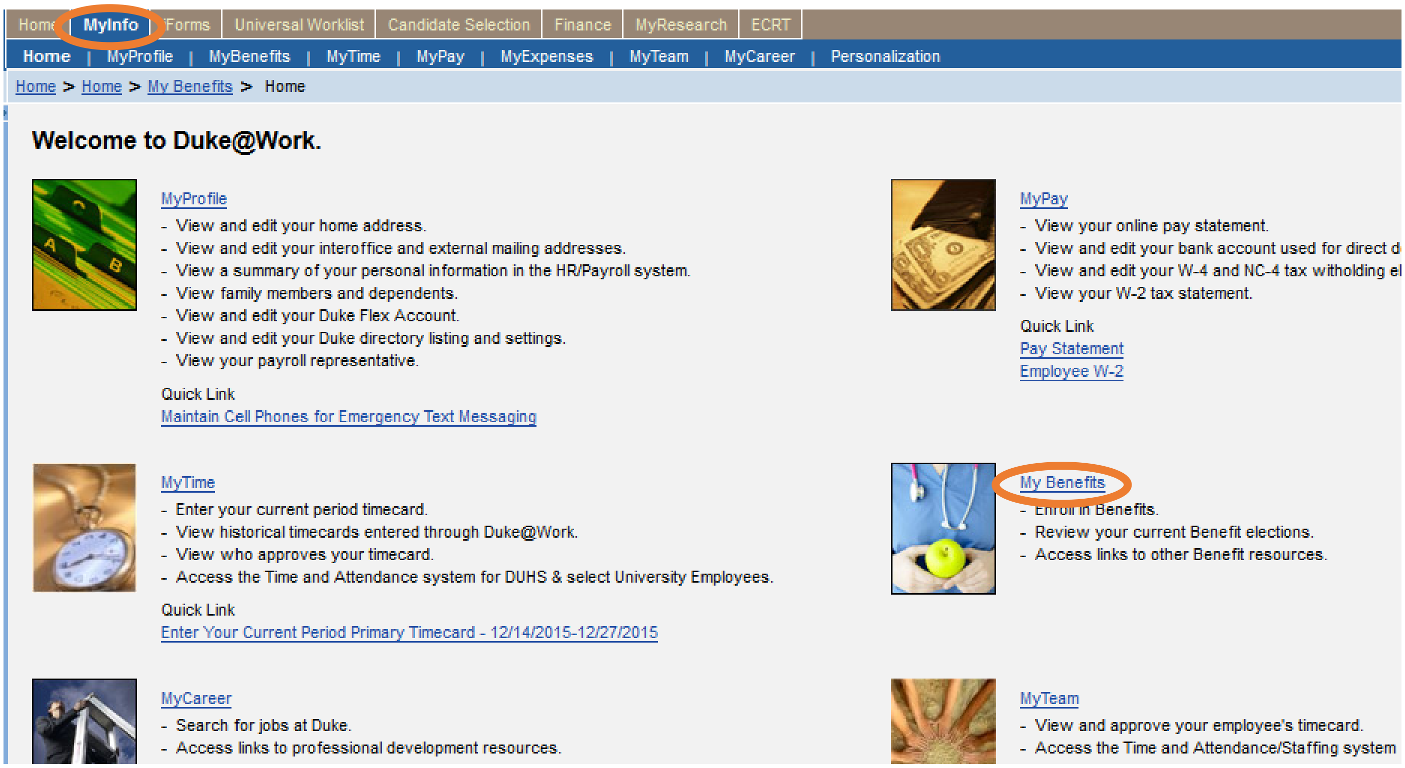
# Qualifying Life Events
# Online Enrollment Guide

You got married and you want to add dependents to your coverage

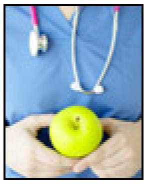
**Where do I go to add dependents to my benefits plans as a result of my marriage?**




Go to the Duke@Work employee self-service portal found at work.duke.edu and log in with your NetID and password. Make sure pop-ups are enabled.

**How do I request changes to my current benefits coverage?**

Click on the "MyInfo" tab, then the My Benefits link.



**Your Benefit Plans**

Benefit Plan Overview

View a list of plans in which you are currently enrolled.

How Do I Enroll in my Benefits?

When Can I Make Benefit Changes?

**Manage Your Benefits**

Qualifying Life Event Enrollment

Enroll in health coverage if you've had a life change that makes you eligible (birth, marriage, divorce, etc.).

Retirement Manager

Next, click on the “Qualifying Life Event Enrollment” link. The Qualifying Life Event Enrollment Form will launch in a new window.

**Quailfying Life Event Enrollment Form**

**Employee Details**

| | | |
|---|---|---|
| Employee Name: | JOANNA KEPLER | DUID: |
| Home Address: | 121 CARRIAGE HILL DR | Email Addres |
| City/State/Zip: | STEM NC 27581 | |
| Home Phone: | 919-529-2219 | Office Phone: |
| Payroll Cycle: | BIWEEKLY | |

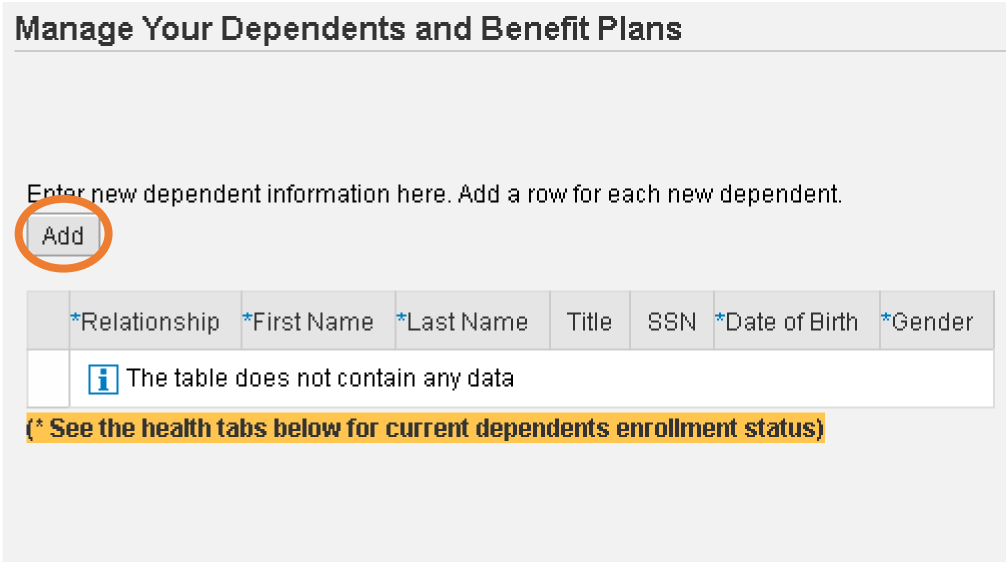
Click on the drop-down menu to choose the appropriate Qualifying Life Event description; in this case, it is “You got married and want to add your spouse and/or new dependents to your health plan”. You’ll also need to indicate the date of your qualifying life event, which is the date of the marriage according to the marriage certificate. You’ll have the option of starting coverage on the first of the month following the date of your marriage, which could save you the premium cost for the previous month if you did not access healthcare between the date of your marriage and the first of the following month.

**Description of Qualifying Life Event (QLE)**

* QLE: You got married and you want to add your spouse and/or new dependents to your health plans

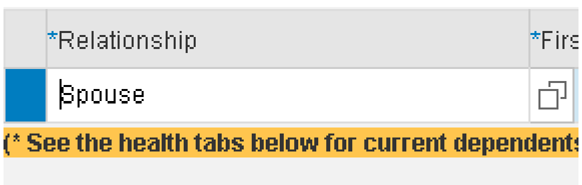
QLE Date: 01/25/2016 ☑ Check here to begin coverage on 02/01/2016 instead of your QLE date

Next, you’ll see the “Manage Your Dependents and Benefit Plans” section. If you were a single employee without dependents, like Joanna Kepler in the example below, you will not see any dependents listed.



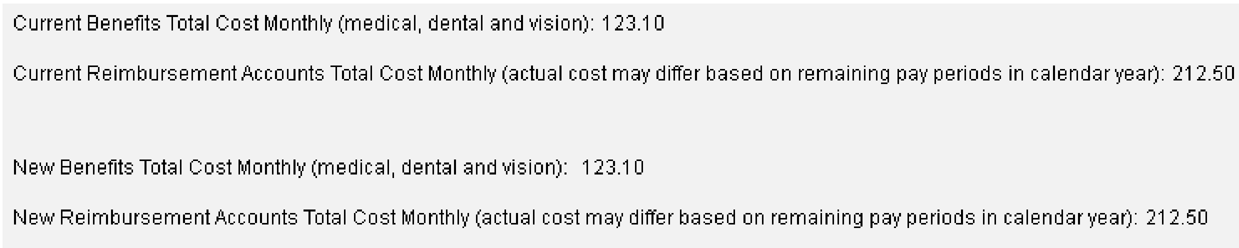

Click the “Add” button to add your new spouse to the dependent table.

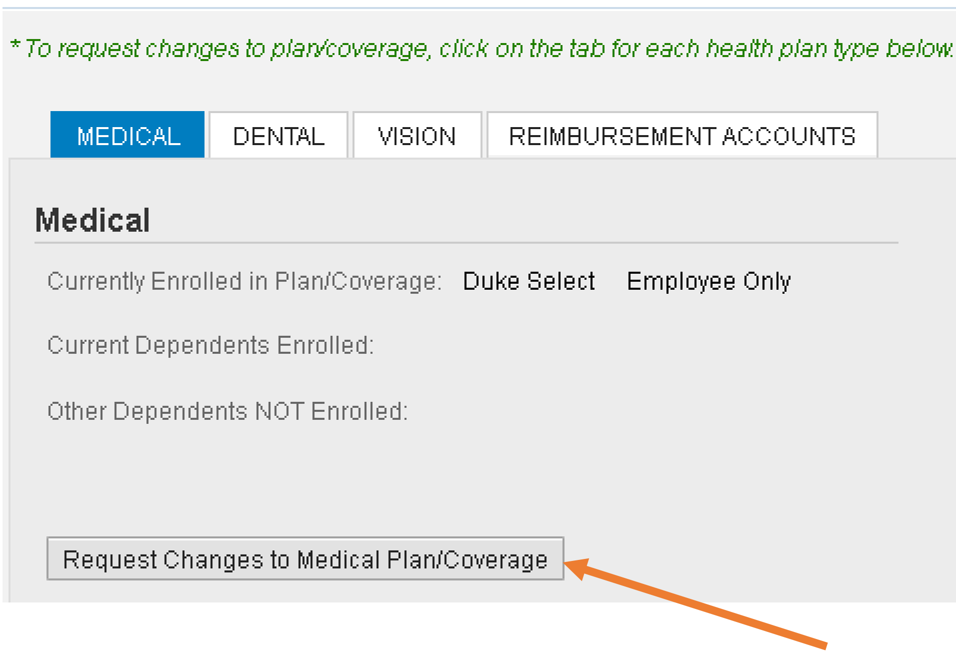
First, you’ll need to click on the stacked squares on the right hand side of this field to see the drop-down menu. Next, indicate how the dependent you are adding is related to you. In this example, Joanna Kepler is adding her spouse, Andrew Hobson.




Joanna enters “Andrew” in the first name field, “Hobson” in the last name field, selects a title from the drop-down list (for I, II, Sr., Jr., etc.) if applicable, enters her spouse’s Social Security Number in the “SSN” field, enters her spouse’s birth date in the “Date of Birth” field, then indicates whether her spouse is male or female.

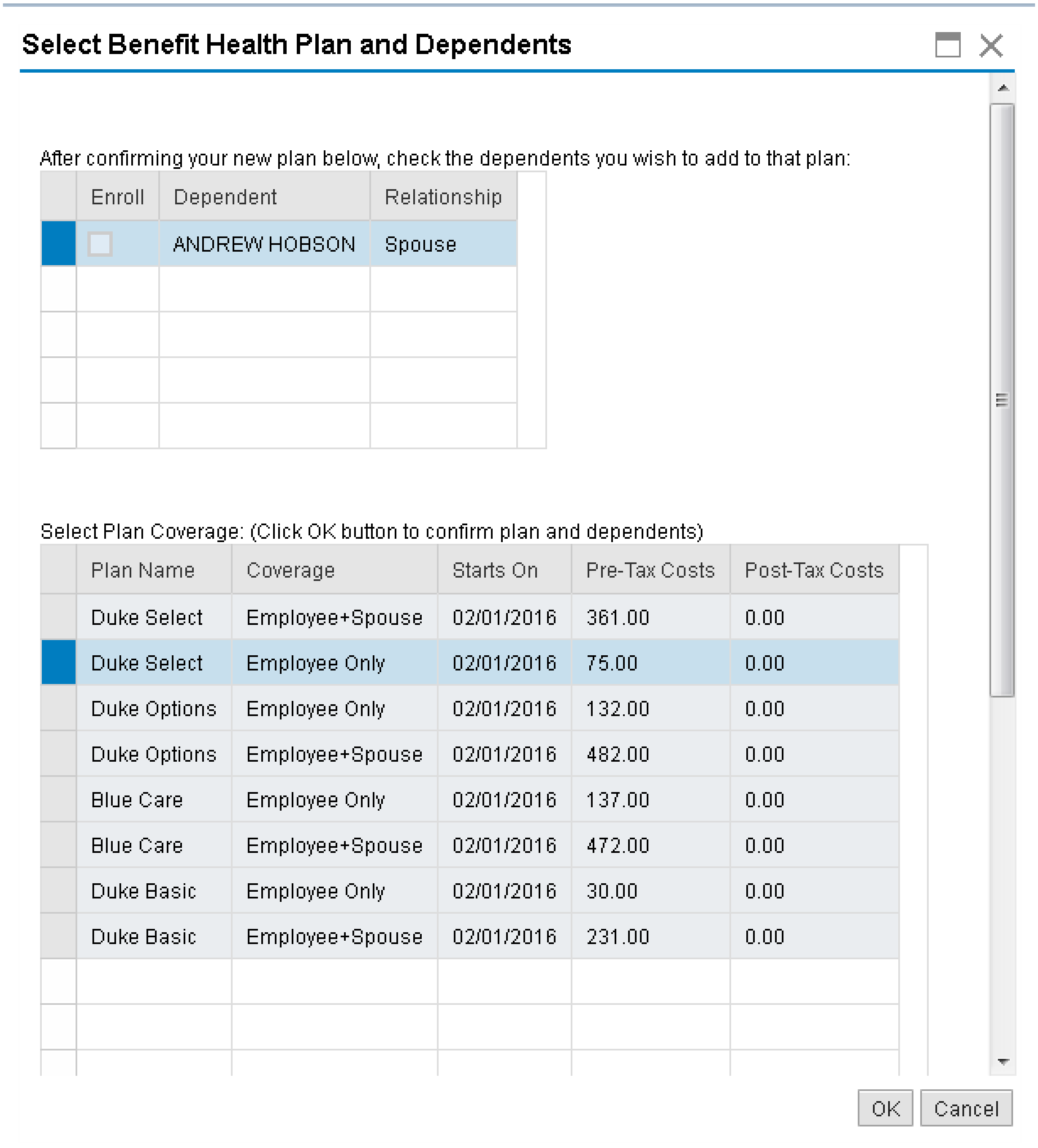
Next, you'll see the current benefits total cost per month, and the new benefits total cost per month. Right now, the amounts are the same because we have not yet requested changes to any of the health plans.



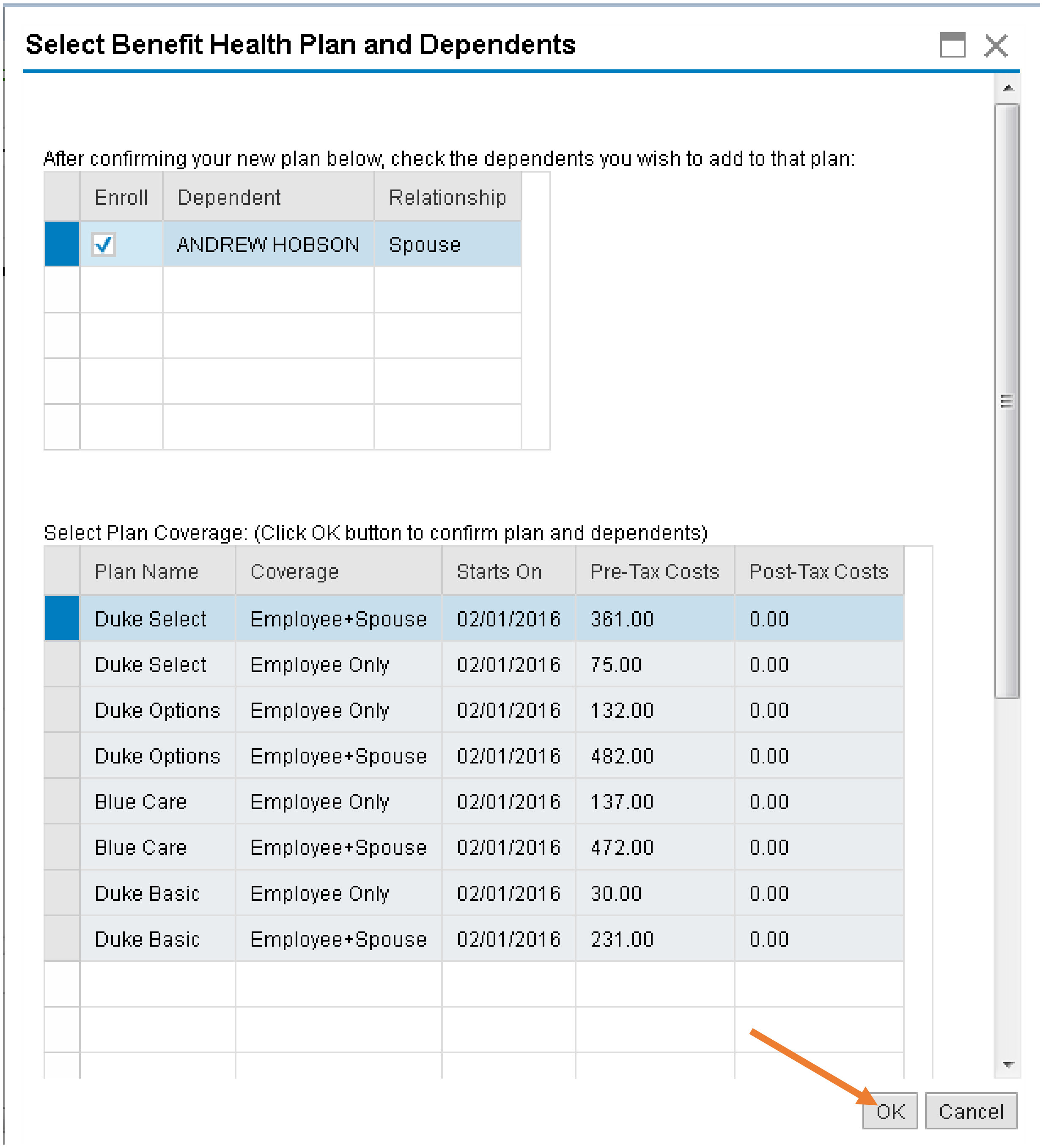




Click the "Request Changes to Medical Plan/Coverage" button to see what changes you can make to your medical plan.

In this example, Joanna wants to add Andrew to her Duke Select Plan.

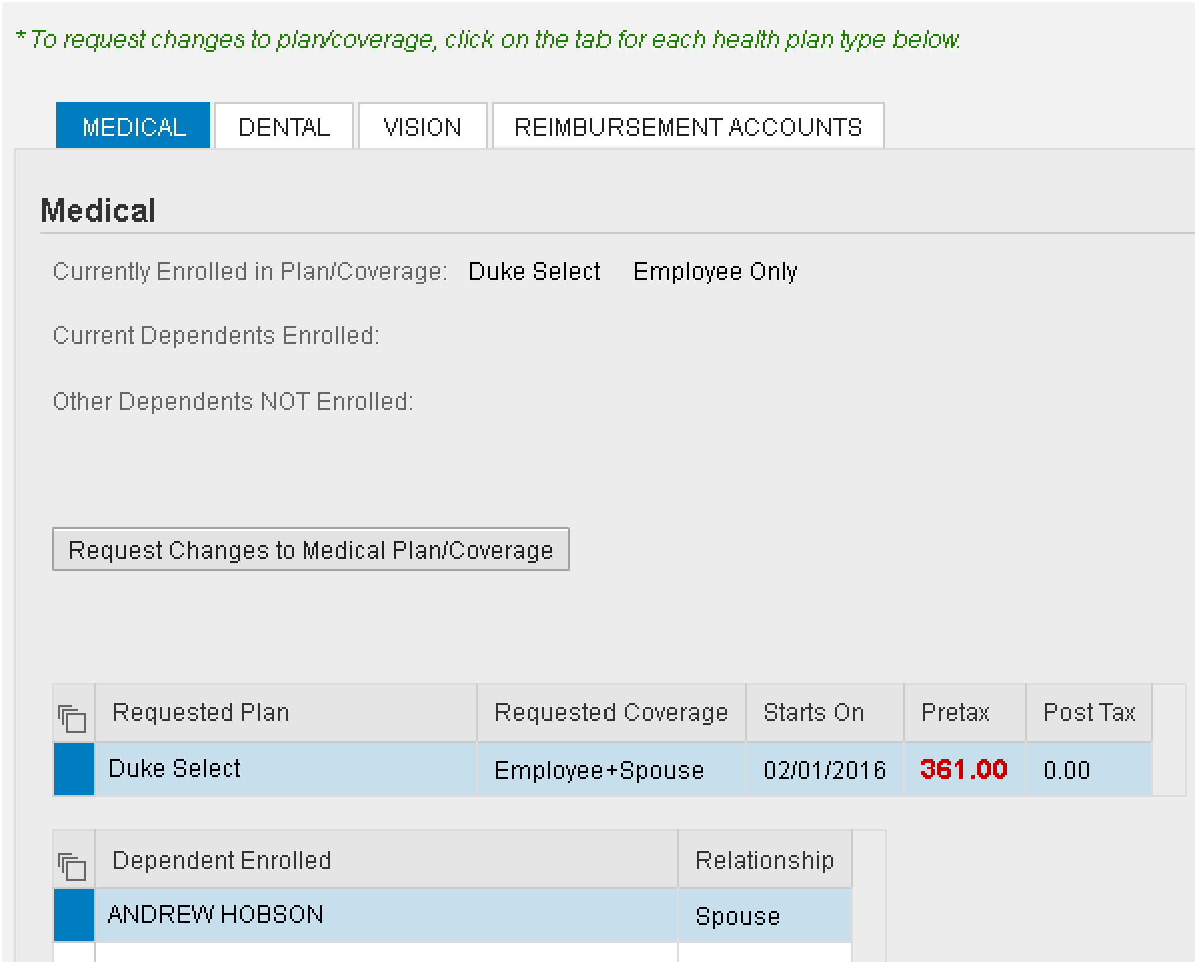



Joanna highlights the line for Duke Select Employee + Spouse coverage, then checks the box beside Andrew's name in the table above.



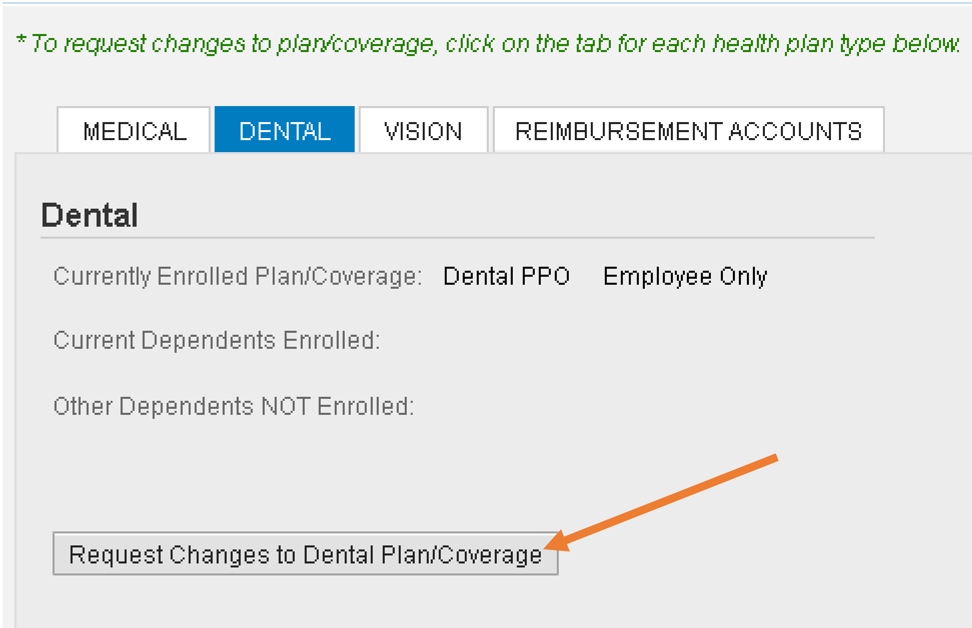

Click “OK” when you have selected the correct plan and coverage level, and have checked the box beside all of the dependents you want to add to your plan.

Next you will see an overview of the changes requested:




If the changes are correct, you can move to the next task by clicking on the “Dental” tab. If you made a mistake, you can click on the “Request Changes to Medical Plan/Coverage” button again to edit your request.

Joanna has added Andrew to her Duke Select coverage. Next, she wants to add Andrew to her Dental plan.




Click on the “Dental” tab, then click on the “Request Changes to Dental Plan/Coverage” button.

This box will pop up on the screen, which lists the dependents who can be added and the types of plans and coverage levels available.

## Select Benefit Dental Plan and Dependents

After confirming your new plan below, check the dependents you wish to add to that plan:

| Enroll | Dependent | Relationship |
|---|---|---|
| ☐ | ANDREW HOBSON | Spouse |

Select Plan Coverage: (Click OK button to confirm plan and dependents)

| Plan Name | Coverage | Starts On | Pre-Tax Costs | Post-Tax Costs |
|---|---|---|---|---|
| Dental PPO | Employee+Spouse | 02/01/2016 | 76.93 | 0.00 |
| Dental PPO | Employee Only | 02/01/2016 | 38.44 | 0.00 |
| Dental A | Employee Only | 02/01/2016 | 42.11 | 0.00 |
| Dental A | Employee+Spouse | 02/01/2016 | 84.25 | 0.00 |
| Dental B | Employee Only | 02/01/2016 | 12.18 | 0.00 |
| Dental B | Employee+Spouse | 02/01/2016 | 24.37 | 0.00 |

OK Cancel

This screen shows Joanna's current dental plan coverage. To add Andrew to her plan, she first selects the plan type and coverage level she needs. In this case, Joanna wants to continue with the Duke PPO dental coverage. She'll need to select the Employee + Spouse option. Next, Joanna will check the box beside Andrew's name to indicate he is the dependent she wants to enroll in the plan.

## Select Benefit Dental Plan and Dependents

After confirming your new plan below, check the dependents you wish to add to that plan:

| Enroll | Dependent | Relationship |
|---|---|---|
| ✓ | ANDREW HOBSON | Spouse |

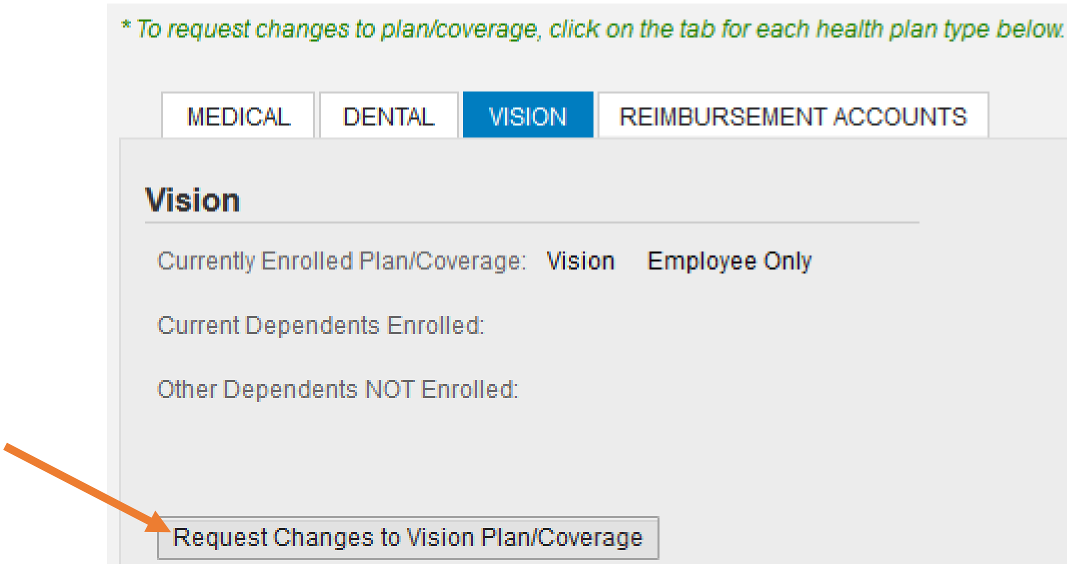
Select Plan Coverage: (Click OK button to confirm plan and dependents)

| Plan Name | Coverage | Starts On | Pre-Tax Costs | Post-Tax Costs |
|---|---|---|---|---|
| Dental PPO | Employee+Spouse | 02/01/2016 | 76.93 | 0.00 |
| Dental PPO | Employee Only | 02/01/2016 | 38.44 | 0.00 |
| Dental A | Employee Only | 02/01/2016 | 42.11 | 0.00 |
| Dental A | Employee+Spouse | 02/01/2016 | 84.25 | 0.00 |
| Dental B | Employee Only | 02/01/2016 | 12.18 | 0.00 |
| Dental B | Employee+Spouse | 02/01/2016 | 24.37 | 0.00 |

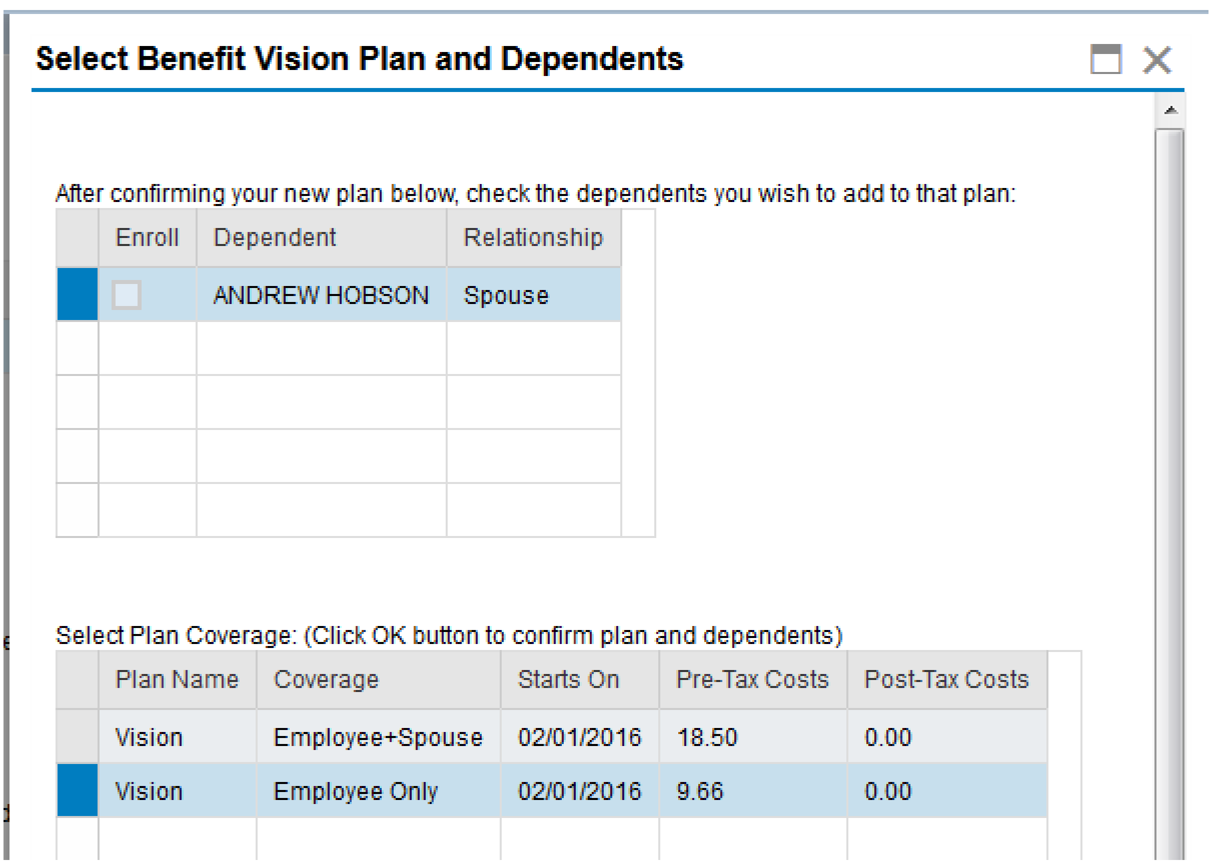
OK Cancel

Click “OK” to proceed.

To make changes to vision coverage, click on the “Vision” tab.




Click on the “Request Changes to Vision Plan/Coverage” button.



The box that appears on the screen will show the current coverage. To change the level of coverage, highlight the row for Employee + Spouse coverage, then check the box beside the dependent to add him/her to the plan. Click “OK” to continue.

**Select Benefit Vision Plan and Dependents**

After confirming your new plan below, check the dependents you wish to add to that plan:

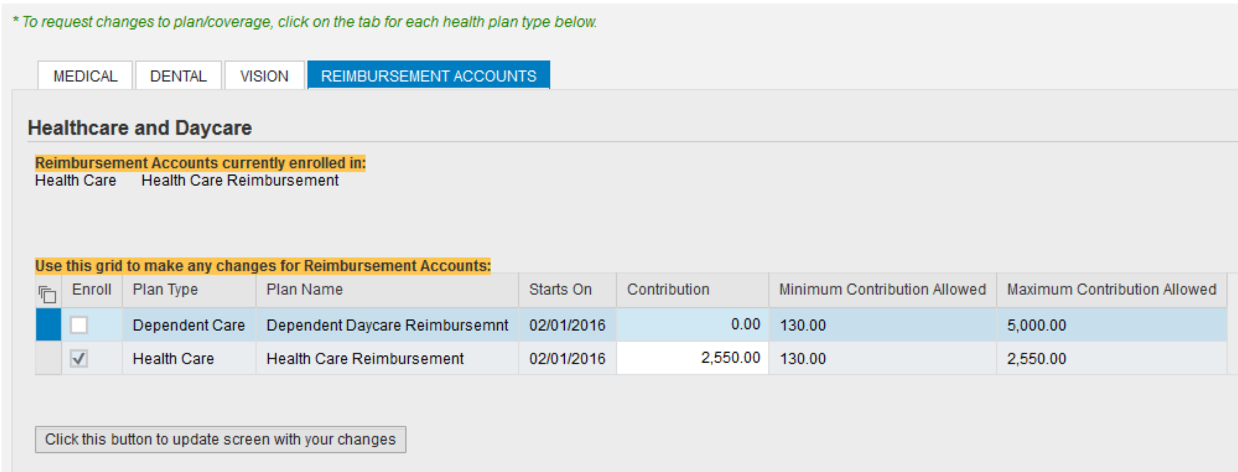
| Enroll | Dependent | Relationship |
|---|---|---|
| ☑ | ANDREW HOBSON | Spouse |

Select Plan Coverage: (Click OK button to confirm plan and dependents)

| Plan Name | Coverage | Starts On | Pre-Tax Costs | Post-Tax Costs |
|---|---|---|---|---|
| Vision | Employee+Spouse | 02/01/2016 | 18.50 | 0.00 |
| Vision | Employee Only | 02/01/2016 | 9.66 | 0.00 |

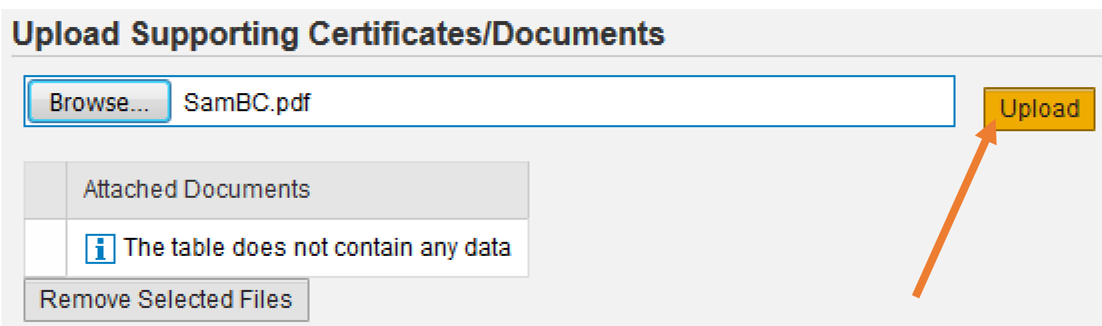
OK Cancel

Next, click on the Reimbursement tab. Joanna is already enrolled in the Health Care reimbursement account, and is contributing the annual maximum, so she is not making any changes. Joanna will be able to submit claims for out-of-pocket, eligible health care expenses incurred by Andrew after coverage begins 2/1/2016 even though she originally enrolled in this account during Open Enrollment. Joanna and Andrew do not have any other dependents, so she is not enrolling in a Dependent Care reimbursement account at this time.

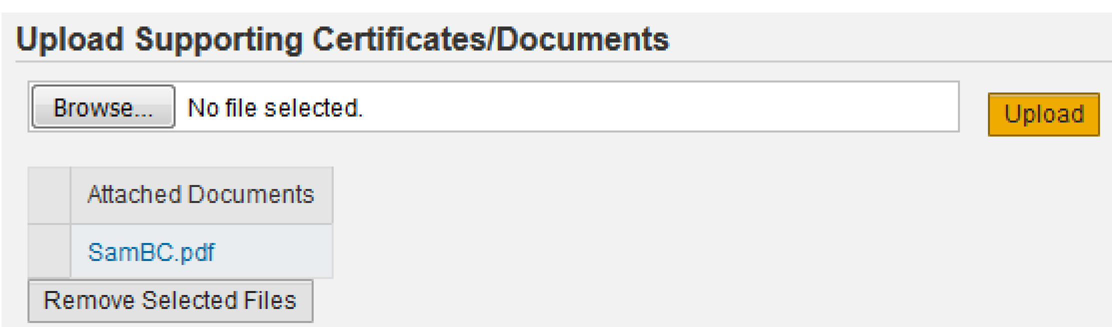



Next, you'll need to upload your supporting documents. For marriage, a copy of the marriage certificate is required.

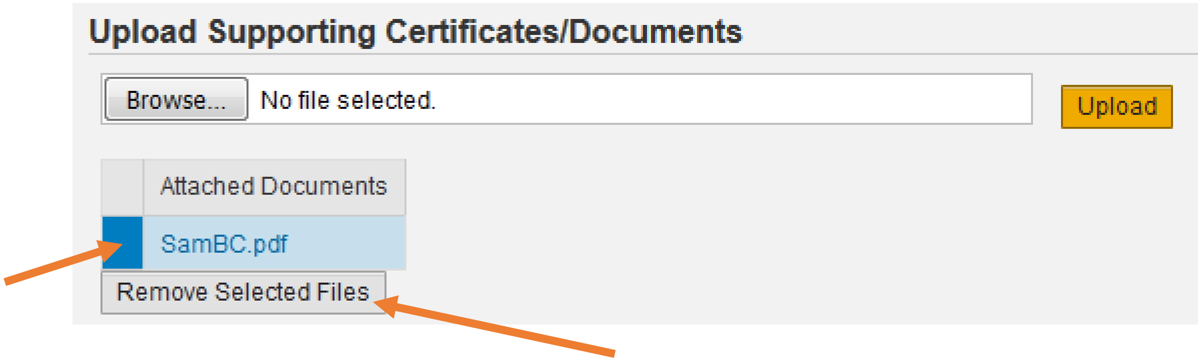
First, you'll need to scan the required document and save the electronic file. Then, within the online enrollment tool, you'll need to click the "Browse" button to find that electronic file.



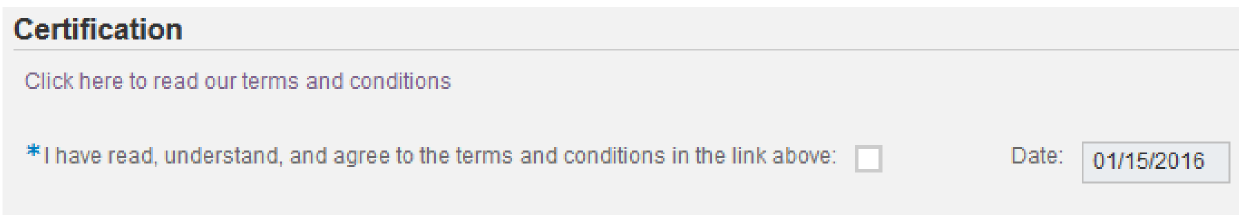

Click the "Upload" button. Your document will now appear in the "Attached Documents" table.



If you selected the wrong file by mistake, you can remove the file by clicking the box beside the document name in the table, then clicking the “Remove Selected Files” button.

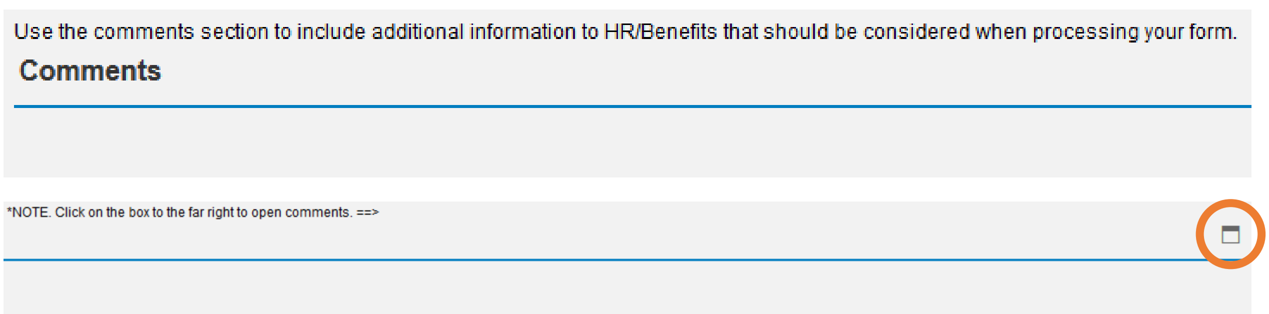



This file contains an image of the marriage certificate and is the file the employee intended to attach.



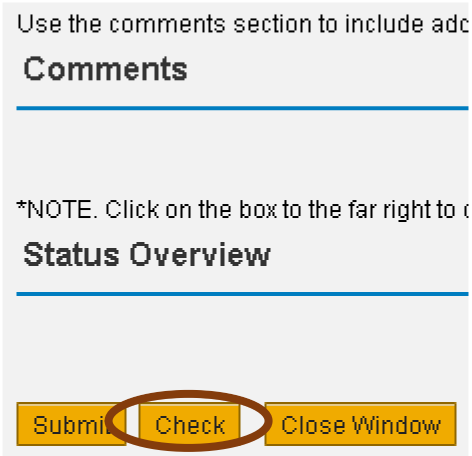

The employee will first click the link to review the terms and conditions, and will then check the box indicating she has read, understands, and agrees to them. The date is entered automatically.

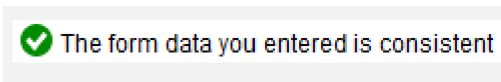
If you would like to include additional comments or clarifications, use the “Comments” section by clicking the box on the far right.



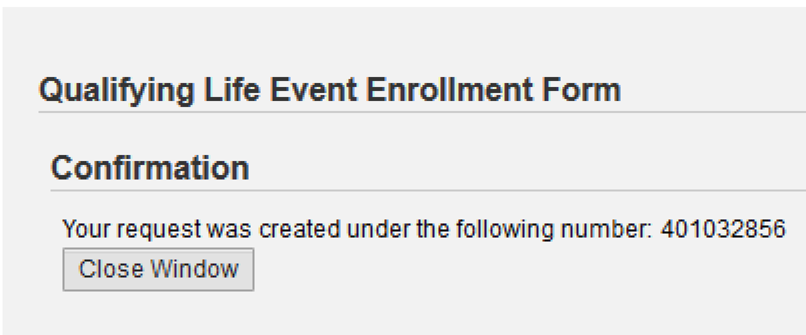

Once you click the box, that section will expand and you can type in the box.

Please use the “Check” button to find any errors. When you see “The form data you entered is consistent” at the top of the screen, you can proceed.




Finally, click the “Submit” button. You will then see this screen:




Your request has been forwarded to the HR Information Center team. It will be reviewed to make sure you have requested changes within 30 days of the event, and that the changes you requested are permitted by plan rules, and consistent with the event.

For assistance while completing this online form, or to check on the status of a request you submitted, please contact the HR Information Center at 919-684-5600.