Open Enrollment (OE) provides you the opportunity to enroll and/or make changes to your benefit plans for you and your family. This document provides guidance on how to complete your benefit elections through UCPath online during Open Enrollment for the plan year of 2023.

Open Enrollment:

- Starts: October 27, 2022, at 8 a.m.
- Ends: November 18, 2022, at 5 p.m.

Contents:

To jump to one of the following sections, click on the link below:

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How to Make Your Open Enrollment Changes

Web Browser Tips
- Use a current version of Safari, Google, Firefox, or Microsoft Edge to enroll during Open Enrollment on UCPath.
- Disable pop-up blockers before you start the enrollment process. Refer to the Disable Pop-Up Blocker job aid for instructions.

Log in to UCPath
Log in to UCPath and locate the Open Enrollment countdown clock at the top of the dashboard and click the Enroll Now button.

If prompted, answer the Security Question and then click the Submit button.
- The questions/answers are specific to your account and may not be the same as the example shown here.
- You are required to set up security questions and answers to use self-service functionality in UCPath, which includes Open Enrollment. Refer to the Security Question Setup training simulation for instructions.
Benefits Enrollment Page

The Benefits Enrollment page appears after successfully answering the displayed security question. You can click on Ask ALEX link to access your virtual benefits counselor.

Under the Open Enrollment Events section, click on the Open button to begin making your Open Enrollment elections.

♦ Note: A spinning circle indicates UCPath is processing your request

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**BENEFITS ENROLLMENT**

Fernando Jiang

Welcome to the benefits enrollment section.

You and your family now have an opportunity to enroll in benefits based on one of the scenarios listed below:

- You are a new hire with a Period of Initial Eligibility (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 Open button next to an event? If so, that indicates the event is currently open to you for enrollment. Click on Open to begin.

Take advantage of the OE opportunity because your other options are limited to:

**90-day Waiting Period**

If you miss your initial enrollment period, you may enroll yourself and/or your family member in medical coverage with a 90-day waiting period. Coverage is effective after 90 consecutive calendar 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, ucpath.uc.edu to guide you through the process. Most changes you make during OE are effective January 1 of the following year.

UC Residents and Fellows are eligible for the Flexible Spending Accounts only through UCPath, please visit www.ucresidentbenefits.com for more information.

**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. Changes to benefits elections made due to a life event are effective retroactive to the date the life event occurred.

The Open button below indicates that you may make benefit elections now. If you recently made Open Enrollment elections and the Open Enrollment period has not ended, you may click on the Submitted button and you will be allowed to submit new elections. You may make changes one time daily through the close of Open Enrollment, then your elections are final. If you encounter an error, need assistance or have additional questions, contact the UCPath Center at 1-855-9UC-PATH (1-855-982-7284).

Need help deciding which benefits are right for you? Ask ALEX

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Open Benefit Events

Click the Open button to load your benefits enrollment information.
Open Enrollment Page

The Open Enrollment page displays the following sections:

♦ Reminders: Review all the information provided in this section for important benefit plan reminders

♦ Election Summary: This section shows your current cost per pay period for your benefit choices. As you make your Open Enrollment elections, the Before Tax and After Tax columns will update to reflect your total costs.

♦ Current Benefits Details: These tiles represent all of the available benefit plans. The benefit plan tiles will display your selected plan and plan cost. If you are a new employee, tiles will default to Waive.

  o Click on the Edit button (pencil icon) on each of the benefit plan tiles to make changes to your elections

  o Note: Benefit plans without an edit (pencil icon) button are not open for changes during Open Enrollment

For this example, click on the Edit button (pencil icon) on the Medical tile to make changes to this benefit plan.
In the **Select an Option** section for the medical benefit plan, select your plan or waive coverage.

Add Dependents to Benefit Plans

Use the **Enroll Your Family Members** section to add dependents to the selected plan. The dependents you enter in UCPath appear in the **Dependent** list. You can add or modify dependents during the enrollment process.

Click on the **Add/Review Family Members** button

On the **Add/Review Dependent** page, select the name of your dependent to view or modify their personal information. To add a dependent, click the **Add a dependent** button.
On the **Dependent Personal Information** page, complete the **Personal Information** section for your dependent(s).

In the **Relationship** section, click the drop-down in **What Relationship do you have with the dependent?** The **Relationship to Employee** section will auto-populate based on your selection.
In the Address and Telephone section, you can select the checkboxes to use the Same Address as Employee and the Same Phone as Employee if the dependent and employee use the same address and phone. Once you complete the Dependent Personal Information page, click on the Save button.

The Save Confirmation page confirms the personal information entered for your dependent was successfully saved. Click OK button to continue.

You are returned to the Enroll Your Family Members section, and the newly entered dependent appears in the Dependent list but is not yet enrolled in the benefit plan.
To enroll a dependent in this plan, click the check box next to the dependent(s) name.
After you complete your elections for the selected benefit plan, you can either:

- Click the **Save and Continue – Your elections are not complete** button to save your changes and continue to the next screen
  
  - **Note:** Clicking on **Save and Continue – Your elections are not complete** DOES NOT submit your Open Enrollment elections. This only saves your elections.

- Click the **Cancel Changes** button to exit this page without saving your changes.

UCPath displays the details for your selection, including the plan, the estimated pay period cost for the benefit election, and the covered dependents.

Click on the **Save Changes** button to submit your changes or click the **Back** button to continue making changes before saving.

The **Open Enrollment** page appears again. The plan and cost for the benefit plan you selected display on the tile. **Repeat the steps for each benefit plan tile to make your Open Enrollment elections.**
How to Submit your Benefit Elections

Once you have reviewed each of the benefit plan tiles and have made all your elections, and want to begin the submit process, scroll down to the bottom of the Open Enrollment page. Click on the Save and Continue – Your elections are not complete button to save your changes and continue to the next screen.

♦ Note: Clicking on Save and Continue – Your elections are not complete DOES NOT submit your Open Enrollment elections. This only saves your elections.

The Submit Benefit Choices page will appear. Review the Terms and Conditions, and click on the checkbox under the Arbitration section to accept the Terms and Conditions, as well as the HIPAA Statement Confirmation.

Click on the following checkboxes:

♦ By checking this box I accept the above Terms and Conditions
♦ HIPAA Notice of Privacy Practices
Below the **Authorize Elections** section, continue with one of the following:

- Click the **Cancel** button to exit this page without saving your changes
- Click on the **Save and Continue – Your elections are not complete** button to save your changes and continue to the next screen
  - **Note:** Clicking on **Save and Continue – Your elections are not complete** DOES NOT submit your Open Enrollment elections. This only saves your elections.

If you select the **Save and Continue – Your elections are not complete** button, the following **Message** page displays. Click **OK** to continue.

The **Submit Confirmation** page will inform you that your benefit elections were successfully submitted.

- **Note:** You will receive a confirmation statement by email within 24-48 hours. Although you submitted your benefit elections, you can still make additional changes. You can submit additional Open Enrollment changes in UCPath **once per day during the Open Enrollment election period**.
- Click **OK** to return to the Open Enrollment page
Under the Open Enrollment Events section, it will display as Submitted until your elections are processed.

♦ Your Open Enrollment event reopens the following day at 8 a.m. in case you want to make additional changes. You will receive an Open Enrollment Submission Statement via email each time you submit your Open Enrollment elections.

♦ You can continue to make and submit your Open Enrollment changes, once per day, until November 18, 2022, at 5:00 p.m. PST

The final Open Enrollment Confirmation Statement is sent to you via email when UCPath completes Open Enrollment processing by December 5, 2022.

Review your Open Enrollment Elections

You can review your Open Enrollment elections on your Open Enrollment Submission Statement sent via email or on UCPath on the Benefits Summary page after your Open Enrollment changes are finalized.

♦ Note: Your Open Enrollment elections are usually finalized by the next business day after you submit your elections

To see your finalized Open Enrollment elections, log into UCPath. From the Dashboard, navigate to Employee Actions > Health and Welfare > Benefits Summary. Refer to the View Benefits Summary training simulation for instructions.

♦ Note: To view your 2023 elections, use the calendar icon to select a date on or after 1/1/2023.
I Have No Changes

Open Enrollment is the opportunity for you to review your benefits and make any necessary changes to your benefits elections, but is not required. If you wish to continue the same benefit plans you currently have, no action is required, except for Flexible Spending Accounts (FSAs)

♦ If you are enrolled in a Flexible Spending Account (Health FSA and/or the DepCare FSA) and want to continue participating in 2023, you must re-enroll (each calendar year)

Note: You can make and submit your Open Enrollment changes, once per day, until November 18, 2022, at 5:00 p.m. PST

OE Coverage Begin Date & Paycheck Deduction Dates

The following table illustrates the coverage begin date for OE changes and the paycheck on which new benefit rates take effect. Bi-weekly employees pay most benefit costs the month in advance of coverage and monthly employees pay most benefit costs at the start of the coverage month. This means that most new 2023 benefit rates will reflect in a December 2022 paycheck for bi-weekly employees.

<table>
<thead>
<tr>
<th>Pay Schedule</th>
<th>OE Coverage Begin Date Before OE Finalized*</th>
<th>OE Coverage Begin Date After OE Finalized*</th>
<th>Deduction Begin Date</th>
<th>Paycheck Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bi-weekly</td>
<td>12/10/2022</td>
<td>1/1/2023</td>
<td>11/13/2022*</td>
<td>12/7/2022</td>
</tr>
<tr>
<td>Monthly</td>
<td>1/1/2023</td>
<td>1/1/2023</td>
<td>12/1/2022*</td>
<td>1/3/2023</td>
</tr>
</tbody>
</table>

*Bi-weekly: 2023 disability premiums for January coverage and Flexible Spending Account (FSA) contributions will be deducted on the 1/4/2023 paycheck

*Monthly: Flexible Spending Account (FSA) contributions and disability premiums will be deducted on the 2/1/2023 paycheck
UCPath Open Enrollment Troubleshooting Tips

If you are unable to move forward in the Open Enrollment pages (for example, the page seems to be 'stuck'), return to the UCPath Dashboard and click the Enroll Here button.

♦ From the Dashboard, you can also navigate to Employee Actions > Health and Welfare > Enroll in Benefits. This action refreshes the Enroll in Benefits transaction. You may or may not lose your data entry; data entry is generally saved, but this may not occur if you were truly 'stuck.'

For security purposes, if there is non-activity while on the Open Enrollment page on UCPath, the system will automatically timeout after 20 minutes. The following warning message will appear five minutes before the default system timeout occurs.

♦ If this message occurs while you are making your Open Enrollment elections, click on the text, Click here to remain on the page. Otherwise, your session will time out and you will need to go back to the Open Enrollment page by clicking on the Enroll Now button on the UCPath dashboard.

♦ Or you may get the UCPath Alert window, if your session is about to expire. Click on Yes to reset your session.