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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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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 if you wish to make Qualifying Event change.
Benefits: Amending Your Benefit Elections Due To A Qualifying Event  Faculty and Staff

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**.

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.
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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.
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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)

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.

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 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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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**.
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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.
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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.
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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.

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

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.
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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 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.
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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**.
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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**.
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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.
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**.
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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 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.**
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.

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.

   ![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.

   ![I Accept]

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

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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.

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.
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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.

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.
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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).
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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.
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.
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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

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**.
**Benefits:** Amending Your Benefit Elections Due To A Qualifying Event

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**.

   ![Medical - Spousal Surcharge](image)

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

2. 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

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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

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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.**
Benefits: Amending Your Benefit Elections Due To A Qualifying Event

Faculty and Staff

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

**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

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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:


2. Click Select and click Confirm and Continue.

The annual limit for 2023 is $3,050.
Benefits: Amending Your Benefit Elections Due To A Qualifying Event  Faculty and Staff

Contribute

Your estimated contributions made this year  0.00

Per Paycheck  0.00  Annual  0.00

Minimum Annual Amount: $100.00
Maximum Annual Amount: $1,050.00

Summary

Total Annual Contribution  0.00
Benefits: Amending Your Benefit Elections Due To A Qualifying Event

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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