**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 Adopted or gained legal custody of a child (Adoption Life Event)
6. Enter Change Status and Date
7. Upload your Adoption Certificate
8. Wait for approval from the Benefits Department
9. Continue Later
10. Resume entering information for the Adoption Life Event
11. Verify Pay and Compensation
12. Enter Benefit Enrollments/Dependent Information
13. Complete the Adoption 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 Adopted or gained legal custody of a child

**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
ADOPTION LIFE EVENT

Step 1: Choose the I Adopted or gained legal custody of a child Life Event

Step 2: Enter in the Date of the Adoption

Step 3: Click

You will be directed to the Welcome page of the Adoption Life Event.
SECTION III
EFFECTIVE ADOPTION 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 Adoption 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 Adoption Event

Step 3: Verify the Effective Date the child was placed in your home.

Step 4: Click 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 Adoption 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 Adoption Certificate and submit it to the Benefits Department.

Note: You MUST have an Adoption Certificate.
Step 2: Click on Add Attachment

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

e.g. Fredrick’s Adoption Certificate

*Note: You MUST enter a description.

Step 4: Click Add Attachment
### Step 5: Click **Browse** to locate your Adoption Certificate document on your computer.

<table>
<thead>
<tr>
<th><img src="image" alt="File Attachment" /></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Help</strong></td>
<td>--</td>
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<tr>
<td></td>
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</tr>
<tr>
<td><strong>Upload</strong></td>
<td>--</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>--</td>
</tr>
</tbody>
</table>

### Step 6: Once the Adoption 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.*

<table>
<thead>
<tr>
<th><img src="image" alt="File Attachment" /></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Help</strong></td>
<td>--</td>
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<tr>
<td></td>
<td>--</td>
</tr>
<tr>
<td><img src="image" alt="C:\Users\kowals\Desktop\Fredrick's Adoption Certificate" /></td>
<td>![Browse...]</td>
</tr>
<tr>
<td></td>
<td>--</td>
</tr>
<tr>
<td><strong>Upload</strong></td>
<td>--</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>--</td>
</tr>
</tbody>
</table>

### Step 7: Once you have uploaded the Adoption 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 Adoption Certificate in order to complete your Life Event.

<table>
<thead>
<tr>
<th><img src="image" alt="Message" /></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Help</strong></td>
<td>--</td>
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<tr>
<td></td>
<td>--</td>
</tr>
<tr>
<td><strong>OK</strong></td>
<td>--</td>
</tr>
</tbody>
</table>

### Step 9: Click **OK**

**4/9/15**

**Page 7 of 22**
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 Fredrick’s Adoption 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.

[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 Adoption 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 Adoption 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 Adoption Certificate. It has
been approved.

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

Due to your recent Adoption, 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 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

Adoption 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 certificates 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 benefit 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**
- The plan will open with your new options

![Life Event – Adoption Event](image-url)
Life Event – Adoption Event

Step 4: Add/Update Dependents

- Dependents that are currently covered will appear with a check mark in the Enroll box.
- 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/Review Dependents

To add the new baby to your benefits.

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4/9/15
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 Next

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

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 dependent’s name.

Dependent Beneficiary
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

Adoption Life Event

Benefits Enrollment

Medical

Freddie Falcon

Important: Your enrollment will not be complete until you submit your choices to the Benefits Department at the end of the enrollment process.

Your Choice

You have chosen Medical Plan A with Employee+Family coverage.

In order for Medical Mutual to apply appropriate benefits to treatment and services provided to me and or my dependent, I consent to any medical professional, clinic, or other medical or medically related facility, government agency or other provider of care to provide Medical Mutual information including copies of medical records (if needed) concerning care of treatment, information relating to mental illness or use of drugs or alcohol. I understand that this health care coverage I am enrolling in contains coordination of benefits, workers’ compensation and subrogation provisions and I acknowledge Medical Mutual’s right on behalf of BGSU to enforce these provisions.

Your Estimated per-pay-period Cost

| Your Cost | $368.37 |

Your Covered Dependents

<table>
<thead>
<tr>
<th>Primary Care Provider Details</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freida Falcon</td>
<td>Spouse</td>
</tr>
<tr>
<td>Frederick Falcon</td>
<td>Child</td>
</tr>
</tbody>
</table>

Notes

Once submitted, this choice will take effect on 02/22/2015. Deductions for this choice, if applicable, will start with the pay period which includes 02/22/2015.

Click OK to store your choices.
Click Edit to go back and change your choices.
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 9-12 until you have completed adding the dependent to your current elections.
**Step 12:** Click **Submit** at the bottom of the **Benefit Enrollment** page after you have added your dependent to your plans.

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**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 Adoption Life Event has been submitted to the Benefits Department.

Click **Next**

**SECTION VIII**

**EVENT COMPLETION AND EXIT**

Congratulations! You have completed your Adoption Life Event.

Click **Complete** to end the event.