Guide to Benefits Enrollment

Enrolling is easy and available 24 hours a day via Employee Self-Service at http://leo.cc.emory.edu.

How to Enroll Online

Enroll online through Employee Self-Service at http://leo.cc.emory.edu. Enrolling online will ensure accuracy and save time. If you do not know your Emory University NETID and password call the IT Help Desk at 404-727-7777.

1. Log On to the Employee Self-Service, click the words Self Service to expand your available selections. Under the Benefits section click Benefits Enrollment.

2. If you are choosing coverage for the first time or want to view your current elections, choose Select.

3. Change or choose your elections by clicking Edit beside a particular plan and follow the prompts to view and/or change your current coverage. You may also enroll, add or drop dependents.

4. After editing your coverage in each plan, your new elections, covered dependents and payroll deductions will be displayed.

5. You will be prompted at the bottom of the page to Continue if coverage is correct or Edit if you have made an error.

6. Print a copy of the enrollment summary after you have finalized and edited your elections.

7. Click Continue at the bottom of the Enrollment Summary page and then Submit after reading the Authorize Elections Statement. Print the confirmation page for your records.

Review your benefit elections through Employee Self-Service at http://leo.cc.emory.edu. Following your enrollment, a confirmation statement of your benefit elections will be mailed to your home address. Please read the statement carefully to ensure accuracy as elections cannot be changed.
Screen Shot Guide to Benefits Enrollment

Whether you are enrolling in benefits due to a job related event such as hire or open enrollment, or if you have experienced a family status change such as marriage or birth and need to enroll dependents, Employee Self Service can walk you through the process.

Benefits Home Page

To enter your benefit elections click on Benefits under Employee Self Service. The Benefits page will open with options for Benefits Summary, Family Status Changes and Benefits Enrollment.

Here is what you’ll see:

- **Benefits Summary** displays your current enrollment in the benefit plans, covered dependents and beneficiary data previously elected within self service. You may update beneficiary data for your life plans under this link. If you haven’t elected beneficiaries within self service, then we are maintaining them on your last paper form. You may also change 403b contribution percents here, although you cannot enter brand new elections or vendors. New elections and/or vendors require additional applications. You will be directed to the Benefits web site for directions on completing those applications. 457b plans are also excluded from online entry. Please see the web site for information on changing 457b plans.

- The **Family Status Changes** link allows you to record events such as marriage, divorce, newborns, adoptions, changes in your spouse or dependent’s employment status, or overage children who no longer qualify as dependents.

- **Benefit Enrollment** takes you directly into the enrollment panels for open events. Job related events like new hire or open enrollment will be opened by Human Resources. After Family Status Change has been created, you may regain access through Benefits Enrollment. This is also where you access Annual Enrollment each fall.
If you clicked **Benefits Summary**, this is what you will see:

To view past or future enrollment, change date and hit Go.

Guide to Life Beneficiary and 403(b) Changes

<table>
<thead>
<tr>
<th>Type of Benefit</th>
<th>Plan Description</th>
<th>Coverage or Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Medical</strong></td>
<td>BCBSGA PPO (HealthChoice)</td>
<td>Employee Only</td>
</tr>
<tr>
<td><strong>Dental</strong></td>
<td>Aetna FPO (Traditional)</td>
<td>Employee Only</td>
</tr>
<tr>
<td><strong>Life</strong></td>
<td>Basic Life, Fulltime</td>
<td>$10,000</td>
</tr>
<tr>
<td><strong>Supplemental Life</strong></td>
<td>Supplemental Employee</td>
<td></td>
</tr>
<tr>
<td><strong>Personal Accident Insurance</strong></td>
<td>PAI Employee</td>
<td></td>
</tr>
<tr>
<td><strong>Spouse Personal Accident Ins.</strong></td>
<td>PAI Spouse</td>
<td></td>
</tr>
<tr>
<td><strong>Spouse Life</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Child Life</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Short-Term Disability</strong></td>
<td>STD 30 Day</td>
<td>60% of Salary</td>
</tr>
<tr>
<td><strong>Long-Term Disability</strong></td>
<td>LTD w/COLA</td>
<td>60% of Salary</td>
</tr>
<tr>
<td><strong>403(b) Basic</strong></td>
<td>Matched 403(b) Basic Vanguard</td>
<td>2% Before Tax</td>
</tr>
<tr>
<td><strong>Fidelity</strong></td>
<td>Supplemental 403(b) Fidelity</td>
<td>4% Before Tax</td>
</tr>
<tr>
<td><strong>SRA TIAA-CREF</strong></td>
<td>Supplemental 403(b) SRA TIAA</td>
<td>6% Before Tax</td>
</tr>
<tr>
<td><strong>ER 403b Basic</strong></td>
<td>Employer Basic Vanguard</td>
<td>6% ER Contribution</td>
</tr>
<tr>
<td><strong>ER 403b Match</strong></td>
<td>3% Fidelity Match</td>
<td>Employer Match</td>
</tr>
<tr>
<td><strong>Healthcare FSA</strong></td>
<td>Healthcare FSA</td>
<td>$750 Pledge</td>
</tr>
</tbody>
</table>

**Supplemental Income Protection**
Enrolled
Clicking a life plan link will open a box with an edit option to update beneficiary data.

**Life**

To view your benefits as of another date, enter the date and click Go:

### Plan
- **Plan Name:** Basic Life, Fulltime
- **Plan Provider:** Emory Benefits
- **Coverage Level:** $10300
- **Group Number:** 61716-8
- **Customer Service:** 1.800.469.9360

#### Covered Beneficiaries

Click Edit to change your current beneficiary allocations or to add a new beneficiary. For beneficiaries already listed, click the beneficiary name to review the individual’s personal information. You may update (Edit) personal information with the exception of Name, Date of Birth, and Social Security Number. Contact the Benefits Department at (404) 727-7613 to request changes to those fields.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship</th>
<th>Allocation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Spouse</td>
<td>100%</td>
</tr>
</tbody>
</table>

Primary Beneficiaries are displayed. Click Edit to view Secondary Beneficiaries or to make changes to either allocation.

Go To: [Benefits Summary](#)
Selecting a 403b plan will open the plan detail page, including the edit option for changing the contribution percent.

Enter New Allocations here. Primary Allocation must add up to 100% and must be entered as whole numbers without decimals. If you chose to list Secondary Beneficiaries, that allocation also needs to equal 100%.

Click Edit to change your contribution percent. You may only make changes to plans you are currently enrolled in and the system does not allow you to stop contributions on this site. To make new elections or to stop current elections, please click the link to Retirement Plans to download the appropriate forms.
Once you’ve clicked Edit, the following page is displayed:

**Change Current Savings Plan Contributions**

To change your current 403(b) plan contribution, enter the new percent in the box below. Only employees making below $98,000.00 will be allowed to contribute on an After Tax basis in the traditional 403(b) plans. (This does not include the Roth Plans.) You cannot change your contribution more than once a day.

<table>
<thead>
<tr>
<th>Current Savings Plan Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Before Tax: 1.00</strong></td>
</tr>
</tbody>
</table>

**Enter New Savings Contributions**

<table>
<thead>
<tr>
<th>Before Tax</th>
<th>% Max</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.000</td>
<td>100.000</td>
</tr>
</tbody>
</table>

Enter your new percent and hit **Save**. The change will be effective with the next payroll run.

It is important for you to note that the 403(b) Basic plan is the plan matched by the University once you have satisfied the plan requirements – one year of service, age 21, and 1,000 hours. Before contributing to any Supplemental plans, you should contribute 2% to the Basic plan to receive the maximum matching funds. Do not reduce the 403(b) Basic plan without understanding the consequences to the University match. All plan and vesting requirements apply to employee elections entered online.
If you click on **Family Status**, the first page you see is the page to click into Create New Family Status Change or if you already have and want to make changes within the 31 days go to Benefits Enrollment:

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If you are making a change to a Family Status event you or the university created earlier, please access that event through the Benefits Enrollment link below.

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The Family Status Change Certification Page will come up next when you create a New Family Status Change.
Family Status Change Certification

To begin enrollment, please complete sections 1, 2, 3, and 4 of the Certification form.

1. I certify that I have incurred the following Family Status Change:
   (Please check one)
   - Marriage
   - Divorce, Legal Separation, or Annulment
   - Newborn/Legal Guardian
   - Adoption
   - Death of Dependent
   - Start or Termination of spouse or dependent employment
   - Spouse has changed from Part-Time to Full-Time or Vice Versa
   - Spouse has taken unpaid leave of absence
   - Dependent has lost/paid Eligibility
   - Significant change in coverage due to spouse’s employment
   - Spouse or dependent Open Enrollment Period
   - Spouse or dependent gains or loses Medicare/Medicaid coverage
   - Change in dependent care provider or cost for Dependent Care Flexible Spending Account

   The following events require documentation:
   - Change in residence to an area in or out of plan network
   - Dependent loses state’s SCHIP plan
   - Judgement, Decree, or Court Order to add dependent coverage
   - New Domestic Partner Agreement completed
   - Domestic Partner Termination

2. Event Date
   (Enter the date the event occurred)
   02/07/2005
   Examples: Newborn - Date of Birth
   Adoption - Date Child is Placed in Home
   Dependent loses Eligibility - Date they marry or no longer qualify as a dependent
   (If student status, then date is their birth date in the current year. For example, a child born 09/01/1983 losing coverage in 2005, would have an event date of 09/01/2005)

3. My dependent(s) meet one of Emory’s definitions of an eligible dependent:
   (Verify that your dependent qualifies)
   - Legal Spouse
   - Natural born Son or Daughter
   - Legally adopted Son or Daughter
   - Step Son or Step Daughter residing in my home
   - Son or Daughter by court order Legal Guardianship
   - Same-Sex Domestic Partner with notarized SSDP Agreement
   - Same Sex Domestic Partner's Son or Daughter with notarized SSDP Agreement

   * Unmarried children are eligible up to age 19 or to age 25 if they are a full time student.
   * Contact the Benefits Department at (404) 727-7613 to establish eligibility for a disabled child.

4. I wish to do the following:
   (Select the action you wish to take)
   - Add dependents to my existing plan
   - Terminate dependents from my existing plan
   - Add new coverage on myself and eligible dependents
   - Terminate myself and all dependents
   - Change Dependent Care Flexible Spending Account election

   Please Read Carefully
   By clicking the Accept button below, I certify that all statements made above are true. I understand that failing to provide accurate and dependent records may result in my immediate dismissal from Emory University. If I choose not to certify the data above, I may click Cancel to exit this page.

   Accept  Cancel

If you make an error, please do not add another event to try and correct. Call the Benefits Department at (404) 727-7613 for assistance.