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Employee Self Service Benefits

Overview

This section will provide an understanding of Employee Self Service Benefits 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 Employee Self Service Benefits
- 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 Materials may include Training Guides, Job Aids, Quick Reference Guides, and Additional Reference Materials.

Links to all PeopleSoft HCM materials are available at the end of each topic.
What are Employee Self Service Benefits?

**Employee Self Service** 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.

The Benefits 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.

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Viewing your Benefits Summary

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

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

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

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

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

10. 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.
11. 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.

![Benefits Summary Table]

12. 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.

![Long-Term Disability Form]

13. When you are done reviewing your **Benefit Summary** page, you can sign out of PeopleSoft HCM.
14. Congratulations! You have completed the training on viewing your benefits summary online.

For reference materials and more tutorials please provided below.

End of Procedure.

For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service).


Refer to the Online Learning web page (https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning) within the Human Resource Services website for all Online Tutorials and videos.
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.

Procedure

Navigation Path: Sign In to Bear Tracks

Important!

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

The Personal Information webpage provides information on how to view/update your personal information.

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.

![Benefits Information](image)

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.

   ![Benefits Information in PeopleSoft HCM](image)

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.

   ![Benefits and Life Events](image)
7. 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 this process will follow shortly.

**Important!**

All pages within the 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.

**WARNING!** You must complete ALL 8 Steps of this process. Failure to do so will result in an incomplete change.

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

8. Click the **Family Status Change** option.

9. **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.

   To initiate the process, enter the day the baby was born. 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.

10. Select the Month, Year and Day.

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

    **Note:** The date must be the SAME throughout the entire process.
11. Click the **OK** button.

**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 webpage' will appear.

Click the **OK** button to continue at a later time.
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.
12. Take note of the following key messages:

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

- 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 contacting your Benefits Advisor, review the Life Events webpages within the Faculty and Staff website.

- 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.

13. Click the **Submit** button.

14. Click the **OK** button.
15. Review the information provided on the Family Status Change Date page for relevant information.

16. 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.
17. **Step 2: Review Benefits Summary Report**

Review all information provided on the Benefits Summary page for accuracy.

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

18. **Optional Benefit Coverage**

If you have waived Optional Benefit coverage and wish to apply for it at this time, download the appropriate form located within the **Forms** webpage on the Human Resource Services website. Once you have completed the form, submit it to Human Resources.

19. **Life Insurance Benefits Information**

For further information pertaining to U of A life insurance benefits available to eligible employees, visit the **Employee Benefits** webpage within the Faculty and Staff website and select the appropriate option that applies to you.
20. **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.

21. **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.

22. 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.

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.
23. Click the **Add a dependent or beneficiary** button.

24. 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".
25. 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.

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

At the bottom of the page click the **Save** button.

27. Click the **OK** button.
28. You will be returned to the **Add/Review Dependent/Beneficiary** page. Notice that the added dependent now appears in the detail listing.

![Image of Add/View Dependent/Beneficiary page]

29. Review the Dependent/Beneficiary summary one more time for completeness. If everything is correct, go to the top right of the page and Click the **Next** button.

![Image of Step 5: Benefit Enrollment page]

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

Click the **Start My Enrollment** button.
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.

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

32. To begin the enrollment process, click the Select button.

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

35. 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.
36. Click the **Continue** button.

37. Review for accuracy and Click the **OK** button.
38. 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.

39. 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.

40. Click the **Continue** button.

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

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

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

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

   This page outlines your updated benefit choices.

   Review your changes to ensure accuracy.

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

47. **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!

48. **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.

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

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

For reference materials and more tutorials please provided below.

**End of Procedure.**

For Employees, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page ([https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service](https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service)).

Refer to the Online Learning web page (https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning) within the Human Resource Services website for all Online Tutorials and videos.
Submitting Marital Status Change

The Marital Status change option 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.

Procedure

Navigation Path: Sign In to Bear Tracks

Important!

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

The Personal Information webpage provides information on how to view/update your personal information

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 **Life Events** link.

7. 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 this process will follow shortly.

**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.

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')
**WARNING!** You must **complete ALL 8 Steps** of this process. Failure to do so will result in an incomplete enrollment.

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

9. Click the **Marital Status Change** option.

   **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 cohabitation.

   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.

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

    Enter the official date of your Marital Status change.

11. Click the button to the right of the **Date Change Will Take Effect** field.
12. Select the date the change will take effect.

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

![Calendar Image]

13. The date must be the **SAME** throughout the entire process.

![Change Status Date Image]

14. Click the **OK** button.

**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 webpage' will appear.

Click the **OK** button to continue.

15. 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.
16. 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.

17. 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.

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

**DO NOT CHANGE** this date.

19. 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.
20. Click the **Submit** button.

21. Click the **OK** button.

22. In this example, the change of status has changed from Single to Married effective July 12, 2016.

23. In the top right of the page, click the **Next** button.
24. **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.
25. To review the details of a specific benefit, Click on the **Type of Benefit** link.

In this example, Click the **Dental** link.
26. 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.

27. **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.

28. 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.
29. 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.

30. Click the **Contact has the same address as the employee** option.

31. Continue to enter information into all required fields identified by a "**".

Ensure that all information entered is accurate.

Click the **Save** button.
32. Click the OK button.

33. 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.

34. **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.
35. For a 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.

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.

**Important!**

When adding a beneficiary or dependent, **NEVER over write** the existing information.

Always add a new row.

36. To **Add** a dependent/beneficiary, Click the **Add a dependent or beneficiary** button.
37. 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".

38. 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.

39. Click the **Save** button.

40. If you see a **Warning Message** click the OK button, make corrections as indicated in the message.
41. In the Save Confirmation page, click the **OK** button.

42. 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.

43. 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.

**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 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.
44. When all additions and revisions have been made, review the information one last time for accuracy and Click the **Next** button.

45. **Step 5: Benefit Enrollment**

Click the **Start My Enrollment** button.

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

Within this grid is an **information icon**, which provides additional information about your enrollment when you click on it.

47. When the Event Status is marked as **Open**, it means your enrollment is open and ready to be completed.
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.

48. To continue this process, click the **Select** button.

49. 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.
50. To add or revise the dependents under your Dental Plan, Click the **Edit** button that is in line with your **Dental Plan** option.

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

52. 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.

Keep in mind that your spouse is a dependent and will need to be enrolled at this time as well.

53. 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.

54. This is also the section where you would withdraw or 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.
55. Once you have selected all dependents (including your spouse) to be included in your dental benefits, Click the **Continue** button.

56. If all dependents are identified correctly within the 'Your Covered Dependents' section, click the **OK** button.
57. You are returned to the **Benefits Enrollment** page and your Dental Plan coverage has changed from Employee Only to Family.

![Benefits Enrollment Page](image)

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

59. The **Overview of all Plans** section should have the Supplementary Health Support option automatically selected, as shown in the example provided.

60. 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.

61. Again, this is the same place where you would withdraw or 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.
62. Click the **Continue** button.
63. Review the summary of your Major Medical page for accuracy.

Click the OK button.

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

**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.

65. If you are sure all information is correct, Click the Submit button.
66. To submit your final choices to Human Resources, click the **Submit** button.

67. In the **Submit Confirmation** page, click the **OK** button.

68. 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.
69. In the top right of the page, click the **Next** button.

70. **Step 6: Benefit Election Review**

    The next page outlines your updated benefit choices.
71. 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.

72. **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 are made to life insurance beneficiaries)
- UAPP Designation of Beneficiary

Click the **Complete** button.
73. **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.

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

Continue to the 'Revising or Adding Designation of Beneficiary' topic, to complete Step 8.

For reference materials and more tutorials please see the links provided below.

**End of Procedure.**

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For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service).


Refer to the Online Learning web page (https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning) within the Human Resource Services website for all Online Tutorials and videos.
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.

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 option.

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** link.

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

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

![Insurance Summary Page](image)

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

8. You can **ADD** a beneficiary and designate your benefits to the new beneficiary from the **Insurance Summary** page.

You will need to add the new beneficiary to each Type of Benefit you want them included in.

In this example, a new baby is being added to the employee’s Basic Life Insurance.

Click the **Life** link.

![Benefits Summary Table](image)
9. 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.

![Life page screenshot]

10. Click the Edit button.

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

   **DO NOT CHANGE** these fields.

![Change Current Beneficiaries and Allocations screenshot]

12. Click the Add a New Beneficiary button.
13. Enter all fields identified with an ' * ', as well as the Date of Birth.

In this example, enter “New” into the First Name field.

In this example, all other fields have been filled in for you.

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

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

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

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

18. The 'New Baby' has been added to the Allocation Details section.
19. Once a beneficiary is 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 entered an allocation amount.

20. 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

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

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

23. Enter "50" into the **New Primary Allocation** field for the Spouse.

24. Enter "10" into the **New Primary Allocation** field for the New Baby.

25. Click the **Update Totals** button.
26. Ensure the New Primary Allocation column total is 100.

   Click the **Save** button.

![Save Confirmation](image)

27. Click the **OK** button.

![Change Current Beneficiaries and Allocation](image)

28. Within the **Change Current Beneficiaries and Allocation** page, click in the **Return to Life Insurance Main** field.

29. Within the **Life** page, click the **Return to Insurance Summary** button.
30. You can also allocate Secondary Beneficiaries for a particular Benefit. The following example demonstrate how this is done.

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

![Image of the Edit button](image_url)

32. 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.
33. 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.

34. 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.

35. Ensure that each column totals 100.

Click the **Save** button.
36. Click the **OK** button.

**Note:** Whether you are adding a Primary or Secondary allocation, ensure the original signed **Designation of Beneficiary form** is submitted to Human Resources.

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.

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

Click the Return to Insurance Summary link.

**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.

39. 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!
40. Congratulations! You have completed the training on Adding Designation of Beneficiary.

For reference materials and more tutorials please see the links provided below.

**End of Procedure.**

For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page ([https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service](https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service)).

For **HR Professionals**, all PeopleSoft HCM Learning Reference Materials are available within the Human Resource Services website under the PeopleSoft Training web page ([https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training](https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training)).

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.

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

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

Navigation Path: Main Menu > Self Service > Benefits > Insurance Summary
Note: The system will default to today's date. **DO NOT** change

8. In the **Insurance Summary** page, select the Type of Benefit you want to update.

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

9. 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.
10. To make changes to the beneficiary allocations, Click the **Edit** button.

11. In the next page, the system will default the **Allocation Type** to Percent. 

   **DO NOT** change.

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

   In this example, change 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.

13. 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.

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

   Enter "50" into the **New Primary Allocation** field for the New Spouse.
15. 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.

In this example, enter "50" into the New Primary Allocation field for the Parent.

16. Click the Update Totals button.

17. Ensure the Update Totals amount is 100.

Click the Save button.

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

The following example demonstrates how this is done.

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

21. 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.

22. 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 person listed.

23. 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.
24. Ensure that each column totals 100.

Click the **Save** button.

25. Click the **OK** button.

**Note:** Ensure the original signed **Designation of Beneficiary form** is submitted to Human Resources.

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.
26. Click the **Return to Life Insurance Main** link.

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

   Click the **Return to Insurance Summary** link.
Remember! Each type of benefit listed must be changed. Changes made within one type of benefit does not automatically get changed in the other types of benefits.

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.

28. 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!

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

For reference materials and more tutorials please see the links provided below.

End of Procedure.

For Employees, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service).


Refer to the Online Learning web page (https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning) within the Human Resource Services website for all Online Tutorials and videos.
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.
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.

   ![Benefits screenshot]

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.

   ![Life Events screenshot]

8. In this example, 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.

![Image of Human Capital Management interface](image1)

13. Confirm the date of the status change for the Dependent.

Click the **Submit** button.

![Image of Human Capital Management interface](image2)

14. Click the **OK** button.

![Image of Human Capital Management interface](image3)
15. Click the **Next** button.

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.

**Note:** The dependent can 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.
18. Click the **Next** button.

19. Click the **Start My Enrollment** button.

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

21. 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.
22. 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.

23. Once the box has been 'UNCHECKED', Click the Continue button.
24. 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.

25. You will need to edit each Benefit Plan individually.

   In this example, edit the Supplemental Health Plan as well.

   Click the **Edit** button.
26. 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.

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

   Click the **OK** button.

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

   Click the **Submit** button.

31. Click the **OK** button.

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

33. 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.
34. Click the **Complete** button and sign out of PeopleSoft HCM.

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

For reference materials and more tutorials please see the links provided below.

**End of Procedure.**

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For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page ([https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service](https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service)).

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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.

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.
7. Within the Dependents and Beneficiaries page, click the **Dependent/Beneficiary Coverage** link.

**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

8. In this example, one of the children listed as a dependent was adopted by the stepparent and as a result, the dependents last name has changed.

9. Select the Dependent you wish to make a name change for.

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

   ![Dependent and Beneficiary Coverage Summary](image)

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

10. To make changes to the dependent's personal information, Click the **Edit** button at the bottom of the page.
11. 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

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

NEVER over write 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.

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

Click the button to the right of the Student field.

13. Click the Yes list item.
14. Once all changes have been made, Click the **Save** option.

15. Click the **OK** button.

16. Confirm that all information provided is correct.

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

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

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

   For reference materials and more tutorials please see the links provided below.

   **End of Procedure.**
For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service).


Refer to the Online Learning web page (https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning) within the Human Resource Services website for all Online Tutorials and videos.