Remove or Maintain an Overage Dependent

Purpose: This reference guide provides you with the steps to remove or maintain an overage dependent from your benefits coverage.

Dependents age 21 to 24 are only eligible to remain on your coverage if they are full-time students, enrolled in an accredited post-secondary institution (proof of enrolment may be requested each year). Alternatively, a dependent is eligible to remain on your coverage if they are dependent upon you by reason of a mental or physical disability, and became totally disabled prior to attaining age 21, and who have been continuously disabled since that time.

Dependents 25 and older are only eligible to remain on your coverage if they meet the definition of a medically disabled dependent (see previous paragraph).

For coverage on a dependent with a mental or physical disability, contact HR directly: hr@ucalgary.ca or call (403) 210-9330.

Audience: University of Calgary employees with dependents age 21 to 25

Prerequisites: You have received a system email notification from DoNotReply@ucalgary.ca indicating you have a dependent turning 21 or 25 in the next month. Or, there is a change in the eligibility status for your adult dependent child.

Quicklinks
Click a link to navigate directly to that section in this document:
  - Remove an Overage Dependent (age 21 to 25)
  - Maintain an Overage Dependent (age 21 to 25)

Related Documents
For related benefits information, visit the UofC Human Resources website and select your employee group:
https://www.ucalgary.ca/hr/

Benefits Enrolment reference guides:
  - Support Staff
  - MaPS
  - Academics
Remove or Maintain an Overage Dependent

The following steps are applicable if any of your dependents are age **21 to 24** and are not enrolled in an accredited educational institution, college, or university on a full-time basis.

Overage Dependents who are dependent on you by reason of a mental or physical disability are eligible to remain on your coverage. Contact hr@ucalgary.ca for details.

**Remove an Overage Dependent**

**Step 1: Navigate to the Family Status Change Page**

1. From the My UCalgary Portal, follow the path: All about me → My benefits → Benefit details

2. On the Benefits page, click Life Events.

3. On the Life Events page, select: Family Status Change
4. In the Change Status Date window, select the Date Change Will Take Effect, the first day of the month following your dependent’s birthday (e.g., birthday: October 16th, effective date: November 1st).
5. Click the OK button.

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Step 2: Update Family Status Information

1. On the Family Status Change page, click the Next button.
2. Confirm the date the change takes effect (first day of the month following the child’s birthday).
3. Click the Submit button.
4. Click the OK button.
5. Click the Next button.
6. Click to **Start My Enrolment**.

   ![Benefit Enrolment](image)

   Depending on your life event, there could be an impact on your benefits. Click **Start My Enrolment**. The system will analyse your information to see if there are more steps required.

   ![Start My Enrolment Button](image)

7. Click the **Select** button.

   ![Benefits Enrolment](image)

   Review **Life Events** for information and resources.

   Click the **Select** button to continue. It may take a few seconds for your benefit enrolment to load. When you have completed your enrolment, click the **Next** button to close your Life Event.

   ![Open Benefit Events Table](image)

   If the event status is Closed, contact benefits@ucalgary.ca.

8. Click **Review/Update Dependent Data**.

   ![Benefits Enrolment](image)

   **Family Status Change**

   Your recent life event allows you to modify your current benefit choices. You may be required to provide proof of enrolment at an accredited education institution for your over-age dependents.

   First click the **Review/Update Dependent Data** button to confirm or change your dependent and beneficiary information.

   Once you have reviewed your dependent data, click each **Confirm** button to review and/or edit all your benefits listed in the enrolment summary. For Life Insurance, AD&D, Optional coverage, and Pension benefits, confirming your benefit allows you to designate your beneficiaries.

   When done confirming each benefit, click the **Save and Continue** at the bottom of the page.

   ![Select Button](image)

   Select **Review/Update Dependent Data** to begin your enrolment. Refer to **Group Benefit Definitions**.
9. Click the name of the adult child that requires updating.

10. On the Dependent/Beneficiary Personal Information page, scroll to the bottom and click the Edit button.

11. Under Personal Information, use the Relationship to Employee drop down menu to select Adult Child.

12. Click the Save button.
13. On the **Save Confirmation** page, click the **OK** button.

![Save Confirmation](image)

14. On the **Add/Review Dependent/Beneficiary** page, click to **Confirm and Return to Enrolment**.

<table>
<thead>
<tr>
<th>Name</th>
<th>Relationship to Employee</th>
<th>Date of Birth</th>
<th>Marital Status</th>
<th>Marital Status Date</th>
<th>Student</th>
<th>Disabled</th>
<th>Dependent</th>
<th>Beneficiary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valerie Sun</td>
<td>Domestic Partner Adult</td>
<td>1960/01/01</td>
<td>Married</td>
<td>2016/11/01</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Daniel L. Sun</td>
<td>Adult Child</td>
<td>1998/09/07</td>
<td>Single</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The adult child’s status has now been revised from a dependent and beneficiary to only a beneficiary.

**Next Steps**

On the Benefits Enrolment screen, select Enrol for each category (Health, Dental, Health and Wellness Spending Accounts) to ensure your dependent and beneficiary information is accurate.

For the steps to review your benefits, access the following reference guides or contact [hr@ucalgary.ca](mailto:hr@ucalgary.ca)

Benefits Enrolment reference guides:

- [Support Staff](#)
- [MaPS](#)
- [Academics](#)
Maintain an Overage Dependent

Dependents **21 and older** are eligible to remain on your coverage if they are attending an accredited educational institution, college or university on a full-time basis, or are dependent on you by reason of a mental or physical disability, and became totally disabled prior to attaining age 21, and who have been continuously disabled since that time.

**Note:** If your overage dependent was a student, but is no longer one, change their student status to ‘No’ in PeopleSoft using the following steps, then Remove the Overage Dependent from your benefits. You will receive a yearly notification reminding you of their student status.

Dependents **over age 25** are only eligible to remain on your coverage if they are dependent on you by reason of mental or physical disability, and became totally disabled prior to attaining age 21, and who have been continuously disabled since that time. Contact hr@ucalgary.ca for details.

Step 1: Navigate to the Dependent/Beneficiary Update Page

1. From the myUofC Portal, click **All about me → Benefits self service**

2. On the **Benefits** page, click **Life Events**.

3. On the **Life Events** page, select: **Dependent/Beneficiary Update**

Questions? UService
4. In the **Status Change Date** window, click the Calendar icon and select the **Date Change Will Take Effect**, the first day of the month following your dependent’s birthday (e.g., birthday: October 16th, effective date: November 1).
5. Click the **OK** button.

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**Step 2: Update Dependent Information**

1. On the **Dependent or Beneficiary Update** page, click the **Next** button.

2. Confirm the date the change takes effect (first day of the month following the child’s birthday).
3. Click the **Submit** button.

4. Click the **OK** button.

5. Click the **Next** button.
6. Click to **Start My Enrolment**.

   **Benefit Enrolment**

   Depending on your life event, there could be an impact on your benefits. Click **Start My Enrolment**. The system will analyse your information to see if there are more steps required.

   ![Start My Enrolment Button]

7. Click the **Select** button.

   **Benefits Enrolment**

   Scott W Sun

   Review [Life Events](#) for information and resources.

   Click the Select button to continue. It may take a few seconds for your benefit enrolment to load. When you have completed your enrolment, click the **Next** button to close your Life Event.

   **Open Benefit Events**

<table>
<thead>
<tr>
<th>Event Description</th>
<th>Event Date</th>
<th>Event Status</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependent/Beneficiary Update</td>
<td>2019/08/01</td>
<td>Open</td>
<td></td>
</tr>
</tbody>
</table>

   If the event status is Closed, contact benefits@ualberta.ca.

8. Click **Review/Update Dependent Data**.

   **Benefits Enrolment**

   **Dependent/Beneficiary Update**

   Scott W Sun

   Your recent life event allows you to modify your current benefit choices. You may be required to provide proof of enrolment at an accredited education institution for your dependent/dependents.

   First click the **Review/Update Dependent Data** button to confirm or change your dependent and beneficiary information.

   Once you have reviewed your dependent data, click each **Confirm** button to review and/or edit all your benefits listed in the enrolment summary. For Life Insurance, AD&D, Optional coverage, and Pension benefits, confirming your benefit allows you to designate your beneficiaries.

   When done confirming each benefit, click the **Save and Continue** at the bottom of the page.

   ![Review/Update Dependent Data Button]

   [Review/Update Dependent Data]

   Refer to [Group Benefit Definitions](#).
9. Click the name of the adult child to change the status.

10. On the Dependent/Beneficiary Personal Information page, scroll to the bottom and click the Edit button.

11. Under Status Information, use the Student drop-down menu to change the status as needed.

12. Confirm the As of date.

13. Click the Save button.
14. On the **Save Confirmation** page, click the **OK** button.

15. On the **Add/Review Dependent/Beneficiary** page, click to **Confirm and Return to Enrolment**.

### Next Steps

If your overage dependent is no longer a student, remove them from your group extended health care and dental care benefits.

If your overage dependent’s status has changed, and now meets the definition of eligible dependent, and they are under the age of 25, enrol them in your benefits:

- On the **Benefits Enrolment** screen, select Enrol for each category (Health, Dental, Health and Wellness Spending Accounts) to enrol your dependent in available benefits and ensure your dependent and beneficiary information is accurate.

For the steps to update your benefits, access the following reference guides or contact hr@ucalgary.ca

Benefits Enrolment reference guides:

- **Support Staff**
- **MaPS**
- **Academics**