Copyright © 2017 University of Alberta  
All rights reserved.

The information contained in this manual is proprietary and confidential to the University of Alberta. No part of this manual may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without express written permission from the University of Alberta.

Every effort has been made to make this manual as complete and as accurate as possible. The University of Alberta shall accept neither liability nor responsibility to any person or entity with respect to any loss or damages in connection with or arising from the information contained in this manual.

The names of software products referred to in this manual are claimed as trademarks or registered trademarks of their respective companies.
# Table of Contents

Employee Online Benefits .................................................................................................................. 1

- Viewing Your Benefits Summary ................................................................................................. 3
- Submitting Family Status Change .................................................................................................. 7
- Submitting Marital Status Change .................................................................................................. 27
- Adding Designation of Beneficiary ................................................................................................ 54
- Revising Designation of Beneficiary ............................................................................................. 66
- Removing Benefits for a Dependent ............................................................................................... 78
- Changing the Name of a Beneficiary/Dependent ............................................................................ 93
Employee Online Benefits Overview

This section will provide an understanding of electronic Benefits (eBenefits) and how you can manage your benefit information online using PeopleSoft HCM.

Objectives

Upon completion of this section you will have a general understanding of:

- What are eBenefits
- How to View Your Benefits Summary Page
- How to Submit a Family Status Change
- How to Submit a Marital Status Change
- How to Add a Designation of Beneficiary
- How to Revise a Designation of Beneficiary
- How to Remove Benefits for a Dependent
- How to Change the Name of a Dependent or Beneficiary

Related Reference Material


Reference Material may include Training Guides, Quick Reference Guides, and Other Documentation.

What are eBenefits?

**eBenefits** provides self service capabilities to staff at the University of Alberta. As a staff member, you can access and manage your personal information and benefit enrollments.

eBenefits functionality is used to add dependents and beneficiary information upon hire, update marital status, modify existing beneficiary information, as well as add and remove dependents by processing a family status change.

The original signed Designation of Beneficiary form **must** be returned to Human Resources to validate the designation.
Viewing your Benefits Summary

In this topic you will learn how to view a Summary of your Benefit information.

To Begin the Online Tutorial:

- Go to the top left of the screen and click the button. Follow the instructions provided.

Procedure

Navigation Path: Sign In to Bear Tracks

1. Once you have signed in to Bear Tracks, Click the Employees link.
2. Click the **Links to Employee Self Service** link.

3. Click the **Benefits Information** link.

4. The **Benefits Information** link in Bear Tracks will open PeopleSoft HCM.

   **Note:** You may not see the same options as shown in the example. The applications you see are based on your security access.

5. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the **Home** link.

6. In your **Self-Service Center** Navigation Collection, look for the **Benefits** section and click the **Benefits** header link.

7. Click the **Benefits Summary** link.
8. **Note:** You can also navigate to the Benefits Summary page directly within PeopleSoft HCM.

   **Navigation Path:** Main Menu > Self Service > Benefits > Benefits Summary

9. The **Benefits Summary** page provides a list of the benefit plans and coverage you have.

10. The current date is the default date to view your Benefit Summary information.

11. You can change the **Date** field to view your Benefits Information as of a different date.

    Click the **Go** button to refresh your Benefits Summary information.
12. To view the details of each benefit type listed, click on the link provided within the Type of Benefit column.

In this example, Click the Long-Term Disability link.

13. The details of the specific benefit you selected will appear on the screen, such as the Plan Name, the Provider, and coverage.

Click the Return to Employee Benefit Summary link.

14. When you are done reviewing your Benefit Summary page, you can sign out of PeopleSoft HCM.

15. Congratulations! You have completed the training on viewing your benefits summary online.

End of Procedure.
Submitting Family Status Change

In this topic you will learn how to enter a Family Status change. During your lifetime many changes occur. You may have a baby or add a new dependent to your family. All these changes may have an impact on your benefits.

To Begin the Online Tutorial:

- Go to the top left of the screen and click the button. Follow the instructions provided.

Procedure
Navigation Path: Sign In to Bear Tracks
1. **Important!**

DO NOT start your Family Status Change until you have reviewed your personal information for accuracy.

Provided is a screen shot of the Employee Self Service web page ([http://www.hrs.ualberta.ca/MyEmployment/ESS.aspx](http://www.hrs.ualberta.ca/MyEmployment/ESS.aspx)). This page provides information on how to view/update your personal information.

You may need to scroll down to view the **Personal Information** section containing links to the training material regarding your Address Information and Phone Information.

2. Once you have signed in to Bear Tracks, click the **Employees** link.

3. Click the **Links to Employee Self Service** link.

4. Click the **Benefits Information** link.
5. The **Benefits Information** link in Bear Tracks will open PeopleSoft HCM.

   **Note:** You may not see the same options as shown in the example. The applications you see are based on your security access.

6. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the **Home** link.

7. In your **Self-Service Center** Navigation Collection, look for the **Benefits** section and click the **Life Events** link.

8. Before beginning, it is important to note that **you can exit the process at any time.**

   However, once you click the 'submit' button, you will not be able to go back and add to the original submission.

   The steps to exit your eBenefits will follow shortly.

9. **Important!**

   All pages within the enrollment process contain important information.

   Please read each page carefully as you work through each step to ensure you understand what is required. Throughout the process there will be times where you may need to consider the additional options available to you.
10. **WARNING!**

You must **complete ALL 8 Steps** of this process.

Failure to do so will result in an incomplete enrollment.

11. There are 8 Steps to the **Family Status Change Process**.

   - **Step 1.** Enter the Effective Date of the Family Status Change
   - **Step 2.** Review Benefits Summary Report
   - **Step 3.** Review Existing Dependents and Beneficiaries
   - **Step 4.** Add New Dependents and Update Beneficiary Percentages
   - **Step 5.** Enroll New Dependent in Benefit Programs
   - **Step 6.** Benefit Election Review
   - **Step 7.** Completion and Exit
   - **Step 8.** Beneficiary Changes
     (Refer to the topic 'Revising Designation of Beneficiary')

12. **Note:** A **Family Status Change** event must be completed within 30 days of the event.

   Click the **Family Status Change** option.

   ![Family Status Change option](image_url)
13. **Step 1: Enter the Effective Date of the Family Status Change**

In this example, an addition to the family is required due to the birth of a baby.

Enter the day the baby was born to initiate the process. The birth date is required for all dependents enrolled in *Supplemental Health Plans*.

Use the calendar icon to select the date or enter the date manually.

Click the button to the right of the *Date Change Will Take Effect* field.

14. **Select the Month, Year and Day.**

In this example, Click the **June 13, 2016**.

15. **Note:** The date must be the **SAME** throughout the entire process.

16. **Click the OK button.**
17. **Note:** From this point forward, you can exit the process at any time UNTIL you click the 'Submit' button.

If during the process you must exit, Click the **Continue Later** button in the top right of the page.

A 'Message from Web page' will appear.

Click the **OK** button.

18. **Note:** The event you started will remain in the "**event in progress**" status until you return to complete the process.

Keep in mind that you will not be able to select any other event until the 'in progress' event has been completed.
19. Take note of the following key messages:

- Reconsider **Health Care coverage, Optional Life, Designation of Beneficiaries for Life Insurance** and **Pension**.

- **Dependent Life** for newborns must be made in writing within **30 days from date of birth**. If you already have Dependent Life coverage, coverage will be automatic for any newborn.

- Before you contact your Benefits Advisor review the information provided on the Life Events web page ([http://www.hrs.ualberta.ca/Benefits/LifeEvents.aspx](http://www.hrs.ualberta.ca/Benefits/LifeEvents.aspx)) on the Human Resource Services web site.

- To apply for **Voluntary Critical Illness** the completed form must be sent to Industrial Alliance.

In the top right of the page, click the **Next** button.

20. Click the **Submit** button.
21. Click the **OK** button.

22. Review the highlighted box for relevant information.
23. Always use the **Previous** or **Next button** located in the top right of the page to navigate to the next page.

**Do not** use the navigation list located on the far left of the page. This information is used to show what step you are at. It will automatically update as you complete each section.

Click the **Next** button.

24. **Step 2: Review Benefits Summary Report**

Review all information provide on the **Benefits Summary** page for accuracy.

In the top right of the page, click the **Next** button.

25. If you have waived **Optional Benefit** coverage and wish to apply for it at this time, download the **appropriate form** located within the Forms Cabinet ([http://www.hrs.ualberta.ca/Forms.aspx](http://www.hrs.ualberta.ca/Forms.aspx)) on the HRS Web site. Once you have completed the form **submit** it to Human Resources.

For further information pertaining to U of A life insurance benefits available to eligible employees, visit the Life Insurance web page ([http://www.hrs.ualberta.ca/Benefits/Life.aspx](http://www.hrs.ualberta.ca/Benefits/Life.aspx)) on the HRS web site and select the appropriate staff option that applies to you.
26. **Step 3: Review existing Dependents and Beneficiaries**

Once you have reviewed the Dependent and Beneficiary coverage, go to the top right of the page and Click the Next button.

27. **Step 4: Add New Dependents and Update Beneficiary Percentages**

**Note:** Review each dependent listed to ensure they still meet the eligibility criteria for dependent coverage.

28. For your dependent child to be eligible they must be:
   - Unmarried and under the age of 21 and dependent on you for financial support,
   - or a Full-time student at an accredited institution to the age of 25,
   - or Over 21 if incapable of financial self-support due to physical or mental disability to be eligible.

If you find a dependent that no longer meets the eligibility criteria for dependent coverage, you have the ability to revise this dependent during the enrollment step.
29. Click the **Add a dependent or beneficiary** button.

30. All fields within the **Dependent/Beneficiary Personal Information** page must be filled out.

Enter your dependent's/beneficiary's name into the **First Name** field.

In this example, enter "New".
31. Continue to enter the appropriate information into the remaining fields.

**Note:** In the Address and Telephone section, the 'Same Address as Employee' box **MUST** be checked regardless of whether it actually is the same or not.

32. In this example, the remaining fields have been entered for you.

Go to the bottom of the page.

Click the **Save** button.

33. Click the **OK** button.
34. You will be returned to the Add/Review Dependent/Beneficiary page. Review the Dependent/Beneficiary summary one more time for completeness. Notice that the added dependent now appears in the detail listing. If everything is correct, go to the top right of the page and Click the Next button.

35. **Step 5: Enroll New Dependent in Benefit Programs**

Click the Start My Enrollment button.
36. **Note:** The only time you may change your benefit choices is when a life event occurs.

However, changes to designation of beneficiary and application for optional benefit coverage's can be made at any time.

37. When the Event Status is marked as **Open** it indicates that your benefits enrollment is open and ready to be completed.

38. To begin the enrollment process, Click the **Select** button.

39. The **Family Status Change** page provides you the opportunity to add or withdraw a dependent from a benefit program.
40. To enroll the new dependent in the Dental Plan, Click the **Edit** button in line with the Dental Plan option.

41. Within the **Enroll Your Dependents** section you can Enroll a dependent by adding a check mark for an eligible dependent or you can withdraw a dependent by removing the check mark for a dependent that no longer meets the criteria.

In this example, find the 'New Baby' entry and Click the **Enroll** option.
42. Click the **Continue** button.

43. Review for accuracy and Click the **OK** button.
44. The next step is to enroll your dependent in the **Supplemental Health Plan**.

Click the **Edit** button in line with the Major Medical/Supplementary Health Plan option.

45. Within the **Enroll Your Dependents** section you can enroll or withdraw dependents from this particular benefit in the same manner as was shown for Dental.

In this example, find the New Baby entry and Click the **Enroll** option.

46. Click the **Continue** button.

47. Review the summary of your Major Medical page for accuracy.

To save your choices, Click the **OK** button.
48. Ensure all information is correct and Click the Submit button.

49. Click the OK button.
50. The Event Status has changed to **Submitted** indicating that your Benefits Enrollment is completed and submitted to Human Resources.

51. In the top right of the page, Click the **Next** button.
52. **Step 6: Review Benefit Elections for Completeness**

The next page outlines your updated benefit choices.

Review your changes to ensure accuracy.

In the top right of the page, Click the **Next** button.

53. **Step 7: Event Completion and Exit**

The following **MUST** be submitted to Human Resources:
- Application for Group Coverage Detail Form (Optional Life Insurance)
- Evidence of Insurability Coverage Detail (Optional Life Insurance)
- Original signed Designation of Beneficiary (ONLY when changes made to life insurance beneficiaries)
- UAPP Designation of Beneficiary for Academic Staff

Click the **Complete** button.
You are almost done.

One more STEP TO GO!

Step 8: Beneficiary Changes

Although you have already identified your beneficiaries in Step 4, Step 8 provides you the opportunity to allocate your insurance amongst your beneficiaries.

Refer to the ‘Revising Designation of Beneficiary’ topic to complete the Family Status Change process.

Congratulations! You have completed the training on steps 1 through 7 of the Submitting a Family Status Change process.

Continue to Step 8. Revising a Designation of Beneficiary topic.

End of Procedure.
Submitting Marital Status Change

The Marital Status change option in eBenefits is used to record the following life events.

- Common-Law Relationship
- Divorce
- Legal Separation
- Marriage

In this topic you will learn how to submit a marital status change for these life events.

To Begin the Online Tutorial:

- Go to the top left of the screen and click the Try It! button. Follow the instructions provided.

Procedure

Navigation Path: Sign In to Bear Tracks
1. Before you start your Marital Status Change, review your personal information for accuracy.

Provided is a screen shot of the Employee Self Service web page (http://www.hrs.ualberta.ca/MyEmployment/ESS.aspx). This page provides information on how to view/update your personal information.

You may need to scroll down to view the Personal Information section containing links to the training material regarding your Address Information and Phone Information.

2. Once you have signed in to Bear Tracks, Click the Employees link.

3. Click the Links to Employee Self Service link.

4. Click the Benefits Information link.

5. The Benefits Information link in Bear Tracks will open PeopleSoft HCM.

**Note:** You may not see the same options as shown in the example. The applications you see are based on your security access.

6. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the Home link.
7. In your **Self-Service Center** Navigation Collection, look for the **Benefits** section and click the **Life Events** link.

8. Before beginning, it is important to note that **you can exit the process at any time**. However, once you click the 'submit' button, you will not be able to go back and add to the original submission.

   The steps to exit your eBenefits will follow shortly.

9. **Important!**

   All pages within this process contain important information.

   Please read each page carefully as you work through each step to ensure you understand what is required. Throughout the process, there will be times where you may need to consider the additional options available to you.

10. **WARNING!**

    **You must complete ALL 8 Steps of this process.**

    Failure to do so will result in an incomplete enrollment.
11. There are 8 Steps in the Marital Status Change Process.

   **Step 1.** Change Status Date

   **Step 2.** Review Benefits Summary Report

   **Step 3.** Enter Emergency Contact Information

   **Step 4.** Add/Review Dependent/Beneficiary

   **Step 5.** Benefit Enrollment

   **Step 6.** Benefit Election Review

   **Step 7.** Completion and Exit

   **Step 8.** Beneficiary Changes
   (Refer to the topic 'Revising Designation of Beneficiary' provided)

12. To demonstrate the Marital Status Change process, this staff member was married 30 days ago and now wants to include their spouse in their benefits.

13. Click the **Marital Status Change** option.
14. **Note:** A Marital Status Change can be completed after the time restraints for the particular life event have been met.

- For **Marriage**, you can submit a status change after 30 days from the marriage date.

- For **Common-Law**, you can submit a status change after 12 months of co-habitation.

- For **Divorce**, you can submit a status change after it has been finalized.

- For **Legal Separation**, you can submit a status change at any time.

15. **Step 1: Change Status Date**

Enter the official date of your Marital Status change using the Calendar graphic.

16. Click the button to the right of the *Date Change Will Take Effect* field.

17. Select the date the change will take effect.

In this example, Click the **July 12, 2016** option.

18. The date must be the **SAME** throughout the entire process.
19. Click the **OK** button.

20. **Note:** From this point forward, you can exit the process at any time **UNTIL** you click the 'Submit' button.

If during the process you must exit the program, click the **Continue Later** button in the top right of the page.

A 'Message from Web page' will appear.

Click the **OK** button to continue.

21. The event you started will remain in the "**event in progress**" status until you return to complete the process.

Keep in mind that you will not be able to select any other event until the 'in progress' event has been completed.

22. Within each page there may be important information provided, such as which supporting material is required to be submitted to HRS if there is a change to your surname.

Therefore, it is important that you read all information provided on each page.
23. Always use the **Previous or Next buttons** located in the top right of the page to navigate to the next page.

**Do not** use the navigation list located on the far left of the page. This information is used to show what step you are at. It will automatically update as you complete each section.

Click the **Next** button.

24. The "**Date Change Will Take Effect**" field will auto populate based on what was entered on the first page.

**DO NOT CHANGE** this date.
25.  In the *Change Marital Status To* field, click on the drop down arrow to select a status change from the list provided.

In this example, the 'Married' list option has been selected.

![Image of marital status change form]

26.  Click the **Submit** button.

![Image of submit confirmation]

27.  Click the **OK** button.

![Image of ok button]

28.  In this example, the change of status has changed from Single to Married effective July 12, 2016.
29. In the top right of the page, Click the Next button.

30. **Step 2: Review Benefits Summary Report**

Review all information provide on the **Benefits Summary** page for accuracy. Make a note of where you may want to make changes.

In the top right of the page, Click the Next button.
31. To review the details of a specific benefit, Click on the **Type of Benefit** link.

In this example, Click the **Dental** link.

![Benefits Summary Table]

**Benefits Summary**

<table>
<thead>
<tr>
<th>Type of Benefit</th>
<th>Plan Description</th>
<th>Coverage or Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dental</td>
<td>Dental Plan Staff Support</td>
<td>Employee Only</td>
</tr>
<tr>
<td>Major Medical</td>
<td>Supplementary Health Support</td>
<td>Employee Only</td>
</tr>
<tr>
<td>Health Spending Account</td>
<td>Health Spending Account</td>
<td>Health Spending Account</td>
</tr>
<tr>
<td>Personal Spending Account</td>
<td>Personal Spending Account Supp</td>
<td>Personal Spending Ac.</td>
</tr>
<tr>
<td>Life</td>
<td>Basic Life Support Staff</td>
<td>Salary X 2</td>
</tr>
<tr>
<td>Supplemental Life</td>
<td></td>
<td>Waived</td>
</tr>
</tbody>
</table>

32. The detail page provides information about the selected benefit type, such as coverage and covered dependents.

To return to the summary report, Click the **eBenefits Summary** link.

![eBenefits Summary Page]

**Step 2**

**Human Capital Management**

**Mental Status Change**

**Dental**

**Emergency Contacts**

**Step 3**

**Human Capital Management**

**Mental Status Change**

**Emergency Contacts**

**Add Emergency Contact**
33. **Step 3: Enter Emergency Contact Information**

If you updated your Personal Information before starting your Marital Status Change and your Emergency Contact information is correctly appearing on this page, **Skip to Step 4**.

To add an emergency contact, Click the **Add Emergency Contact** button.

34. Enter your information into the fields provided by either selecting the drop down options or entering into the free text fields.

   In this example, enter "**New Spouse**" into the **Contact Name Required** field.

35. In the **Relationship to Employee** field use the drop down arrow to select from the choices provided.

   **Note:** Use the 'Spouse' option within the Relationship to Employee field to represent both marriage and common law partners.

   In this example, Click the **Spouse list item**.

36. Click the **Contact has the same address as the employee** option.
37. Continue to enter information into all required fields identified by a "*".

Ensure that all information entered is accurate.

Click the **Save** button.

![Save button]

38. Click the **OK** button.

![OK button]

39. The contact information you entered will be populated on this page.

At this point, you may choose to delete and start over if needed.

In the top right of the page, Click the **Next** button.

![Next button]
40. **Step 4: Add/Review Dependent/Beneficiary**

Review each dependent listed to ensure they still meet the eligibility criteria for dependent coverage.

Also, review each beneficiary to ensure accuracy of provided information.

For Marital Status Changes, this step can be used to add/remove dependents/beneficiaries that were part of the marital status change, such as children.

41. For your dependent child to be eligible they must be:
   - unmarried and under the age of 21 and dependent on you for financial support,
   - or a full-time student at an accredited institution to the age of 25,
   - or over 21 if incapable of financial self-support due to physical or mental disability to be eligible.

If you find a dependent that no longer meets the eligibility criteria for dependent coverage, you have the ability to revise this dependent during the enrollment step.

42. **Important!**
   When Adding a beneficiary or dependent, **NEVER over write the existing information.** Always add a new row.

43. **To Add** a dependent/beneficiary, Click the **Add a dependent or beneficiary** button.
44. All fields within the **Dependent/Beneficiary Personal Information** page must be filled out.

Enter your dependent's/beneficiary's name into the **First Name** field.

In this example, enter "New".

*First Name*  

45. Continue to enter the appropriate information into the remaining fields.

**Note:** In the Address and Telephone section, the 'Same Address as Employee' box MUST be checked regardless of whether it actually is the same or not.

Click the **Same Phone as Employee** option.

46. Click the **Save** button.

47. If you see a **Warning Message** click the OK button and make corrections as indicated in the message.
48. Click the **OK** button.

49. If no warning message appears, you will be returned to the **Add/Review Dependent/Beneficiary** page.

   Notice that the added dependent now appears in the detail listing.

   Continue to add your dependents/beneficiaries until all persons have been added. This includes your spouse, partner, children, etc.

50. To **Revise** information for an existing dependent click the **Last Name of the Dependent** link.

   In the **Dependent/Beneficiary Personal Information** page:
   - Click the **Edit** button and correct the information accordingly.
   - Click the **Return to Dependent/Beneficiary Summary** link.

51. **Important!**

   When revising existing information, it is important to **NEVER delete or change the First and Last Name fields to a different person**. The information in these fields are used for audit and reporting purposes.

   Instead of over writing the name fields you would add a new Beneficiary/Dependent and withdraw (uncheck) the incorrect person. (Instructions on how to withdraw a dependent/beneficiary is covered later within this topic.)

   If a name has changed but the person is the same (such as a last name change) refer to the topic 'Changing the Name of a Beneficiary/Dependent' for further instructions.
52. When all additions and revisions have been made, review the information one last time for accuracy and Click the Next button. 

53. **Step 5: Benefit Enrollment**

Click the **Start My Enrollment** button.

54. Within the **Benefits Enrollment** page, is the Open Benefit Events area.

Within this grid, you will see an **information icon**, which provides additional information about your enrollment when you click on it.
55. When the Event Status is marked as Open it means your enrollment is open and ready to be completed.

56. **Important!**

The only time you can change your benefit choices is when a life event occurs.

However, changes to designation of beneficiary and application for optional coverage’s may be made at any time.

57. To continue this process, Click the **Select** button.

58. In the **Marital Status Change** page you can add your spouse or dependents to your Dental and Supplemental Health Plans.

If you do not want to add your spouse or dependent click the **Next** button.
59. To add or revise the dependents under your Dental Plan, Click the **Edit** button that is in line with your **Dental Plan** option.

60. The **Overview of all Plans** section should have the Dental Plan option automatically selected, as shown in the example provided.

61. At the bottom of the screen is your Dependent Beneficiary list.

   Any Dependents/beneficiaries added earlier in Step 4 will be included in this list.

   Also, keep in mind that your spouse is also considered a dependent and will need to be enrolled at this time as well.

62. Select all dependents you would like to enroll.

   Click the **Enroll** option next to each name you would like to be included in your Dental Plan.

   In this example there is only one person to select.

   Click the **Enroll** option.
63. This is also the section where you would go to withdraw/remove a dependent/beneficiary from your benefits.

To **Withdraw a dependent/beneficiary**, remove the check mark beside the name by clicking on the 'Enroll' box to the left of the name.

64. Once you have selected all dependents (including your spouse) to be included in your dental benefits, Click the **Continue** button.
65. If all dependents are identified correctly within the 'Your Covered Dependents' section, Click the OK button.

![OK button image]

66. You are returned to the Benefits Enrollment page and your Dental Plan coverage has changed from Employee Only to Family.

![Benefits Enrollment page showing Dental Plan change]

67. To add dependents to your Major Medical/Supplemental Health Plan, Click the Edit button that is in line with the Major Medical option.

![Edit button image]
68. The **Overview of all Plans** section should have the Supplementary Health Support option automatically selected, as shown in the example provided.

69. Select all dependents you would like to enroll.

Click the **Enroll** option next to each name you would like to be included in your Supplemental Health Plan.

In this example, there is only one name to select.

Click the **Enroll** option.

70. Again, this is the same place where you would go to withdraw/remove a dependent/beneficiary from your benefits.

To **Withdraw a dependent/beneficiary**, remove the check mark beside the name by clicking on the 'Enroll' box to the left of the name.

71. Click the **Continue** button.
72. Review the summary of your Major Medical page for accuracy.

Click the **OK** button.

73. You are returned to the **Benefits Enrollment** page and your Supplementary Health Plan has changed from Employee Only to Family.

74. **Note:** Do not click submit until you have completed your enrollment.

Once your enrollment has been processed, you may not be able to make any further benefit choices until another life event occurs.

If the 90 day non-medical period has expired, proof of medical insurability may be required.
75. If you are sure all information is correct, Click the Submit button.

Submit

76. To submit your final choices to Human Resources, Click the Submit button.

Submit
77. In the **Submit Confirmation** page, Click the **OK** button.

78. You are returned to the **Benefits Enrollment** page.

   The Event Status has changed to **Submitted** indicating that your Benefits Enrollment is completed and submitted to Human Resources.

79. In the top right of the page, Click the **Next** button.
80. **Step 6: Benefit Election Review**

The next page outlines your updated benefit choices.

Review your changes to ensure accuracy. You may need to scroll down to view ALL of the information provided.

In the top right of the page, Click the **Next** button.
81. **Step 7: Event Completion and Exit**

The following **MUST** be submitted to Human Resources:
- Application for Group Coverage Detail Form (Optional Life Insurance)
- Evidence of Insurability Coverage Detail (Optional Life Insurance)
- Original signed Designation of Beneficiary (ONLY when changes made to life insurance beneficiaries)
- UAPP Designation of Beneficiary

Click the **Complete** button.

82. **Step 8: Beneficiary Changes**

Although you have already identified your beneficiaries in Step 4, Step 8 provides you the opportunity to allocate your insurance amongst your beneficiaries.

For Marriage and Common-Law, refer to the 'Adding Designation of Beneficiary' topic.

For Divorce and Legal Separation, refer to the 'Revising Designation of Beneficiary' topic.

83. Congratulations! You have completed the training on steps 1 through 7 of the Submitting a Marital Status Change process. Continue to step 8. Revising or Adding Designation of Beneficiary topic.

**End of Procedure.**
Adding Designation of Beneficiary

In this topic you will learn how to add a new Designation of Beneficiary for both primary and secondary allocation types.

To Begin the Online Tutorial:

- Go to the top left of the screen and click the button. Follow the instructions provided.

Procedure

Navigation Path: Sign In to Bear Tracks

1. Once you have signed in to Bear Tracks, Click the Employees link.
2. Click the Links to Employee Self Service link.
3. Click the **Benefits Information** link.

4. The **Benefits Information** link in Bear Tracks will open PeopleSoft HCM.

   **Note:** You may not see the same options as shown in the example. The applications you see are based on your security access.

5. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the **Home** link.
6. **In your Self-Service Center Navigation Collection, look for the Benefits section and click the Benefits Header link.**

![Benefits](image)

7. **In the Benefits Page, Click the Insurance Summary link.**

8. **Note:** You can also navigate to the Insurance Summary page directly within PeopleSoft HCM.

   Navigation Path: **Main Menu > Self Service > Benefits > Insurance Summary**

9. **Note:** The system will default to today's date. **DO NOT** change.

10. You can **Add** a beneficiary from the Insurance Summary page.

    In this example, a new baby is being added.

    Click the **Life** link.

11. The **Life** page provides information such as the Plan Provider and Coverage information.

    At the bottom of the page is a section providing the current beneficiary allocations.
12. Click the **Edit** button.

13. In the **Change Current Beneficiaries and Allocation** page, the system will default the **Allocation Type** fields to Percent.

**DO NOT CHANGE** these fields.

14. Click the **Add a New Beneficiary** button.

15. Enter all fields identified with an '*' as well as the Date of Birth.

Enter a valid value e.g. "New" into the **First Name** field.
16. In this example, all other fields have been filled in for you.

17. In the **Address and Telephone** section click the **Same Address as Employee** option, regardless of whether it actually is the same or not.

18. Once all fields have been filled in, Click the **Save** button.

19. Click the **OK** button.
20. In the **Dependent/Beneficiary Personal Information** page, ensure all information shown is correct.

Click the **Return to Change Current Beneficiaries and Allocations** link.

21. The 'New Baby' has been added to the Allocation Details section.

22. Once a beneficiary has been added, you can allocate the percentage amounts for your insurance.

You will need to re-enter the New Primary Allocation percentage for all beneficiaries including those you had already allocated for.

23. In this example you will be:
   - keeping the allocation for the existing children
   - adjusting your Spouse allocation and
   - adding an allocation for the New Baby

24. Enter "20" into the **New Primary Allocation** field for the first child.

25. Enter "20" into the **New Primary Allocation** field for the second child.

26. Enter "50" into the **New Primary Allocation** field for the Spouse.
27. Enter "10" into the **New Primary Allocation** field for the New Baby.

28. Click the **Update Totals** button.

29. Ensure the New Primary Allocation column total is 100.

   Click the **Save** button.

30. Click the **OK** button.
31. Click in the **Return to Life Insurance Main** field.

32. Click the **Return to Insurance Summary** button.
33. You can also allocate Secondary Beneficiaries for a particular Benefit.

The following example demonstrate how this is done.

Click the **Life** link.

<table>
<thead>
<tr>
<th>Benefit Type</th>
<th>Plan Description</th>
<th>Coverage or Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Life</td>
<td>Life Insurance Academic</td>
<td>$100000</td>
</tr>
<tr>
<td>Supplemental Life</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>AD and D</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Critical Illness Mandatory</td>
<td>Critical Illness Mandatory</td>
<td>$100000</td>
</tr>
</tbody>
</table>

34. Click the **Edit** button.
35. In this example, the list of beneficiaries have been added and your spouse is the Primary receiver.

Enter "100" into the New Primary Allocation field of the person that is your Primary Receiver.

36. You can then identify a New Secondary Allocation and divide the allocation over several Beneficiaries.

In this example, the secondary allocation is being split between all of the children listed.

Enter "20" into the New Secondary Allocation field of the first child listed.

37. Continue entering values into the New Secondary Allocation column until the column total equals 100.

In this example, the remaining secondary allocation fields have been filled in for you.

Click the Update Totals button.
38. Ensure that each column totals 100.

Click the **Save** button.

39. Click the **OK** button.

40. **Note:** Whether you are adding a Primary or Secondary allocation, ensure the original signed **Designation of Beneficiary form** is submitted to Human Resources. (Refer to the Change of Beneficiary web page [http://www.hrs.ualberta.ca/Benefits/LifeEvents/ChangeBeneficiary.aspx](http://www.hrs.ualberta.ca/Benefits/LifeEvents/ChangeBeneficiary.aspx) on the HRS web site for more information)

If this form is **NOT** on your file and a claim is submitted, the benefit will be paid based on the previous Designation of Beneficiary on file.

If no form is on file then the benefits will be paid to the estate.
41. Click the **Return to Life Insurance Main** link.

42. Before you return to the Insurance Summary page, review the beneficiary percentages for accuracy.

   Click the **Return to Insurance Summary** link.
43. **Remember!**
Each type of benefit listed is separate from each other. Therefore, if you want to add a beneficiary for All of your benefit types, you must make the change within each type of benefit. Changing the beneficiary allocation in one type of benefit does not automatically change the beneficiary allocation in the other types of benefits.

You may continue to add/change beneficiary allocations for any other Benefits by selecting the appropriate Type of Benefit and following the same steps as outlined earlier.

Once all additions/changes have been made, you can sign out of PeopleSoft.

44. Once your Benefit Selections have been submitted to Human Resource Services you will be able to **view your Benefit Summary information on the next working day.**

The system requires overnight processing to upload your information over night.

**REMEMBER** to submit your completed paper Form(s) to Human Resource Services!

45. Congratulations! You have completed the training on Adding Designation of Beneficiary.

**End of Procedure.**
Revising Designation of Beneficiary

In this topic you will learn how to update an existing Designation of Beneficiary for both primary and secondary allocation types.

To Begin the Online Tutorial:

- Go to the top left of the screen and click the button. Follow the instructions provided.

Procedure

Navigation Path: Sign In to Bear Tracks

1. Once you have signed in to Bear Tracks, Click the Employees link.
2. Click the Links to Employee Self Service link.
3. Click the **Benefits Information** link.

4. The **Benefits Information** link in Bear Tracks will open PeopleSoft HCM.

**Note:** You may not see the same options as shown in the example. The applications you see are based on your security access.

5. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the **Home** link.
6. In your **Self-Service Center** Navigation Collection, look for the **Benefits** section and click the **Benefits** Header link.

![Benefits](image)

7. In the **Benefits** Page, Click the **Insurance Summary** link.

8. **Note**: You can also navigate to the Insurance Summary page directly within PeopleSoft HCM.

   Navigation Path: **Main Menu > Self Service > Benefits > Insurance Summary**

9. **Note**: The system will default to today's date. **DO NOT** change.
10. In the **Insurance Summary** page, select the Type of Benefit you want to update.

In this example, Click the **Life** link.

11. The **Life** page provides information such as the Plan Provider and Coverage information.

At the bottom of the page is a section providing the current beneficiary allocations.
12. To make changes to the beneficiary allocations, Click the **Edit** button.

13. In the next page, the system will default the **Allocation Type** to Percent. **DO NOT** change.

14. In the **Allocation Details** section you can change how you have allocated your benefits to the listed beneficiaries.

In this example, you are changing one of the Beneficiaries to a New Spouse.

**Note:** If the beneficiary you want to use is not listed, you will need to Add a New Beneficiary. Refer to the Adding a New Beneficiary topic for further instructions.

15. First, you need to remove the allocation of the existing beneficiary.

Enter "0" into the **New Primary Allocation** field for the beneficiary you are removing.

16. Enter the percentage amount you want your new beneficiary to have.

Enter "50" into the **New Primary Allocation** field for the New Spouse.
17. The totals at the bottom of the column must balance to 100.

Therefore, you need to fill in the New Primary Allocation field for all people even if you are not changing someone.

Enter "50" into the New Primary Allocation field for the Parent.

18. Click the **Update Totals** button.

19. Ensure the **Update Totals** amount is 100.

Click the **Save** button.

20. Click the **OK** button.
21. You can also allocate Secondary Beneficiaries for a particular Benefit.

The following example demonstrate how this is done.

Click the **Life** link.
22. Click the **Edit** button.

23. In this example, your spouse is the Primary receiver.

   Enter "**100**" into the **New Primary Allocation** field of the person that is your Primary Receiver.

24. You can then identify a New Secondary Allocation and divide the allocation over several Beneficiaries.

   In this example, the secondary allocation is being split between all of the children listed.

   Enter the percentage amount, eg. "**20**" into the **New Secondary Allocation** field of the first person listed.
25. Continue entering values in the New Secondary Allocation column until the column total equals 100.

In this example, the remaining secondary allocation fields have been filled in for you.

Click the **Update Totals** button.

26. Ensure that each column totals 100.

Click the **Save** button.

27. Click the **OK** button.
28. **Note:** Ensure the original signed **Designation of Beneficiary form** is submitted to Human Resources. (Refer to the Change of Beneficiary web page (http://www.hrs.ualberta.ca/Benefits/LifeEvents/ChangeBeneficiary.aspx) on the HRS web site for more information)

If this form is **NOT** on your file and a claim is submitted, the benefit will be paid based on a previous Designation of Beneficiary on file.

If no form is on file then the benefits will be paid to the estate.

29. Click the **Return to Life Insurance Main** link.
30. Before you return to the Insurance Summary page, review the beneficiary percentages for accuracy.

Click the **Return to Insurance Summary** link.

31. **Remember!**
   Each type of benefit listed is separate from each other. Changing the beneficiary allocation in one type of benefit does not automatically change the beneficiary allocation in the other types of benefits.

   You may continue to change beneficiary allocations for any other Benefits by selecting the appropriate Type of Benefit and following the same steps as outlined earlier.

   Once all additions/changes have been made, you can sign out of PeopleSoft.

32. Once your Benefit Selections have been submitted to Human Resource Services you will be able to view your Benefit Summary information on the next working day.

   The system requires overnight processing to upload your information over night.

   **REMEMBER** to submit your completed paper Form(s) to Human Resource Services!

33. Congratulations! You have completed the training on Revising Designation of Beneficiary.

   **End of Procedure.**
Removing Benefits for a Dependent

In this topic you will learn how to submit a withdrawal of benefits for dependent coverage.

The eligibility criteria for dependents for Benefit Coverage include the following:

- Your opposite or same sex spouse or partner with whom you have cohabitated for at least 12 months in a marriage-like relationship
- Your children and your spouse/partners children who are under age 21, unmarried and dependent on you for financial support
- A child age 21 to 25 if a full-time student at an accredited institution
- A child over age 21 if incapable of financial self-support due to a physical or mental disability

When your Dependents becomes ineligible for coverage on your Health Plans for one of the reasons stated above, the type of criteria not met by the individual will determine if you submit a:

- Family Status Change or
- Marital Status Change

Family Status Change

Several events could take place, which would render a Dependent ineligible and warrant a revision to your Health Plans, for example:

- Your Dependent graduates from College, University, or Trade School
- Your Dependent reaches the age of 22 and not in an accredited institution
- Your Dependent still under the age of 21, is married and not dependent on you for financial support

These examples would require a revision to your Health Plans by submitting a Life Event change and selecting the option of a Family Status Change.

Marital Status Change

- You and your spouse/partner divorce or legally separate
- Your spouse/partner do not require coverage under your Health Plans

These examples would require a revision to your Health Plans by submitting a Life Event change and selecting the option of Marital Status change.
To Begin the Online Tutorial:

- Go to the top left of the screen and click the button. Follow the instructions provided.

Procedure

Navigation Path: Sign In to Bear Tracks.

1. Once you have signed in to Bear Tracks, Click the Employees link.

2. Click the Links to Employee Self Service link.

3. Click the Benefits Information link.

4. The Benefits Information link in Bear Tracks will open PeopleSoft HCM.

   Note: You may not see the same options on this page as is shown in the example. The applications you see are based on your security access.
5. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the **Home** link.

6. In your **Self-Service Center** Navigation Collection, look for the **Benefits** section and Click the **Life Events** link.
7. To change Dependent coverage, follow the process for a **Life Event**.

Select a **Family Status Change** for a child who no longer meets the eligibility criteria for dependent coverage.

Select a **Marital Status Change** for a spouse who no longer requires or meets the eligibility for dependent coverage.

8. For the purpose of this exercise, the dependent child no longer meets the criteria of an **unmarried child under the age of 21**.

Click the **Family Status Change** option.

9. Select the date that the dependent became ineligible based on the criteria.

Click the button to the right of the **Date Change Will take Effect** field.

10. Select the Month, Year and Day of your benefit's eligibility date.

In this example, Click **August 15, 2016**.
11. Click the OK button.

12. Always use the Previous or Next buttons located in the top right of the page to navigate to the next page.

Do not use the navigation list located on the far left of the page. This information is used to show what step you are at. It will automatically update as you complete each section.

Click the Next button.
13. Confirm the date of the status change for the Dependent.

Click the **Submit** button.

![Submit button](image)

14. Click the **OK** button.

![OK button](image)

15. Click the **Next** button.

![Next button](image)
16. The Benefits Summary will indicate which Benefits you have Family Coverage for.

In this example, Family Coverage has been set up for both the Dental Plan and the Supplementary Health Plan.

Click the **Next** button.
17. **The Dependent and Beneficiary Coverage Summary** page confirms which dependent has what coverage.

   In this example, the Dependent highlighted is the child that requires the revision.

   Click the **Next** button.

18. **Note:** The dependent can still remain a **beneficiary**.

   Withdrawing the dependent from benefit coverage does not remove them as a beneficiary. Refer to the topic "Revising Distribution of Beneficiary" for further instructions on how to remove a beneficiary.

19. Click the **Next** button.

20. Click the **Start My Enrollment** button.
21. **Note**: The Event Status is now **OPEN**, indicating that the system has opened your benefits to allow you to make revisions.

22. Click the **Select** button.
23. To withdraw/remove a Dependent from the plan, Click the **Edit** button that is in line with Benefit Plan you are removing the dependent from.

In this example, the dependent is being removed from the Dental Plan.

Click the **Edit** button that is in line with the Dental Plan option.

24. At the bottom of the screen is your Dependent Beneficiary list.

Identify the Dependent in the list to be removed and **UNCHECK** the Enroll option next to their name.

Click the **Enroll** option.

25. Once the box has been 'UNCHECKED', Click the **Continue** button.
26. The next page confirms the removal of the Dependent from the Dental Plan as the child no longer appears as a covered dependent.

Click the **OK** button.
27. You will need to edit each Benefit Plan individually.

In this example, you will need to edit the Supplemental Health Plan as well.

Click the **Edit** button.

28. Go to the list of Dependent Beneficiary at the bottom of the page.

Identify the dependent to be removed from the plan and **UNCHECK** the Enroll option next to their name.

Click the **Enroll** option.

29. Once the box has been 'UNCHECKED', Click the **Continue** button.
30. This page confirms the removal of the Dependent from the Supplemental Health Plan.

Click the OK button.

31. If no further changes are required, Click the Submit button.
32. In the **Submit Benefit Choices** page, click Submit ONLY if there are no additional changes.

Click the **Submit** button.

33. Click the **OK** button.

34. **Note:** The Event Status has changed to **SUBMITTED** indicating that the changes have been saved and recorded in the system.
35. Click the **Next** button.

36. The **Family Status Change Summary** page provides a final look at your Benefit Plans and Options as well as the Benefit Coverage for each.

   Click the **Next** button.
37. Click the **Complete** button and sign out of PeopleSoft HCM.

38. Congratulations! You have completed the training on Removing Benefits for a Dependent.

**End of Procedure.**
Changing the Name of a Beneficiary/Dependent

In this topic, you will be shown how to change the name of an existing beneficiary or dependent. This process is most commonly used when your beneficiary/dependent gets married and their last name changes.

To Begin the Online Tutorial:

- Go to the top left of the screen and click the button. Follow the instructions provided.

Procedure

Navigation Path: Sign in to Bear Tracks

1. Once you have signed in to Bear Tracks, Click the Employees link.

2. Click the Links to Employee Self Service link.
3. Click the **Benefits Information** link.

4. The **Benefits Information** link in Bear Tracks will open PeopleSoft HCM.
   
   **Note:** You may not see the same options as shown in the example. The applications you see are based on your security access.

5. To begin at your PeopleSoft Home page, go to the top right corner of your screen and click the **Home** link.
6. In your **Self-Service Center** Navigation Collection, look for the **Benefits** section.

   Click the **Dependents and Beneficiaries** link.

   ![Dependents and Beneficiaries link](image)

7. Click the **Dependent/Beneficiary Coverage** link.

8. **Note:** You can also navigate to the Dependents and Beneficiaries page directly within PeopleSoft HCM.

   Navigation Path: **Main Menu > Self Service > Benefits > Dependents and Beneficiaries > Dependent/Beneficiary Coverage**

9. For demonstration purposes, one of the children listed as a dependent was adopted by the stepparent and their last name changed as a result.
10. Select the Dependent you wish to make a name change for.

In this example, click the **Leupo D Cnifm** link.

11. **Note:** The system will default to today's date. **DO NOT** change.
12. To make changes to the dependent's personal information, Click the **Edit** button at the bottom of the page.

13. In the **Dependent/Beneficiary Personal Information** page, enter the new name of the existing dependent/beneficiary in the applicable field.

   In this example, Enter "**Johnson**" into the **Last Name Required** field

![Personal Information](image)

14. **Note:** Review all information for your dependent and make applicable changes.

   **NEVER** overwrite an existing dependent/beneficiary name with another person's name. To Add a new person, refer to either the 'Submitting a Family Status Change' topic or the "Submitting a Marital Status Change' topic.

15. In this example, the dependent has also become a full time student.

   Click the button to the right of the **Student** field.

![Status Information](image)

16. Click the **Yes** list item.
17. Click the **Save** option.

18. Click the **OK** button.
19. Confirm that all information provided is correct.

   At the bottom of the page, Click the **Return to Dependent and Beneficiary Coverage Summary** link.

20. Sign out of PeopleSoft HCM when you have completed your benefit changes.

21. Congratulations! You have completed the training on Changing the Name of a Beneficiary/Dependent.

**End of Procedure.**