Overview

- UCPath Open Enrollment 2018 starts at 8:00 a.m. October 26, 2017 and completes at 5:00 p.m. November 21, 2017. During this time you are able to add, change and dis-enroll from specific benefit elections via UCPath eBenefits Employee Self Service. You cannot make Open Enrollment changes before 8:00 a.m. on October 26, 2017.
- Open Enrollment is voluntary. Click here for instructions on making no changes to enrollments.
- Flexible Spending Accounts (Health FSA and/or the DepCare FSA) require enrollment each calendar year.
- You will receive a final benefits enrollment confirmation statement via email when Open Enrollment processing is completed in December, 2017.
- Refer to the Open Enrollment website to learn more about Open Enrollment and help make your benefit choices for 2018. ucnet.universityofcalifornia.edu/oe/

Benefit Plans Available for Open Enrollment 2018

Benefit plans open for Open Enrollment changes for benefit plan year 2018 are:

- Medical
- Dental
- Vision
- Flexible Spending Accounts (Health FSA and DepCare FSA)
- Health Savings Account (HSA), if applicable
- Legal
- Accidental Death & Dismemberment (AD&D)

OE Coverage Begin and Paycheck Deduction Dates

Note that because most benefit costs are paid the month before coverage, new 2018 benefit rates take effect in 2017. Disability rates are not changing for 2018. However, note that premium costs for disability depend on your monthly salary, age and level of coverage. The following table illustrates the coverage begin date for Open Enrollment changes and the paycheck on which new benefit rates take effect.

<table>
<thead>
<tr>
<th>Pay Schedule</th>
<th>OE Coverage Begin Date</th>
<th>Paycheck Deduction Begin Date</th>
<th>Paycheck Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bi-Weekly</td>
<td>1/1/2018</td>
<td>11/19/2017</td>
<td>12/13/2017*</td>
</tr>
<tr>
<td>Monthly</td>
<td>1/1/2018</td>
<td>12/1/2017</td>
<td>1/2/2018*</td>
</tr>
</tbody>
</table>

How to Make Your Open Enrollment 2018 Changes

Log into UCPath. Locate and click the HERE link in the Notices and Updates section. The Benefits Enrollment transaction page appears.

Or, click the Benefits link.
Then click the **Enroll in Benefits** link.
Welcome to the benefits enrollment section. Congratulations! You and your family now have an opportunity to enroll in benefits based on one of the newly benefits eligible scenarios listed below. You have either been directed to this page or navigated here on your own because

- You are a new hire with a PIE to enroll in benefits initially, OR
- You are newly eligible for benefits, OR
- You have a life event that enables you to make enrollment changes, OR
- The annual Open Enrollment period is now open

Scroll down to view the list of your benefit events below. Do you see the Select button next to an event? If so, that indicates the event is currently open to you for enrollment. Click on Select to begin.

Take advantage of this opportunity now because your other options are limited to:

**90-day Waiting Period**
You may enroll yourself or eligible family members at any time in medical coverage only with a 90 consecutive calendar day waiting period; coverage is effective after the 90 days have elapsed. Your premiums may need to be paid on an after-tax basis.

**Open Enrollment**
Open Enrollment (OE) is the time each year (typically in the Fall) when you can change your medical plan and sign up for other benefits. Shortly before OE opens, UC will launch a dedicated web site to guide you through the process. Changes you make during OE are effective January 1 of the following year.

**Life Event**
A life event provides an opportunity to enroll in, or make changes to, your UC benefits when family status changes occur (marriage, domestic partnership, birth, adoption or divorce) or, in some cases, after you or an eligible family member experience an involuntary loss of non-UC health & welfare coverage.

If you don't see the Select button, you do not currently have an open event allowing you to make enrollment changes. If you think this is in error or have additional questions, contact the UCPATH Center at 1-855-9UC-PATH (1-855-982-7284).
In the **Open Benefits Events** section, locate the **Open Enrollment** event and click the **Select** button.

You can have one open benefit event at a time in UCPath. If you are a new hire, newly benefit-eligible employee or have an open life event such as marriage, divorce, adoption, birth or benefits changes (adding, changing or waiving Life, Disability and AD&D plans), you may see multiple benefit events in the **Open Benefit Events Section**. If this is the case, you must **complete the currently open event before you can complete the Open Enrollment event**. If you have an open life event, complete the life event using the **Life Event** transaction in UCPath. Do **not** complete the life event using the **Enroll in Benefits** transaction. Note that there may be a one-day processing period **after** completing the open event **before** you can access the **Open Enrollment** event.

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**Click the Select button and complete the open event.**

**You cannot access the Open Enrollment event until you complete the open benefit event.**
Benefit plans that are open for Open Enrollment appear in the Enrollment Summary section of the Benefits Enrollment page. Benefit plans with an Edit button are open for change. Benefit plans without an Edit button are not open for change.

Click the Edit button to add or change benefit enrollments.

Your current benefit election appears to the right of Current.

Your Open Enrollment election appears in blue font to the right of New.
Review the benefit plan choices and select the desired benefit plan. Select **Waive** to decline coverage.

**Benefits Enrollment**

**Dental**

Leslie Tappen

Proper dental care plays an important role in your overall health. That’s why UC provides dental coverage for you and your family, including routine preventive care and fillings, oral surgery, dentures, bridges and braces. UC pays the full cost of coverage on your choice of either an HMO or PPO plan.

HMO or PPO? Can’t decide? Review a brief overview of your dental plan options. Or, for a more detailed comparison of the two plans, read the section about your dental benefits in the UC benefits booklet.

ℹ️ Important! Your current coverage is: Delta Dental PPO with Family (NA+NC) coverage. You will continue with this coverage if you do not make a choice.

**Select an Option**

UC pays the cost of this benefit.

**Summary**

Select one of the following plans:

- [ ] Delta Dental PPO
- [ ] DeltaCare USA
- [ ] Waive

Select **Waive** to decline coverage.
Review your covered dependents for applicable benefit plans. Use the Enroll check box to select or deselect dependents for applicable benefit plans. Note that if you remove a dependent from all benefit plans, the dependent is not deleted from UCPath. The dependent remains in UCPath for historical purposes.

Click the Add/Review Dependents button to add a new dependent not currently listed or to make demographic changes for an existing dependent.

You can change an existing dependent’s name, Social Security number, address and phone number online in eBenefits Employee Self Service during Open Enrollment. You cannot change a dependent's date of birth, gender or relationship to you (for example, change a spouse to ex-spouse) after a dependent is entered and processed in UCPath. Contact the UCPath Center to request dependent record changes that you are unable to do online.
You can remove dependents from benefit plans as long as an active Qualified Medical Child Support Order does not exist for the dependent or the benefit plan type. You cannot remove dependents from benefit plans with active Qualified Medical Child Support Order (QMCSO).

To change an existing dependent’s demographic information, click the dependent’s name.

Click the Add a dependent button to add a new dependent.
Enter dependent information in the available fields. You do not have to enter dashes or slashes in the Date of Birth or the SSN field. UCPath properly formats the information when you exit the field.

### Dependent Personal Information

Leslie Tappen

Select Save once you have added your Dependent personal information. This information will go into effect as of Dec 1, 2016.

#### Personal Information

- **First Name**
- **Middle Name**
- **Last Name**
- **Name Prefix**
- **Name Suffix**
- **Date of Birth**
- **Gender**
- **SSN**
- **Relationship to Employee**

#### Relationship

What Relationship do you have with this dependent?

#### Address and Telephone

- **Same Address as Employee**
- **Country** United States
- **Address** 300 Lakeside Dr
  
  Dummy 100
  
  Oakland, CA 94612
Address and Telephone

- **Same Address as Employee**
  - **Country**: United States
  - **Address**: 123 Helen Ln
    - Redlands, CA 92373

- **Same Phone as Employee**
  - **Phone**: 

Select if the dependent shares your address.

Select if the dependent shares your phone number.

Click the **Save** button to save the new or changed dependent information.
Click the **Save and Continue** button to save your benefit plan changes or click the **Cancel Changes** button to start over.

### Enroll Your Dependents

The following list displays all individuals you have named as dependents. If an individual is missing from this list, use the **Add/Review Dependents** button to add new dependents or to determine why a dependent has been determined to be ineligible.

To enroll any of the listed individuals for coverage in this plan, check the **Enroll** box next to the dependent's name.

<table>
<thead>
<tr>
<th>Enroll</th>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Max Tappen</td>
<td>Spouse (Opposite/Same Sex) NA</td>
</tr>
<tr>
<td>✓</td>
<td>Mavis Tappen</td>
<td>Child EE Biological/Adopted NC</td>
</tr>
<tr>
<td>✓</td>
<td>Martin Tappen</td>
<td>Child EE Biological/Adopted NC</td>
</tr>
<tr>
<td></td>
<td>New dependent test</td>
<td>Child EE Biological/Adopted NC</td>
</tr>
</tbody>
</table>
Enroll in Benefits Job Aid – Open Enrollment 2018

Review your elections and click the OK button to return to the Benefits Enrollment page.

Your estimated per pay period cost

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Max Tappen</td>
<td>Spouse (Opposite/Same Sex) NA</td>
</tr>
<tr>
<td>Mavis Tappen</td>
<td>Child EE Biological/Adopted NC</td>
</tr>
<tr>
<td>Martin Tappen</td>
<td>Child EE Biological/Adopted NC</td>
</tr>
</tbody>
</table>

Notes

- Select the OK button to store your choices.
- Select the Cancel Changes button to go back and change your choices.

Repeat the enrollment steps for each available benefit plan.

Note that some Medical plans require you to enter a Primary Care Provider. If this is the case for your Medical plan, the following page appears. Click the Select a Provider link to specify your provider. Click the Dependent Provider List to specify the dependent’s providers. Select other check boxes based on your information.

Choose a Primary Care Provider ID

Enrollment in this plan requires that you select a primary care provider. You must indicate whether or not you have already established a relationship with this provider, since some providers are not accepting new patients.

- **Dependent/beneficiary error**
  - The Primary Care Provider ID for Leslie Tappen is missing.

- [ ] Check here if you have previously seen this provider
- [ ] Click here to have the vendor select a Primary Care Provider ID on your behalf
- [ ] Check here to use the same provider for all your dependents

Dependent Provider List
Enroll in Benefits Job Aid – Open Enrollment 2018

After you enter all benefit changes, click the **Submit** button to finalize your Open Enrollment changes.

This table summarizes estimated costs for your new benefit choices. (The Employer column displays the amount UC contributes to the UC Retirement Plan on your behalf.)

<table>
<thead>
<tr>
<th>Election Summary</th>
<th>Total</th>
<th>Before Tax</th>
<th>After Tax</th>
<th>Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summarized estimates for new Benefit Elections</td>
<td>Costs</td>
<td>278.40</td>
<td>261.57</td>
<td>16.73</td>
</tr>
<tr>
<td>Your Costs</td>
<td>278.40</td>
<td>261.57</td>
<td>16.73</td>
<td></td>
</tr>
</tbody>
</table>

Select the **Submit** button to finalize your choices.

**Important:** Your enrollment will not be complete until you submit your choices.
Review the **Submit Benefit Choices** page, select the **Terms and Conditions** and **HIPAA Statement Confirmation** check boxes and click the **Submit** button to submit your Open Enrollment choices.

### Benefits Enrollment

**Submit Benefit Choices**

**Leslie Tappen**

You have almost completed your enrollment. If you have no further changes, select the **Submit** button at the bottom of this page to finalize your benefit choices.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Do not submit your benefit choices until you have completed your enrollment. You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you select the Submit button your benefit choices will be processed.

Once your enrollment is processed, you may not be able to make any further benefit changes until the next Open Enrollment period or if you have a qualified family status change.

### Terms and Conditions

- [ ] I agree to the terms and conditions listed here.

### HIPAA Statement Confirmation

- [ ] By selecting this checkbox, I am electing to receive an electronic HIPAA statement.

### Authorize Elections

By submitting your benefit choices you are authorizing the University of California to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

[Submit] [Cancel]

Select the **Submit** button to finalize your elections.

Select the **Cancel** button if you are not ready to submit your choices and wish to return to the Enrollment Summary.
Review the Open Enrollment message and then click the OK button.

Elections can only be submitted once daily during the open enrollment election period. Please review elections before submitting. Any subsequent changes cannot be made until tomorrow. Click OK to proceed.

Terms and Conditions
- I agree to the terms and conditions listed here.

HIPAA Statement Confirmation
- By selecting this checkbox, I am electing to receive an electronic HIPAA statement.

Authorize Elections
By submitting your benefit choices you are authorizing the University of California to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

Select the Submit button to finalize your elections.
Select the Cancel button if you are not ready to submit your choices and wish to return to the Enrollment Summary.
The confirmation message appears.

```
Benefits Enrollment
Submit Confirmation

- Your benefit choices have been successfully submitted.
  You will receive a final confirmation statement by mid-December.
  To return to the Benefits Enrollment page, use the OK button.

OK
```

Read the message and click the OK button. You have completed Open Enrollment.

You can make and submit Open Enrollment changes online once per day until 5:00 p.m. on November 21, 2017.

A Final Confirmation Statement is sent via email when Open Enrollment processing is completed in December, 2017.
I Have No Changes

Open Enrollment is voluntary. If you have no Open Enrollment changes to make, click the I Have No Changes button.

This table summarizes estimated costs for your new benefit choices. (The Employer column displays the amount UC contributes to the UC Retirement Plan on your behalf.)

<table>
<thead>
<tr>
<th>Election Summary</th>
<th>Total</th>
<th>Before Tax</th>
<th>After Tax</th>
<th>Employer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Summarized estimates for new Benefit Elections</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costs</td>
<td>278.40</td>
<td>261.67</td>
<td>16.73</td>
<td>1,005.86</td>
</tr>
<tr>
<td>Your Costs</td>
<td>278.40</td>
<td>261.67</td>
<td>16.73</td>
<td></td>
</tr>
</tbody>
</table>

Select the Submit button to finalize your choices.
Select the I Have No Changes button if you are happy with your prior elections and do not want to make any changes.

⚠️ Important: Your enrollment will not be complete until you submit your choices.
Benefits Summary Page through November 21, 2017

You can review your Open Enrollment elections online in the UCPath Benefits Summary page after your Open Enrollment changes are finalized. (Your Open Enrollment elections are usually finalized by the next business day after you submit your elections.)

To see your finalized Open Enrollment elections, sign into the UCPath Portal, expand the Benefits section and then click the Benefits Summary link. Enter 1/1/2018 in the date field and then click the Go button. The following image shows an example of the Benefits Summary page.

<table>
<thead>
<tr>
<th>Type of Benefit</th>
<th>Plan Description</th>
<th>Coverage or Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical</td>
<td>Kaiser Noth</td>
<td>Family (NA+NC)</td>
</tr>
<tr>
<td>Dental</td>
<td>Delta Dental PPO</td>
<td>Family (NA+NC)</td>
</tr>
<tr>
<td>Vision</td>
<td>Vision Service Plan (VSP)</td>
<td>Family (NA+NC)</td>
</tr>
<tr>
<td>Legal Services</td>
<td>ARAG Legal</td>
<td>Family (NA+NC)</td>
</tr>
<tr>
<td>Behavioral Health</td>
<td>Optum Behavioral Health-OPTKP</td>
<td>Family (NA+NC)</td>
</tr>
<tr>
<td>Life</td>
<td>Basic Life Anl Salary to $50K</td>
<td>Salary</td>
</tr>
<tr>
<td>Supplemental Life</td>
<td>Supplemental Life 4x Annual</td>
<td>Salary X 4</td>
</tr>
<tr>
<td>Employee &amp; Dependent ADD</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Basic Dependent Life</td>
<td>Waived</td>
<td></td>
</tr>
<tr>
<td>Supp Dependent Life - Spouse</td>
<td>Expanded Dep Life-Spouse 2.0X</td>
<td>Salary X 2</td>
</tr>
<tr>
<td>Supp Dependent Life - Child</td>
<td>Expanded Dep Life-Child 10K</td>
<td>$10,000</td>
</tr>
<tr>
<td>Basic Disability</td>
<td>Basic Disability</td>
<td>55% of Salary</td>
</tr>
<tr>
<td>Voluntary Long-Term Disability</td>
<td>Voluntary LongTerm Disability2</td>
<td>60% of Salary</td>
</tr>
<tr>
<td>Voluntary Short-Term Disability</td>
<td>Voluntary ShortTerm Disability</td>
<td>60% of Salary</td>
</tr>
<tr>
<td>403(b)</td>
<td>Waived</td>
<td></td>
</tr>
</tbody>
</table>
Benefits Summary Page on November 27, 2017
The new UCPath Portal is live on November 27, 2017. This means that the method to access the Benefits Summary page changes.

To see your finalized Open Enrollment elections on or after November 27, 2017, sign into the UCPath Portal, click Health and Welfare and then click Benefits Summary. Enter 1/1/2018 in the date field and then click the Go button. The following image shows an example of the Benefits Summary page in the new UCPath Portal.
eBenefits Employee Self Service Troubleshooting Tips

- If you are unable to move forward in Open Enrollment pages (for example, the page seems to be 'stuck'), start over by opening the Enroll in Benefits transaction again. Navigate to Main Menu > HCM Home > Self Service > Benefits > Enroll in Benefits. This action refreshes the Enroll in Benefits transaction. You may or may not lose your data entry; data entry is generally saved, but this may not occur if you were ‘stuck.’
- You must resolve error messages before you complete and submit your Open Enrollment changes. Error messages generally appear in red font.

Example Error Messages in the Enroll in Benefits Transaction

Benefits Enrollment
Medical

There are errors with your enrollment which are noted below. Make your corrections, then select the Update Elections button to save your changes.

Medical coverage is one of the most important benefits that UC offers you and your eligible family members. UC’s medical plans provide comprehensive coverage, including doctor visits, hospital services, prescription drugs and behavioral health services. The plans also offer a broad choice of providers — including UC medical center doctors, hospitals and medical groups — and plan designs to fit your needs.

Choose a Primary Care Provider ID

Enrollment in this plan requires that you select a primary care provider. You must indicate whether or not you have already established a relationship with this provider, since some providers are not accepting new patients. **Dependent/beneficiary error**

- The Primary Care Provider ID for Leslie Harper is missing.

Specify a Primary Care Provider ID [ ] Select a Provider

- Check here if you have previously seen this provider
- Click here to have the vendor select a Primary Care Provider ID on your behalf
- Check here to use the same provider for all your dependents

Dependent Provider List

Save and Continue Cancel Changes

- Refer to the Open Enrollment website to learn more about Open Enrollment and help make your benefit choices for 2018. ucnet.universityofcalifornia.edu/oe/