

# Making Mid-Year Changes to Benefits

Outside of your initial benefit enrollment and the Annual Enrollment period, you may make changes your benefit package within **30-days** following a family status event, including one of the following:

- Adoption
- Birth of Child
- Establish Legal Guardianship
- Death of Dependent
- Dependent Gains/Loses Other Coverage
- Divorce/Legal Separation
- Employee Gains/Loses Other Coverage
- Enrollment in Health Exchange
- Gain of CHIPRA Coverage
- Marriage
- Spouse Gains/Loses Other Coverage

All information you need to know to make an informed decision is in the Forms & Plan Documents Section of Benefits in UKG or on D-Web under Human Resources, in Benefits.

TYPES OF REQUIRED DOCUMENTS	
<b>SPOUSE</b>	
You will need to submit the item from List A <b>and</b> one item from List B. The document from List B must be dated within the last 6 months & have the dependent's name on it.	
List A	List B
<b>Marriage Certificate</b>	Bank or Credit Card Statement with a Common Address
	Mortgage or Lease Statement with a Common Address
	Motor Vehicle Statement with a Common Address
	Current Federal Tax Return w/Spouse Listed (you can hide any financial information)
	Utility Bill with a Common Address
<b>CHILD</b>	
You will need to submit the item from List A. If your Child is a stepchild, you will need to submit your marriage certificate with Spouse listed as well as an item from List B for spouses.	
List A	
Adoption Certificate or Adoption Placement Agreement	
Birth Certificate with Parent's Name Listed	
Documentation of Legal Custody	
Documentation of Legal Guardianship	
Hospital Birth Record (within 90 Days of Birth)	
Qualified Medical Child Support Order	

**How to submit a Life Event:** To begin your enrollment, you will need to access the benefits section in UKG, and then select Life Event. You will use the **date of the event** as the effective date. This event will go to a pending status until the required documentation is submitted.

**Documentation:** For mid-year events, you will need to submit documentation showing the loss or gain of coverage with the effective date of change. If you are adding dependents, you will need to provide the documentation listed on this page.

**All mid-year events and applicable dependent changes will remain in a pending status until all verification documents are received by Dependent Verification Services. If all documents are not received within 30 days from when the event is declared, your elected changes will be denied.**

If you do not experience one of the above events during the plan year, you may **NOT** make changes to your benefit elections. The next opportunity to make changes to your benefit elections will be the following August for an effective date of October 1. If you have any questions as to what constitutes a family status change or what written proof is required, please contact the Benefits Office at 812-450-2025.

### Important Notes:

- The Provider Network is location based on primary residence of the employee; all dependents need to have the address they generally reside written under their information in UKG.
- Once enrollment is complete, the Benefits Office recommends that a copy of the summary confirmation page be saved for your personal records.
- Wellness Program - Be sure to mark your calendar to complete your Annual Wellness Visit with your Primary Care Provider.
- If you are unable to enroll online, please contact the Benefits Office at 450-2025 before your 30-day deadline!
- In the event of separation of employment or reduction in hours to a non-benefit eligible status, all insurance coverage ends at midnight the last day physically worked.
- **Any change in coverage elections shall be effective as of the date of the change in status, change in coverage, or change in cost; unless otherwise required by law.**

**Documentation is required within 30 days of the family status change in order to fulfill the Consolidated Omnibus Budget Reconciliation Act (COBRA) requirements.**

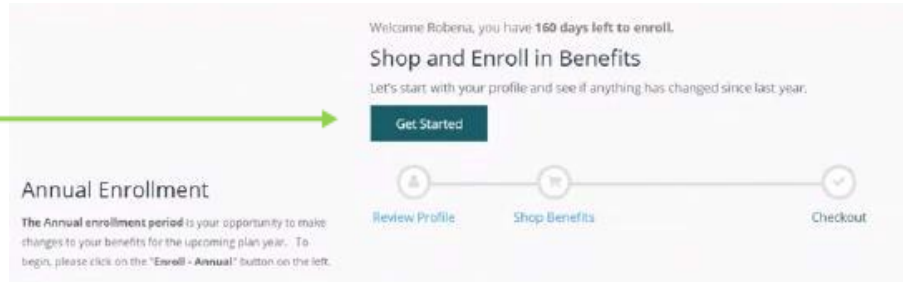
*Employee Benefits Corporation will notify the dependent regarding the Consolidated Omnibus Budget Reconciliation Act. Under COBRA, coverage may be continued for dependent children up to 36 months if they no longer qualify as the employee's dependent under the insurance plan.*

# UKG Benefit Enrollment Instructions

## Once logged into UKG...

### Step 1: Navigation: Menu > Myself > Benefits > Manage My Benefits

Select **Get Started** to begin the benefits selections process.



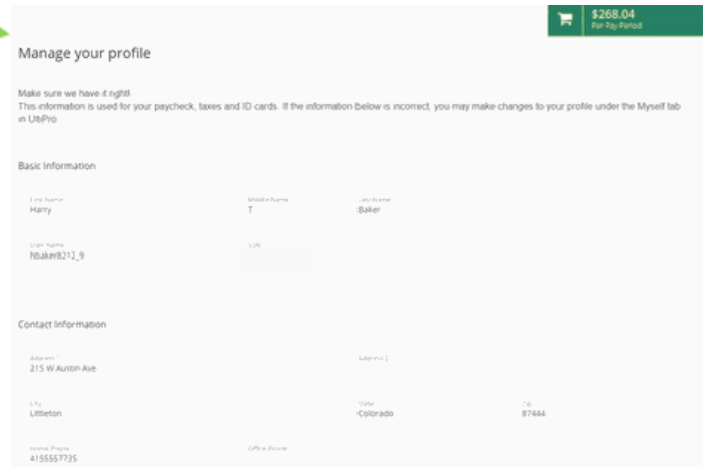
The **My Profile** page appears.

**Step 2:** From the **My Profile** page, review and verify that all of your profile information is correct.

**Step 3:** Scroll to the bottom of the page and select **Next: Review My Family**.

The **Dependent Information** page appears. At the **Current Family Members** section, you can:

- Review or edit the dependent information on file for current family members.
- Remove a family member from receiving benefits through your plan.
- Add a family member as a dependent.



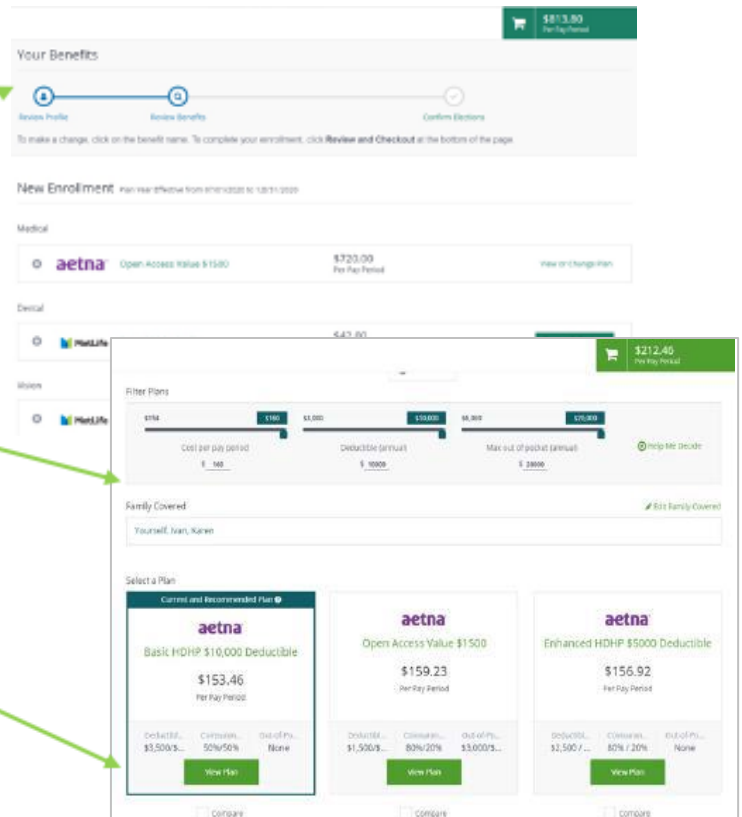
**Step 4:** Select **Next: Shop for Benefits**.

The **Current Benefit Elections** page appears.

- In the **New Enrollment** section, select the **Shop Plans** button for each of the benefit plans available to you (for example, Medical, Dental, Vision), as applicable.

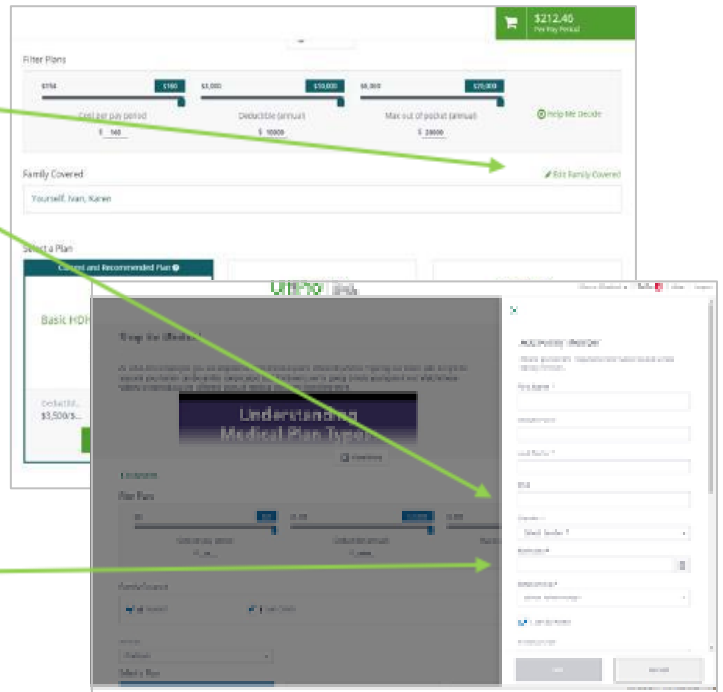
The **Shop for Plan** page appears.

- Additional information for the selected benefit type appears. Select **View More** to expand the information. Additional Content, when available, provides additional general information.



# UKG Benefit Enrollment Instructions (cont'd)

- In order to add a family member directly from the plan page, select Add Family Member link.
- A card appears on the right-hand side of the page.



**Note** When adding a family member, the change only applies to the selected coverage. However, the family member is available for selection, if applicable, on other coverages.

*For example, if you select a family member while viewing the medical plan, this election does not automatically apply to your dental plan. Regardless, you can select the added family member to the dental plan by following the same process.*

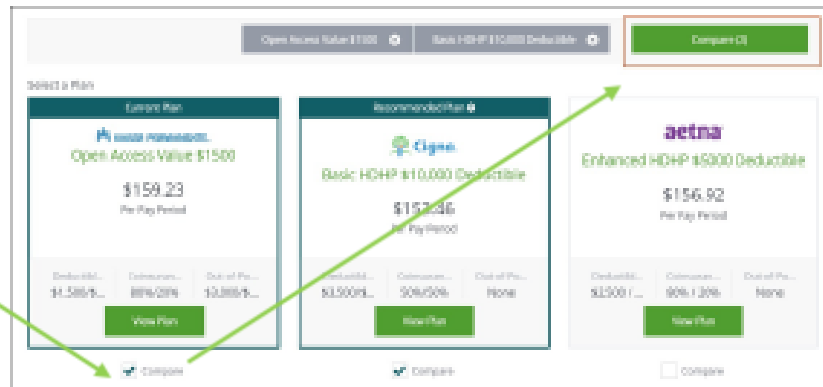
- Enter the family member's First Name, Middle Name, Last Name, and SSN.
- Select Gender from the drop-down list.
- Enter the birth date.
- Select relationship from drop-down list.

**Note** Additional information may be required. Complete as applicable.

- Select **Add**. The family member appears in the Family Covered section.
- Shop for a benefit plan by viewing available plans in the **Filter Plans** section.
- View plans by:
  - ✦ Adjusting the available filters to view the benefit plans available to you that match the filtered criteria.
  - ✦ Selecting **Help Me Decide** to navigate through questions to help you select a benefit plan. This feature is only available when you have three or more benefit plans available for selection.

**Note** For benefits that require a beneficiary, select one or more Primary Beneficiaries. A beneficiary can be a current dependent or you can add a new beneficiary, as needed. The total allocation amount for Primary Beneficiaries must add up to 100%.

- When you have the choice of more than one plan, each plan displays on a separate card that summarizes key parts of the plan. Select a plan to view details, such as coverage levels and per pay period amounts and to access benefits and coverage information.
  - ✦ Check the **Compare** box below two or more benefit plans to review the details of the selected plans.
  - ✦ Select **Compare**. The **Compare Plan Benefits** page displays the selected plans.
  - ✦ Select **View Plan** to review a plan in more detail.
- From the selected plan details page, select **Update Cart** to add a benefit plan to your Annual Enrollment cart. You must select or decline all coverages to complete the Annual Enrollment process.

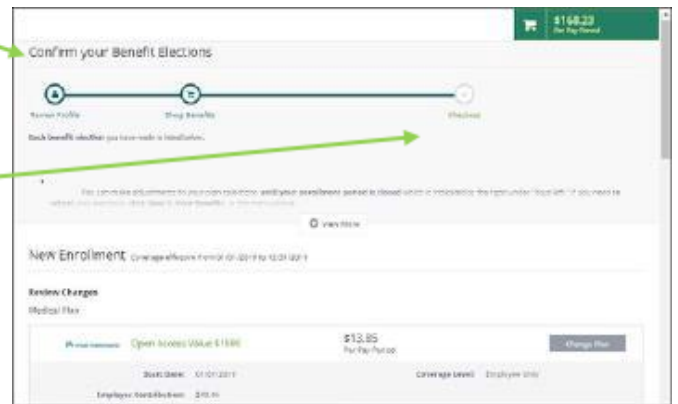


# UKG Benefit Enrollment Instructions (cont'd)

**Step 5a:** From the **Current Benefits Elections** page, select **Review and Checkout**.



**Step 5b:** The **Confirm Your Benefit Elections** page appears. Each benefit election you selected is listed.



**Step 5c:** Select **Checkout** to confirm benefit plans selections.

**Step 5d:** The **Enrollment Complete** page displays your benefits enrollment information.



**Step 6:** From the **Documents** menu, select **My Documents** to review documents regarding your benefits or any documents required for benefits enrollment.

When documents are required, a red exclamation mark displays next to the **Documents** menu.

