# Support Staff (AUPE) Benefits Enrolment New Hire

## Purpose:
This reference guide provides you with the steps to enrol in Support Staff (AUPE) group benefits. You have two weeks from your date of hire to complete your enrolment in the benefits program. HR sends you an email within two days of your hire date, outlining the steps to follow. This guide is also helpful if you experience a life event and need to make changes to your benefit selections. The steps provided here are specific to new hires but are relevant for making changes to existing benefits, dependents, and beneficiaries.

## Audience:
New hires to the University of Calgary Support Staff.

## Prerequisites:
You have received a system email notification from DoNotReply@ucalgary.ca indicating you can access the enrolment tool to make your benefit selections.

## Related Documents
For related benefits information, visit the UofC Human Resources website:

https://ucalgary.ca/hr/benefits-pension/new-employee-enrolment/support-staff
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Complete Your Enrolment

Our comprehensive benefits and pension program is designed to promote a productive level of health and well-being to staff members through coverage for retirement income planning, health, dental, life insurance, and income protection for disability. We hope you find these programs beneficial in meeting your needs.

Benefit eligibility and an overview of your benefit plan would have been outlined in your offer of employment. Detailed benefit plan information can be found on the Support Staff Benefits at a Glance page.

If you have experienced a life event, go to the HR Life Events page at https://ucalgary.ca/hr/benefits-pension/life-events/support-staff for key information, prior to making changes to your benefits.

Step 1: Navigate to the Benefits Enrolment Page

1. From the my.ucalgary.ca Portal, click All about me → Benefits self service

Step 2: Review Key Information

1. The **Benefits Enrolment** page displays.
2. Read the information.
3. Click the **Overview of All Plans** link to review details about your benefits. This opens in a new tab.
4. In the **Open Benefits Events** section, click the **Information** button for more detailed instructions.
5. Review the important information about **Benefits Enrolment**.
6. Click the **OK** button.
Step 3: Enter Dependent/Beneficiary Information

Enter dependent information as needed to ensure appropriate coverage. This is also the time to add your beneficiaries for applicable Life, and optional benefits.

1. Click the Select button

2. The Benefits Enrolment page displays (you may need to scroll up).

3. Click the Review/Update Dependent Data button.

Note: You cannot make your benefit selections until you have entered dependent/beneficiary information.
4. The **Add/Review Dependent/Beneficiary** page displays.
5. To add a dependent or beneficiary, click the button.

6. Enter your dependent/beneficiary personal information.
7. Note that under **Status Information**, leave the **As of** date field blank.

8. Click the **Save** button.
9. Click to **Return to Dependent/Beneficiary Summary**.
10. To **add another dependent or beneficiary**, click the button.

**Note**: Ensure you add any non-dependent beneficiaries for your Life Insurance at this point.

11. When done adding dependents and beneficiaries, click the **Confirm and Return to Enrolment** link to validate your entries and open up your benefits for making selections.

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**Step 4: Make Your Enrolment Selections**

1. The **Benefits Enrolment** page displays.
2. Scroll down to your **Enrolment Summary**.
3. Click the **Enrol** button for each item in the **Enrolment Summary**, in order to make changes or validate your existing choices.

Note that the numbers displayed here may not accurately reflect the numbers that will display in your enrolment summary.

Depending on your eligibility, the **Enrolment Summary** may include:

- a. Health
- b. Dental
- c. Basic Life
- d. Optional Employee Life
- e. Optional Spousal Life (Family coverage only)
- f. Optional Child Life (Family coverage only)
- g. Long-Term Disability
- h. Flexible Credits
- i. Wellness Spending Account
- j. Health Spending Account
- k. Pension

![Enrolment Summary Table]
Note: When you click into each item, ensure your pop-up blocker is set to allow pop-ups on this site.

Overview of All Plans

1. For an Overview of All Plans, once you have selected to edit an item in your Enrolment Summary, click the link in the top right corner. This link is available when you navigate into each item of the Enrolment Summary.

2. Click the OK button to open a new browser window of the UofC Human Resources website – Group Benefits Information.

3. When done reviewing the available plans on the Human Resources website, click the other tab to return to your benefits enrolment. You can return to the Human Resources website at any time by clicking the Benefits and Pension tab.
4. Click **Return** to go back to your benefits information.

Health

1. Click the **Enrol** button for the **Health** option.

2. Before you confirm your **Health** selection, review the important information.

3. Validate the selection. You cannot waive coverage unless your spouse (if applicable) has coverage through his/her employer. Rather than opting out, we recommend coordination of benefits between your and your spouse’s plans.
4. **Enrol Your Dependents** in this benefit. To make changes to dependents, click the **Update and Continue** button to return to the Re-Enrolment Summary page.

   **Note:** Changing dependents impacts your coverage. If changes are made to dependents after benefits are selected, review selections to ensure they are still accurate.

5. If you are done reviewing and/or making changes, click the **Update and Continue** button.

6. A summary displays with your selection.

7. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.
Dental

1. Click the Enrol button for the Dental option.

2. Dental coverage takes effect six months after your date of hire. Before you confirm your Dental selection, review the important information.

Remember, you can review all plans by clicking the link in the top right corner.

3. Validate the selection. You cannot waive coverage unless your spouse (if applicable) has coverage through his/her employer. Rather than opting out, we recommend coordination of benefits between your and your spouse’s plans. You must enrol in Dental if you have enrolled in Health.
4. **Enrol Your Dependents** in this benefit. To make changes to dependents, click the **Update and Continue** button to return to the Re-Enrolment Summary page.

**Note:** Changing dependents impacts your coverage. If changes are made to dependents after benefits are selected, review selections to ensure they are still accurate.

5. If you are done reviewing and/or making changes, click the **Update and Continue** button.

6. A summary displays with your selection.

7. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.
Basic Life

1. Click the **Enrol** button for **Basic Life**.

2. Basic Life coverage is mandatory and takes effect six months after your date of hire. Review the important information on basic life.

3. Designate your primary and secondary allocation by percent.

   **Note:** You can’t change the Primary or Secondary Allocation from Percent (the drop down is deceiving).

4. Click the **Update and Continue** button.
5. A summary displays with your selection.
6. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.

**Note that Basic Life comes into effect six months after your start date.**
Optional Employee Life

1. Click the Enrol button for Optional Employee Life.

2. Before you make your Optional Employee Life selections, review the important information.
3. If you choose to enrol, medical evidence of insurability is required.
4. Scroll down to make your selections.

Remember, you can review all plans by clicking the link in the top right corner.

5. If you would like to enrol in this additional insurance, select Yes Opt. Life Support Staff.
6. Enter a Coverage Amount in units of $1000 up to $300,000. You will be sent required forms to complete and submit to the provider. Your coverage does not begin until approval is received from the provider and the six-month waiting period has ended.
7. Designate your beneficiaries by percent. To add a beneficiary, navigate back to the Enrolment Summary page.

**Note:** You can’t change the Primary or Secondary Allocation from Percent (the drop down is deceiving).

8. Click the **Update and Continue** button.
9. A summary displays of your selections.
10. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.
Optional Spousal Life

This is only relevant to employees with Family coverage.

1. Click the Enrol button for Optional Spousal Life.

2. Review the important information about Optional Spousal Life.

3. If you choose to enrol, medical evidence of insurability is required.

4. Scroll down to make your selections.
5. To enrol your spouse in this plan, select **Yes** for **Life-Optional Spouse Support**.

6. Enter a **Coverage Amount** in units of $1000 up to $300,000. You will be sent required forms to complete and submit to the provider. Your spousal coverage does not begin until approval is received from the provider and the six-month waiting period has ended.

7. Enrol your spouse by selecting the check box in the Covered column. To add a dependent, navigate back to the **Enrolment Summary** page.

8. Click the **Update and Continue** button.
9. A summary displays of your selections.
10. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.

## Optional Child Life

This is only relevant to employees with **Family** coverage, with at least one child.

1. Click the **Enrol** button for Optional Child Life.
2. Review the important information about Optional Child Life.
3. Scroll down to make your selections.
4. If you would like to enrol, select Yes for Life-Optional Child Support.

5. Enter a **Coverage Amount** in units of $5,000 up to $15,000.

6. To enrol your child. Select the checkbox in the Covered column. To add a dependent, navigate back to the **Enrolment Summary** page.

7. Click the **Update and Continue** button.
8. A summary displays of your selections.
9. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.
Wellness Spending Account

1. Click the **Enrol** button for the **Wellness Spending Account**.

2. Before you make your **Wellness Spending Account** selection, review the important information.

3. If you choose to enrol in Wellness Spending, enter an amount in the **Annual Credit Allocation** field. This number cannot exceed your available credit amount, which appears below the important information once you select this option. You can divide your credit amount between the WSA and Health Spending account. A minimum of $100 is required in each account.

4. Click the **Update and Continue** button.
5. A summary displays with your selection.
6. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary. Otherwise click **Discard Changes** to update your selection.

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**Health Spending Account**

1. Click the **Enrol** button for the **Health Spending Account**.

2. Review the important information about your Health Spending Account. All flexible spending credits default to this account. To change the amount, change your Wellness Spending Account amount.

3. The Annual Credit Allocation displays.
4. Click the **Update and Continue** button.
5. A summary displays with your selection.
6. If you are happy with your selection, click the **Update Elections** button to return to the Enrolment Summary.

### Pension

1. Click the **Enrol** button for **Pension**.

2. Depending on your eligibility, pension is mandatory and can’t be deselected.

   New enrolments in the pension plan will receive a new member package from the PSPP administrator, Alberta Pensions Services, which contains information and the applicable forms to be completed to declare your pension partner and designate you pension beneficiary.

3. Click the **Update and Continue** button.
4. A summary displays of your selections.
5. Click the **Update Elections** button to return to the Enrolment Summary.

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**Step 5: Finalize Your Selections**

1. If you are happy with your selections, click to **Save and Continue**. You can also choose to **Save for Later** if you are not ready to finalize your selections.

**Note**: Your enrolment is not complete until you submit your choices. If you do not submit your choices, your coverage defaults to single and all flexible credits go to your health spending account.
2. After clicking the **Save and Continue** button a Benefits Enrolment Summary displays. Review the summary.

3. If you are happy with the information, click the **OK** button. To make changes, click the **Cancel** button.

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**Errors**

1. If you have any errors, click the **Return** button to make changes to your plan selections, or click the **Continue** button (warnings only).

2. Warnings also indicate whether you need to complete an evidence of medical insurability form (for each insurance plan you registered in). This form is provided to you by Benefits once you have submitted your selections.

3. Click the **Continue** button.
Submit Benefits

1. Review the important information prior to submitting your benefits, including instructions on printing the beneficiary designation form prior to submitting your choices.

2. Before you click the Submit button, click the links to the form: **Group Benefits – Beneficiary Designation Form**.

   **Note:** When you click each form, ensure your pop-up blocker is set to allow pop-ups on this site.

3. Once you have printed off the form, and you are done making changes to your benefits, click the **Submit** button.

4. **Submit Confirmation** displays. Click the **Print Enrolment Confirmation** button to generate a confirmation statement of your elections.

5. To return to the **Benefits Enrolment** page, click the OK button.

You will receive an email confirming your choices; the Benefits team receive a copy as well.
Next Steps

Your selections will remain in place unless you experience a qualified life event, such as a marriage, divorce, birth of a child, etc. For a qualified life event, review Life Events on the HR web pages at https://ucalgary.ca/hr/benefits-pension/life-events/support-staff and follow the steps provided.