UCPath Online Self Service – Employee Actions

Open Enrollment Workshop
Thursday, Oct. 25 – Tuesday, Nov. 20, 2018
Trainer Introduction

Kathleen Cool
Title: Principal Trainer
Department: HR | UCPath
Years @ UC: 1 year
Previous Experience: 10+ years of experience in instructional design and training in higher education. Taught Information System Management at the undergraduate and graduate levels.
Housekeeping

Cell Phones

Breaks

Restrooms
Learning Topics (1 of 3)

- Accessing UCPath Help Site & UCPath Online
  - Accessing the UCPath Online Help Site
  - Accessing UCPath Online
- UCPath Online Basics
  - Select Your Location
  - Enter Your Credentials
  - Security Verification
- Open Enrollment Demo
  - Open Enrollment Widget
  - Identity Verification
Learning Topics (2 of 3)

- Welcome Page
- Current Enrollment Summary
- Medical Elections
- Dependent Enrollments
- Review of Elections Page
- Updated Benefits Enrollments
- Submit Benefit Choices Page
- Confirmation of Enrollments
- Events Status After Submission
- Confirmation Statements
Learning Topics (3 of 3)

- Adding Domestic Partner to Life Insurance and AD&D
- Adding Pet Insurance

- Additional Resources
- Contact the FOM|UCPath Training Team
Accessing UCPath Help Site & UCPath Online
Accessing the UCPath Online Help Site

The **UCPath Help for Portal and Self Service** website is where you can find UCPath resources such as,

a. How-to-videos  
b. Interactive simulations  
c. Job aids
Accessing UCPath Online

To access UCPath:

1. Go to R’Space OR https://ucpath.universityofcalifornia.edu/
2. Click the Authorized Apps tab
3. Click on the UCPath Portal link
4. Select University of California, Riverside
5. You will be prompted to sign in to UCPath using your UCR credentials
UCPath Online Basics
Select Your Location

Welcome to UCPath, where you can view and/or update your personal information. If you have questions about UCPath or need assistance, please contact the UCPath Center at 855-982-7284.

Authorized users sign in below

- University of California - Office of the President
- University of California, Los Angeles
- University of California, Merced
- University of California, Riverside
- University of California-Santa Barbara
- University of California; Former Employees

UC RIVERSIDE
FOM|UCPath Training
Enter Your Credentials
UCPath has launched a new feature to further protect and verify your identity – personalized security questions and answers.

- Answers must be at least four characters and are NOT case sensitive.
Security Verification (Cont.)

Employees will be required to verify their identity by answering one of their security questions when they view or update the following UCPath information:

- Direct deposit
- Paycheck
- Benefits Summary
- W-2
- W-4 (State and Federal)

- Dependent Coverage
- Life events/benefits changes
- Enroll in benefits
- Personal information
Security Verification (Cont.)

Menu Navigation: Employee Actions > Security Question Setup

- The following process only applies to the first time an employee sets up their security questions and answers.
- If an employee has previously set up their security questions and answers, they will only be prompted to answer a security question.
Security Verification (Cont.)

Menu Navigation: Employee Actions > Security Question Setup

To prevent unauthorized changes, UCPath prompts you to verify your identity by entering your date of birth and the last four digits of your Social Security number.
You must choose five questions from the question list and provide an answer for each question. Answers must be a minimum of four characters. The answer fields are not case sensitive.
Menu Navigation: Employee Actions > **Security Question Setup**

Click the Submit button
Menu Navigation: Employee Actions > **Security Question Setup**

A confirmation message appears. An email is also sent to the preferred email address identified on your UCPath profile. Click the OK button.
Open Enrollment Demo
Open Enrollment Widget

UCPath Online

New Widget with live countdown clock

To begin Open Enrollment, click on "Enroll Now"

Mobile View
Open Enrollment – UCPath Online

Identity Verification

Employees will be prompted to answer one of their security questions.
Open Enrollment – UCPath Online

Welcome Page

**BENEFITS ENROLLMENT**

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**
  - At any time, you may enroll yourself or eligible family members 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 website 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, 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).

Open Benefit Events

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

**Open Enrollment**

AUDI PROFI 4
10/10/2014
Open Enrollment – UCPath Online

Current Enrollment Summary

Click on Edit button to make changes to the current enrollment
Open Enrollment – UCPath Online

Medical Elections

**MEDICAL**

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.

Not sure which plan is best for you? Visit UCnet for videos and information about all of your options.

**Your enrollment on this page may affect your choices for the following type(s) of coverage:**
- Health Savings Account

Complete your enrollment on this page before enrolling in the benefit plans listed above.

**Select an Option**

Here are your available options with your costs per pay period. (Your cost = full benefit cost – UC contribution)

<table>
<thead>
<tr>
<th>Core Plan</th>
<th>UC Health Savings Plan</th>
<th>UC Care Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Blue &amp; Gold HMO</td>
<td>Select</td>
<td>Select</td>
</tr>
</tbody>
</table>

**Click to view different medical plan costs**
Open Enrollment – UCPath Online

Dependent Enrollments

[Diagram showing the UCPath Online interface for enrolling family members, with instructions on how to add or delete dependents, review providers on vendor sites, and save changes to continue the election process.]
Open Enrollment – UCPath Online

Review of Elections Page

Cost will be displayed for new changes

Changes on dependents for plans will be displayed

Changes must be saved to continue the election process

SAVE CHANGES
Open Enrollment – UCPath Online

Updated Benefits Enrollments

**OPEN ENROLLMENT**

Take advantage of online tools, including medical benefit videos. To learn more about your choices, click here. Now is the time to make sure you're enrolled in the right medical plan for you and your family.

**Reminders**

To continue participating in the Flexible Spending Account (FSA) next year, you must reenroll in these programs during Open Enrollment. If you do not reenroll in the Health FSA, you must have a minimum of $35 remaining in your account after the run-out period (April 1 of the next plan year) to be able to carry over funds (up to $500) to the next plan year. Remaining funds in your account will only be carried over for one plan year.

Important: Your choice is summarized below.

If you are not satisfied with your choice, then select the *Cancel Changes* button and correct the selections.

If you are satisfied with your choice, then select the **OK** button to store your choices.

Your enrollments are not finalized until you submit all your choices from the Enrollment Summary page.

**Current Enrollment Summary**

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

**Election Summary**

<table>
<thead>
<tr>
<th>Summarized estimates for new Benefit Elections</th>
<th>Before Tax</th>
<th>After Tax</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Costs</td>
<td>298.84</td>
<td>386.20</td>
<td>685.04</td>
</tr>
</tbody>
</table>

**Your Costs**

- Medical: 298.84 Before tax
- Dental: 0.00 Before tax
- Vision: 0.00 Before tax

New costs and enrollments will be displayed after plan changes have been saved.
Updated Benefits Enrollments (Cont.)

The submit button appears on the updated benefit enrollment page. Changes in enrollments must be submitted in order for changes to occur.
Open Enrollment – UCPath Online
Submit Benefit Choice Page

If you are confirmed as eligible for part-time in UC-sponsored plans, you are subject to the following terms and conditions:

1. With the exception of benefits provided as reimbursed by DHC or at UC sponsored medical plans may require a net of display through separation. With respect to each plan, by your written or electronic signature on this website, you acknowledge that you have read and agreed to the following: HIPAA Statement Confirmation.

The submission page requires agreement to Terms & Conditions and
HIPAA Statement Confirmation

Submission of elections are required

By submitting your benefit choices you are authorizing the University of California to take deductions from your income. You do so on a voluntary basis and are subject to the terms of the University of California Benefits Plan. If you have any questions, please contact the Human Resources Office at your campus.

HIPAA Statement Confirmation

By submitting your benefit choices you are authorizing the University of California to take deductions from your income. You do so on a voluntary basis and are subject to the terms of the University of California Benefits Plan. If you have any questions, please contact the Human Resources Office at your campus.

Cancel
Submit
Open Enrollment – UCPath Online

Confirmation of Enrollments

Elections can only be submitted once daily during the OE period.

Confirmation of elections is displayed after the enrollment process is complete.
Open Enrollment – UCPath Online

Event Status After Submission

Open Benefit Events

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

Open Enrollment
AUDIT PROFIL4

Open Enrollment event will show “SUBMITTED” when changes were successfully submitted.
Open Enrollment – UCPath Online

Confirmation Statements

Confirmation Statements will be sent the first week of December
Open Enrollment – UCPath Online

Adding Domestic Partner to Life Insurance and AD&D

Select “Benefit Changes for AD&D, Disability or Life”.

Visit the UCPath website for more information and instructions.
Open Enrollment – UCPATH Online

Adding Domestic Partner to Life Insurance and AD&D (Cont.)

Enter 01/01/19 as the Status Change Date. Employees are not allowed to future date so they will need to wait until 01/01/19 to enroll their Domestic Partner and will only have 31 days to enroll.
Open Enrollment – UCPath Online

Adding Domestic Partner to Life Insurance and AD&D (Cont.)

Benefits Summary page gives you an overview of your current benefit elections. Select Next to start enrollment.

Select to start enrollment.
Open Enrollment – UCPath Online

Adding Domestic Partner to Life Insurance and AD&D (Cont.)

Click on Edit button to add Domestic Partner to Supplemental Life and AD&D

The submit button appears on the updated benefit enrollment page.

Changes in enrollments must be submitted in order for changes to occur.
Adding Domestic Partner to Life Insurance and AD&D (Cont.)

The submission page requires agreement to Terms & Conditions and HIPAA Statement Confirmation.

The submit button appears again on the Submit Benefit Choices page.

Changes in enrollments must be submitted in order for changes to be finalized.
Open Enrollment – UCPath Online

Adding Domestic Partner to Life Insurance and AD&D (Cont.)

Elections can only be submitted once. Any subsequent changes will require UCPath Center review and approval.

Confirmation of elections is displayed after the enrollment process is complete.
Open Enrollment – UCPath Online

Adding Pet Insurance

Click the Edit button. Note that pet insurance enrollment defaults to Waive unless you elect this benefit.

Click Submit
Open Enrollment – UCPath Online

Adding Pet Insurance (Cont.)

Click the Select button to enroll in pet insurance.

Click the Save and Continue button.
Open Enrollment – UCPath Online

Adding Pet Insurance (Cont.)

You must click the here link to access Nationwide’s website and enroll in pet insurance.

A new web browser window opens to access Nationwide.
Open Enrollment – UCPath Online

Adding Pet Insurance (Cont.)

After enrolling in pet insurance on the Nationwide website, you must return to UCPath and click the Save Changes button to complete your pet insurance enrollment.
Training Resources

http://fomucpath.ucr.edu/training/resources.html
Thank You