## PROCESS OVERVIEW

The purpose of this reference guide is to assist you in modifying your dependents on your benefits. This document is set up according to the steps needed to be performed in order to complete a Family Status Change:

1. Begin at the bgsu.edu home page
2. Click MyBGSU
3. Enter Username and Password
4. Navigate: Employees > Benefits Enrollment > Family Status Change/Life Event
5. Choose I had a Baby (Birth Life Event)
6. Enter Change Status and Date
7. Upload your Birth Certificate
8. Wait for approval from the Benefits Department
9. Continue Later
10. Resume entering information for the Birth Life Event
11. Verify Pay and Compensation
12. Enter Benefit Enrollments/Dependent Information
13. Complete the Birth Life Event

### SECTION I
**NAVIGATION**

Begin the process at the bgsu.edu home page.

*Note: Please use Internet Explorer*

Where do I go?

MyBGSU > Employees > Benefits Enrollment > Family Status Change > Life Event > I had a Baby

**Step 1:** Click MyBGSU

**Step 2:** Enter USERNAME and PASSWORD

*Note: These will be your BGSU network credentials.*

**Step 2a:** Click Login
Step 3: Click Employees

Step 4: Under Benefits Enrollment
- Click Family Status Change/Life Event
**SECTION II**

**BIRTH LIFE EVENT**

**Step 1:** Choose the **I had a Baby** Life Event

**Step 2:** Enter in the **Date** of the Birth

**Step 3:** Click **OK**

You will be directed to the Welcome page of the Birth Life Event.

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**Life Events**

**Select Your Event**

Review the choices and select the appropriate Event. Then enter the date of your event.

**Employee**

- [ ] I had a Baby
- [ ] I Adopted or gained legal custody/guardianship of a child
- [ ] I got Married
- [ ] I got Divorced

**Other Life Events**

- [ ] Change in Coverage - Employee, Spouse, Dependent
- [ ] Death of a Dependent

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**Change Status Date**

Enter the date of your status change, then select the OK button. The Life Event must be completed within 30 days of your qualifying event or you will not be eligible to change your Benefit Elections until the next plan year.

**Status Change Date**

*Date Change Will Take Effect 02/22/2015*

[OK] [Cancel]
SECTION III
EFFECTIVE BIRTH DATE

Step 1: The Welcome page will appear.

The Activity Guide, (located on the left side of the event) – will guide you through each step that is needed in order to complete the Birth Life Event.

Navigational buttons:

The Next button, located in the right hand corner of the page will also navigate you through each step.

The Cancel button allows you to cancel the transaction at any time when clicked upon. Nothing will be saved if this button is pressed.

The Continue Later button allows you to logout of the event and save any information you have already entered. You are able to return at any point to complete and submit your event to the Benefits Department.

Step 2: Click Next to begin the Birth Event

Step 3: Verify the Effective Date of the Change.

Step 4: Click Submit

Birth Life Event

Birth Date

Select the Submit button to notify the Benefits department of this change.

Required Documentation: You must send a copy of the hospital birth record or birth certificate to the Benefits department before your new dependent(s) can be covered, or designated as a beneficiary.

After the required documentation is received, the Benefits department will notify you when your enrollment is open. Then you can add your new dependent(s) to your benefit plans.

Date of Birth: 02/22/2015

Submit
Step 5: A Submit Confirmation will show. Also, you will notice that in the Activity Guide when a step is completed it will turn green.

Step 6: Click OK.

Step 7: The Birth Date page appears and shows the information that has been submitted to the Benefits Department.

Step 8: Click Next.

SECTION IV DOCUMENT UPLOAD

Step 1: The Document Upload page allows for you to attach your Birth Certificate and submit it to the Benefits Department. Note: You MUST have a Birth Certificate.
Step 2: Click on

Add Attachment

Step 3: Enter a description of the Birth Certificate in the Subject field.

e.g. Fredrick Falcon's Birth Certificate

*Note: You MUST enter a description.

Step 4: Click

Add Attachment
Step 5: Click **Browse** to locate your Birth Certificate document on your computer.

Step 6: Once the Birth Certificate has been located, Click on the **Upload** button.  
**Note:** If the wrong file is attached, you may click **Cancel** and start over with the Document Upload Activity.

Step 7: Once you have uploaded the Birth Certificate, you may now view the attachment if you wish.  
Click **View Attachment**

IF

If you do not want to review the attached document then

Click **Save**

Step 8: You will receive a message stating the Benefits Department must approve your Birth Certificate in order to complete your Life Event.

Step 9: Click **OK**
Step 10: (Optional) You may Add a Note to your attachment if you would like.

If so desired, click on the Add Note button.

If you do not want to add a note, proceed to Step 14.

Step 11: Enter a description of the note in the Subject field.

e.g. Explanation of Falcon’s Birth Certificate
Step 12: Enter in note information in the **Note Text** field.

Step 13: Click **Save**

Step 14: Review that your attachment and your note (if you added one) have a **Status** of Needs Approval and Submitted.

Step 15: You have now completed the first portion of the process.

Click **Continue Later**
To save your information.

You will be notified by email when your documentation has been approved by the Benefits Department.

Step 16: A message will appear asking if you would like to **Continue Later**.

Click **OK** to **Save** and **Continue Later**

OR

Click **Cancel** if you need to add additional information.
SECTION V
APPROVAL FROM BENEFITS DEPARTMENT

You have received an email from the Benefits Department stating that your Birth Certificate has been approved.

You may now proceed with the second phase of the process.

Step 1: Navigate to the Self Service Life Event page.

Follow Section 1:
Steps 1-4

MyBGSU > Employees > Benefits Enrollment > Family Status Change > Life Event

Step 2: Click
Continue my Life Event

Note: The Birth Event states that the Event is in Progress.

You will now be directed back to the Life Event
The Document Upload page appears. You will notice that the Status has now changed for the Birth Certificate. It has been approved.

**Step 3:** Click **Next** to begin Phase 2 of the Live Event.
SECTION VI
PAY AND COMPENSATION

Due to your recent Birth, you are eligible to make changes to your W-4 Tax Information.

Step 1: Click on the Pay and Compensation link

Step 2: Click on the W-4 Tax Information link

- Review the Total number of Allowances you are claiming
- Make changes to the W-4 Tax Data if needed
- Certify the withholding year
- Click Submit

Note: If no changes are needed, you still must click Submit.
Life Event – Birth Event

Step 3: Verify Identity
- Enter your network Password
- This will verify that you have made the changes to your W-4 Tax Information
- Click Continue

Step 4: Submit Confirmation will appear
Step 5: Click OK.
Step 6: Click Next.

SECTION VII
BENEFIT ENROLLMENT
The Benefit Enrollment section will allow you to add your new Dependent to your existing benefit elections.
Step 1: Click Start My Enrollment.
Step 2: Click [Select] To begin your enrollment

Birth Life Event

Benefits Enrollment

Freddie Falcon

Your recent family status change event allows you to modify your current benefit choices. You will have 30 days from the event date below to update your benefits enrollment and submit your new choices.

For each newly added dependent, you will be required to provide the birthdate and Social Security number, especially for your spouse. Before you continue, please make sure that you have this information available. You will be required to provide birth certificates and/or marriage certificate as proof of dependency to the Office of Human Resources within 30 days of the event date noted below. If you are electing to waive medical/dental coverage as a result of this family status change, you must provide proof of other coverage within 30 days of the event date noted below.

Please refer to the [Office of Human Resources](#) website for more information.

The Enrollment Summary will display which benefit options are open for edits. All of your benefits changes will be effective the date of the family status change event.

The blue Information icon below provides you with additional information about your enrollment.

The [Select] button next to an event means it is currently open for you to make enrollment elections. To begin your enrollment process, click [Select].

NOTE: Some events may be temporarily closed until you have completed enrollment for a prior event.

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Event Date</th>
<th>Event Status</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marital Status Change</td>
<td>02/15/2015</td>
<td>Closed</td>
<td>Director</td>
</tr>
<tr>
<td>Birth/Adoption</td>
<td>02/22/2015</td>
<td>Open</td>
<td>Director</td>
</tr>
</tbody>
</table>

Once you click [Select], it will take a few seconds for your benefits enrollment information to load.
Step 3: Current Benefit enrollment appears

- Review your current benefit enrollments
- Add your new dependent(s) to your plans, Click **Edit**
- The plan will open with your new options
Step 4: Add/Update Dependents

- Dependents that are currently covered are in the box at the bottom of the page.
- At the bottom of the Plan page, click **Add/Review Dependents**.

Step 5: The Add/Review Dependent/Beneficiary page will appear

- You may edit your Dependent/Beneficiary information if needed.

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Step 6: Click **Add a dependent or beneficiary**

To add the new baby to your benefits.
Step 7: Dependent/Beneficiary Personal Information

- Enter Personal Information
- Status Information
- Address and Telephone
- Click Save

*Note: Any field that has an * is a required field. Data MUST be entered.

Step 8: Personal Information Save Confirmation

You will receive a Save Confirmation once your new dependent information has been saved.

Click OK
Step 9: Add/Review Dependent/Beneficiary page will appear

Your new dependent will now show on your summary page.

Click Return to Event Selection

Step 10: Enroll new dependent into your benefit elections

1. Place a checkbox in the Enroll box to add this dependent to the benefit plan.

2. You will need to do this for each plan you would like to add your dependents too.

Step 9: Click Continue

Birth Life Event

Required Documents

If you are adding eligible dependents for the first time, all of the documents that you may be required to complete are available below. You will also be required to provide proof of dependency such as birth certificate or adoption finalization papers or marriage certificate.

Older Adult Child Certification 26-28 years of age
Other Insurance Information Certification
Primary Coverage Certification
Same-Sex Domestic partner Affidavit

You may enroll any of the following individuals for coverage under this plan by checking the Enroll box next to the dependents name.

Dependent Beneficiary

<table>
<thead>
<tr>
<th>Enroll</th>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Fredics Falcon</td>
<td>Spouse</td>
</tr>
<tr>
<td>✔</td>
<td>Frederick Falcon</td>
<td>Child</td>
</tr>
</tbody>
</table>

Add/Review Dependents

Continue  Cancel
Step 11: Review new elections for plan

1. Verify your new coverage choices
2. Your new Cost will show per pay period
3. Covered Dependents for this plan only

Once you have reviewed your new information for this plan

Click **OK**
Step 12: Benefit Enrollment page

You will be returned to the Benefit Enrollment page where you will see the change that was made to the plan you just changed.

- Add new dependent(s) to other plans.
- Repeat Steps 10-11 until you have completed adding the dependent to your current elections.
Step 12: Click at the bottom of the Benefit Enrollment page after you have added your dependent to your plans.
### Life Event – Birth Event

<table>
<thead>
<tr>
<th>Step 13: Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Once Submitted, you will receive a message stating you are not finished yet. Click OK.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 14: Authorize Elections/Benefit Enrollment page</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Benefit Enrollment page returns with a section for Authorizing Elections:</td>
</tr>
<tr>
<td>- Check off the Employee Agreement box</td>
</tr>
<tr>
<td>- Click on Submit</td>
</tr>
</tbody>
</table>

** Marriage Life Event **

** Benefits Enrollment **

** Submit Benefit Choices **

Freddie Falcon

You have almost completed your enrollment. If you have no further changes, please read the contents of this page. After reading 'Authorize Elections', click Submit at the bottom of this page to finalize your benefit choices.

Click Cancel if you are not ready to submit your choices and wish to return to the Enrollment Summary.

Do not submit your benefit choices until you have completed your enrollment. You may make your choices on each page and return to the Enrollment Summary as many times as you like up to your enrollment deadline. However, once you click Submit your benefit choices will be sent to the Benefits Department for processing.

Once your enrollment is processed, you may not be able to make any further benefit changes until the next Open Enrollment period in the fall if you are eligible for a qualified family status change.

As a reminder, to add dependents and same sex domestic partner to the plans for which they are eligible, you must prove that the new dependents qualify as dependents for your spouse/spouse's benefit. This includes dependents under the health care plan who require Dependent Eligibility Information. If you choose to add a dependent, you will be requested to provide proof of dependency such as birth certificate or adoption documentation.
Step 15: Submit Confirmation

After submitting your new benefit elections, you will receive a Submit Confirmation. Click OK.

Step 16: Open Benefit Events

The Open Benefits Event page will now indicate that your Birth Life Event has been submitted to the Benefits Department. Click Next.
Congratulations! You have completed your Birth Life Event.

Click [Complete] to end the event.