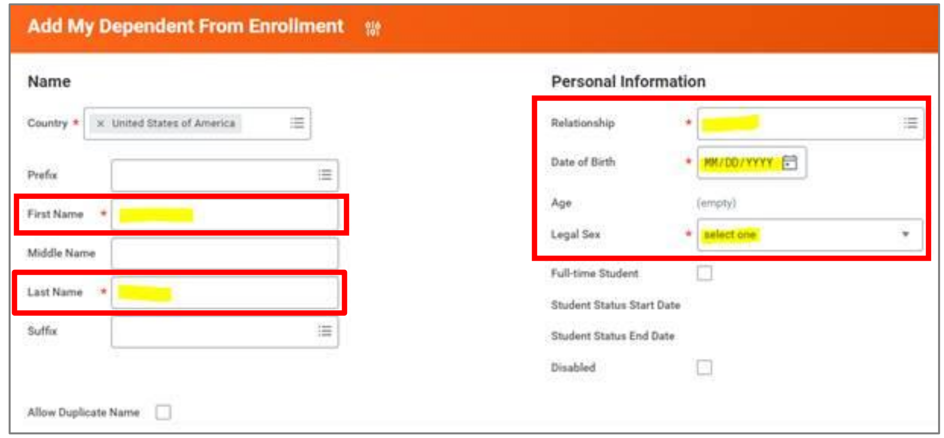
If they have been previously, just **check the box next to their name**, click **Save** and skip to step 14.




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

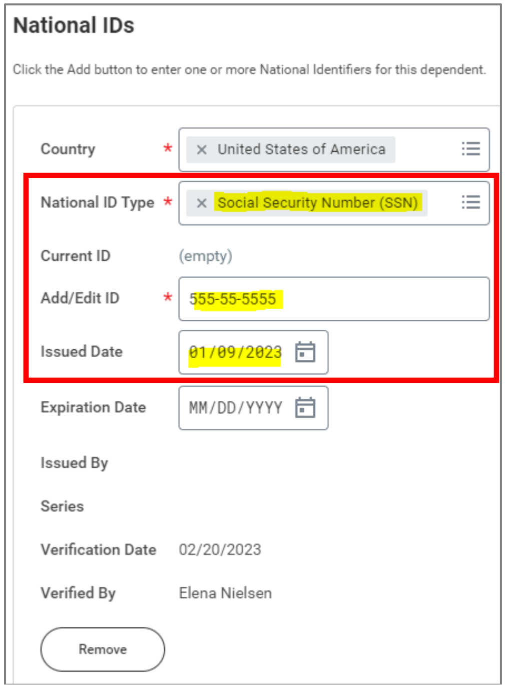

8. On the next page, fill in first the following information about your Dependent.

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



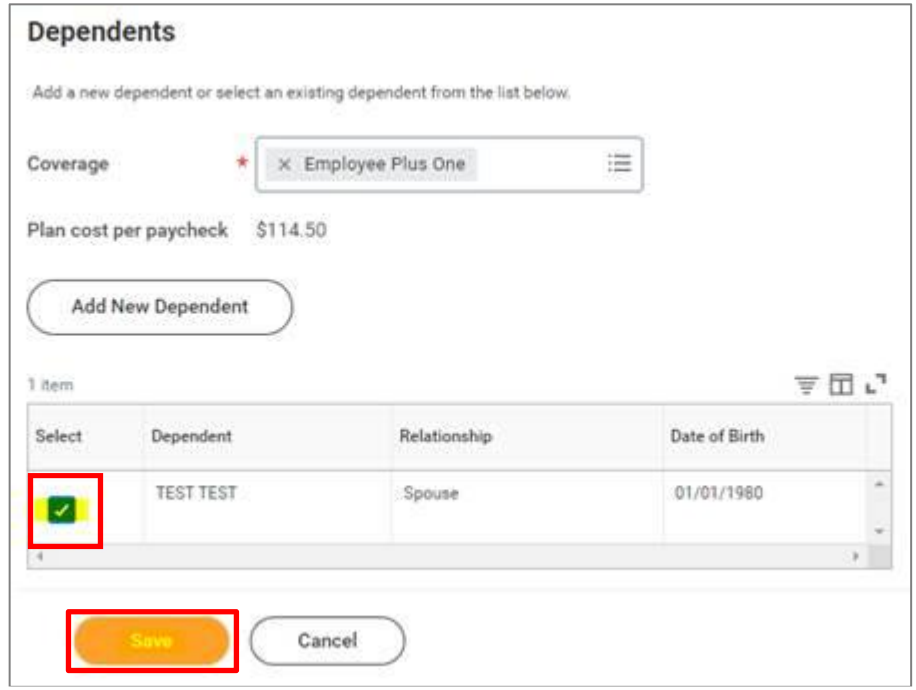

9. Scroll down to **National IDs** and click **Add**.


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



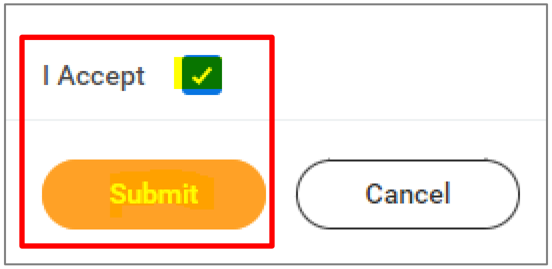

11. Click **Save**.


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




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**.

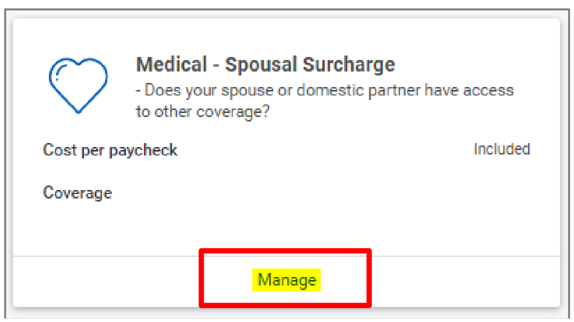



17. On the next page, click **Done**.
18. Your submission will be automatically routed to your HR Benefits partner for processing.

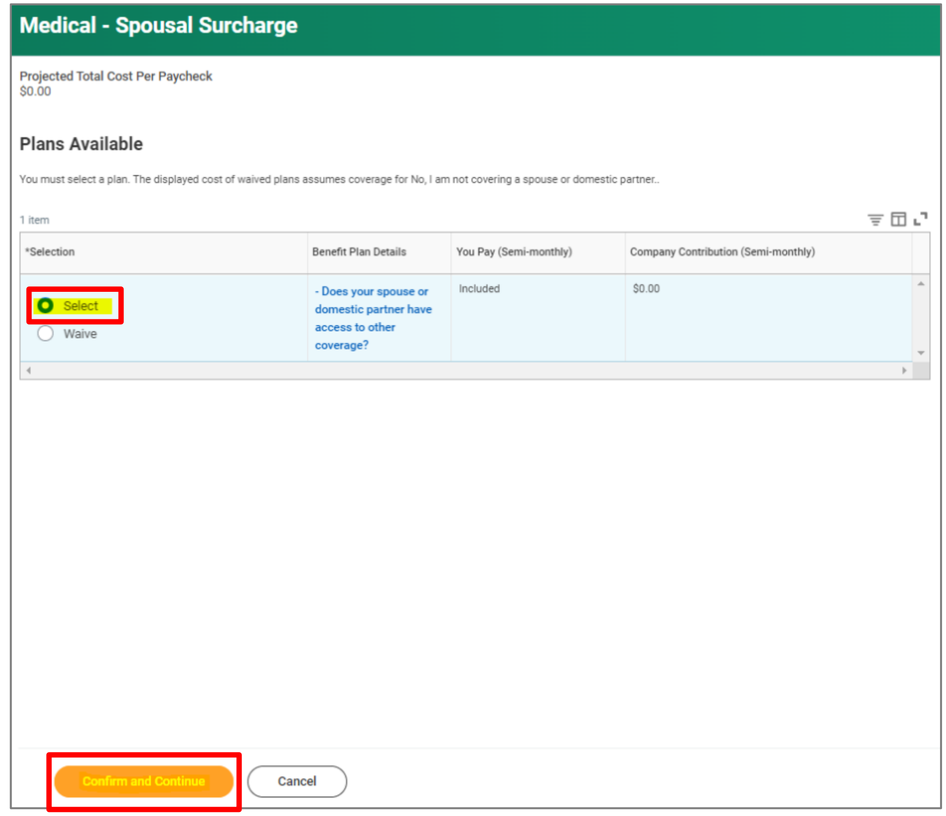
**IMPORTANT:**

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**.

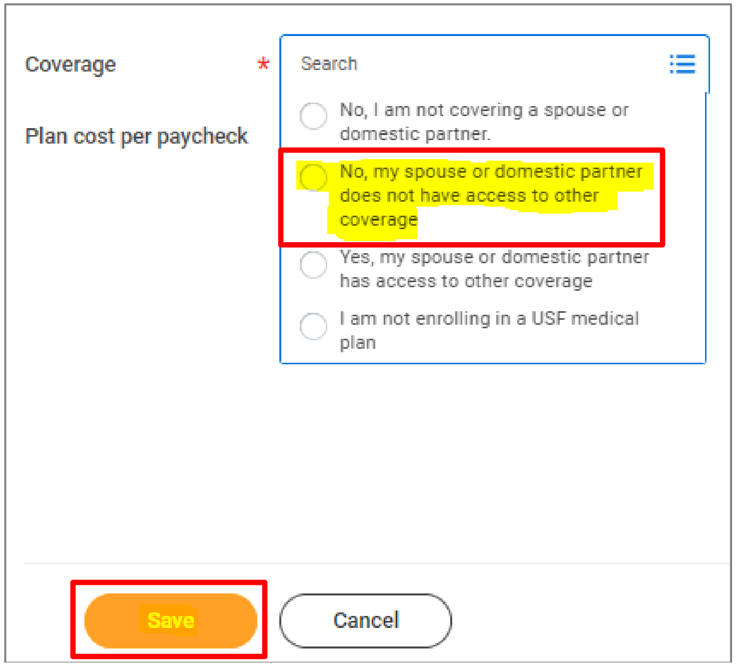
1. On the page with the Benefit cards, if you are enrolling your spouse/RDP on your Medical plan, under the **Medical – Spousal Surcharge** card, click **Manage**.




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.*


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

## 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**.

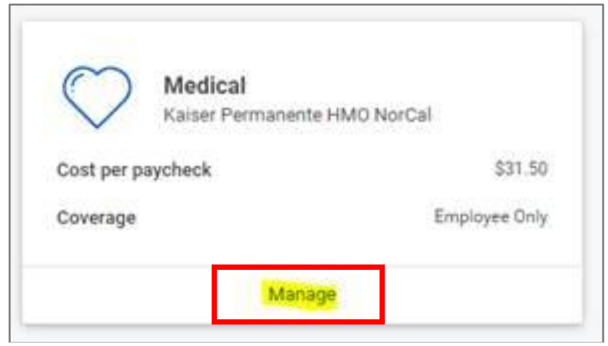
2. A pop-up window will appear stating you have submitted. Click **Open**.


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

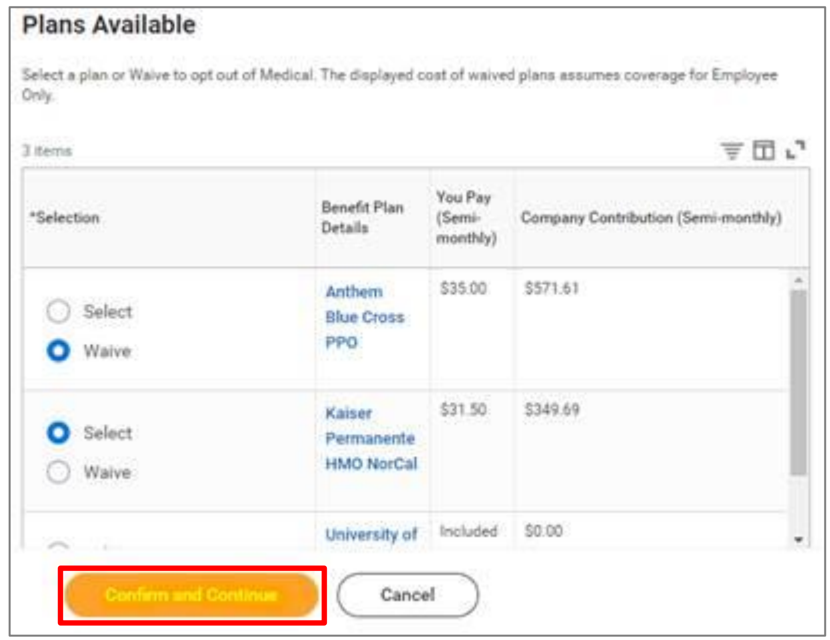

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

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**.



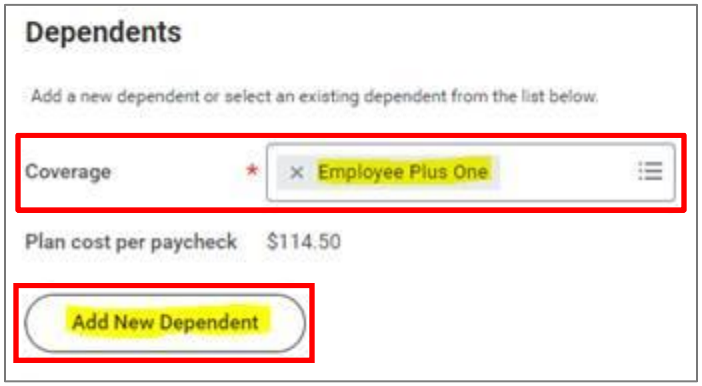

5. Click **Confirm and Continue**.




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

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**.

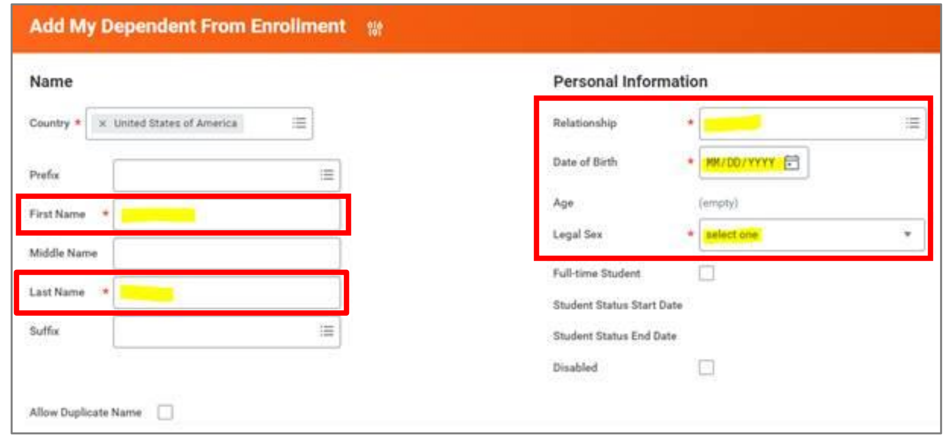
If they had been previously, just **check the box next to their name**, click **Save** and skip to step 14.




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

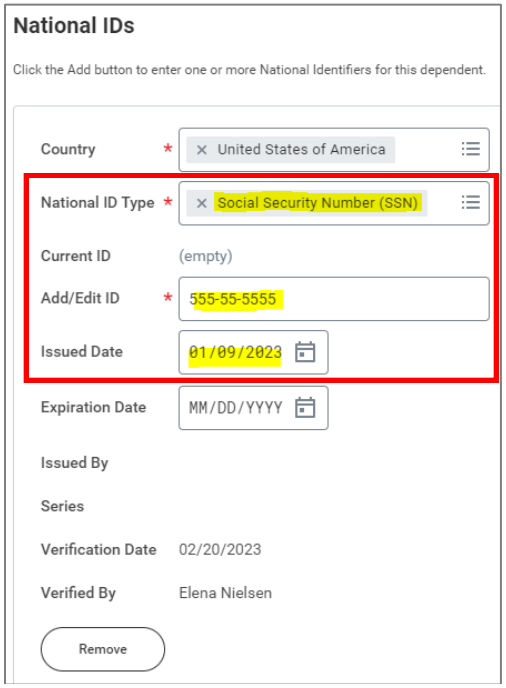

8. On the next page, fill in first the following information about your Dependent.

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

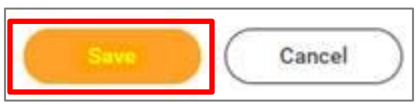



9. Scroll down to **National IDs** and click **Add**.

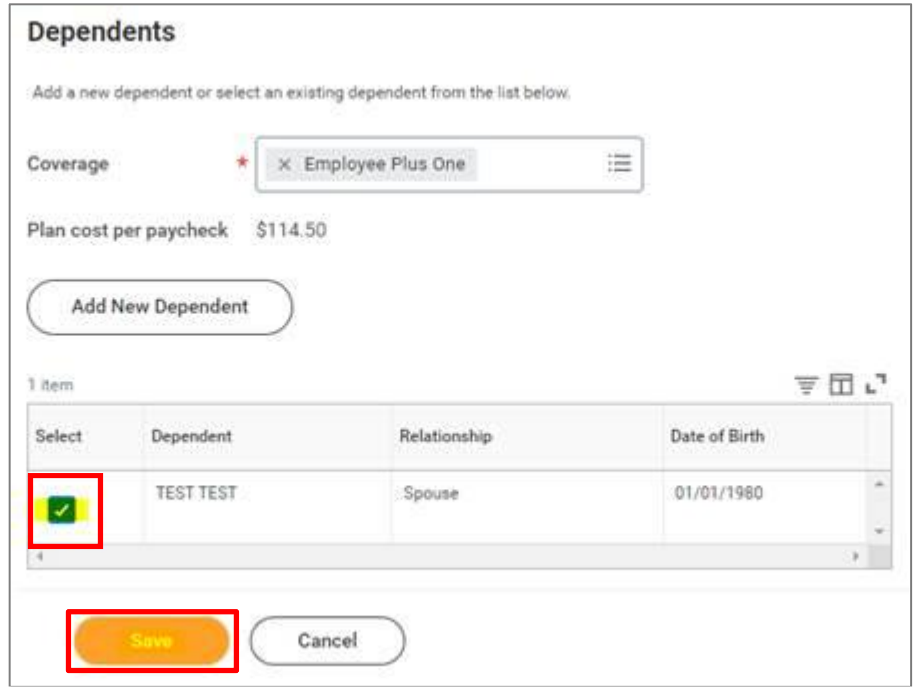

10. Enter the **Country**, **National ID Type** (SSN or ITIN if US), **ID number** (SSN or ITIN if US) and **Issued Date** (if known).




11. Click **Save**.

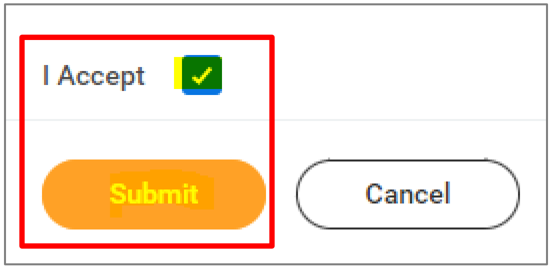



12. On the next page, ensure the checkbox is checked next to your child's name and click **Save**.




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**.

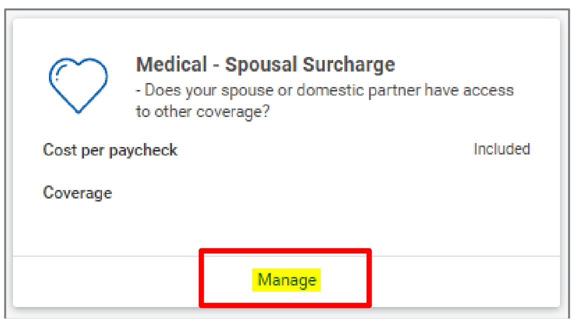



17. On the next page, click **Done**.
18. Your submission will be automatically routed to your HR Benefits partner for processing.

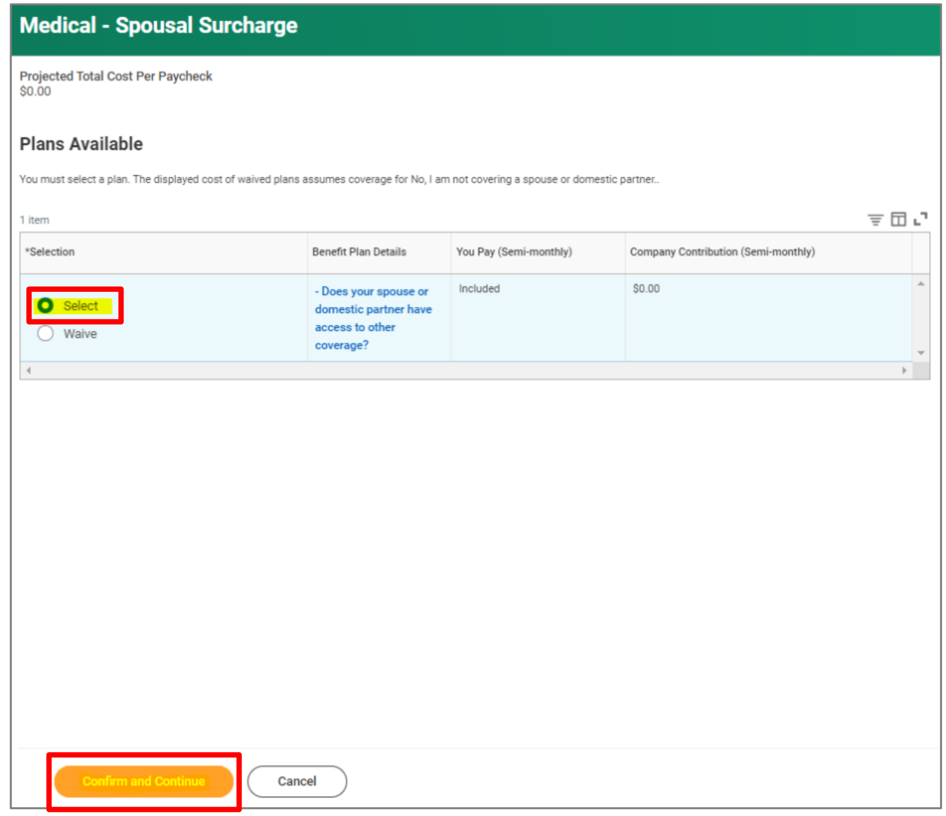
**IMPORTANT:**

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**.

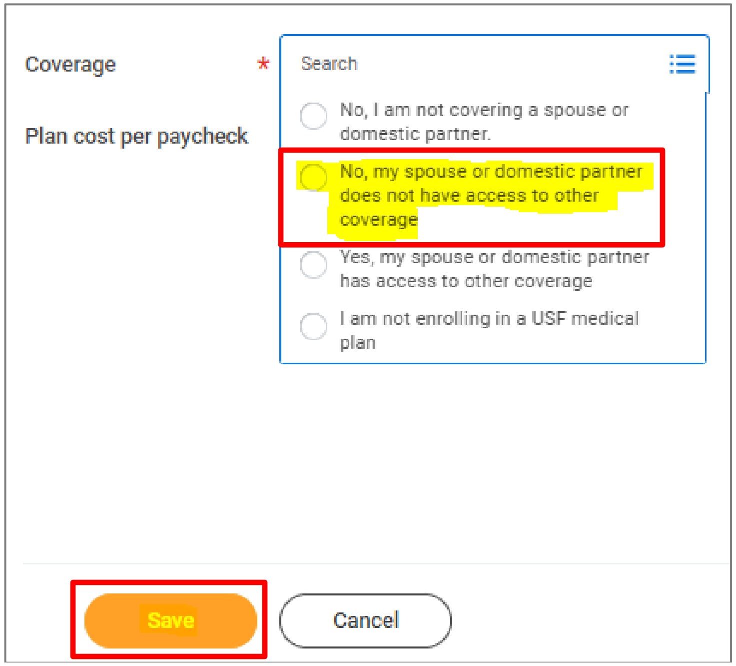
1. On the page with the Benefit cards, if you are enrolling your spouse/RDP on your Medical plan, under the **Medical – Spousal Surcharge** card, click **Manage**.




2. Click **Select** (do <u>not</u> 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.*


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

## 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**.

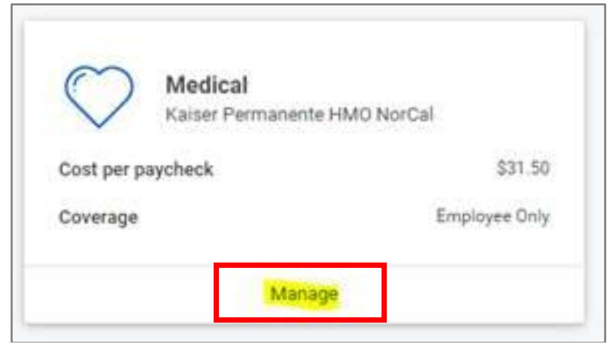
2. A pop-up window will appear stating you have submitted. Click **Open**.


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

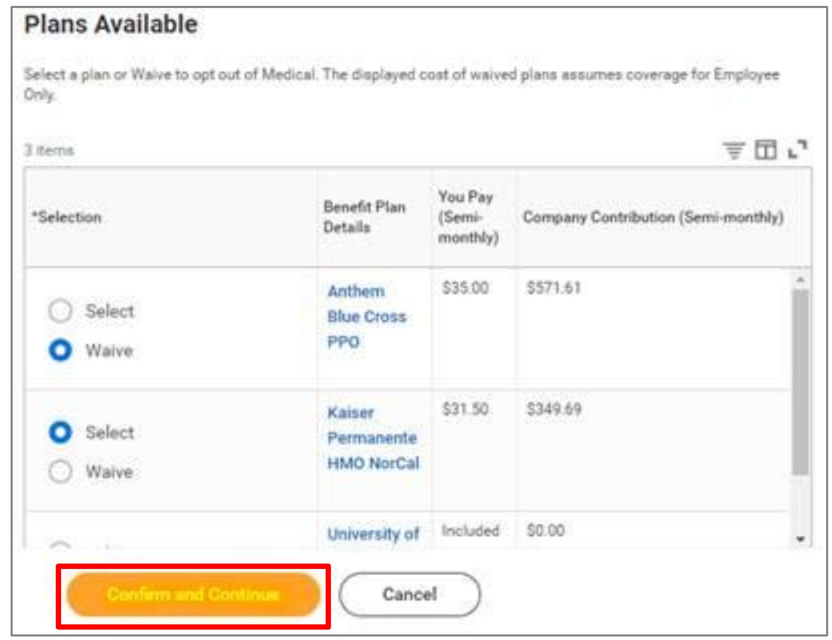

(If the pop-up window closes before you can click Open, you can find the task in your USFWorks Inbox – just click the **Benefit Event** message and then on **Let's Get Started**).

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.

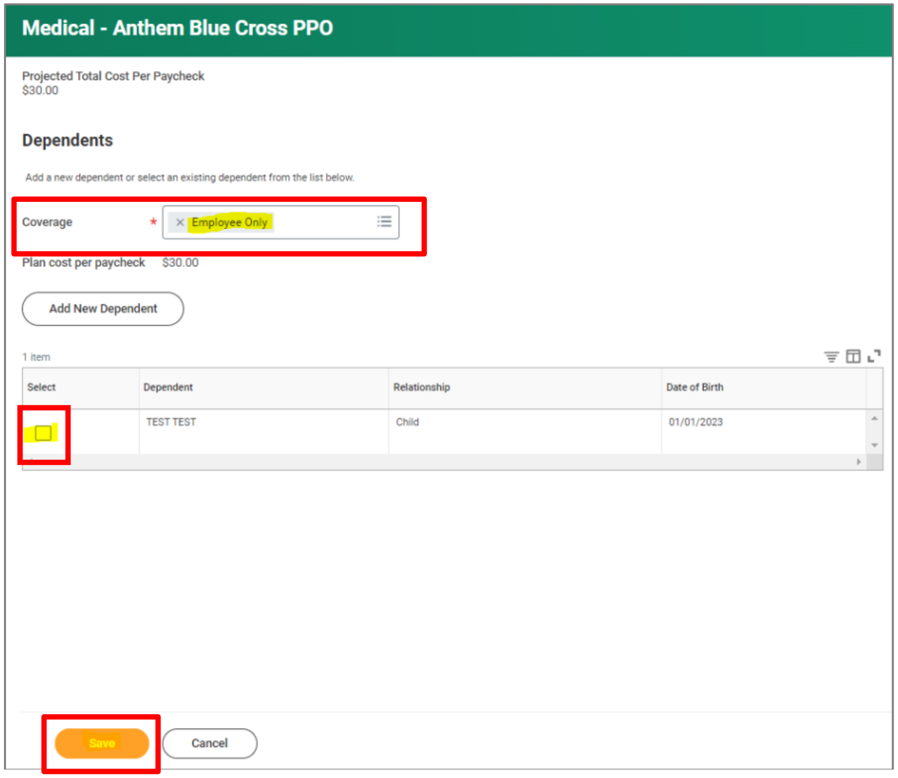
For example, Medical: Under the **Medical** card, click **Manage**.



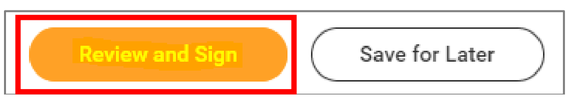

5. Click **Confirm and Continue**.



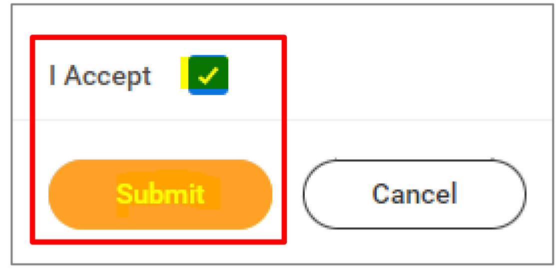

6. On the next page, change the **Coverage** level if necessary, **uncheck the checkbox** next to the Dependent's name and click **Save**.




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




10. 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**.

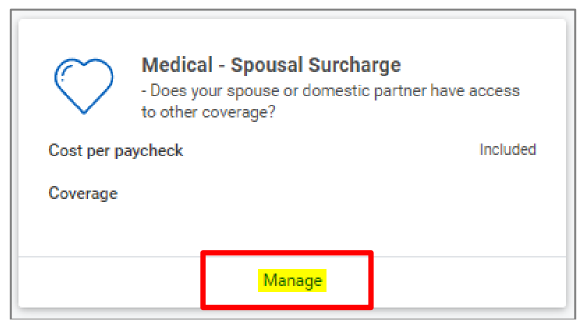



11. On the next page, click **Done**.
12. Your submission will be automatically routed to your HR Benefits partner for processing.

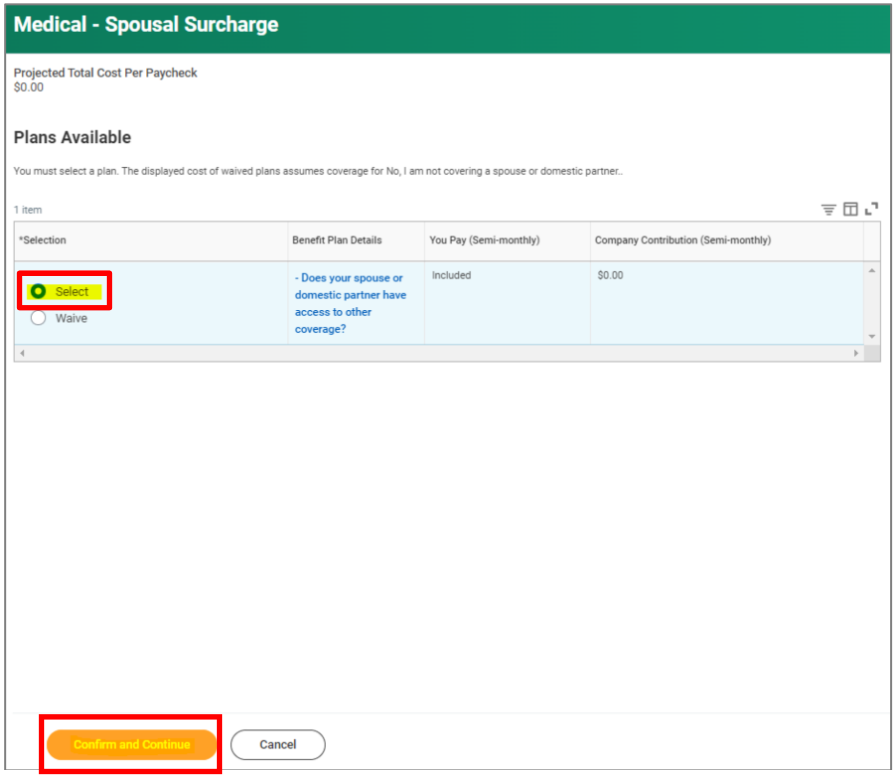
**IMPORTANT:**

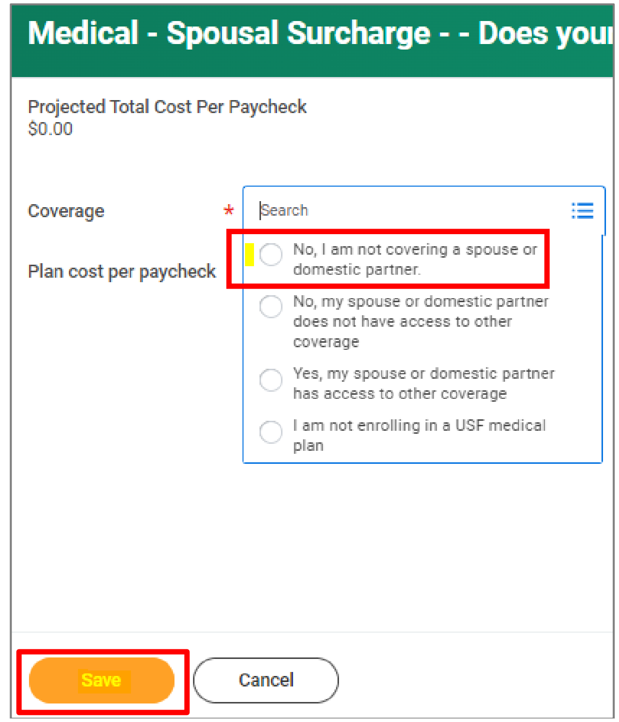
If the Dependent you are removing was your spouse or registered domestic partner and you are removing them from your Medical plan, **before submitting the task,** you need to amend the option you currently have selected for the **Medical – Spousal Surcharge**.

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 option from the **Coverage** drop-down list and click **Save**.

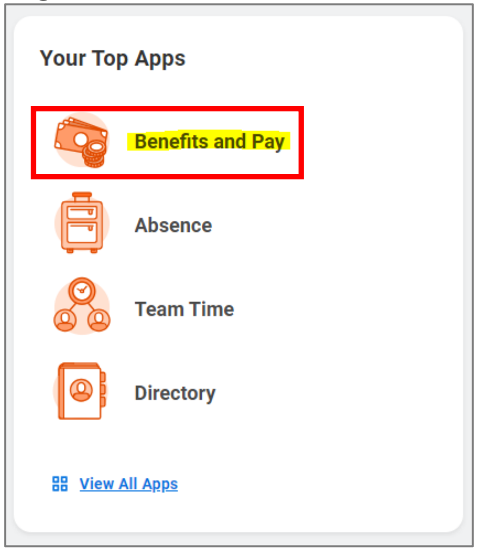
   - *No, I am not covering a spouse or domestic partner*.

## View or amend retirement savings contributions – 403(b)

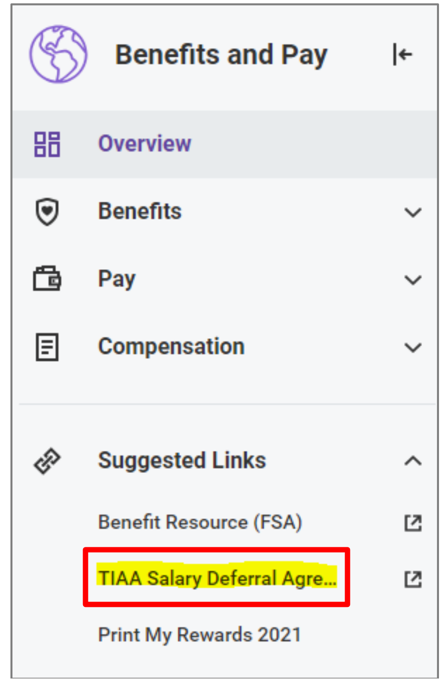
You can amend your 403(b) plan contributions **at any time**. You do **not** have to experience a Qualifying Event.

### 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**.



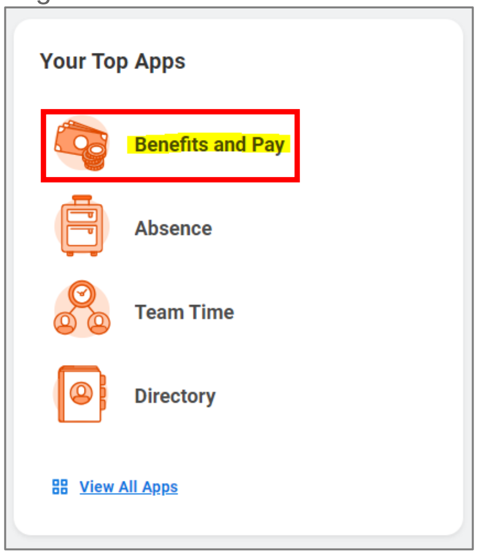

3. You will be logged into your TIAA retirement account. Please see this guide on myUSF, which contains further steps.

## View existing Flexible Spending Accounts (FSA)

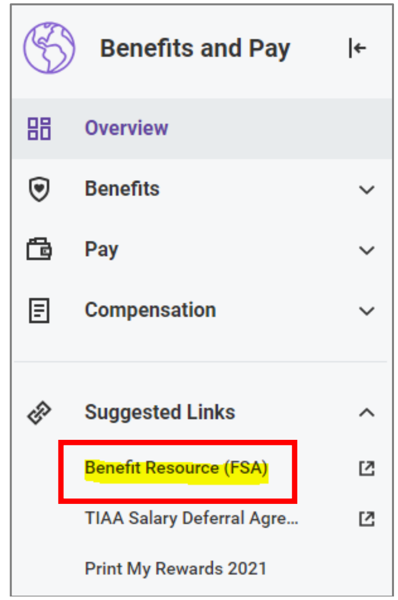
You can view your existing Flexible Spending Accounts (FSA) **at any time**. However, you cannot amend your election amount unless you experience a Qualifying Event.

**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.

## FSA enrollment due to a consistent Qualifying Event

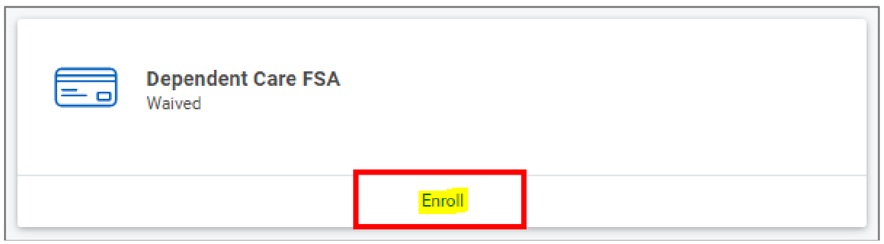
If you wish to **enroll** in FSA (Healthcare and/or Dependent Care), you do this on your New Hire event, or on your Open Enrollment event (Open Enrollment falls sometime Oct-Nov each year).

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.

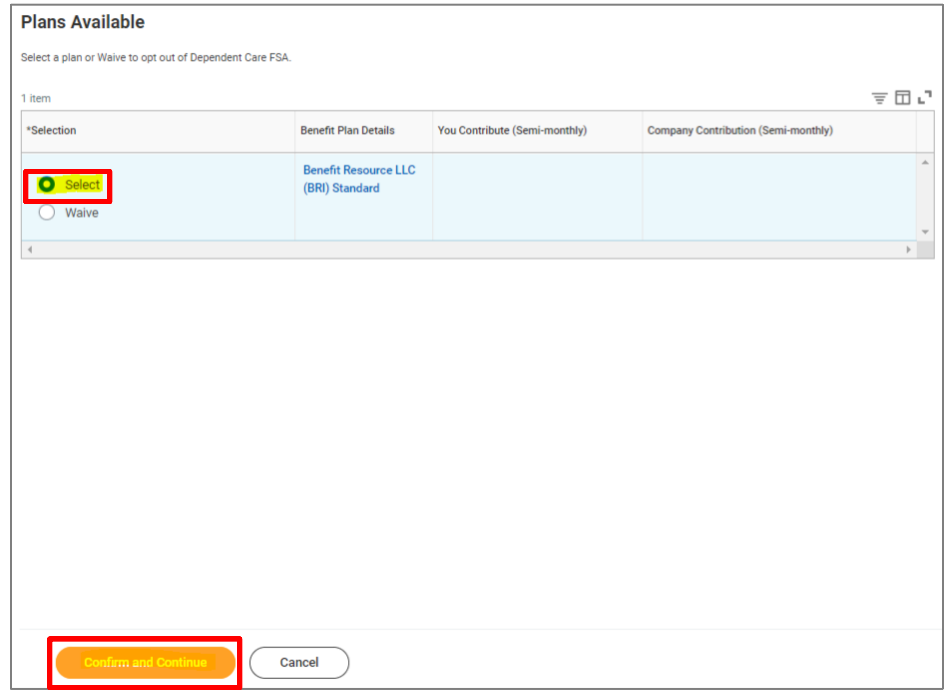
**Follow these steps on the task:**

### To enroll in Healthcare FSA:

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




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

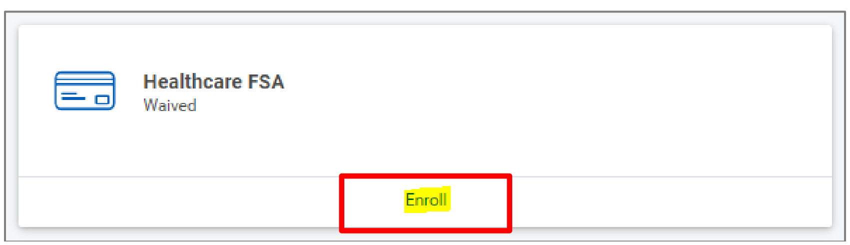



3. On the next page, enter either an **amount** (either per paycheck or the total annual amount) and click **Save**.

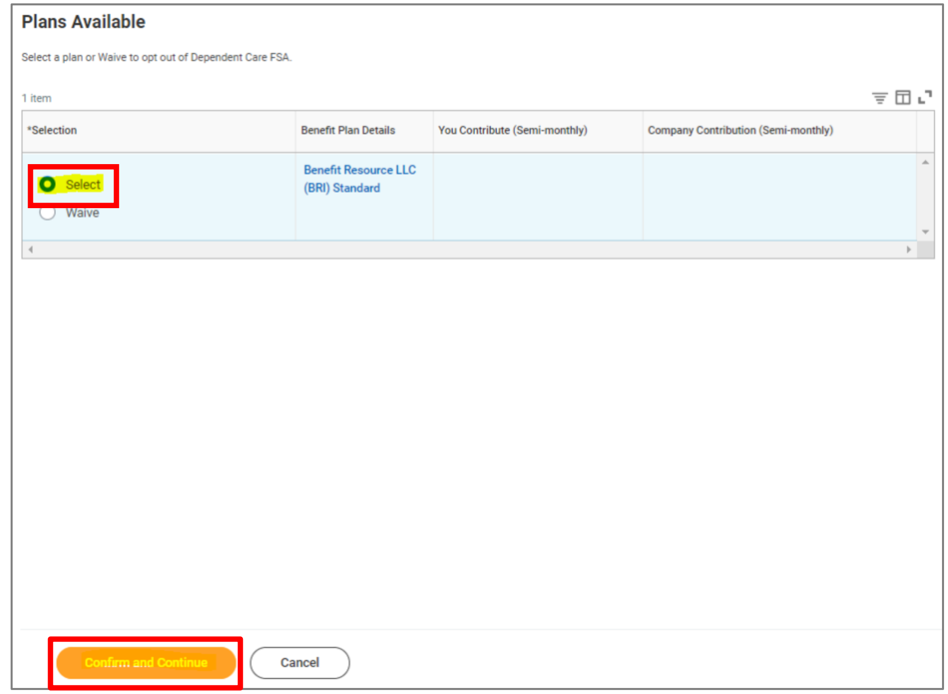
   The annual limit for 2023 is $5,000 ($2,500 if married, filing separately).

## To enroll in Dependent Care FSA:

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

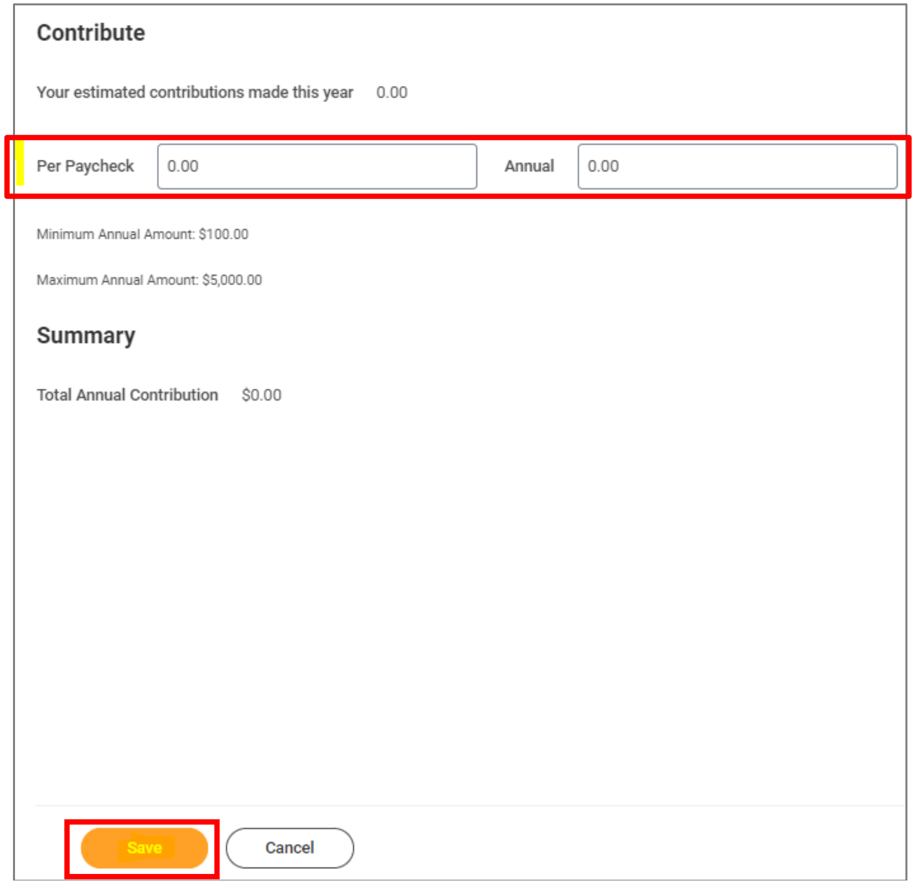


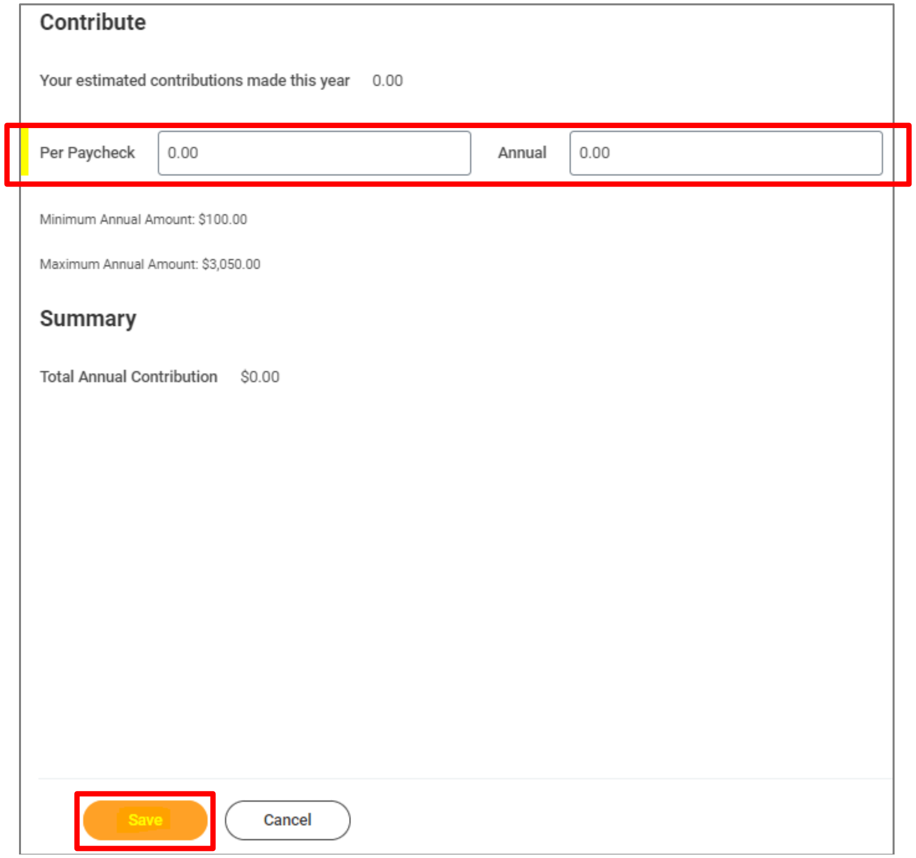

2. Click **Select** and click **Confirm and Continue**.




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 $3,050.

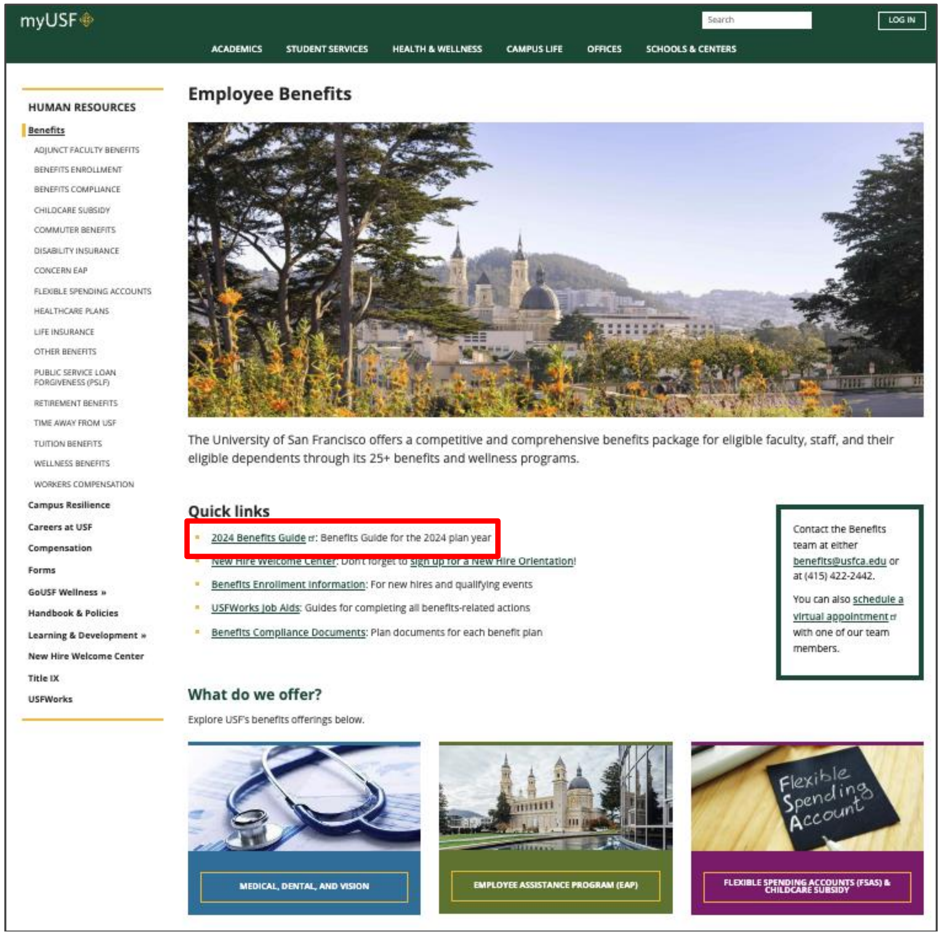



Contribute
Your estimated contributions made this year 0.00
Per Paycheck 0.00
Annual 0.00
Minimum Annual Amount: $100.00
Maximum Annual Amount: $3,050.00
Summary
Total Annual Contribution $0.00
Save
Cancel

## 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:




## 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