Manage Your Benefits

A life event refers to a change in your circumstances. This job aid covers generic events.

There are different ways you can navigate your Benefits. You can use the Benefit application on your home page, you can go to your profile, click actions, and select Benefits, or you can select Benefits from your profile menu.

On this Job Aid:

Report a Coverage Change Event

View and Edit Benefit Elections

Add Dependents

View Dependents' Benefit Elections

Manage Beneficiaries

Print Benefits Statement

Report a Coverage Change Event

Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, divorce, or similar life event, you can update your benefits to fit your needs better.

On your Home Page under Your Top Apps, click View all Apps,

From the Benefits and Pay application:

1. Click the **Benefits** button under Change.

2. Select the **Benefit Event Type**.

3. Click the **Calendar** icon to enter the date of the benefit event.

Benefit Event Type	*	select one ▼
Benefit Event Date	*	MM / DD / YYYY 📅

4. Attach required documents, if applicable.

Change Benefits
Brian Kaplan (Actions)

Instructional Text
Any dependent/marital status change event requires proof of the change in family status, prior to making mid-year benefit election changes.
You will be required to attach supporting documentation to your request for such a benefit event.
Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval.
Reminder: The Benefits Policy Document includes specifics on all of the requirements.

Benefit Event Type	*	Beneficiary Change ▼
Benefit Event Date	*	08 / 01 /2018 📅
Submit Elections By		08/30/2018
Enrollment Offering Types		Voluntary Supplemental Life Voluntary AD&D Basic Group Life 401(k)

Attachments

Drop files here
or
Select files

⊘ Certain life events require you to submit documentation. A system will display an error if the required documentation is missing.

⊘ **1 Error**   **View All**

Note

As you select benefit events, the system will determine the due date to submit elections and the enrollment offering types available to you.
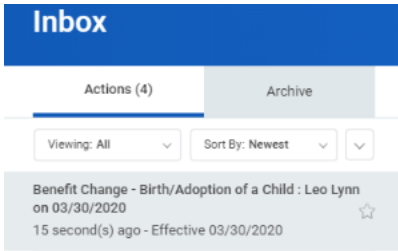
5. Click **Submit**, then click **Done**. A task will route to your Inbox, if applicable.

Done

6. Navigate to your **Inbox**.

7. Click the **Benefit Event** task. In this example, the task is related to the birth/adoption of a child.

8. Once you click on the task, on the right side of your screen, complete and continue through all required benefit screens. Click **Continue** to move to the next benefit screen.
9. On the last page, you will see a summary of your benefit changes, including an impact on your biweekly contribution. Scroll down Select the **I Agree** checkbox, if required, to provide an electronic signature, confirming your changes.

> ⊘ Your electronic signature is required before you can submit your benefit elections. Go to the Electronic Signature section and select "I Agree" to Submit your elections. Or, you can Save for Later to complete your elections at a later date.

10. Click **Submit**.
11. Click **Done** to complete the task or **Print** to launch a printable version of the summary for your records.

View and Edit Benefit Elections

Employees can change benefit elections when a qualifying event occurs, such as a change in marital status, the birth or adoption of a child, or a beneficiary change.
From the Benefits application:

1. Click the **Benefit Elections** button under View.
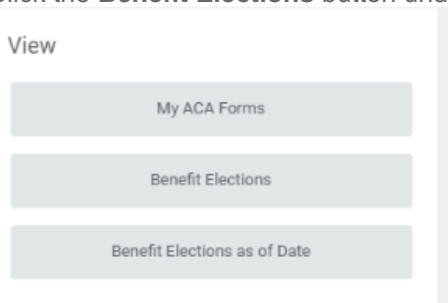
2. Review your benefit elections and costs.

Benefit Elections
Brian Kaplan (Actions)

Current Benefit Elections and Costs 9 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage
Medical - Aetna PPO	11/16/2009	11/16/2009	EE - Employee Only	
Dental - Aetna PPO	11/16/2009	11/16/2009	EE - Employee Only	
Vision - Vision Service Plan VSP	01/01/2013	01/01/2013	EE - Employee Only	
Healthcare FSA - SHPS	01/01/2012	01/01/2012	$1,000.00 Annual	
Basic Group Life - Liberty Mutual (Employee)	11/16/2009	11/16/2009	$75,000	$75,000.00
Voluntary Supplemental Life - Liberty Mutual (Employee)	01/01/2013	01/01/2013	$300,000	$300,000.00
Short Term Disability - Liberty Mutual (Employee)	11/16/2009	11/16/2009	75% of Salary	$52,382.25
Long Term Disability - Liberty Mutual Enhanced (Employee)	11/16/2009	11/16/2009	60% of Salary	$41,905.80
Employee Assistance Program - Liberty Mutual MyLibertyAssist®	01/01/2010	01/01/2010		

3. (Actions) Click your **Related Actions** button next to your name.
4. Select **Benefits** > **Change Benefits**.
5. Enter all required information, denoted by asterisks, and make any permitted changes.

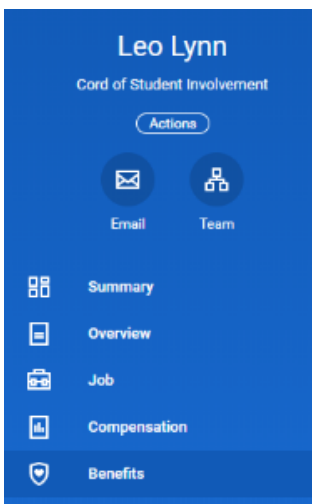| Benefit Event Type	*	select one ▼
Benefit Event Date	*	MM / DD / YYYY 🗓
Submit Elections By		(empty)
Enrollment Offering Types		(empty)

6. Click **Submit**.

Add Dependents

A dependent is someone, like a child or a spouse, who receives benefits under your plan.
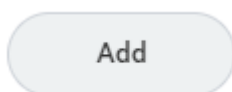From the Benefits application:

1. From your profile, select benefits.

2. Click the **My Dependents** tab.

| Benefits | My Retirement Savings | My Dependents | My Beneficiaries |
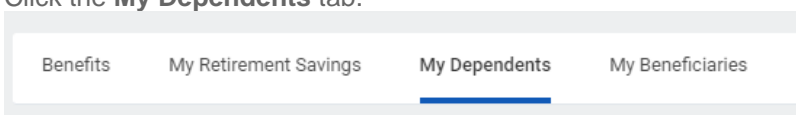
3. Click **Add**.

4. Select Dependent options. Click the **Edit** icon or click in the field to modify. Asterisks denote required fields.

Dependent Options

Is your new dependent already a beneficiary or emergency contact?

If yes, which one?

Effective Date & Reason

Effective Date *
03/31/2020

Reason

Use your new dependent as a beneficiary?

Use as Beneficiary
No

5. Click **Submit**.

6. A green checkmark will appear to signal the process was completed successfully. Click Done.

Process Successfully Completed

> **Note**
>
> If you add a dependent, you may need to update your Federal Tax elections, as well as your Benefit elections. If you add a beneficiary, you may need to update your Benefit elections.

View Dependents' Benefit Elections

From the Benefits application:

1. Click the **Dependents** button under Change.
2. Review your existing dependents and their benefit plan coverage.

Manage Beneficiaries

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can change, edit, and add beneficiaries from the Benefits application.
From the Benefits application:

1. Click the **Beneficiaries** button under **Change**.
2. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking **Edit**.
3. Click **Add** to add a new beneficiary. The Add Beneficiary page displays.
4. Select **Existing Dependent or Emergency Contact**, **Create a New Beneficiary** or **Create a New Trust as Beneficiary**.
5. Click **OK**.
6. Enter all required information, denoted by an asterisk.
7. Click **Submit**.
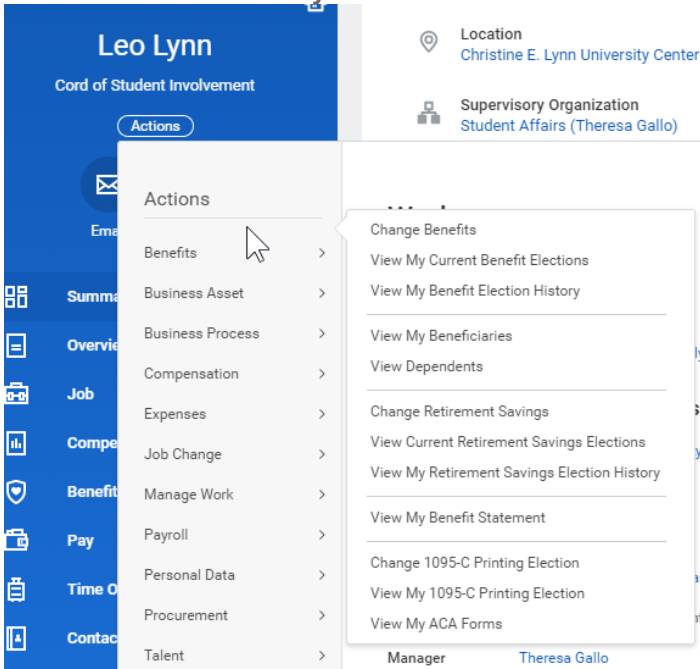
Print Benefits Statement

From your Home Page:

1. Click the **Profile** image > **View Profile**.
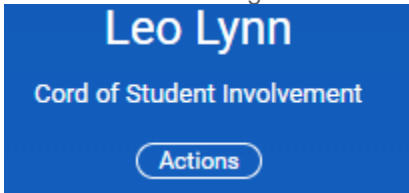
2. Click the **Actions** button.

3. Select **Benefits** > **View My Benefit Statement**.

4. Click the **prompt** in the Benefit Event field.
5. Select the desired Benefit Event you would like to view and print.
6. Click **OK**.

7. Click the **Print** icon.
8. The selected Benefit Event will open as a PDF document, which can be saved and printed.

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