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' →



EMPLOYEE SELF SERVICE NAVIGATION – NEWLY ELIGIBLE

• Navigate to Self Service > Benefits > Benefits Enrollment

Favorites ▼ Main Menu ▼ > Self Service ▼		
ORACLE'	All V Search	_
Self Service		
Self Service		
Inquire or Update your personal information		
Personal Information Update Directory Opt Out Update Directory Opt Out Update Directory Status Update Veteran Status	Payroll and Compensation Payroll and Compensation View Paycheck View Paycheck Update Direct Deposit Update Tax Withholdings Support Boston College View Faculty Ment	Benefits
Time Reporting View Leave Balance Summary View Leave Balance Details Request Time Off	Arring & Development Image: Contract of the second seco	

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	6	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 alle automatically enrolled in Basic Litre winch is provided by Jestion Outget and Cost by you. It is important that you assign beneficialises 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

Enroll/Edit	Medical Current: No Coverage	Before Tax	After Tax
Enroll/Edit	New: Waive Dental Current: No.Coverage No.	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: Valve Supplemental Life New: Walve 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
Enroll/Edit	Flex Spending Dependent Care Current: Walve FSA Dependent Care New: Walve FSA Dependent Care	Before Tax 0.00	After Tax
	marizes estimated monthly costs for your new benefit choices. The amounts will display		

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 F		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	3	
*Gender	Female	T	
Social Security Number			
*Relationship to Employee	Spouse	V	
Status Information			
*Marital Status	Single	•	As of
Disabled	No	▼	As of

Same Phone as Employee



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

Save Confirmation



OK	

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 an	Dependent and Beneficiary Information						
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	Spouse	08/12/1970	Single		No	Yes	Yes
Add a depend	ent or beneficiary						

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

NEWLY ELIGIBLE – ADDING DEPENDENTS/BENEFICIARIES

Dep	endent Benef	ficiary				
Г	Enroll	Name	Relationship			
		Lucy Doe	Child			
A	dd/Review Dep	endents				
Up	date and Contin	ue Disca	rd Changes	dependent to be enro	olled.	n

Allocation Det	ails				
Name	Relationship	Current Primary Percent	Curren Contingen Percen	New Primary Allocation	New Contingent Allocation
Lucy Doe	Child			100	
John Doe	Spouse				100
		T	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.

8

Dependent Benef	ficiary						
Enroll	Name	Relationship					
	Lucy Doe	Child					
	John Doe	Spouse		Benefits Enrollment			
				Medical			
Add/Review Dep	endents			Jane Doe			
				Select the OK button to proce	ed This will or	oen a new web browser	
hoose a Primary	y Care Provider ID			Select the OK button to proce		Jen a new web browser.	
ou and your covered then you initially enro alationship with this p	d dependents are requi oll. Remember to indic provider, since some p	ired to select a Primary Care ate whether or not you have a roviders are not accepting ne	Provider for this plan already established a w patients.	When you have finished, clos to Enrollment to go back to y	se the new web your benefits in	browser. Then select Return formation.	
nportant After your irectly with Harvard I arvard Pilgrim to up	initial enrollment, all ch Pilgrim. If the Provider date your and your cov	nanges to your Primary Care ID field is "grayed out" you w vered dependents Primary Ca	Provider must be made vill need to contact are Provider.	ок 2. С	Click "C	OK" button.	
lick on the link below	w to update the Primar	y Care Provider for each of y	ou dependents	Return			
_	Specify a Primary C	are Provider ID	Select a Provider		E H	muard Pilarim	
Check here if yo	ou have previously se	en this provider			W He	ealthCare	OUR PLANS
Check here to us	se the same provider	for all your dependents	I. Click on the S	elect			
nportant. Assign Pro		endents by clicking here.	. Duassidan links	_		How to Search	
Update and Contin	Discar	rd Changes	a Provider link to	D		Find a Doctor or Care Provider	
			look up your Pri	imary		Select your health plan from the list below - (of plan you are enrolled in. If you need help find member: (800) 848-9995. For TTY service, call i	Check the upper right-hand corner of your ID card to determine what type ng a provider, call us. Already a member: (888) 333-4742. Not yet a 711.
			Care Physician.			Standard Plans	
			1			Access America	
						HMO or HMO Open Access	
						Medicare Stride HMO NetOption HMO	3 Select HMO or
						POS or POS Open Access PPO	
						PPO - Flex	HMO Open Acce
							to find a provider
							to mu a provider.

NEWLY ELIGIBLE – SELECTING PROVIDER FOR HMO

Find a Doctor or Car	e Provider		1 Search for Providers and make		
Zip code: Enter ZIP Code or Enter address			sure to write the Provider ID		
Search by Name, Facility, or	r Specialty	SEARCH	Number down.		
	Show	Providers that accept: HMO or HMO Open Access Change Plan			
SEARCH BY PROVIDER T	YPE	SEARCH BY SPECIALTY			
Primary Care Providers (PC Specialists	P)	Internal Medicine Family Practice			
Behavioral Health Providers Hospitals	3	Pediatrics OB/GYN	Benefits Enrollment		
Other Care Providers		Dermatology	Medical		
	Laura R Benzaquen, MD Primary Care Provider (PCP) Specialties: Cardiovascular Disease Internal Medicine Provider ID: 142369	MASS General Hospital Ambulatory Care Division Estimated Distance: 0 mile C/O Chelsea Healthcare Center 151 Everett Ave Chelsea, MA 02150 617-884-8300 Driving Directions Text Me	Jane Doe Use the Return to Enrollment button to go back to your benefits information.		
	Accepting New Patients: No Hospital Affiliations: Brigham and Women's Hospital Cambridge Health Alliance Massachusetts General Hospital More about this provider Compare with other providers Add to List	2018 👷	Return 5. Close the window and click on the Benefit Enrollment Window. Click the "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:

Dependent Infor	mation		
Name	Provider Link	Health Provider ID	Previously Seen
Lucy Doe	Provider Link	12345	۲
John Doe	Provider Link	12345	~
Return	Cancel		

 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
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	Dominicon			/	

Instructions			
You have chosen to e	nter a new attachment.		
 Selection Criteri 	а		
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 description of t	:h
Save			C

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

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

Go To Life Events - Document Upload

instructions			
ou have chosen to	o enter a new attachment.		
Selection Crit	eria		
Select	t a document PROOF_SPOUSE Sequence 0 Jane Doe		
	Created 10/17/19 7:40PM	Last Updated 10/17/19 7:40PM	File Attachment
*Subject Jan	ne Doe Spouse		🭠 🚺 😋 🏶 🕍 не
Attachment	Add Attachment		Choose File Doe Marriageificate.docx Upload Cancel
Save			
	vente Desument Unland		
Life E	vents - Document Opload		

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

Document Definition -	New Attachment		
▼ Instructions			
You have chosen to enter a new	attachment.		
Telection Criteria			
Select a document Sequence Created	PROOF_SPOUSE 2 Jane Doe 10/17/19 7:40PM	Last Updated 10/17/19 7:40PM	3 Click "Save"
*Subject Jane Doe Spouse	i		
Attachment Doe_Marriage_C	ertificate.docx himent		
Save			
Go To Life Events - Docun	nent Upload		

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 documen	Newly Eligible PROOF_SPOUSE Q

Add Attachment

ŀ	Attachment	s			Personalize Find	🛛 📑 🛛 First 🧃) 1-2 of 2 🕟 Last
ſ	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.

Election Summary						
Summarized extinutes for new Denefit Dectrons	Telai	Defore Tax	After Tax	Employee		
Ceats	223.14	221.84	1.50	860.23		
Your Costs	223.14	221.64	1.50			

			Previous. Next. Cancet Continue	e Late
He Events	0 07		Related Content - New Window Help Person	alize P
A	regena	Benefits Enrollment		
• weicome		Submit Benefit Choices		
• Mantai Status		John Doe		
 Opdate Dependent and Be 	ieneticiary	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 		Enrollment Summary		
		Do not submit your benefit holices until you have completed goor enrollment. You may store your choices on early hoge and return to the Findlinet Submary as many times as you't like up until your enrollment do adfine. How were, note you select the submit buttory your benefit choices will be sent to the Benefit Department for processes you may not be able to make any further benefit changes until the need Open Enrollment period or if you have a qualified family status change. Enrollment periods or if you have a qualified family status change . This is on encoursely medical, dental or vision coverage for a dependent Spouse not previously enrolled in a Bootton College health plan, you must submit documentation that proves spouse status. Citick the link below and select the Life Event Type of "MAR" to upload your documentation. <u>Department Valors</u> link to upload your documentation. <u>Dacument Valors</u> link to upload your documentation. Beant Walls and link to upload your documentation.		
	[Submitting your benefit costs, You are submitting Basten College to take deductions from your penefits costs, You are submitting the Benefits Office to send necessary performed to gate the send necessary context to part the send necessary context to be and the send necessary context to be and the send necessary context set to the send necessary set to the send necessary context set to the send necessary set to the set to the send necessary set to the send necessary set to the send necessary set to the set to the send necessary set to the s	Click "Submit" to send your elections 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	

0.00

0.00

Personal Information

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

Dependent Informa	ition			
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 Choic	es			
Benefit Plan Benefit Opti		lion	Coverage / Category Base	Per Pay Pd
Medical	HarvPapp	0	Family	139.75
Dental DettaDent			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.

To view your benefits as of another date, enter the date and select Go.						
10/17/2019 🛐 Go		Confirmation Statement				
Benefits Summary						
Type of Benefit	Plan Description	Coverage or Participation				
Medical	Harvard Pilgrim HMO	Family				
Dental	Delta Premier Plan	Family				
Vision		Waived				
Basic Life	Basic Life under 55 (2xsal)	Salary X 2				
Supplemental Life		Waived				
Dependents Life		Waived				
401(k)		Waived				
403(b)		Waived				
Section 457		Waived				
Sick	Sick Leave Accrual Plan					
Vacation	Vac Facilities by Hour					
Sick Incentive Time (BC)	Sick Incentive Time					
Vacation Bonus Time (BC)	Vacation Bonus Facilities 40Hr					
Flex Spending Healthcare		Waived				

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