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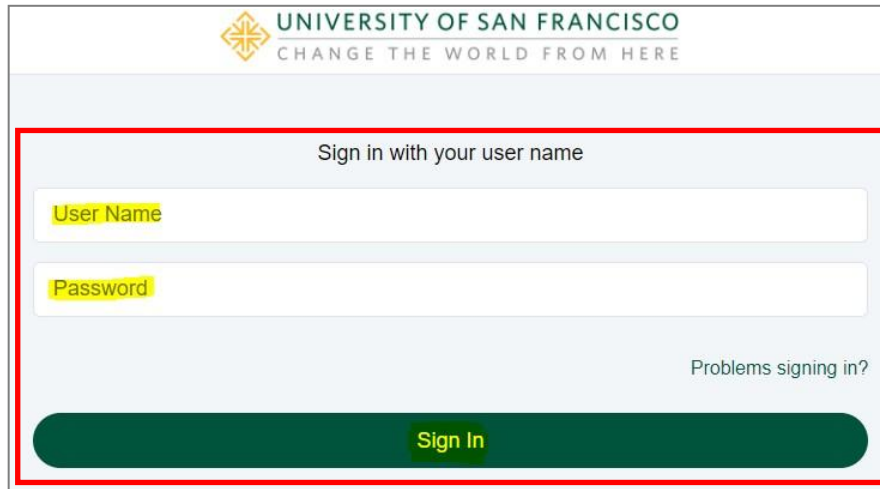
## How to submit your Open Enrollment Benefit Elections

During Open Enrollment, you can make changes to your Benefit Elections effective January 1 of the upcoming year.

Open Enrollment takes place sometime in October the preceding year, which will be confirmed each year via email and on myUSF.

### Follow these steps:

1. Log in to **USFWorks** using your USF username and password. Enter your **username** and **password**, and click **Sign In**.

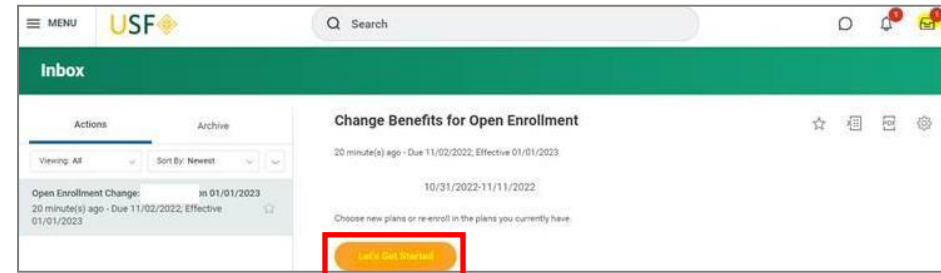


The login screen for the University of San Francisco (USF) features the university's logo and tagline "CHANGE THE WORLD FROM HERE". Below this, a red rectangular box highlights the login section. Inside this box, the text "Sign in with your user name" is centered. There are two input fields: "User Name" and "Password", both with yellow highlights. A "Sign In" button with a green highlight is at the bottom of the box. To the right of the box, there is a link that says "Problems signing in?".

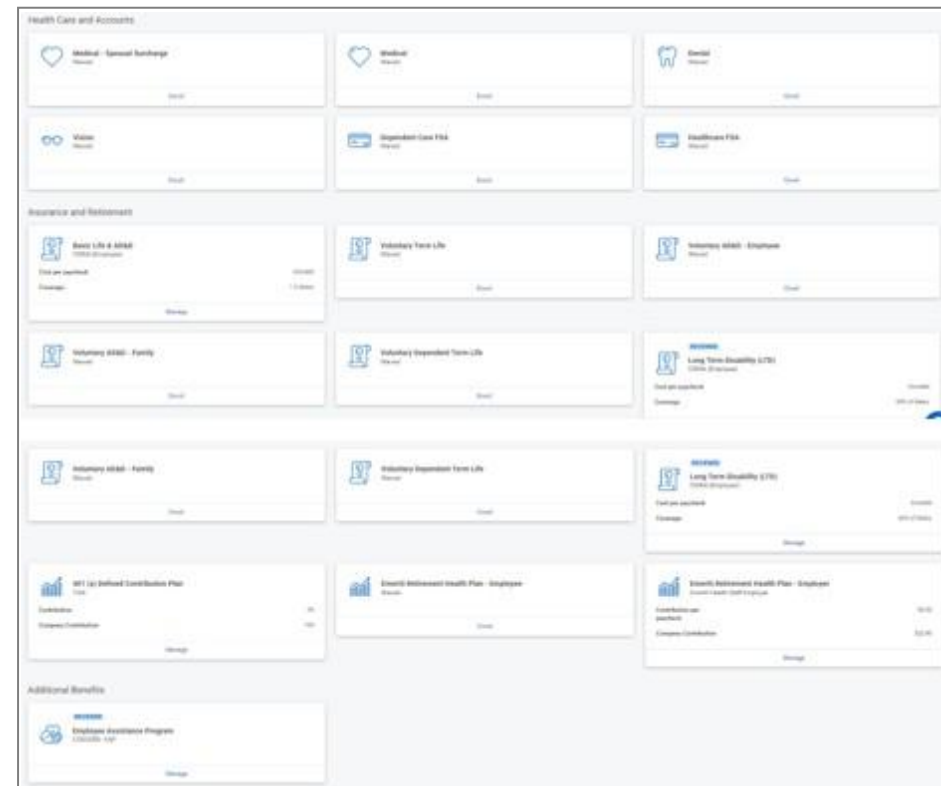
2. Once you are logged in, go to your USFWorks Inbox by clicking on the mail symbol on the top right-hand side.



3. Open the **Change Benefits for Open Enrollment** message and click **Let's Get Started**.



4. On the next page, you will see a number of Benefits cards.



If you do **not** wish to make any changes for the upcoming year, you simply need to submit your elections. Your current elections will automatically roll over (**with the exception of** the Medical Waiver Plan [University of San Francisco Waiver] and FSA, which require annual re-enrollment). Please skip to step 5.

If you wish to make changes, please go into the relevant cards to make your changes and then submit your elections.

The following are employer-paid plans for which no action is required:

- Long Term Disability (LTD)
- 401 (a) Defined Contribution Plan
- TIAA Retirement Healthcare Savings Plan – Employer
- Employee Assistance Program

### Important note regarding Flexible Spending Accounts (FSA):

Flexible Spending Accounts (FSA) elections do **not** automatically roll over to the next year. If you wish to continue to have Dependent Care and/or Healthcare FSA for the upcoming year, you **must re-enroll**. See [pages 26-29](#) for the steps.

### Important note regarding the Medical Waiver Plan (University of San Francisco Waiver):

In order to continue receiving the \$75/month in taxable income, you **must re-enroll**. For Medical, you need to select the 'University of San Francisco Waiver' (Medical Waiver Plan). After submitting your Open Enrollment task, you will receive a Medical Waiver Attestation task in your USFWorks inbox to accept and submit.

If required, you will be asked to complete and return the San Francisco Healthcare Security Ordinance (SF HCSO) Waiver Form available at <https://myusf.usfca.edu/human-resources/forms> and to email the completed form to [benefits@usfca.edu](mailto:benefits@usfca.edu).

If your coverage is through an “individual market” plan, you are not eligible to enroll in the Medical Waiver Plan and should leave all three medical options as waived. If this is the case, please also inform the Benefits Team at [benefits@usfca.edu](mailto:benefits@usfca.edu).

### Important note regarding life insurance Beneficiaries:

If you do not have a Beneficiary added onto any USF life insurance plans in which you are enrolled, you are required to add at least one. See [pages 15-19](#) for the steps.

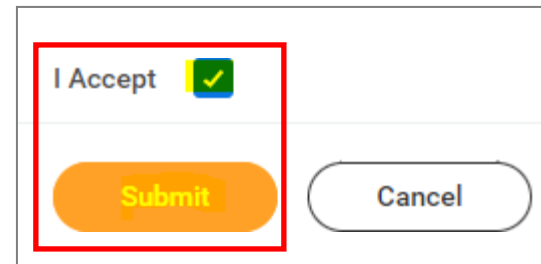
### Important note regarding the Spousal Surcharge:

If you add or remove your spouse or registered domestic partner as a Dependent on your Medical, Dental and or Vision plans, you will need to update your selected option in the **Medical – Spousal Surcharge** card. See [pages 4-5](#) for the steps.

5. Once you have made your elections, click **Review and Sign**.



6. On the next page, review to make sure everything is correct, read the legal notice, **attach proof of relationship** if you have added any Dependents (e.g. marriage certificate, birth certificate), **check the checkbox** next to *I Accept*, and click **Submit**.



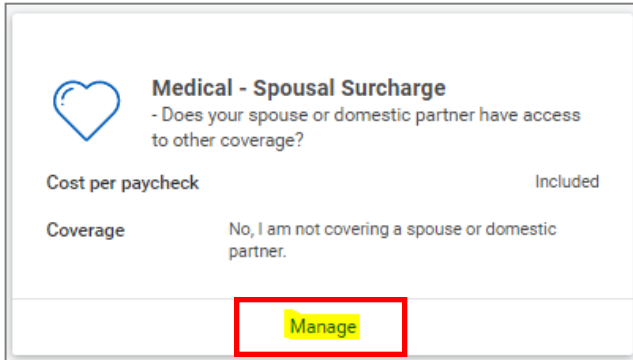
7. On the next page, click **Done**.
8. Your submission will be automatically routed to your HR Benefits partner for processing.

## Making changes

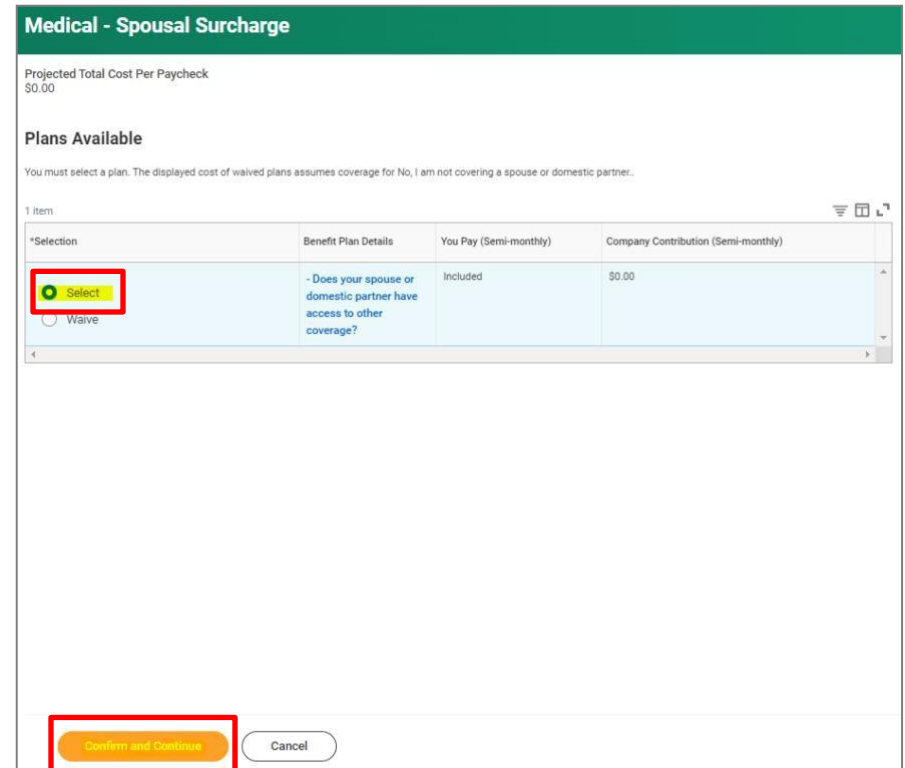
### Medical – Spousal Surcharge

Follow these steps:

1. On the **Medical – Spousal Surcharge** Benefit card, click **Manage**.



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



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

If you are enrolling your spouse or registered domestic partner (RDP) in your Medical Plan:

- *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)*

If you are **not** enrolling your spouse/RDP in your Medical Plan, or do not have a spouse/RDP the selected option needs to be:

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

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

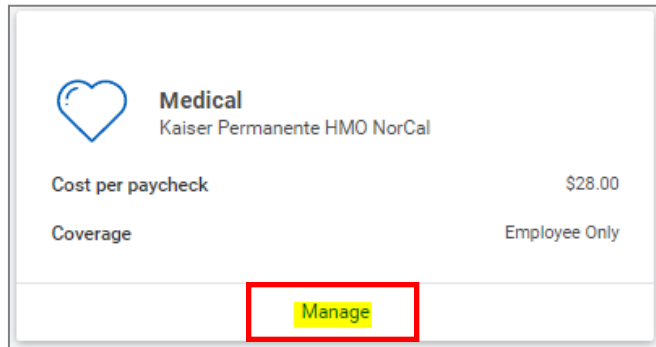
- *I am not enrolling in a USF medical plan.*

The screenshot shows a web form titled "Medical - Spousal Surcharge - - Does your". Below the title, it says "Projected Total Cost Per Paycheck: \$0.00". The form has a section labeled "Coverage" with a sub-label "Plan cost per paycheck". A dropdown menu is open, showing four radio button 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", and "I am not enrolling in a USF medical plan". At the bottom of the form, there are two buttons: "Save" and "Cancel".

## Medical

Follow these steps:

1. On the **Medical** Benefit card, click **Manage**.



**Medical**  
Kaiser Permanente HMO NorCal

Cost per paycheck \$28.00

Coverage Employee Only

**Manage**

2. On the next page, if enrolling in a USF Medical Plan select the one you prefer:

- *Anthem Blue Cross PPO*
- *Kaiser Permanente HMO*

If you are **not** enrolling in a USF Medical Plan because you and/or your Dependents have healthcare coverage elsewhere that is not an “individual market” plan\*, select:

- *University of San Francisco Waiver* (also known as the Medical Waiver Plan)

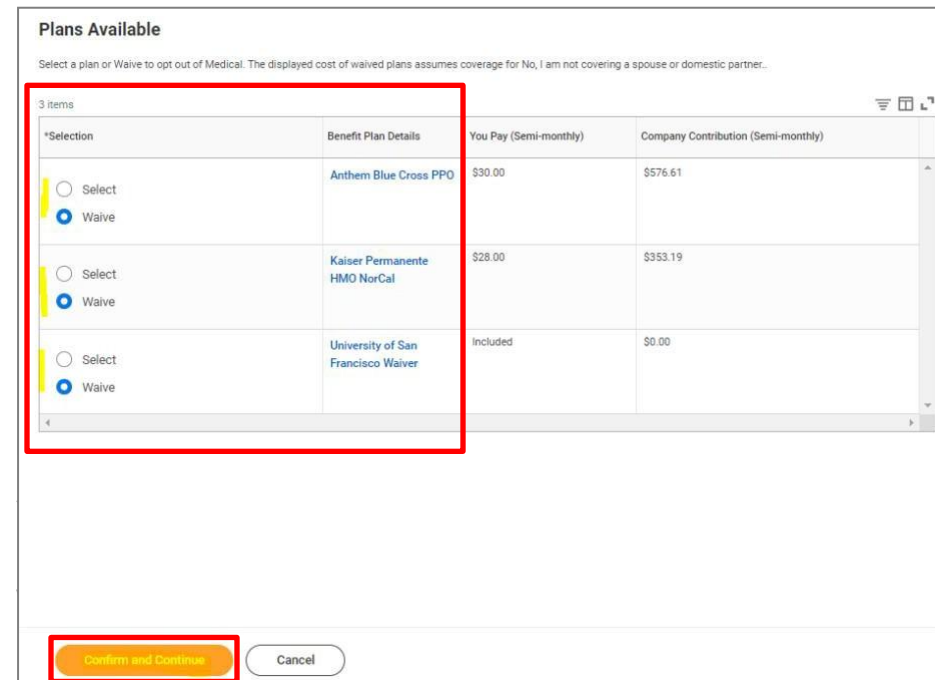
In this case, will receive \$75/month in taxable income. Annual re-enrollment in the Medical Waiver plan is required during Open Enrollment.

If your other coverage is considered an “individual market” plan, you are **not** eligible to enroll in the USF Medical Waiver plan. In this case, you should **waive all three options**.

\*“Individual market plans” include plans sold in Federal or State Exchanges or outside of Exchanges in the individual insurance market.

Then click **Confirm and Continue**.

3.



**Plans Available**

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for No, I am not covering a spouse or domestic partner...

*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	\$30.00	\$576.61
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Kaiser Permanente HMO NorCal	\$28.00	\$353.19
<input type="radio"/> Select <input checked="" type="radio"/> Waive	University of San Francisco Waiver	Included	\$0.00

**Confirm and Continue** Cancel

**Dependents**

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

Coverage x Employee Only

Search

Plan cost per paycheck

- ☒ Employee Only
- ☐ Employee Plus One
- ☐ Employee Plus Family
- ☐ Employee + Domestic Partner and Children
- ☐ Employee plus Domestic Partner

**Add New Dependent**

**Save** Cancel

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

If you have not enrolled in 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 Open Enrollment task, you will receive **another task** in your USFWorks Inbox to complete.

- After submitting your elections, go back to your USFWorks Inbox.

- Click the **Open Enrollment Change** message and then on **Let's Get Started**.

USF

Search

**Inbox**

Actions Archive

Viewing All Sort By Newest

**Open Enrollment Change** on 01/01/2023  
20 minute(s) ago · Due 11/02/2022; Effective 01/01/2023

**Change Benefits for Open Enrollment**  
20 minute(s) ago · Due 11/02/2022; Effective 01/01/2023

OE - Adjunct Kaiser 10/31/2022-11/11/2022

Choose new plans or re-enroll in the plans you currently have.

**Let's Get Started**

- On the next page, read the **Medical Waiver Attestation**, check the **checkbox** next to *I Accept* and click **Submit**.

**Documents**

Document Medical Waiver Attestation

Signature Statement I am waiving an offer of affordable, minimum value medical coverage for myself and eligible dependents and will receive \$75 per month in taxable income.

I understand my dependents and I may not be eligible to enroll for benefits until USF's next annual open enrollment period. However, I and/or my dependents may become eligible to enroll if there is a qualifying event, and I request enrollment within 30 days of the eligible qualifying event.

I attest that I and none of my tax dependents are enrolled in coverage that is considered an "individual market" plan, including plans sold in Federal or State Exchanges or outside of Exchanges in the individual insurance market.

I understand that I will need to re-certify annually during Open Enrollment.

**I Agree** ☒

**Submit** Save for Later Cancel

- The Benefits Team will then send you another form to fill in and return by email to [benefits@usfca.edu](mailto: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 this form as soon as possible.

### Important note:

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

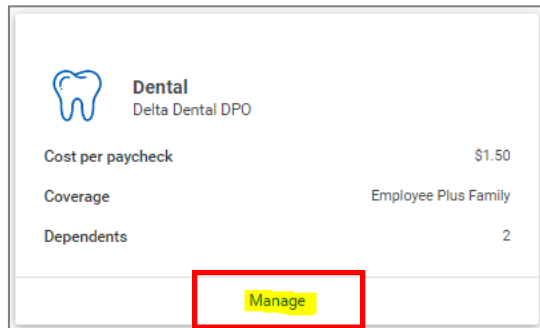
The Medical Waiver Attestation task is not always generated after a resubmission of the Open Enrollment task.

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

## Dental

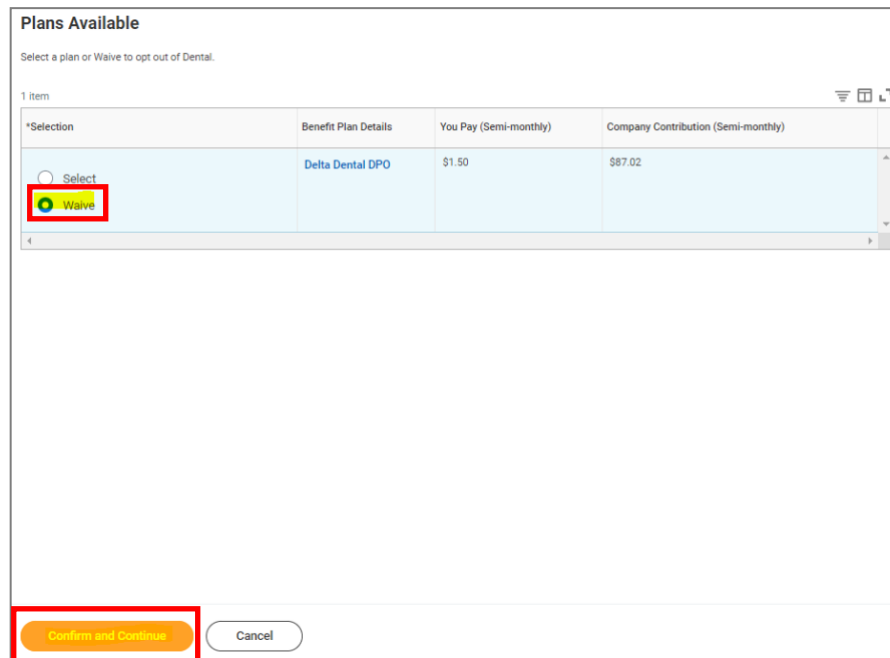
Follow these steps if you are currently enrolled and would like to disenroll effective January 1:

1. On the **Dental** Benefit card, click **Manage**.



The screenshot shows a 'Dental' benefit card for 'Delta Dental DPO'. It lists 'Cost per paycheck' as \$1.50, 'Coverage' as 'Employee Plus Family', and 'Dependents' as 2. A red box highlights the 'Manage' button at the bottom.

2. If you wish to enroll in the Delta Dental Plan, select **Waive** and click **Confirm and Continue**.



The screenshot shows the 'Plans Available' screen with the instruction 'Select a plan or Waive to opt out of Dental.' Below this is a table with one item:

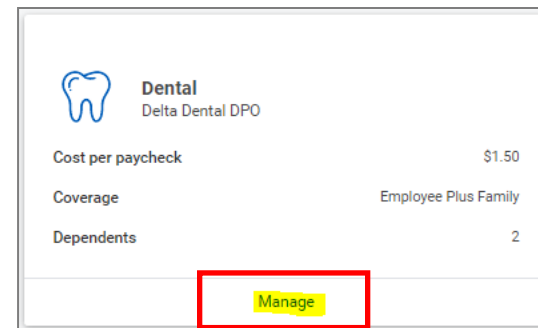
*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Waive	Delta Dental DPO	\$1.50	\$87.02

At the bottom, a red box highlights the 'Confirm and Continue' button.

Follow these steps if you are currently enrolled and would like to make changes to your Dependents effective January 1:

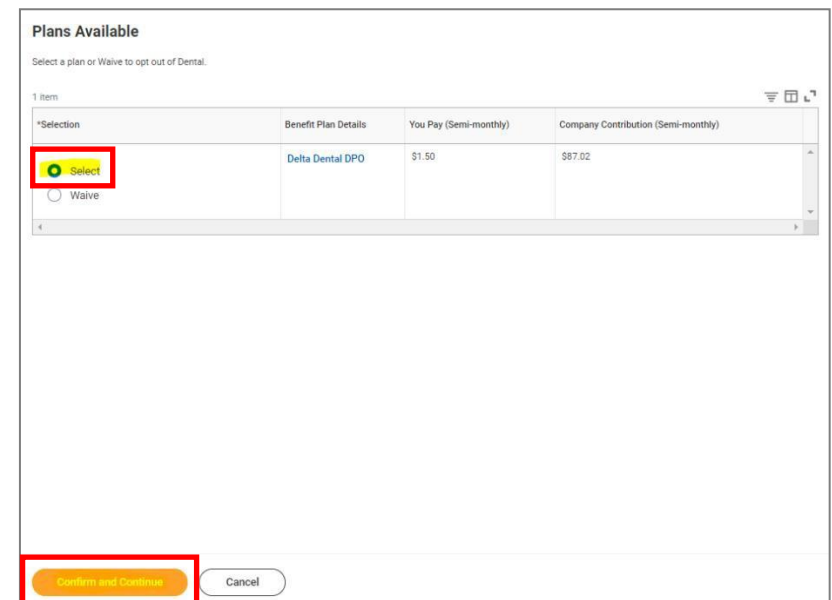
1. If you wish to enroll in the USF Dental Plan, on the **Dental** Benefit card, click **Manage**.

If you do **not** wish to enroll, you can ignore this Benefit card.



The screenshot shows a 'Dental' benefit card for 'Delta Dental DPO'. It lists 'Cost per paycheck' as \$1.50, 'Coverage' as 'Employee Plus Family', and 'Dependents' as 2. A red box highlights the 'Manage' button at the bottom.

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



The screenshot shows the 'Plans Available' screen with the instruction 'Select a plan or Waive to opt out of Dental.' Below this is a table with one item:

*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select	Delta Dental DPO	\$1.50	\$87.02

At the bottom, a red box highlights the 'Confirm and Continue' button.

3. If you have selected enroll on the previous page, there are more

steps. On the next page, select the **Coverage** level, add any Dependents, if necessary (see [here](#) for the steps), and click **Save**.

### Dependents

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

Coverage

✕ Employee Only

⋮

Search

☒ Employee Only

☐ Employee Plus One

☐ Employee Plus Family

☐ Employee + Domestic Partner and Children

☐ Employee plus Domestic Partner

Add New Dependent

Plan cost per paycheck

Save

Cancel

## Vision

Follow these steps if you are currently enrolled and would like to disenroll effective January 1:

1. On the **Vision** Benefit card, click **Manage**.

2. If you wish to enroll in the VSP Vision Plan, select **Waive** and click **Confirm and Continue**.

*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input type="radio"/> Select <input checked="" type="radio"/> <b>Waive</b>	VSP	\$6.31	\$6.59

Follow these steps if you are currently enrolled and would like to make changes to your Dependents effective January 1:

1. If you wish to enroll in the USF Dental Plan, on the **Dental** Benefit card, click **Manage**.

If you do **not** wish to enroll, you can ignore this Benefit card.

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

*Selection	Benefit Plan Details	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> <b>Select</b> <input type="radio"/> Waive	Delta Dental DPO	\$1.50	\$87.02

3. If you have selected enroll on the previous page, there are more steps. On the next page, select the **Coverage** level, add any Dependents, if necessary (see [here](#) for the steps), and click **Save**.

**Dependents**

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

Coverage \* × Employee Only

Search

Plan cost per paycheck

**Add New Dependent**

- ☒ Employee Only
- ☐ Employee Plus One
- ☐ Employee Plus Family
- ☐ Employee + Domestic Partner and Children
- ☐ Employee plus Domestic Partner

**Save** Cancel

## How to add a Dependent

Follow these steps, if you wish to add a Dependent:

1. On the **Coverage** level page for the Benefit plan (Medical, Dental or Vision), select the appropriate Coverage level and then click **Add New Dependent**. You will need to repeat the add new dependent process for each dependent you wish to add.

**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	Child	01/01/1980

**Save** **Cancel**

### Please note:

If you wish to enroll a Dependent who was previously on one of your Benefit plans, they will already appear as a Dependent in the list of previously saved Dependents, so **you won't need to add their details again** – you just **need to select the correct Coverage level** from the drop-down list, **check the checkbox** next to their name) and click on **Save**. Skip to step 8.

**Add My Dependent From Enrollment**

Instructional Text  
Click OK to add dependents.

**OK** **Cancel**

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

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

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

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

6. If you do not have the SSN/ITIN/foreign National ID for your Dependent 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 guide on how to do this.

7. Click **Save**.

8. On the next page, ensure the checkbox is checked next to your Dependent'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	Child	01/01/1980

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

9. You will then be taken back to the screen with the Benefits cards.
10. If you have **added your spouse/registered domestic partner** as a Dependent, please ensure you amend the selected option for the **Medical – Spousal Surcharge** (see [page 4-5](#)).



## How to remove a Dependent

Follow these steps, if you wish to remove a Dependent:

1. On the **Coverage** level page for the Benefit plan (Medical, Dental or Vision), select the appropriate Coverage level, uncheck the checkbox is checked next to your Dependent's name and click **Save**.

**Dependents**

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

Coverage: Employee Only

Plan cost per paycheck: Employee Only

Add New Dependent

2 items

Select	Dependent	Relationship	Date of Birth
<input type="checkbox"/>	Mosiah Sterling	Child	06/03/2007
<input type="checkbox"/>	Jayland Bailey	Child	09/12/2001

**Save** Cancel

2. If you **remove your spouse/registered domestic partner** as a Dependent, please ensure you amend the selected option for the **Medical – Spousal Surcharge** (see [page 4-5](#)).

## Basic Life & AD&D

You are automatically enrolled in the Basic Life & AD&D plan, but you need to designate a Beneficiary.

If you do not currently have a Beneficiary, you need to add one before submitting your Open Enrollment Benefit Elections.

You can manage your Beneficiaries at any time (i.e. add, remove, amend percentage allocations). For steps on how to do so, see the [Managing Life Insurance Beneficiaries](#).

Follow these steps to add a life insurance Beneficiary:

1. On the **Basic Life & AD&D** Benefit card, click **Manage**.

2. Click **Confirm and Continue**.

1. On the next page, click the **'Plus, +'** symbol and then **Add New Beneficiary or Trust**.

2. To add a new Beneficiary select **Add New Beneficiary** or **Add New Trust**, depending on the type of Beneficiary you are adding, and then click **Continue**.

**Required Information** to enter:

- First and last name
- Relationship
- Address
- Type (Home or Work)
- *We also recommend adding your Beneficiary's phone number, email address, date of birth, legal sex and National ID too (this is their SSN or ITIN, or National ID from country of citizenship if ineligible for an SSN or ITIN).*
- **Note:** Trust Beneficiary designations will require trust name, trustee name [first and last]. Additionally, Trust ID, trust date, and contact information [address, phone number and email address] for Trustee

*may be provided for ease of administration.*

### Important note:

An existing Beneficiary or Trust can be added by simply selecting the relevant option (Existing Beneficiary Persons / Existing Trusts) and clicking on their name.

### Add New Beneficiary or Trust

A beneficiary is the person or entity you name to receive benefits or hold assets on behalf of a beneficiary or beneficiary.

Would you like to add a new beneficiary or trust?

☒ Add New Beneficiary  
☐ Add New Trust

Continue

Cancel

### 3. If adding a New Beneficiary:

### Add New Beneficiary or Trust

Relationship

Use as Beneficiary ☒

Date of Birth

MM/DD/YYYY

Age (empty)

Legal Sex

select one

Allow Duplicate Name ☐

Legal Name

Contact Information

National IDs

Additional Government IDs

Country

United States of America

Prefix

First Name

Middle Name

Last Name

Suffix

OK

Cancel

Legal Name

Contact Information

National IDs

Additional Government IDs

Phone

Add

Address

Add

Email

Add

Instant Messenger

Add

Web Address

Add

OK

Cancel



4. If adding a **New Trust** as a Beneficiary:

**Add New Beneficiary or Trust**

Trust Name

Trust ID

Trust Date MM/DD/YYYY

**Trustee Contact Information**

**Trustee Name**

Country x United States of America

Prefix

First Name

Middle Name

Last Name

Suffix

Remove

Add

Phone

Add

Email Address

Add

Address

Add

OK Cancel

5. Once you have entered the information, click **OK**.

OK Cancel

- Check that your Beneficiary's name now appears and then allocate the **percentage** you would like them to receive.

**Beneficiaries**

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

**Primary Beneficiaries:** 1 item

Beneficiary	Percentage
Beneficiary's name appears here	100

**Secondary Beneficiaries:** 0 items

Beneficiary	Percentage
No Data	

**Save** **Cancel**

- Add additional Beneficiaries by following the previous steps (9-14). Click **Save** when you are done.

*If you have more than one Beneficiary, enter Allocations for Primary and/or Secondary Beneficiary.*

*Percentages MUST total 100%. You may also add additional Beneficiaries to whom you may allocate Secondary Percentage totaling 100%. You may NOT designate the same Beneficiary more than once within a single Benefit plan.*

**Primary Beneficiaries:** 1 item

Beneficiary	Percentage
Mouse Mouse	100

**Secondary Beneficiaries:** 2 items

Beneficiary	Percentage
Mulky Mouse	50
Test Trust	50

- You will be taken back to the page with the Benefits cards.

If you wish to elect any of the following voluntary life insurance plans, you must also add at least one Beneficiary to these plans. These plans are:

- Voluntary AD&D – Employee\*
- Voluntary AD&D – Family\*
- Voluntary Term Life

If you wish to add the same Beneficiary(s) as the one(s) you designated on your *Basic Life & AD&D* plan, an existing Beneficiary or Trust can be added by simply selecting the relevant option (**Existing Beneficiary Persons / Existing Trusts**) and clicking on their name.

\* You may only elect **one** Voluntary AD&D Plan (i.e. Employee or Family).

**Beneficiaries**

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

**Primary Beneficiaries:**

- Existing Beneficiary Persons
- Existing Trusts
- Add New Beneficiary or Trust
- Search

**NOTE:** Previous Beneficiaries for your plan(s) will still appear on your USFWorks profile.

## Voluntary AD&D and Term Life plans (optional)

If you also elect any of the following voluntary life insurance plans, you must go into each Benefit card and add at least one Beneficiary on these plans. These plans are:

- Voluntary AD&D – Employee\*
- Voluntary AD&D – Family\*
- Voluntary Term Life

If you are currently enrolled in one of the above plans, please ensure that you have already previously added a Beneficiary(s).

If you wish to add the same Beneficiary(s) as the one(s) you designated on your *Basic Life & AD&D* plan, an existing Beneficiary or Trust can be added by simply selecting the relevant option (**Existing Beneficiary Persons / Existing Trusts**) and clicking on their name.

\* You may only elect **one** Voluntary AD&D Plan (i.e. Employee or Family).

## Voluntary AD&D - Family – Ensure you have eligible Dependents

If enrolling in **Voluntary AD&D – Family** coverage, your spouse/RDP will not be covered after age 70, and your unmarried children will not be covered after age 26. For coverage information, see the [Life & AD&D Insurance](#) page on myUSF.

If you are currently enrolled in **Voluntary AD&D – Family** and you no

longer have eligible Dependents for this plan (i.e. spouse/RDP up to age 70, unmarried child[ren] up to age 26), you must disenroll. You still have the option to enroll in **Voluntary AD&D – Employee Only** instead.



## Dependent Care FSA (optional)

If you do **not** wish to enroll in Dependent Care FSA for the upcoming year, you can ignore this Benefit card.

### Important:

Dependent Care FSA elections do **not** automatically continue from year to year; you must actively enroll each year during Open Enrollment.

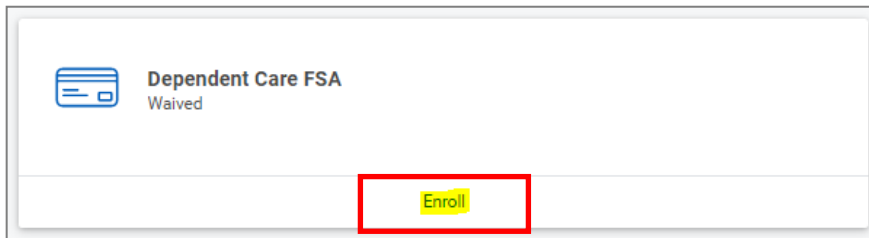
If electing Dependent Care FSA, you are electing an annual amount that will be deducted pre-tax from your paycheck. Please do **not** include any **USF Child Care Subsidy** amount. However, **both** your own contribution plus the subsidy will go towards your Dependent Care FSA, which you can manage on Benefit Resource (BRI).

Funds will be available for claims as they are contributed.

You can find more information about the Child Care Subsidy [here](#) on myUSF.

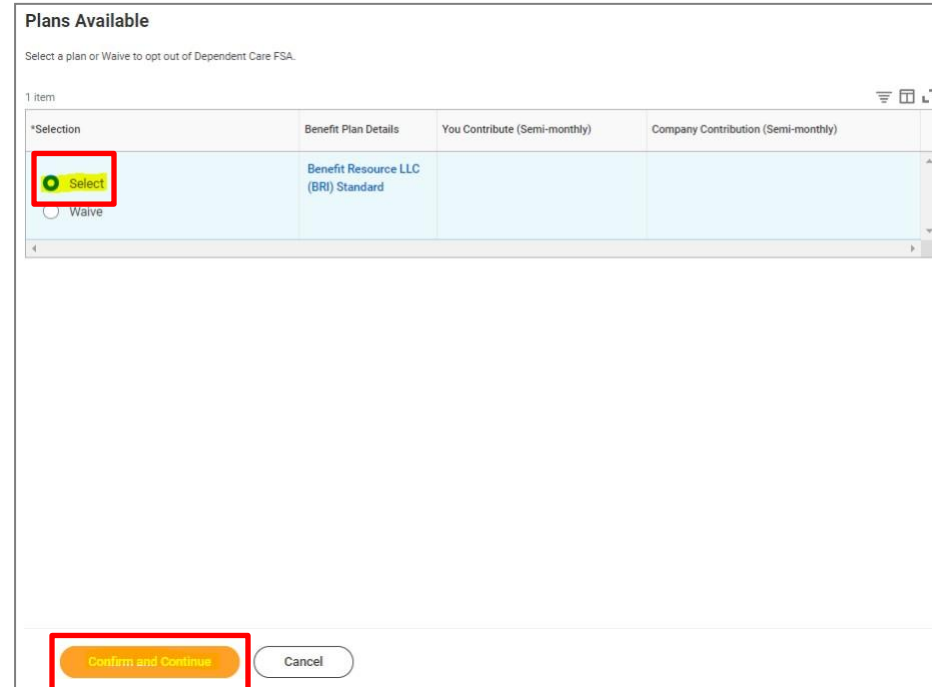
### Follow these steps if you wish to enroll:

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



The screenshot shows a card titled "Dependent Care FSA" with a status of "Waived". At the bottom right of the card, there is a yellow button labeled "Enroll" which is highlighted with a red rectangular box.

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



The screenshot shows the "Plans Available" section of a web interface. It includes a table with the following columns: "Selection", "Benefit Plan Details", "You Contribute (Semi-monthly)", and "Company Contribution (Semi-monthly)". One item is listed: "Benefit Resource LLC (BRI) Standard". The "Selection" column for this item has a radio button labeled "Select" (which is highlighted with a red box) and another radio button labeled "Waive". Below the table, there are two buttons: "Confirm and Continue" (highlighted with a red box) and "Cancel".

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

The annual limit \$7,500 (\$3,750 if married, filing separately).

Contribute

Your estimated contributions made this year0.00

Per Paycheck

0.00

Annual

0.00

Minimum Annual Amount: \$100.00

Maximum Annual Amount: \$5,000.00

Summary

Total Annual Contribution\$0.00

Save

Cancel

## Healthcare FSA (optional)

If you do **not** wish to enroll in Healthcare FSA for the upcoming year, you can ignore this Benefit card.

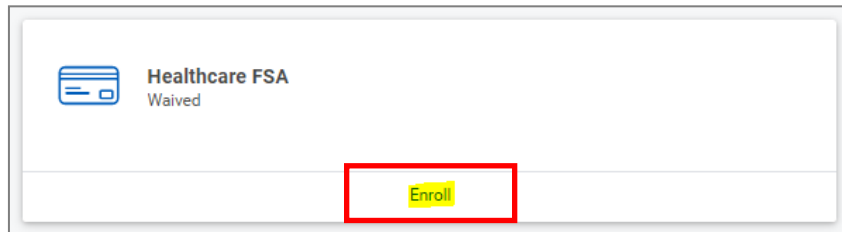
### Important:

Healthcare FSA elections do **not** automatically continue from year to year; you must actively enroll each year during Open Enrollment.

If electing Healthcare FSA, you are electing an annual amount that will be deducted from your paycheck pre-tax, although the total annual amount you elect will be available to you immediately. You can manage your Healthcare FSA on Benefit Resource (BRI).

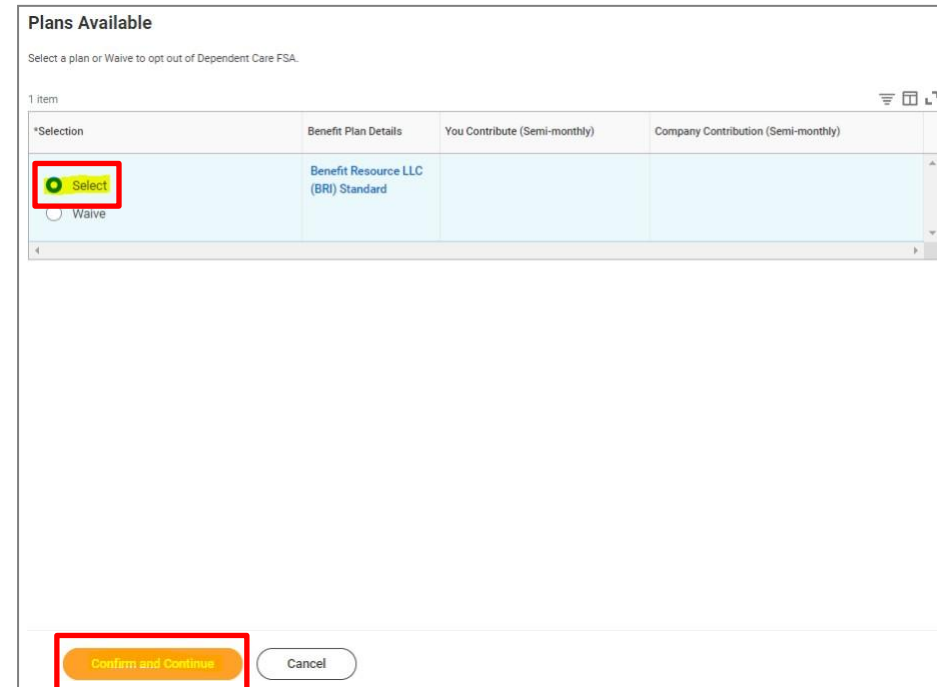
Follow these steps if you wish to enroll:

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



The screenshot shows a 'Healthcare FSA' card with a 'Waived' status. At the bottom right of the card, there is a yellow 'Enroll' button, which is highlighted with a red rectangular box.

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



The screenshot shows the 'Plans Available' section. It includes a table with the following columns: 'Selection', 'Benefit Plan Details', 'You Contribute (Semi-monthly)', and 'Company Contribution (Semi-monthly)'. The table contains one item: 'Benefit Resource LLC (BRI) Standard'. The 'Selection' column has a radio button labeled 'Select' (which is highlighted with a red box) and another radio button labeled 'Waive'. Below the table, there are two buttons: 'Confirm and Continue' (highlighted with a red box) and 'Cancel'.

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

For the latest Healthcare FSA annual limit, please visit the FSA page [here](#) on myUSF.

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

## TIAA Retirement Healthcare Savings Plan – Employee contribution (optional)

USF will make its own contributions into a plan for you if you are aged 40 or over (10-year vesting period).

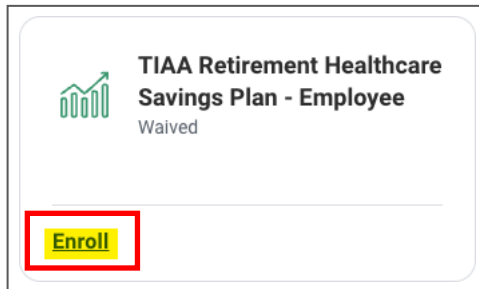
You can make your own post-tax contributions if you are aged 21 or over.

If you do **not** wish to enroll in contribute your own post-tax dollars into your TIAA Retirement Healthcare Savings Plan, you can ignore this Benefit card.

### Follow these steps:

**If you are currently not enrolled if you wish to enroll:**

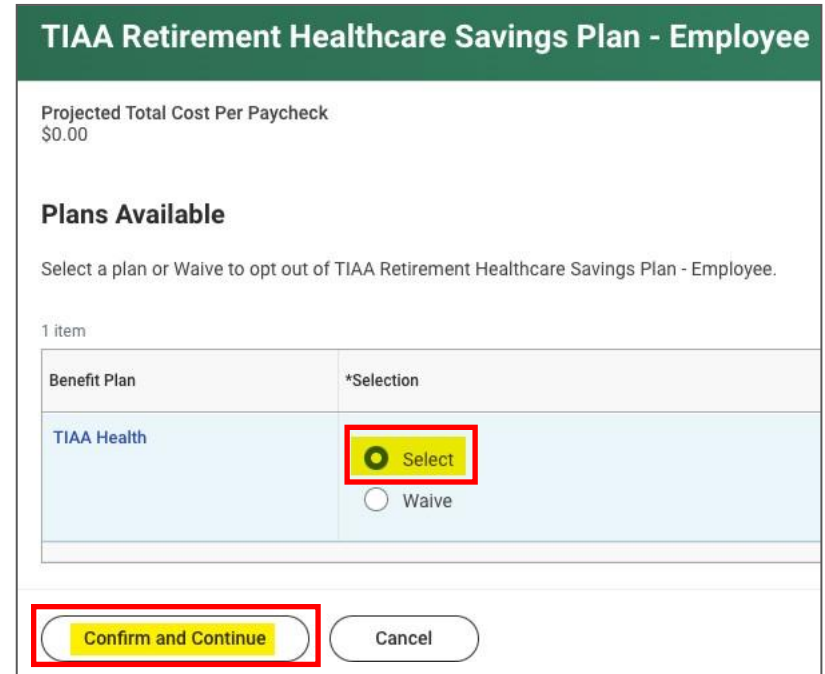
1. On the **TIAA Retirement Healthcare Savings Plan - Employee** Benefit card, click **Enroll**.



**TIAA Retirement Healthcare Savings Plan - Employee**  
Waived

**Enroll**

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



**TIAA Retirement Healthcare Savings Plan - Employee**

Projected Total Cost Per Paycheck  
\$0.00

**Plans Available**

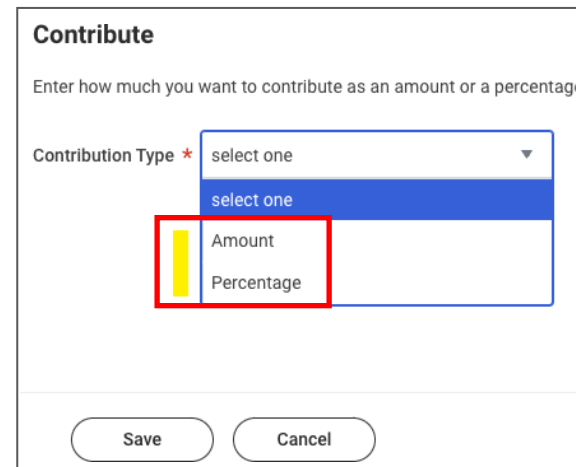
Select a plan or Waive to opt out of TIAA Retirement Healthcare Savings Plan - Employee.

1 item

Benefit Plan	*Selection
TIAA Health	<input checked="" type="radio"/> Select <input type="radio"/> Waive

**Confirm and Continue** **Cancel**

3. On the next page, select either **Amount** or **Contribution** from the drop-down list.



**Contribute**

Enter how much you want to contribute as an amount or a percentage.

Contribution Type \* select one

select one

**Amount**  
Percentage

**Save** **Cancel**

4. Enter the per paycheck **contribution amount** (e.g. \$50.00) and click **Save**.

### Contribute

Enter how much you want to contribute as an amount or a percentage.

Contribution Type
\*
Amount

Per Paycheck Contribution (\$)
0.00


Minimum Amount: \$0.50

Maximum Amount: \$50,000.00

Save
Cancel

If you are currently enrolled and wish to amend your employee contribution amount:

1. On the next page, click **Manage** under the **TIAA Retirement Healthcare Savings Plan - Employee** card.



### TIAA Retirement Healthcare Savings Plan - Employee

TIAA Health

Contribution 5%

Manage

2. On the next page, ensure that **Select** is still selected and click **Confirm and Continue**.

### TIAA Retirement Healthcare Savings Plan - Employee

Projected Total Cost Per Paycheck  
\$0.00

### Plans Available

Select a plan or Waive to opt out of TIAA Retirement Healthcare Savings Plan - Employee.

1 item

Benefit Plan	*Selection
TIAA Health	<input checked="" type="radio"/> Select <input type="radio"/> Waive

Confirm and Continue
Cancel

3. On the next page, select either **Amount** or **Contribution** from the drop-down list.

### Contribute

Enter how much you want to contribute as an amount or a percentage.

Contribution Type
\*

select one
select one
Amount
Percentage

Save
Cancel

4. Enter the per paycheck **contribution amount** (e.g. \$50.00) and click **Save**.

**Contribute**

Enter how much you want to contribute as an amount or a percentage.

Contribution Type \* Amount ▼

Per Paycheck Contribution (\$) 0.00


Minimum Amount: \$0.50

Maximum Amount: \$50,000.00

**Save** Cancel

If you wish to disenroll:

1. On the next page, click **Manage** under the **TIAA Retirement Healthcare Savings Plan - Employee**.

 **TIAA Retirement Healthcare Savings Plan - Employee**  
TIAA Health

Contribution 5%

**Manage**

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

**TIAA Retirement Healthcare Savings Plan - Employee**

Projected Total Cost Per Paycheck  
\$0.00

**Plans Available**

Select a plan or Waive to opt out of TIAA Retirement Healthcare Savings Plan - Employee.

1 item

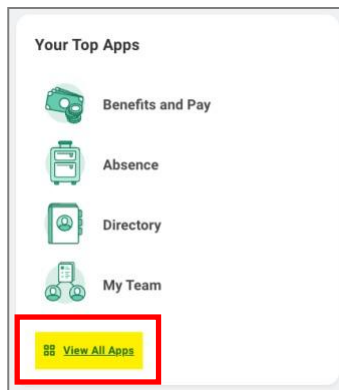
Benefit Plan	*Selection
TIAA Health	<input type="radio"/> Select <input checked="" type="radio"/> <b>Waive</b>

**Confirm and Continue** Cancel

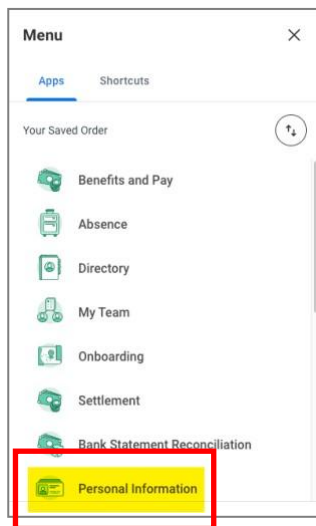
## Update your marital status (if applicable)

If your marital status has changed and you have not yet updated it in USFWorks, please do so by following the steps below.

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

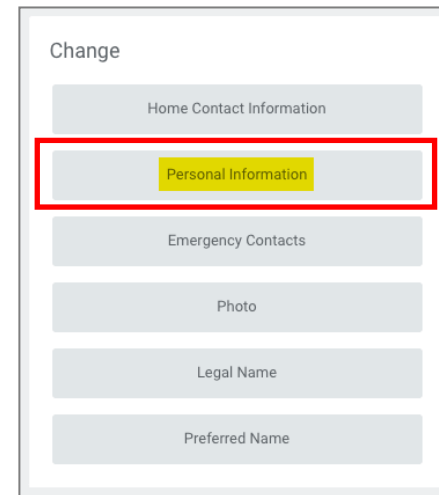


2. On the next page, click **Personal Information**.



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**.



Marital Status

Marital Status

Currently selected option appears here

Search

- ☐ Divorced (United States of America)
- ☒ Married (United States of America)
- ☐ Partnered (United States of America)
- ☐ Separated (United States of America)
- ☐ Single (United States of America)
- ☐ Widowed (United States of America)

enter your comment

Attachments

Drop files here

or

Select files

Submit Save for Later Cancel

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

Marital Status

Marital Status

Search

Newly selected option appears here

Marital Status Date

MM/DD/YYYY

7. Scroll down to the bottom of the page, upload a **copy of the supporting documentation** (e.g. marriage/RDP certificate, divorce decree, RDP dissolution document), if you have not done so already, **enter a comment** if you wish, and then click **Submit**.

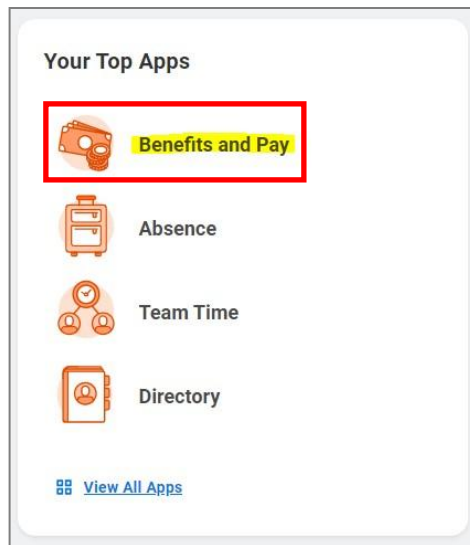


### If you are now divorced/registered domestic partnership has been dissolved

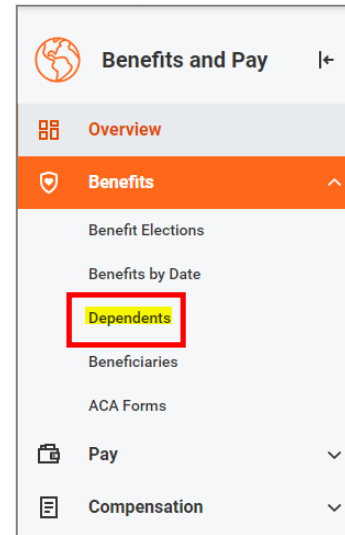
If you have removed your former spouse/RDP from your USF benefit plans on your Open Enrollment task as you are now divorced or your registered domestic partnership has been dissolved, please update your former spouse/RDP's relationship status to ex-spouse/RDP by following the steps below. They will no longer be a Dependent on your plans, but they will remain on USFWorks as archived.

#### Follow these steps:

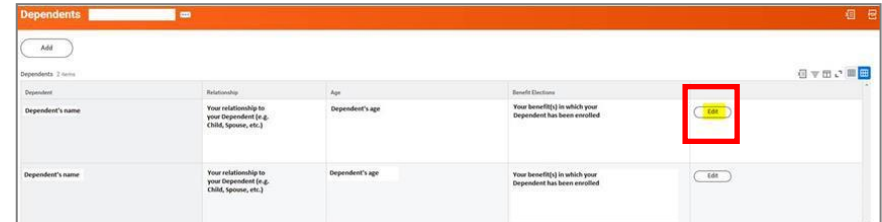
1. Log in to [USFWorks](#) and click **Benefits and Pay**.



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.



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

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

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

- 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.

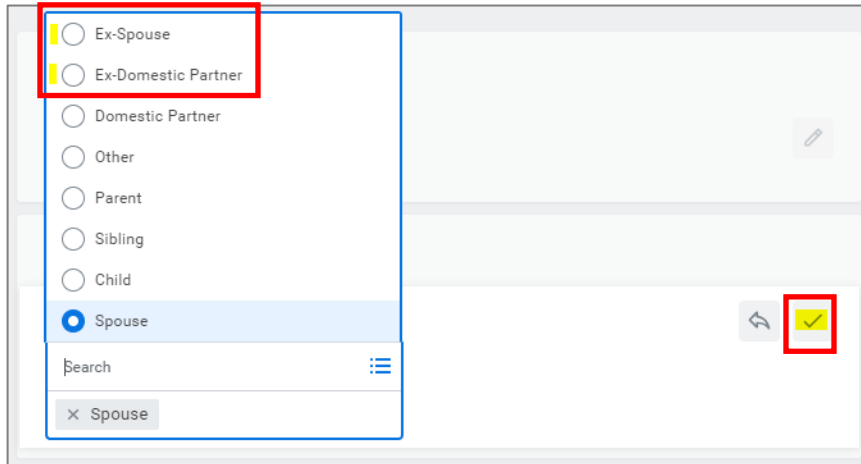
- Under the Benefits and Pay tab, click **Benefits** and then select **Beneficiaries**.

- 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.

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

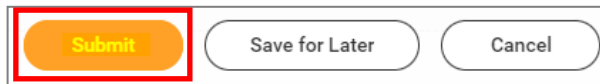
- On the next page, scroll down to **Relationship** and click the **pencil** symbol.

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



The screenshot shows a web form for selecting a relationship. A dropdown menu is open, displaying the following options: Ex-Spouse, Ex-Domestic Partner, Domestic Partner, Other, Parent, Sibling, Child, and Spouse. The 'Spouse' option is currently selected. A red box highlights the 'Ex-Spouse' and 'Ex-Domestic Partner' options. To the right of the dropdown, there is a yellow checkmark icon, also highlighted with a red box, indicating the confirmation step.

5. Click **Submit**.



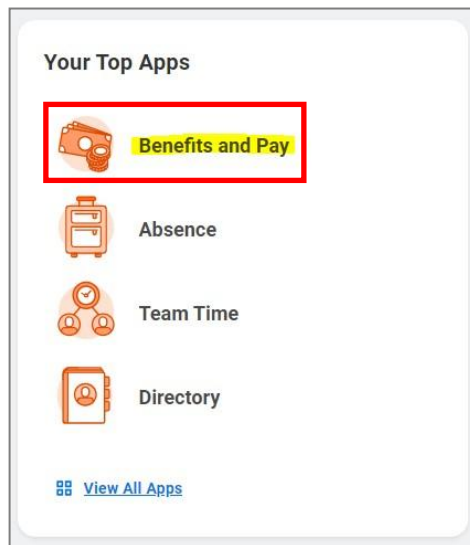
The screenshot shows three buttons at the bottom of the form: 'Submit', 'Save for Later', and 'Cancel'. The 'Submit' button is highlighted with a red box.

## How to edit and resubmit Open Enrollment task prior to Open Enrollment closing

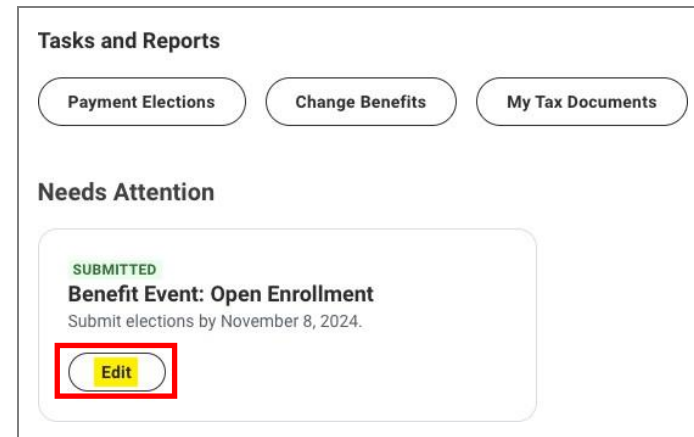
If you have already submitted your Open Enrollment task, you can make changes and resubmit it, as long as you do this **before** Open Enrollment closes. No changes are permitted once Open Enrollment has closed.

### Follow these steps:

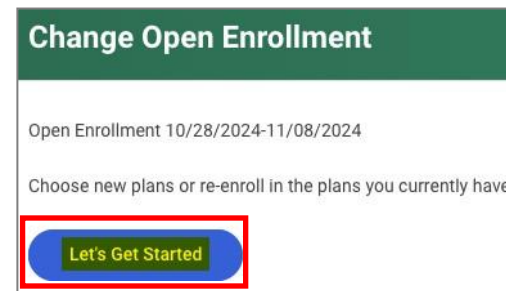
1. Log in to USFWorks and click **Benefits and Pay**.



2. On the next page, in the **Needs Attention** section, under **Benefit Event: Open Enrollment**, click **Edit**.



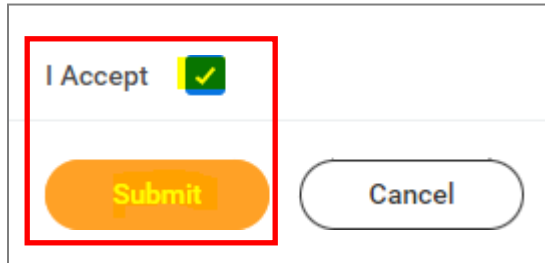
3. On the next page, click **Let's Get Started** to go back into your Open Enrollment task.



4. Once you have made your changes, you will need to **resubmit the task**. On the page with the benefit cards, click **Review and Sign**.



5. On the next page, review to make sure everything is correct, read the legal notice, **attach proof of relationship** if you have added any Dependents (e.g. marriage certificate, birth certificate), **check the checkbox** next to *I Accept*, and click **Submit**.



I Accept ☒

Submit Cancel

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

### 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:

New Employees	Current Employees	Employees leaving USF
<ol style="list-style-type: none"><li>1. Carefully review the plan information in the <a href="#">2025 Benefits Guide</a> ☞</li><li>2. Attend a <a href="#">benefits orientation</a></li><li>3. Enroll for your benefits in <a href="#">USFWorks</a> ☞</li><li>4. Visit the <a href="#">enrollment information web page</a> for detailed instructions and critical dates</li></ol>	<ol style="list-style-type: none"><li>1. Review your benefits elections anytime in <a href="#">USFWorks</a> ☞</li><li>2. <a href="#">How to View your Benefits Elections</a></li><li>3. Modify your benefits if you experience a <a href="#">Qualifying Event</a></li><li>4. Visit the <a href="#">enrollment information web page</a> for detailed instructions and critical dates</li></ol>	<p>Please review the <a href="#">Ending Employment at USF – Benefits Information Guide</a> for information on what happens to your benefits upon leaving USF.</p>
<b>QUICK LINKS</b> <ul style="list-style-type: none"><li>• <a href="#">2025 Benefits Guide</a>: ☞ Benefits Guide for the 2025 plan year</li><li>• <a href="#">New Hire Welcome Center</a>: Don't forget to <a href="#">sign up for a New Hire Orientation</a>!</li><li>• <a href="#">Benefits Enrollment Information</a>: For new hires and qualifying events</li><li>• <a href="#">USFWorks Job Aids</a>: Guides for completing all benefits-related actions</li><li>• <a href="#">Benefits Compliance Documents</a>: Plan documents for each benefit plan</li></ul>		<p>Contact the Benefits team at either <a href="mailto:benefits@usfca.edu">benefits@usfca.edu</a> or at (415) 422-2442.</p> <p>You can also <a href="#">schedule an appointment</a> ☞ with one of our team members.</p>

### Benefits Team contact information

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

For inquiries concerning:

- a general HR issue, please email [humanresources@usfca.edu](mailto:humanresources@usfca.edu)
- leaves, please email [leaves@usfca.edu](mailto:leaves@usfca.edu)
- payroll, please email [payroll@usfca.edu](mailto:payroll@usfca.edu)
- retirement, please email [retirementplan@usfca.edu](mailto:retirementplan@usfca.edu)
- Tuition Remission, please email [tuitionremission@usfca.edu](mailto:tuitionremission@usfca.edu)