Use this task to enroll in benefits in UCPath.

Dashboard Navigation:
Health and Welfare > **Enroll in Benefits**
or
Menu Navigation:
Employee Actions > Health and Welfare > **Enroll in Benefits**

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

Step	Action
1.	Before you enroll in benefits, you must validate your identity. UCPath randomly displays one of the security questions set up on your profile. Click in the **Security Question** field. For this example click in the **Who is your childhood best friend?** field.
2.	Enter the desired information into the **Security Question** field. For this example, enter **Molly**.
3.	Your answer appears as a series of dots. Click the **Submit** button.

Step	Action
4.	If you answer the question correctly, UCPath displays the **Benefits Enrollment** page, and you can enroll in benefits.
	If you answer incorrectly, an error message appears. You have three attempts to answer this question correctly. After three incorrect answers, UCPath displays the **Security Questions Setup** page. You must provide your date of birth and the last four digits of your Social Security number to validate your identity and then update your security questions and answers.

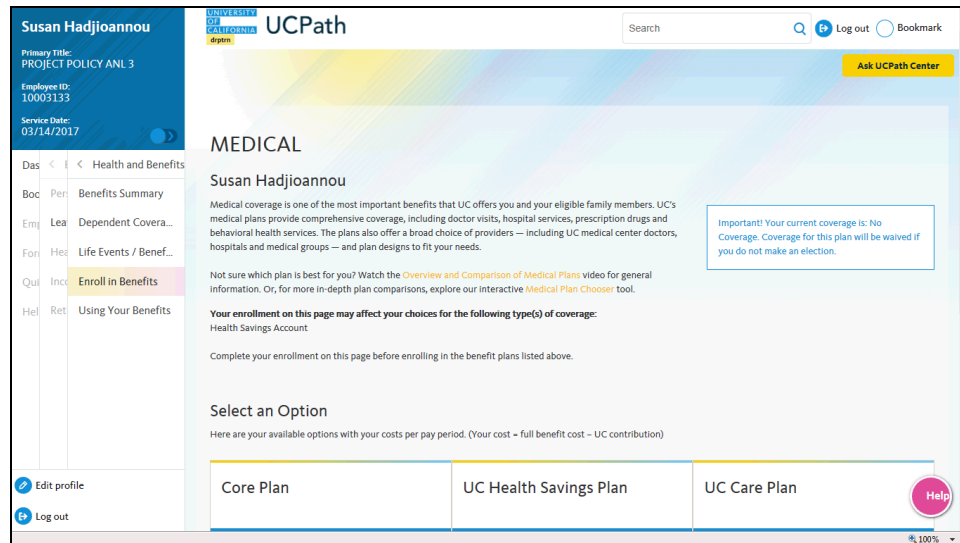| Step	Action
5.	In this scenario, you will enroll yourself and your dependents in benefits eligible to a new hire. Review the **Benefits Enrollment** page before you begin the enrollment task. You elect your benefits when you are first eligible for benefits during the hire process, if you become newly eligible due to a job change and annually during the open enrollment process.
6.	Click the scroll bar.
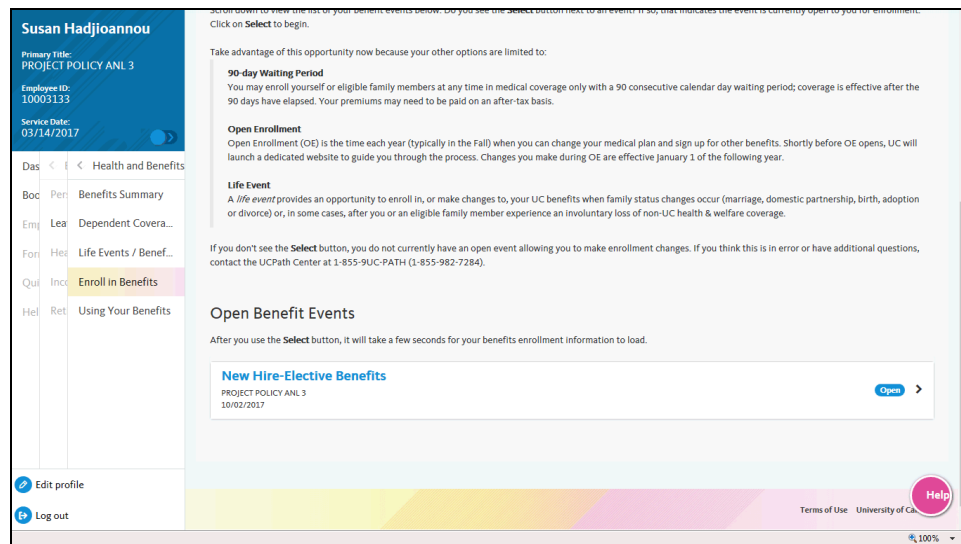
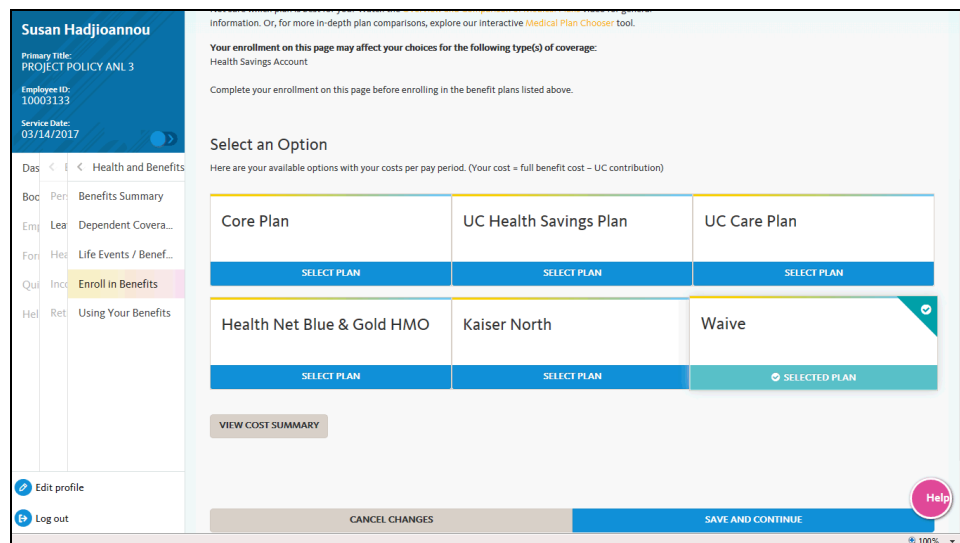| Step	Action
7.	The **Open Benefit Events** section displays events for which you are eligible, such as the **New Hire-Elective Benefits** event that is **Open** in this example. Click the **Open** button. Open >

Step	Action
8.	The **New Hire-Elective Benefits** page appears. You must complete your benefit elections within 31 days of eligibility. Click the scroll bar.

Step	Action
9.	The **Current Enrollment Summary** section displays your current elections for all eligible plan types. At new hire, most elections default to **Waive**. Click the **Edit** button for each benefit plan to make your benefit choices. As you make selections, the **Before Tax** and **After Tax** columns at the top of the page display your costs associated with the election for that plan.
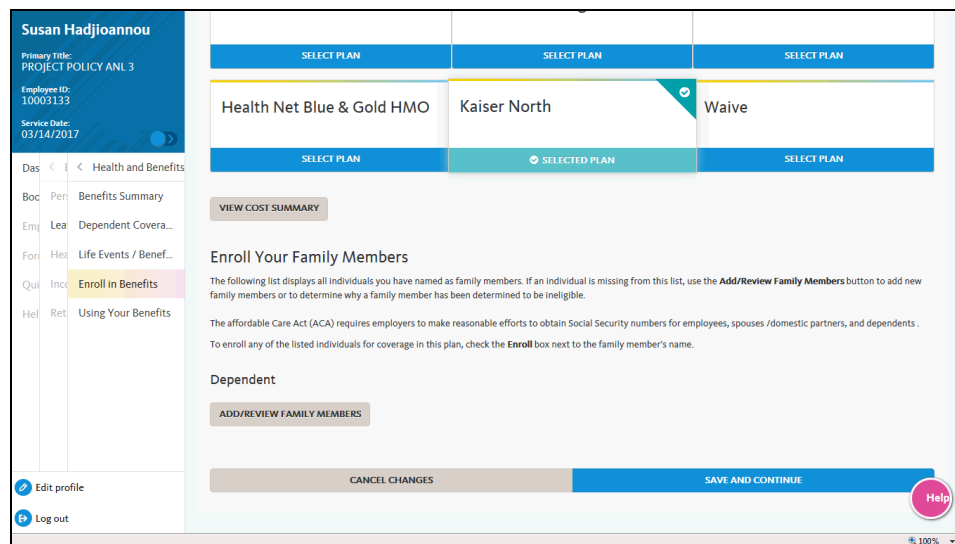
Step	Action
10.	To add **Medical** coverage, click the **Edit** button.

Step	Action
11.	If you need information about the medical plans before you make your selection, click the links to watch the **Overview and Comparison of Medical Plans** video or to use the interactive **Medical Plan Chooser** tool.
12.	Click the scroll bar.

Step	Action
13.	In the **Select an Option** section, choose your medical plan or waive coverage. For this example click the **Select Plan** button for the **Kaiser North** option. SELECT PLAN
14.	Click the scroll bar.

Step	Action
15.	Use the **Enroll Your Family Members** section to cover dependents with the selected plan.
16.	Dependents you already entered in UCPath appear in the **Dependent** list. In this example, no dependents appear. You can add or modify dependents during the enrollment process. Click the **Add/Review Family Members** button. ADD/REVIEW FAMILY MEMBERS

Step	Action
17.	In this example, add your spouse and child. Click the **Add a Dependent** button.

Step	Action
18.	Use the **Dependent Personal Information** page to enter key information for your dependent. Click in the **First Name** field.
19.	Enter the desired information into the **First Name** field. For this example, enter **Rafa**.
20.	Click in the **Last Name** field.

Step	Action
21.	Enter the desired information into the **Last Name** field. For this example, enter **Hadjioannou**.
22.	Click in the **Date of Birth** field.
23.	Use the calendar to enter the dependent's date of birth. For this example, the date will be entered for you.
24.	The **Gender** field defaults to **Male**. Update the gender, if necessary.
25.	Click the scroll bar.

Step	Action
26.	While the **SSN** filed is not required, you should enter the dependent's Social Security number, if known. Click in the **SSN** field.
27.	Enter the Social Security number in the **SSN** field with dashes between the digits. For this example, enter **123-13-3121**.
28.	Click the button to the right of the **What Relationship do you have with this dependent?** field. ⌄
29.	Choose the dependent's relationship to you. For this example, click the **Spouse** list item.
30.	Click the scroll bar.

Step	Action
31.	The address for the dependent defaults to your address. Deselect the **Same Address as Employee** check box if you need to enter a different address for the dependent. For this example, do not change the address.
32.	Click in the **Phone** field.
33.	Enter the desired information into the **Phone** field. For this example, enter **5125559144**.

Step	Action
34.	Click the **Save** button.

Step	Action
35.	A confirmation message appears. Click the **OK** button.

Step	Action
36.	Your spouse appears in the list. Now add a child as another dependent. Click the **Add a Dependent** button.

Step	Action
37.	Click in the **First Name** field.
38.	Enter the desired information into the **First Name** field. For this example, enter **Cada**.
39.	Click in the **Last Name** field.
40.	Enter the desired information into the **Last Name** field. For this example, enter **Hadjioannou**.
41.	Click in the **Date of Birth** field.
42.	Use the calendar to enter the dependent's date of birth. In this example, the date will be entered for you.
43.	Update the gender, if necessary. For this example, accept the default.
44.	Click the scroll bar.

Step	Action
45.	Click in the **SSN** field.
46.	Enter the desired information into the **SSN** field. For this example, enter **137-97-3197**.
47.	Click the button to the right of the **What Relationship do you have with this dependent?** field. ⌄
48.	Select the dependent's relationship to you. For this example, click the **Child (Biological or Adopted)** list item. Child (Biological or Adopted)

Step	Action
49.	Deselect the **Same Address as Employee** check box if you need to enter a different address for the dependent. For this example, accept the default address.
50.	Click in the **Phone** field.
51.	Enter the desired information into the **Phone** field. For this example, enter **5125551100**.
52.	Click the **Save** button.
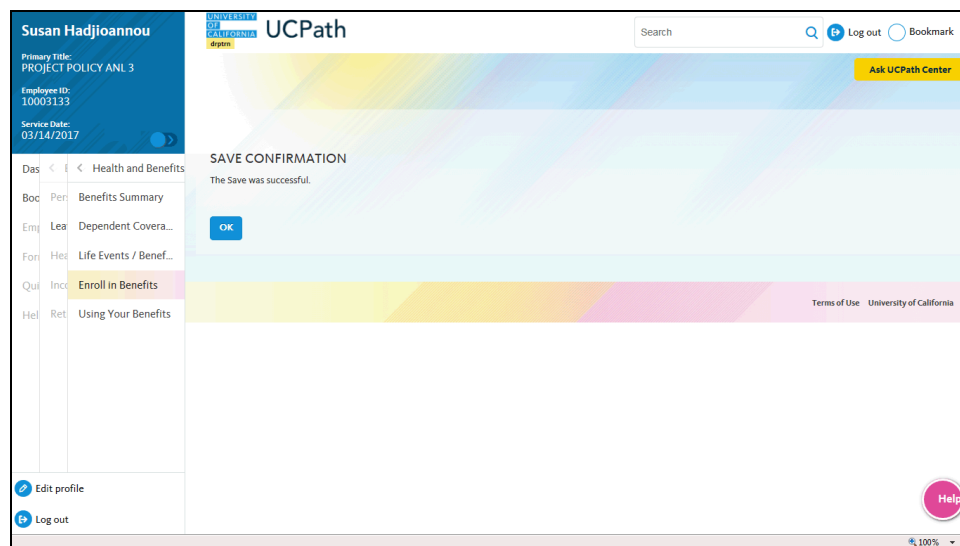
Step	Action
53.	A confirmation message appears. Click the **OK** button.

Step	Action
54.	Details for the newly added dependent appear in the list. Click the **Add a Dependent** button to add another dependent or return to the enrollment event to enroll the dependents in coverage. Click the **Return to Event Selection** button.

Step	Action
55.	The **Medical** page appears again. Click the scroll bar.

Step	Action
56.	The newly entered dependents appear in the **Dependent** list but are not yet enrolled in coverage. To enroll a dependent in this plan, click the check box next to the dependent's name. For this example, click the **Rafa Hadjioannou** option.
57.	Continue to enroll dependents. For this example, click the **Cada Hadjioannou** option.

Step	Action
58.	Some medical plans require that you specify a primary care provider. This is an example of the **Choose a Primary Care Provider ID** section so that you can see the fields, but it is not required for this enrollment example.

Step	Action
59.	After you complete all medical enrollments, click the **Save and Continue** button to submit your changes or click the **Cancel Changes** button to exit this page without saving your changes. Click the **Save and Continue** button.

Step	Action
60.	UCPath displays the details for your election, including the plan, the estimated pay period cost for the benefit election and the covered dependents.
61.	Click the **Save Changes** button to submit your changes or click the **Back** button to make changes before saving. Click the **Save Changes** button.

Step	Action
62.	Click the scroll bar.

Step	Action
63.	The **Current Enrollment Summary** page appears again. The details for your medical election have been updated.
64.	To add **Dental** coverage, click the **Edit** button.

Step	Action
65.	If you need information about the dental plans before you make your selection, click the links to watch the **overview** video or review the UC **Delta Dental site**.
66.	In the **Select an Option** section, choose your dental plan or waive coverage. For this example select the **Delta Dental PPO** option.
	Click the **Select Plan** button.
67.	Click the scroll bar.

Step	Action
68.	Previously entered dependents appear in the **Dependent** list but are not yet enrolled in the plan. If necessary, click the **Add/Review Family Members** button to create or modify dependents. For this example, enroll both dependents. For this example, click the **Rafa Hadjioannou** option.
69.	Continue to enroll dependents. For this example, click the **Cada Hadjioannou** option.

Step	Action
70.	Some dental plans require that you specify a primary care provider. This is an example of the **Choose a Primary Care Provider ID** section so that you can see the fields, but it is not required for this enrollment example.

Step	Action
71.	After you complete all dental enrollments, click the **Save and Continue** button to submit your changes or click the **Cancel Changes** button to exit this page without saving your changes.

Click the **Save and Continue** button. |

Step	Action
72.	UCPath displays the details for your election, including the plan, the estimated pay period cost for the benefit election and the covered dependents.
	Click the **Save Changes** button to submit your changes or click the **Back** button to make changes.
	Click the **Save Changes** button.

Step	Action
73.	Click the scroll bar.

Step	Action
74.	The **Current Enrollment Summary** page appears again. The details for your dental election have been updated.
75.	To add **Vision** coverage, click the **Edit** button.
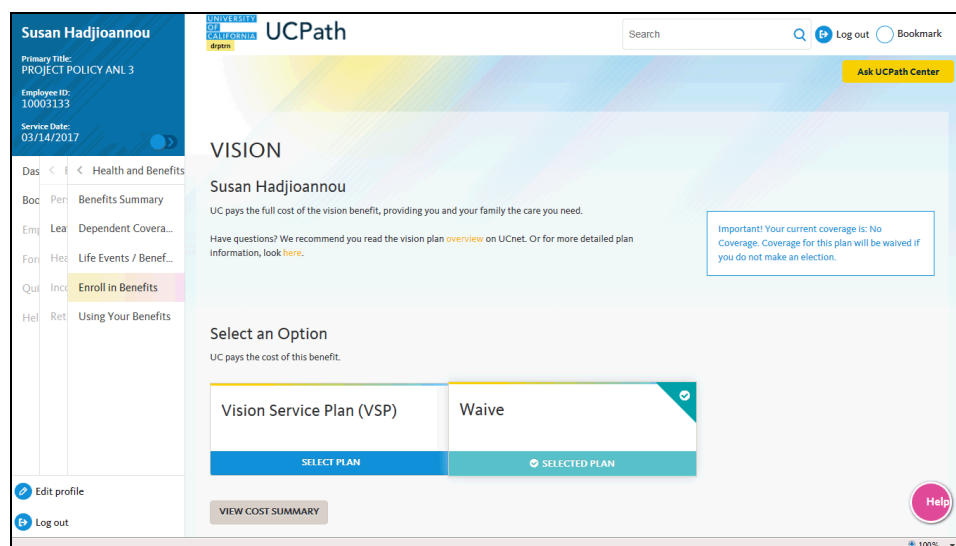
Step	Action
76.	If you need information about the vision plans before you make your selection, click the link to read the **overview** or, for more detailed plan information, click the **here** link.
77.	In the **Select an Option** section, choose your vision plan or waive coverage. For this example select the **Vision Service Plan (VSP)** option. Click the **Select Plan** button. **SELECT PLAN**
78.	Click the scroll bar.

Step	Action
79.	Previously entered dependents appear in the **Dependent** list but are not yet enrolled in the plan. If necessary, click the **Add/Review Dependents** button to create or modify dependents. For this example, enroll both dependents. For this example, click the **Rafa Hadjioannou** option.
80.	Continue to enroll dependents. For this example, click the **Cada Hadjioannou** option.
81.	After you complete all vision enrollments, click the **Save and Continue** button to submit your changes or click the **Cancel Changes** button to exit this page without saving your changes. Click the **Save and Continue** button.

Step	Action
82.	UCPath displays the details for your election, including the plan, the estimated pay period cost for the benefit election and the covered dependents. Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
83.	Click the scroll bar.

Step	Action
84.	The **Current Enrollment Summary** page appears again. The details for your vision election have been updated.
85.	To add **Legal Services**, click the **Edit** button.

Step	Action
86.	If you need information about the legal services plan before you make your selection, click the **here** link to see an overview or click the plan **website** link.

Step	Action
87.	In the **Select an Option** section, choose your legal services plan or waive coverage. For this example select the **ARAG Legal** option. Click the **Select Plan** button. **SELECT PLAN**
88.	Click the scroll bar.

Step	Action
89.	Previously entered dependents appear in the **Dependent** list but are not yet enrolled in the plan. If necessary, click the **Add/Review Dependents** button to create or modify dependents. For this example, enroll both dependents. For this example, click the **Rafa Hadjioannou** option.
90.	Continue to enroll dependents. For this example, click the **Cada Hadjioannou** option.
91.	After you complete all legal services enrollments, click the **Save and Continue** button to submit your changes or click the **Cancel Changes** button to exit this page without saving your changes. Click the **Save and Continue** button.

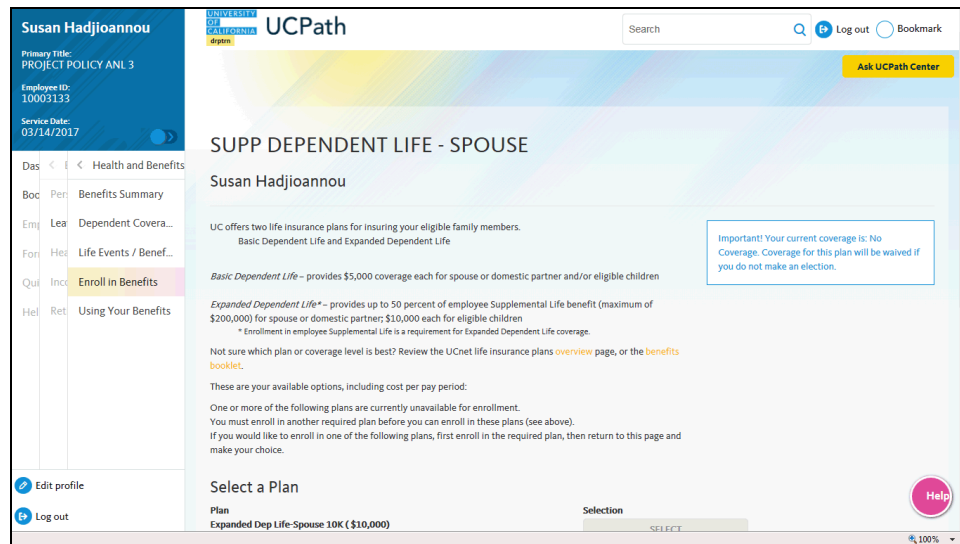| Step	Action
92.	UCPath displays the details for your election, including the plan, the estimated pay period cost for the benefit election and the covered dependents.
93.	Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
94.	Click the scroll bar.

Step	Action
95.	The **Current Enrollment Summary** page appears again. The details for your legal services election have been updated. Notice that the system has also automatically enrolled you in the **Optum Behavioral Health** plan because you enrolled in a medical plan. The **Edit** button is not available for this plan type.
96.	To add **Supplemental Life** coverage, click the **Edit** button.

Step	Action
97.	If you need information about the supplemental life plans before you make your selection, click the links to see the **overview** on UCnet or review the UC **benefits booklet**.
98.	Click the scroll bar.

Step	Action
99.	In the **Select a Plan** section, choose your supplemental life plan or waive coverage. For this example, click the **Supplemental Life 1x Annual (85,000)** button. ![SELECT]
100.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
101.	After you complete all supplemental life selections, click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
102.	Click the scroll bar.

Step	Action
103.	The **Current Enrollment Summary** page appears again. The details for your supplemental life election have been updated.
104.	Click the scroll bar.

Step	Action
105.	To add **Basic Dependent Life** coverage, click the **Edit** button.

Step	Action
106.	If you need information about the dependent life plans before you make your selection, click the links to see the **overview** on UCnet or review the UC **benefits booklet**.
107.	Click the scroll bar.

Step	Action
108.	In the **Select an Option** section, choose to enroll in the plan or accept the default option to not enroll in **Basic Dependent Life**.

For this example, click the **Basic Dependent Life ($5,000)** button. |

Step	Action
109.	Your dependents appear in the **Your Covered Dependents** list. Notice that the **Covered** check box is selected for all eligible dependents. If necessary, clear the check box for one or more dependents or click the **Add/Review Dependents** button to create or modify dependents.
110.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
111.	UCPath displays the details for your election, including the plan, the estimated pay period cost for the benefit election and the covered dependents. Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
112.	Click the scroll bar.
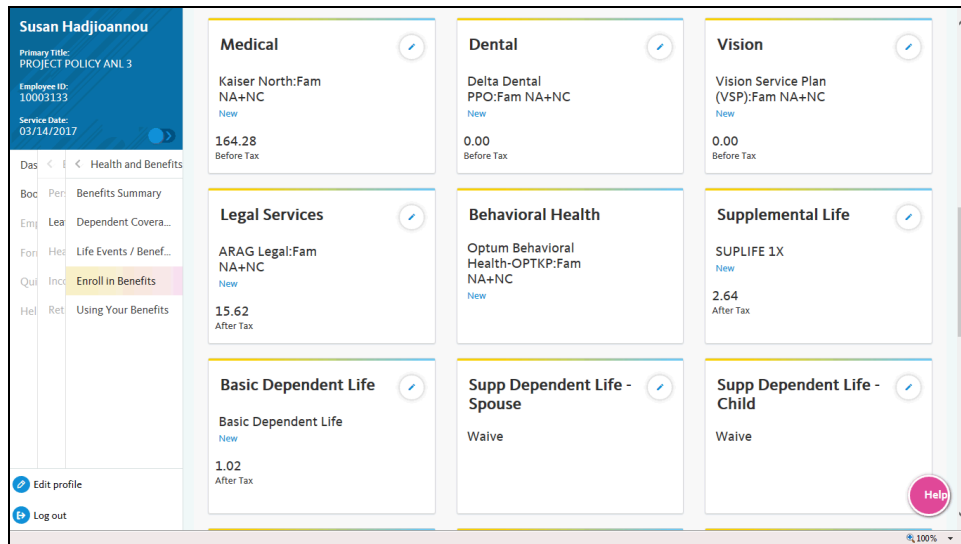
Step	Action
113.	To add **Supp Dependent Life - Spouse** coverage, click the **Edit** button. Click the **Edit** button.

Step	Action
114.	If you need information about the supplemental dependent life - spouse plans before you make your selection, click the links to see the **overview** on UCnet or review the UC **benefits booklet**.
115.	Click the scroll bar.

Step	Action
116.	In the **Select a Plan** section, choose your dependent life plan or waive coverage. For this example, click the **Expanded Dep Life-Spouse 0.5X ($43,000)** button. ![SELECT button]

Step	Action
117.	Your dependents appear in the **Your Covered Dependents** list. Notice that the **Covered** check box is selected for eligible dependents. If necessary, clear the check box for one or more dependents or click the **Add/Review Dependents** button to create or modify dependents.
118.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
119.	UCPath displays the details for your election, including the plan and the estimated pay period cost for the benefit election.
120.	Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
121.	Click the scroll bar.

Step	Action
122.	The **Current Enrollment Summary** page appears again. The details for your supplemental dependent life - spouse election have been updated.
123.	Click the scroll bar.

Step	Action
124.	To add **Supp Dependent Life - Child** coverage, click the **Edit** button.

Step	Action
125.	If you need information about the supplemental dependent life - child plans before you make your selection, click the links to see the **overview** on UCnet or review the UC **benefits booklet**.
126.	In the **Select an Option** section, choose to enroll in the plan or accept the default option to not enroll in expanded dependent life. For this example, click the **Expanded Dep Life-Child 10K ($10,000)** button.
127.	Click the scroll bar.

Step	Action
128.	Your dependents appear in the **Your Covered Dependents** list. Notice that the **Covered** check box is selected for eligible dependents. If necessary, clear the check box for one or more dependents or click the **Add/Review Dependents** button to create or modify dependents.
129.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
130.	UCPath displays the details for your election, including the plan, the estimated pay period cost for the benefit election and the covered dependents. Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
131.	Click the scroll bar.

Step	Action
132.	The **Current Enrollment Summary** page appears again. The details for your supplemental dependent life - child election have been updated.
133.	Click the scroll bar.

Step	Action
134.	To add **Employee & Dependent AD&D** coverage, click the **Edit** button.

Step	Action
135.	If you need information about the employee and dependent accidental death and dismemberment plans before you make your selection, click the **rate chart online** link, click the **here** link for general plan information or click the link to review the UC **benefits booklet**.
136.	Click the scroll bar.

Step	Action
137.	In the **Select a Plan** section, choose your coverage level or waive coverage.
	For this example, click the **AD & D Family** button.
138.	Click the scroll bar.

Step	Action
139.	Click the button to the right of the **Coverage Amount** field.

Step	Action
140.	Select your coverage amount. For this example, click the **$10,000** list item.
141.	Your dependents appear in the **Your Covered Dependents** list. Notice that the **Covered** check box is selected for all eligible dependents. If necessary, click the **Add/Review Dependents** button to create or modify dependents.
142.	Click the scroll bar.

Step	Action
143.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
144.	Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
145.	Click the scroll bar.

Step	Action
146.	You are automatically enrolled in **Basic Disability** coverage. The **Edit** button is not available for this plan.
147.	To add **Voluntary ShortTerm Disability** coverage, click the **Edit** button.

Step	Action
148.	Review the **Voluntary ShortTerm Disability** plan information before you make your selection. Click the scroll bar.

Step	Action
149.	In the **Select a Plan** section, choose to enroll in the plan or accept the default option to not enroll in **Voluntary ShortTerm Disability**. For this example, click the **Voluntary Shortterm Disability** button.
150.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
151.	UCPath displays the details for your election, including the plan and the estimated pay period cost for the benefit election. Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.
152.	Click the scroll bar.

Step	Action
153.	The **Current Enrollment Summary** page appears. The details for your voluntary shortterm disability election have been updated.
154.	Click the scroll bar.

Step	Action
155.	To add **Voluntary Long-Term Disability**, click the **Edit** button.

Step	Action
156.	Review the voluntary long-term disability plan information before you make your selection.

Click the scroll bar. |

Step	Action
157.	In the **Select a Plan** section, choose to enroll in the plan or accept the default option to not enroll in **Voluntary Long Term Disability2**. For this example, click the **Voluntary LongTerm Disability2** button.
158.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
159.	UCPath displays the details for your elections, including the plan and the estimated pay period cost for the benefit election. Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
160.	Click the scroll bar.

Step	Action
161.	The **Current Enrollment Summary** page appears. The details for your voluntary long term disability election have been updated.
162.	Click the scroll bar.

Step	Action
163.	To add **Flex Spending - Health**, click the **Edit** button.

Step	Action
164.	If you need information about the flex spending - health plans before you make your selection, click the UCnet health FSA **overview**, review the UC **benefits booklet** or the plan's **website** links.
165.	Click the scroll bar.

Step	Action
166.	In the **Select an Option** section, choose to enroll in the plan or accept the default option to not enroll in **Health FSA**. For this example, click the **Health FSA** button.
167.	Click in the **Annual Contribution Amount** field.
168.	Notice the minimum and maximum amounts listed above the field. Remember that the amount entered in this field is the annual amount, not the pay period amount. Enter the desired information into the **Annual Contribution Amount** field. For this example, enter **200.00**.
169.	Click the **Continue** button to submit your changes or click the **Cancel** button to exit this page without saving your changes. Click the **Continue** button.

Step	Action
170.	UCPath displays the details for your election, including the estimated pay period cost and the date the election will take effect. Click the **Save Changes** button to submit your changes or click the **Back** button to make changes. Click the **Save Changes** button.

Step	Action
171.	Click the scroll bar.

Step	Action
172.	After you complete all benefit selections, click the **Submit** button at the bottom of the **Current Enrollment Summary** section to finalize your choices. After you submit your choices, you cannot change your selections. Click the **Submit** button.

Step	Action
173.	If you receive any errors or warnings, review the message and correct your errors. In this example, there are conflicts with dependent life coverages.
174.	Return to the **Current Enrollment Summary** page and edit your benefits choices. Click the scroll bar.

Step	Action
175.	Click the **Back** button.

Step	Action
176.	Click the scroll bar.

Step	Action
177.	The error stated you cannot select both **Basic Dependent Life** and **Expanded Dependent Life - Spouse**. Also, you cannot select both **Basic Dependent Life** and **Expanded Dependent Life - Child**. For this example, waive basic coverage and keep the expanded coverage. Click the **Edit Basic Dependent Life** button.

Step	Action
178.	Select the **No, I do not want to enroll** option to waive coverage.

Step	Action
179.	Click the **Continue** button.

Step	Action
180.	Click the **Save Changes** button.

Step	Action
181.	Click the scroll bar.

Step	Action
182.	Click the **Submit** button.

Step	Action
183.	The **Submit Benefit Choices** page appears. Review the **Terms and Conditions**, as well as the **HIPAA Statement Confirmation**. Click the scroll bar.

Step	Action
184.	Click the **By checking this box I accept the above Terms and Conditions** option. ☐ By checking this box I accept the above Terms and Conditions
185.	Click the **Submit** button.

Step	Action
186.	Click the **OK** button to submit your changes or click the **Cancel** button to exit this page without saving your changes.
	Click the **OK** button.

Step	Action
187.	A confirmation message appears.
	Click the **OK** button.

Step	Action
188.	Click the scroll bar.

Step	Action
189.	The **New Hire-Elective Benefits** event is submitted.
190.	You have enrolled in benefits. A confirmation email is sent to the primary email address on your account. You can identify your primary email address under Employee Actions > Personal Information > **Personal Information Summary**. **End of Procedure.**