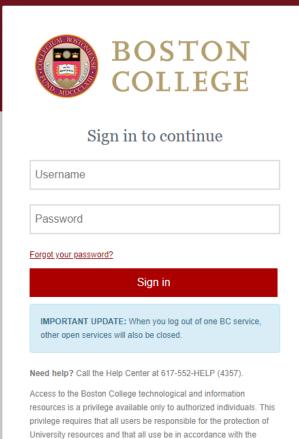
BENEFIT ENROLLMENT



Employee Self Service – PeopleSoft eBenefits Newly Eligible

LOG INTO PEOPLESOFT HR



Boston College Technology Use Agreement

Note: You will only be able to enroll in eBenefits after you have been hired into the PeopleSoft Payroll system and assigned a User ID and Password (typically day after entered into the system).

- Log into the Agora Portal
 - https://portal.bc.edu
- Find the Human Resources box and click 'PeopleSoft Human Resource Services' →

Human Resources

Healthy You 🕑

Management / Applicant Job Center / Job Opportunities



EMPLOYEE SELF SERVICE NAVIGATION – NEWLY ELIGIBLE

• Navigate to Self Service > Benefits > Benefits Enrollment

Favorites ▼ Main Menu ▼ > Self Service ▼			
ORACLE	All - Search	>>> Advanced Search	
Self Service Self Service Inquire or Update your personal information			
Personal Information Public View Personal Information Update Directory Opt Out Update Disability Status Update Veteran Status	Payroll and Compensation Wiew Paycheck Wiew Pay Deduction History Update Direct Deposit Update Tax Withholdings Support Boston College View Faculty Merit		Benefits Mad/Update Dependents View Current Dependents Ad Dependents (Form) Vision Open Enrollment If the Events Benefits Enrollment Cocument Upload
Time Reporting View Leave Balance Summary View Leave Balance Details Request Time Off	kearning & Development		

Benefits Enrollment/Change

Jane Doe

After your initial enrollment, normally the only time you may change your benefit choices is during open enrollment or when you have a qualifying event.

To begin your benefits enrollment or change, click the Select button.

Open Benefit Events					
Event Description		Event Date	Event Status	Job Title	
Newly Eligible	0	09/03/2019	Open	HVAC Mechanic I Sp 1	Select

Click the "Select" button to begin.

After you use the Select button, it will take a few seconds for your benefits enrollment information to load.

NEWLY ELIGIBLE – ENROLLMENT SUMMARY

🧭 🛄 👽 ¥ 💻 Jane Doe

Your benefit options are displayed below. Please note the following:

- · You are automatically enrolled in Basic Life which is provided by Boston College at no cost to
- to all # automatically enroles in Basic Life winch is provided by Jestion Outget and Cost by you. It is important that you assign beneficiaries for this plan by clicking the "EditEricnoff button.
 to use automatically enrolled in the Long Term Disability Plan on the first of the month following one year of eligible billine employment. To wany be eligible for immediate enrollment if you had similar disability coverage just prior to joining Boston College. You should consult with the Benefits Office I that is the case.

ENROLLMENT INSTRUCTIONS

Step 1: Click the 'Enroll/Edit' button next to each available benefit plan to select your new election and to update dependents and beneficiaries information.

Step 2: Once complete, click the 'Save and Continue' button near the bottom of this page.

important: Any election changes made in this enrollment process will not be complete until you click the 'Submit to Benefits' button at the end of the process.

Encollement Commence

	t Summary		
Enroll/Edit	Medical Current: No Coverage New: Walve	Before Tax	After Tax
Enroll/Edit	Dental Current: No Coverage New: Waive Dental	Before Tax	After Tax
Enroll/Edit	Vision Current: Waive Vision New: Waive Vision	Before Tax	After Tax
Enroll/Edit	Basic Life Current: BasLife01: Salary X 2 New: BasLife01: Salary X 2 : \$163,000	Before Tax	After Tax
Enroll/Edit	Supplemental Life Current: Waive Supplemental Life Neur: Waive Supplemental Life	Before Tax	After Tax
Enroll/Edit	Dependents Life Current: Waive Dependents Life New: Waive Dependents Life	Before Tax	After Tax
	Long-Term Disability Current: No Coverage New: Long-Term Disability Insurance: 65.00% of Salary	Before Tax	After Tax
Enroll/Edit	Flex Spending Health - U.S. Current: Waive FSA Healthcare New: Waive FSA Healthcare	Before Tax	After Tax

under 'Before Tax' or 'After Tax' depending on the tax treatment of the particular benefit. (The "Employer" column displays the amount Boston College is contributing to subsidize the cost of your benefits.)

Election Summary				
Summarized estimates for new Benefit Elections	Total	Before Tax	After Tax	Employer
Costs	0.00	0.00	0.00	4.08
Your Costs	0.00	0.00	0.00	

- Select the "Enroll/Edit" button • next to each benefit option to enroll.
 - Don't forget to select the Basic Life enrollment option to assign Beneficiaries.

Once you are done enrolling, click • the "Save and Continue" button to finalize your elections.

NEWLY ELIGIBLE – ADDING DEPENDENTS/BENEFICIARIES

• Dependents and Beneficiaries will be added as part of the Health and Life Insurance Plan enrollment pages.

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, use the **Add/Review Dependents** button to determine why s/he is not eligible. You may also use this button to add new dependents to your list.

Check the box next to each dependent you wish to cover under this plan.

You may enroll any of the following individuals for coverage under this plan by checking the **Enroll** box next to the dependent's name.

IMPORTANT: If you are enrolling a dependent spouse into a BC health plan for the first time, you will be directed to upload your proof of spouse documentation, satisfactory to the Benefits Office, before you complete your enrollment. Your enrollment will not be **Processed** until such required documentation has been submitted and reviewed by the Benefits Office.

Dependent Beneficiary				
Enroll	Name	Relationship		
	Lucy Doe	Child		



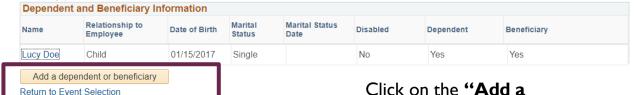
To add a new dependent, click on the **"Add/Review Dependents button"**

Add/Review Dependent/Beneficiary

John Doe

The individual(s) listed may be eligible for Benefit Coverage. Select a name to view or modify personal information. To add a dependent or beneficiary, select the 'Add a dependent or

beneficiary' pushbutton.



Click on the **"Add a** dependent or beneficiary button"

NEWLY ELIGIBLE – ADDING DEPENDENTS/BENEFICIARIES

Dependent/Deneficiary Personal Information

John Doe

Select Save once you have added your Dependent/Beneficiary's personal information. This information will go into effect as of Oct 5, 2019.

If the Dependent/Beneficiary's address is different from your own, deselect the "Same Address as Employee" checkbox and click "Edit Address" button to update.

The "As Of" dates in the Status Information section can be either the date of the event (e.g. date of birth, marriage, etc) or your Date of Hire, whichever is most recent.

Personal Information

*First Name	Sarah		
Middle Name			
*Last Name	Doe		
Name Prefix		Q	
Name Suffix		Q	
Date of Birth	8/12/1970	31	
*Gender	Female	•	
Social Security Number			
*Relationship to Employee	Spouse	▼	
Status Information			
*Marital Status	Single	•	As of
Disabled	No	V	As of

Same Phone as Employee



Add the dependent details and click the **"Save"** button

Save Confirmation



	OK	
£		a

Click **"OK"** to continue

Add/Review Dependent/Beneficiary

John Doe

Return to Event Selection

The individual(s) listed may be eligible for Benefit Coverage. Select a name to view or modify personal information. To add a dependent or beneficiary, select the 'Add a dependent or beneficiary' pushbutton.

Dependent a	and Beneficiary Inf	ormation					
Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Disabled	Dependent	Beneficiary
Lucy Doe	Child	01/15/2017	Single		No	Yes	Yes
Sarah Doo	Spouso	08/12/1970	Single		No	Yes	Yes
Add a deper	ndent or beneficiary						

Click **"Return to Event Selection"** to continue

NEWLY ELIGIBLE – ADDING DEPENDENTS/BENEFICIARIES

Dep	endent Benef	ficiary			
Γ	Enroll	Name	Relationship		
		Lucy Doe	Child		
ŀ	\dd/Review Dep	endents			
Up	date and Contin	ue Disca	rd Changes	For Health Plans, sel dependent to be enr	ect the checkbox next to each [•] olled.

Allocation Deta	ils				
Name	Relationship	Current Primary Percent	Curren Contingen Percen	New Primary Allocation	New Contingent Allocation
Lucy Doe	Child			100	
John Doe	Spouse				100
		Т	otal 100	100	

For Life Insurance Plans, enter primary (required) and contingent (optional) beneficiaries

NEWLY ELIGIBLE – SELECTING PROVIDER FOR HMO

• If you are enrolling in Harvard Pilgrim HMO, you must enter a Provider ID for you and your covered dependents.

Dependent Bene	ficiary				
Enroll	Name	Relationship			
✓	Lucy Doe	Child			Benefits Enrollment
•	John Doe	Spouse			Medical
					Jane Doe
Add/Review Dep	pendents				Select the \mathbf{OK} button to proceed. This will open a new web browser.
					When you have finished, close the new web browser. Then select Return to Enrollment to go back to your benefits information.
Choose a Primar	y Care Provider ID)			to Enforment to go back to your benefits information.
when you initially enr relationship with this Important After your directly with Harvard	roll. Remember to indi provider, since some initial enrollment, all (Pilgrim. If the Provide	uired to select a Primary Care Provi icate whether or not you have alread providers are not accepting new pat changes to your Primary Care Provi r ID field is "grayed out" you will nee overed dependents Primary Care Pr	ly established a ients. der must be made ed to contact		Click " OK " button.
Click on the link belo	w to update the Prima	ary Care Provider for each of you de	pendents.		
Check here if yo	Specify a Primary ou have previously s		Select a Prov	der	
Check here to u	se the same provide	er for all your dependents			
Important: Assign Pr Update and Contir		ependents by clicking here. ard Changes	Provider	n the Select a link to look up Care Physician.	your

NEWLY ELIGIBLE – SELECTING PROVIDER FOR HMO

3. Search for Providers and make sure to write the Provider ID Number down.

Start your search

Important Plan Details

You can search by: Location - Enter the address, city, state or ZIP code Name, Facility or Specialty - Select your option and type the provider, facility or specialty name Provider Type - Select one of the provider type links

To start a new search with a different plan, Change Plan.

Health Plan

HMO or HMO Open Access

Location

(Address, City, State, or ZIP Code)

Search by

Name or Facility O Specialty

<u>Alyssa R Smith, MD</u>

Address 55 HIGH ST STE 102 Hampton, NH 03842

⊘ <u>Map</u>

Phone (603) 929-3838

Provider Type Primary Care Provider (PCP)



4. Close the window and click on the Benefit Enrollment Window. Click the "**Return**" link.

Benefits Enrollment

Medical

Jane Doe

Use the **Return to Enrollment** button to go back to your benefits information.

Return

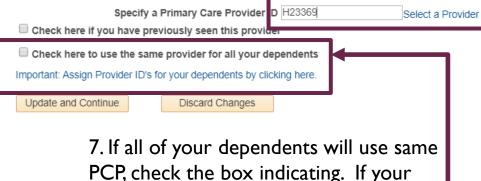
NEWLY ELIGIBLE – SELECTING PROVIDER FOR HMO

Choose a Primary Care Provider ID

You and your covered dependents are required to select a Primary Care Provider for this plan when you initially enroll. Remember to indicate whether or not you have already established a relationship with this provider, since some providers are not accepting new patients.

Important After your initial enrollment, all changes to your Primary Care Provider must be made directly with Harvard Pilgrim. If the Provider ID field is "grayed out" you will need to contact Harvard Pilgrim to update your and your covered dependents Primary Care Provider.

Click on the link below to update the Primary Care Provider for each of you dependents



PCP, check the box indicating. If your dependents will have a different PCP, then click the "Important: Assign Provider ID for your dependents by clicking here." 6. Enter the Provider ID Number and indicate if you have previously seen the provider.

Benefits Enrollment

Medical

Jane Doe

i Impo

Important: Any election changes made in this enrollment process will not be complete until you click the 'Submit to Benefits' button at the end of the process.

Provide the Primary Care Provider ID numbers for your dependents:

Provider Link	Health Provider ID	Previously Seen
Provider Link	12345	Ø
Provider Link	12345	2
	Provider Link	Provider Link 12345

 If you are adding a Spouse for the first time, you are required to provide proof. You can upload your documentation from the Health Plan Enrollment Pages.

Medical

Jane Doe

Boston College offers two comprehensive medical insurance options: the Harvard Pilgrim HMO plan and the Harvard Pilgrim PPO plan. Both plans promote wellness as part of their benefits and are available to protect you and your dependents if you become sick or injured.

Learn more about Boston College's medical plans in the BC Employee Handbook

ENROLLMENT INSTRUCTIONS

Step 1: <u>Select an Option</u>. To enroll, select either the HMO plan or the PPO plan. If you are waiving medical coverage, choose 'Waive Medical' at the bottom of the list.

Step 2: <u>Enroll Your Dependents.</u> This section will list previously submitted dependents eligible for this plan. If you need to enroll an eligible dependent not listed, click the 'Add/Review Dependents' button to add dependents. Check the box next to each eligible dependent to enroll that dependent.

Note: Selecting dependents will automatically enroll you in family coverage.

Step 3: <u>Upload Documentation</u>. If you are requesting medical, dental or vision coverage for a dependent spouse not previou by enrolled in a BC nearly plan, you must submit documentation that proves spouse status. Select the <u>Document Upload</u> I hk and enter the Life Event Type of "NEW" to upload your documentation.

Notes: If your spouse has previously been enrolled in a BC health plan as your dependent, then you may skip this step. Only one document upload is necessary to satisfy the requirement for all health plans at once.

Step 4: <u>Save Your New Election</u>. Select the Save and Continue button near the bottom of the page to store your medical plan election until you are ready to submit your final enrollment on the Enrollment Summary page.

Click on the Document Upload link.

If you are adding a Spouse for the first time, you are required to provide proof. You can upload your documentation from the Health Plan **Enrollment Pages.**

Eind an Existing Value	Add a New Value
Life Event Type NEW Q	Enter NEW in the Life Event Type field and
Add	click the "Add" button.

Find an Existing Value Add a New Value

Life Events - Document Upload

Instructions

Add Attachment

You may be required to submit one or more of the document(s) listed here. Required types of proof include:

PROOF SPOUSE - Documentation must be submitted for either a Marriage or Divorce that results in a change to your medical, dental or vision plan for the Spouse.

- <u>Marriage</u> If you are requesting medical, dental or vision coverage for a dependent Spouse not previously enrolled in a Boston College health plan, you must submit a copy of a marriage certificate, a copy of a signed tax form, or other documentation, satisfactory to the Benefits Office, that proves spouse status.
- · Divorce If you are requesting to drop coverage or maintain existing coverage for a Spouse as a result of a Divorce, you must submit a copy of the Divorce Decree.

PROOF COVERAGE - Documentation must be submitted if you are choosing to enroll or drop medical, dental or vision coverage due to gaining or losing other coverage.

- · Loss of Other Coverage If you have lost coverage and are enrolling in medical, dental or vision coverage, you must provide proof. Acceptable proof includes a letter from a former/existing employer, letter from your Spouse or Ex-Spouse's employer or a COBRA letter that states the date coverage ended and includes the names of all insured members.
- · Gain of Other Coverage If you choose to drop medical or dental benefits as a result of a Life Event, you must provide proof of other coverage. Acceptable proof is a letter from another employer or insurance company that states the effective date of new coverage and includes the names of all insured members.

PROOF CHILD - Generally, documentation will NOT be required for children to be covered under a family membership, although there are some exceptions, for example, in the case of a new adoption, legal guardianship, foster child or proof of residency for stepchild/legal ward

 Life Event Documents 	Click on the "Add	
EmpID:	35375095	Attachment" button.
Life Event Type:	NEW	
	Newly Eligible	12
Select a docu	ment PROOF_SPOUSE Q Proof of Eligible Spouse	

12

Document	Definition	2	New	Attachment	
oodinionit	Dominion			/	

Instructions			
You have chosen to e	nter a new attachment.		
 Selection Criteri 	a		
Select a	document PROOF_SPOUSE Sequence 0 Jane Doe Created 10/17/19 7:40PM	Last Updated 10/17/19 7:40PM	
*Subject	Add Attachment	I. Enter a descriptio marriage certificate)	
Save		mai mage cer emeacej	in the

I. Enter a description of the document (e.g. marriage certificate) in the Subject field and Click the "Add Attachment' button.

Go To Life Events - Document Upload

Instructions			
You have chosen to enter a new a	attachment.		
Selection Criteria			
	신경영 방법 이 방문가 많이 가지 않는 것이 없다.	Last Updated 10/17/19 7:40PM	File Attachment
*Subject Jane Doe Spouse Attachment Add Attach			Image: Choose File Doe Marriageificate.docs Upload Cancel
Save	ent Upload		[<u> </u>

Please note: before you can upload an attachment, you will need to scan a copy of the document and save it to your computer.

2. Select the file to be uploaded and Click the "Upload" button.

	New Attachment		
Instructions			
You have chosen to enter a new	attachment.		
 Selection Criteria 			
Select a document Sequence Created		Last Updated 10/17/19 7:40PM	3. Click "Save"
*Subject Jane Doe Spouse Attachment Doe_Marriage_C	ertificate.docx		J. CIICK Save
Attachment Doe_Marriage_C			

13

Spouse's employer or a COBRA letter that states the date coverage ended and includes the names of all insured members.

 <u>Gain of Other Coverage</u> If you choose to drop medical or dental benefits as a result of a Life Event, you must provide proof of other coverage. Acceptable proof is a letter from another employer or insurance company that states the effective date of new coverage and includes the names of all insured members.

<u>PROOF_CHILD</u> - Generally, documentation will **NOT** be required for children to be covered under a family membership, although there are some exceptions, for example, in the case of a new adoption, legal guardianship, foster child or proof of residency for stepchild/legal ward.

Life Event Documents	
EmpID:	35375095
Life Event Type:	NEW
Select a doc	Newly Eligible ument PROOF_SPOUSE

Add Attachment

Attachmen	its		Personalize Find	🛛 📑 🛛 First 🧃) 1-2 of 2 🕟 Last	
Select	Sequence	Created	Author	Entry ID	Subject	Status
	1	10/16/2019 2:56PM	Jane Doe	Proof of Eligible Spouse	Jane Doe Spouse	Active

The saved documentation will be displayed in the grid. Close the Window to return to your enrollment.

NEWLY ELIGIBLE – SUBMITTING ELECTIONS

• When you are done making elections and have clicked "Save and Continue" complete your elections by clicking the "Submit" button.

ection Summary				
Summariand malimates for new Denetil Electrons	Total	Before Tax	After Tax	Employee
Cests	223.14	221.84	1.50	860.23
Your Costs	223.14	221.64	1.50	

			(Previous Next) Cancel C	Continue Later
Life Events	0 07		Related Content - New Window Help P	Personalize Pa
Welcome	Legend	Benefits Enrollment		
* Mantal Status		Submit Benefit Choices		
- Contraction and the first of		John Doe		
Update Dependent and Be	Beneticiary	You have almost completed your enrollment. If you have no further changes, select the Submit button		
O Document Upload		on this page to finalize your benefit choices.		
O Benefit Enrollment		Select the Cancel button if you are not ready to submit your choices and wish to return to the		
Benefit Election Review Event Completion and Exit		Enrollment Summary		
		Do not submit your benefit choices uniti you have completed your enrollment. You may store your choices on early ange and return to the Enrollment Summary as many times as you'd two unitifyour enrollment de addine. However, once you select the silumit battory your cenetif choices will be sent to the Benefits Department for processing. Once your enrollment is processed, you may not be able to make any further benefit changes until the next Ober Enrollment periods or if you have a qualified family status change. Enrollment as forcessed, you may not be able to make any further benefit changes until the next Ober Enrollment periods of if you have a qualified family status change. Enrollment as forcessed you may not must submit documentation that proves spouse status. Citic the link below and select the Life Event Tips of "MAR" to upload your documentation. <u>Decument Listica</u> in the processed until submitted documentation has been reviewed by the Benefits Office.		
		Authorize Elections	Click "Submit" to send your elections	
		By submitting your benefit choices you are submitting Bestin College to take deductions from your praches to perform or prevent constraints. Your are also and orderinging the Benefits Office to send necessary praches to perform or prevent constraints. The send are support your coverage. Submit Cancel Calculations can be botton to send your final choices to the Benefits Office. Select the Calculation of your final choices to the Benefits Office.	to the Benefits Office	

NEWLY ELIGIBLE CONFIRMATION STATEMENT

• Review and Print a copy of your Confirmation Statement

Benefits Confirmation

Jane Doe

Vision

Basic Life

Congratulations, you have successfully submitted your benefit elections to the Benefits Office. Below is a summary of your benefit elections. Please print a copy of your Confirmation Statement to keep for your records. Then click "Next".

-	Print	1

0.00

0.00

Personal Information

Current Name Jane Doe Home Mailing Address Mailing Address Home Phone Emergency Contact

Dependent Information	tion			
Name	Date of Birth	Sex	Relationship	Marital Status
Lucy Doe	01/15/2017	Male	Child	Single
John Doe	01/06/1970	Male	Spouse	Single
Your Benefit Choice	15			
Benefit Plan	Benefit Opt	lion	Coverage / Category Base	Per Pay Pd
Medical	HarvPEPP	0	Family	139.75
Dental	DeltaDent		Family	13.36

\$163,000

Watve

BasLife01





Jane Doe Employee ID: 35375095 Effective Date: 10/17/2019

Congratulations, you have successfully submitted your benefit elections to the Benefits Office. Below is a summary of your benefit elections. Please print a copy of your Confirmation Statement to keep for your records.

PERSONAL INFORMATION

Name J Home Address 1 Louis Lane, Randolph, MA 02368 Mailing Address Home Phone Business Phone Emergency Contact

DEPENDENT INFORMATION			
Name	Date of Birth	Relationship	Marital Status
Lucy Doe	2017-01-15	Child	Single
John Doe	1970-01-06	Spouse	Single

EMPLOYEE SELF SERVICE – VIEW BENEFIT SUMMARY AND LAST PRINT CONFIRMATION STATEMENT

Navigation: Self Service > Benefits > Benefit Summary

Benefits Summary

Jane Doe

Click "Confirmation Statement" for a copy of your last submitted Confirmation Statement.

Plan Description Harvard Pilgrim HMO Delta Premier Plan	Coverage or Participation Family Family
Harvard Pilgrim HMO	Family Family
	Family
Delta Premier Plan	
	Waived
Basic Life under 55 (2xsal)	Salary X 2
	Waived
Sick Leave Accrual Plan	
Vac Facilities by Hour	
Sick Incentive Time	
Vacation Bonus Facilities 40Hr	
	Waived
	Vac Facilities by Hour Sick Incentive Time

Boston College Confirmation Statement



Jane Doe Employee ID: 35375095 Effective Date: 10/17/2019

Congratulations, you have successfully submitted your benefit elections to the Benefits Office. Below is a summary of your benefit elections. Please print a copy of your Confirmation Statement to keep for your records.

PERSONAL INFORMATION

Name Jane Doe Home Address Mailing Address Home Phone Business Phone Emergency Contact

DEPENDENT INFORMATION			
Name	Date of Birth	Relationship	Marital Status
Lucy Doe	2017-01-15	Child	Single
John Doe	1970-01-06	Spouse	Single