What do I do?

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 got Married (Marriage Life Event)
6. Enter Marital Status and Date
7. Upload your Marriage Certificate
8. Wait for approval from the Benefits Department
9. Continue Later
10. Resume entering information for the Marriage Life Event
11. Verify Personal Information
12. Verify Pay and Compensation
13. Enter Benefit Enrollments/Dependent Information
14. Complete the Marriage 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 got Married

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**
**MARRIAGE LIFE EVENT**

**Step 1:** Choose the **I got Married** Life Event

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

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

You will be directed to the Welcome page of the Marriage Life Event.
SECTION III
EFFECTIVE DATE/ MARITAL STATUS CHANGE

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 Marriage 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 Marriage Event

Step 3: Verify the Effective Date of the Change.

Step 4: Click on the drop down to change your Marital Status to Married

Step 5: Click Submit
Step 6: A Submit Confirmation will show. Also, you will notice that in the Activity Guide when a step is completed it will turn green.

Step 7: Click **OK**

Step 8: **The Marital Status Change** page appears and shows the information that has been submitted to the Benefits Department.

Step 9: Click **Next**

SECTION IV
DOCUMENT UPLOAD

Step 1: The Document Upload page allows for you to attach your Marriage Certificate and submit it to the Benefits Department.

*Note:* You MUST have a Marriage Certificate. A Marriage license will not be accepted.

Step 2: Click on **Add Attachment**
**Step 3:** Enter a description of the Marriage Certificate in the **Subject** field.

Example: Freddie Falcon’s Marriage Certificate

**Note:** You MUST enter a description.

**Step 4:** Click **Add Attachment**

**Step 5:** Click **Browse** to locate your Marriage Certificate document on your computer.
### Step 6: Once the Marriage 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 Marriage 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 Marriage 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 Marriage Certificate**

*Note: You MUST enter a description if you are adding a note.*
**Life Event – Marriage Event**

**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 (1st) 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 Marriage 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.

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

- Follow Section 1:
  - Steps 1-4

**Step 2:** Click

Continue my Life Event

*Note: The Marriage 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 Marriage Certificate it has been approved.

**Step 3:** Next to complete Phase 2 of the Live Event.

### SECTION VI

**PERSONAL INFORMATION**

Your personal information will be available to modify if changes are needed. You are able to modify:
- Home and Mailing Address
- Phone
- Emergency Contacts

**Step 1:** Click the Personal Information link

**Step 2:** Review the Addresses you have on file.

- **If YES change is needed,** choose the proper address and Click to make the necessary changes.
- **If NO change,** proceed to Step 6
Step 3: Enter the Change As Date

Step 4: Proceed in making the necessary changes to your new address.

Step 5: Click Save

Step 6: Click Phone link
- Review the Phone that is listed
- Click Add Phone Number if a new phone number needs to be added.
- Click to delete old phone numbers
- Click Save

Step 7: Click Emergency Contact
- Review the Emergency Contact listed
- Click to make the necessary changes.
- Click Add Emergency Contact to add a new emergency contact.
- Click to delete old phone numbers
- Click Save

Step 8: Click Next
SECTION VII
PAY AND COMPENSATION

Due to your recent Marriage, 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
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 VIII
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
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

- 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.

Step 6: Click Add a dependent beneficiary
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: Enroll new dependent into your benefit elections

- Place a checkmark in the Enroll box to add this dependent to the benefit plan.

Step 9: Click

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

<table>
<thead>
<tr>
<th>Enroll</th>
<th>Name</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔</td>
<td>Freida Falcon</td>
<td>Spouse</td>
</tr>
</tbody>
</table>

Add/Review Dependents

Continue  Cancel
Step 10: Review new elections for plan

- Verify your new coverage
- Your new Cost will show
- Covered Dependents for this plan

Once you have reviewed your new information for this plan,

Click OK

Step 11: 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 8-10 until you have completed adding the dependent to your current elections.
Step 12: Click Submit at the bottom of the Benefit Enrollment page.

Step 13: Message
Once Submitted, you will receive a message stating you are not finished yet

Click OK
Step 14: Authorize Elections/Benefit Enrollment page

The Benefit Enrollment page returns with a section for Authorizing Elections

- Check off the Employee Agreement box
- Click Submit

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 Marriage Life Event has been submitted to the Benefits Department.

Click **Next**

**SECTION IX EVENT COMPLETION AND EXIT**

Congratulations! You have completed your Marriage Life Event.

Click **Complete** to end the event.