

# Tufts Support Services

## Job Aid for Life Events

### Description

- This job aid is intended to guide you through the online process for a Life Event which is triggered by an Employee through Employee Self Service.
- After initiating the Life Event in the online system, in Step 3 of the guided process, Employees must Submit Documentation by emailing TSS at [tss@tufts.edu](mailto:tss@tufts.edu) and it must be approved by a Benefits Administrator before they can continue with the Life Event Enrollment process and make changes to their benefits.
- Employees can only have one Life Event open at a time.
- Employees must submit and complete a Life Event within 31 days of the Event
- Marital Status and Name Change is a two-step approval process by the HR / Benefits Administrator. The employee will Submit the election for Marriage or Divorce Status, will be prompted to Submit Documentation, and will only be able to elect a Name Change under Personal Information after approval for the Marital Status Event is received. For the Name Change, they will submit separate documentation (Social Security Card, Passport or court-issued document), which will have a separate approval process.
- Name Change is only allowed on a Marriage or Divorce Life Event.

Tufts Life Events Available:

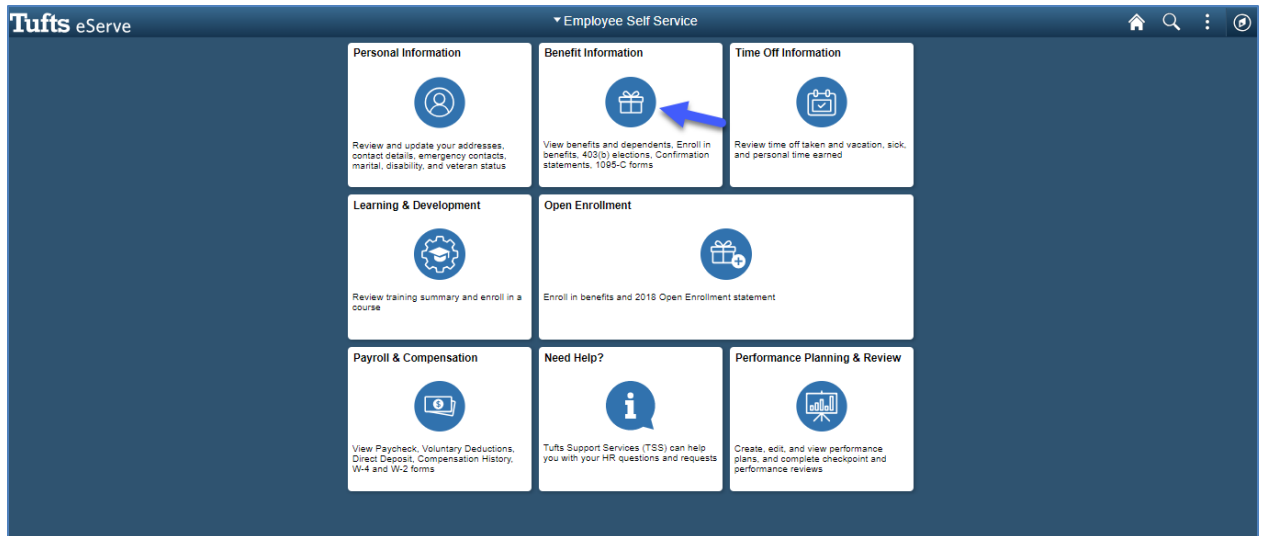
LIFE EVENT TYPE	COMMENTS- ACCEPTABLE DOCUMENTATION
I got married or entered a domestic partnership	Marriage Certificate or Statement of Domestic Partnership Proof of Other Coverage if terminating Tufts plan  If Employee is also Changing their Name, they must wait for approval of documentation submitted for change in Marital Status before proceeding and a separate Name Change submission of documentation (Social Security Card, passport, or court-issued document) and approval must occur before it is updated to the database.
I had a baby	Certificate or statement of birth record letter from the hospital  Proof of Other Coverage if terminating Tufts plan)

I adopted or gained legal custody or guardianship of a child	Completed Adoption/Custody paperwork)
I got divorced or legally separated	Court Document or Statement of Termination of Domestic Partnership If Employee is also Changing their Name, they must wait for approval of documentation submitted for change in Marital Status before proceeding and a separate Name Change submission of documentation (Social Security Card, passport, or court-issued document) and approval must occur before it is updated to the database.
I or my dependent lost employer sponsored coverage	Documentation would include information on the employer's letterhead detailing the coverage (Medical, Dental, Vision, etc.), which was gained or lost, the reason for the change, the affected members, and the date of the change; this can include dependent's Open Enrollment documentation
I or my dependent moved out of my health plan's service area	Change of Address must be done in eServe Employee Self Service Portal
I or my dependent began or returned from unpaid leave	Employer documentation required
I or my dependent had a change in job status	Documentation would include information on the employer's letterhead detailing the coverage (Medical, Dental, Vision, etc.), which was gained or lost, the reason for the change, the affected members, and the date of the change)
Coverage change for Medicare, Medicaid, MAHealth	Documentation is needed from Social Security or Department of Health; for a Retiree electing Medicare, the Medicare Election Form
I or my dependent have reached age 26	If the employee is turning age 26 and is covered under another plan, or if the employee has a dependent turning age 26 covered under another plan, and wants to enroll in the Tufts University benefits, he/she must provide supporting documentation from the parent's employer as proof of the loss of coverage.

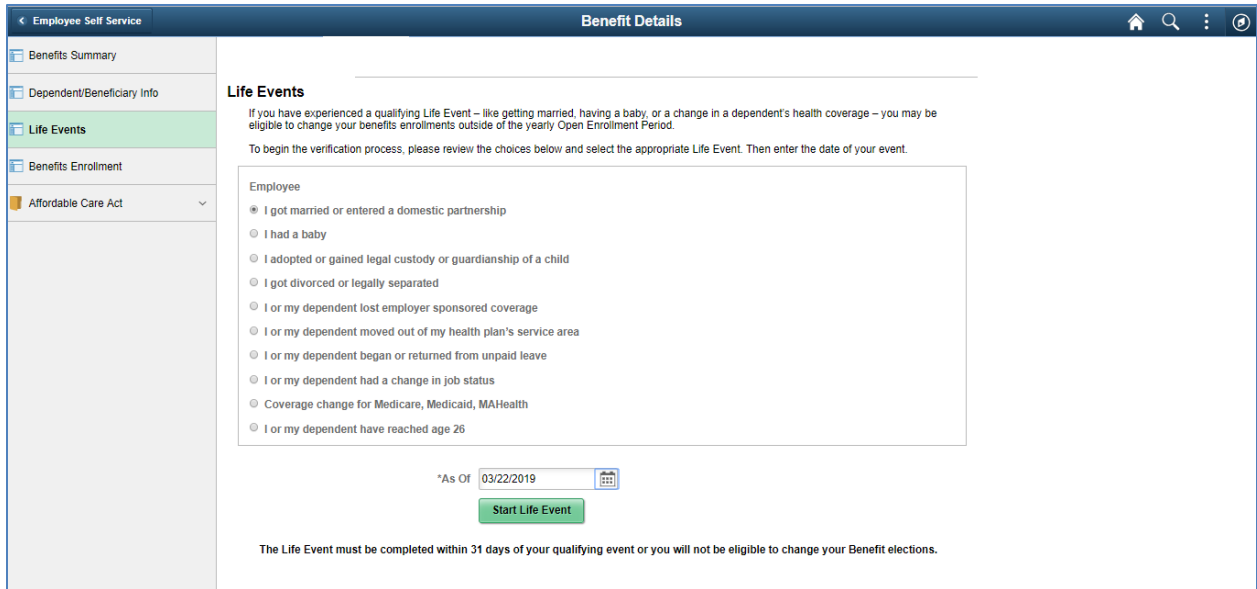
(Note that if an employee has a dependent/child enrolled on the Tufts plan age out, this is not a Life Event and is handled outside of this system)

### Key Steps/Activities to be performed

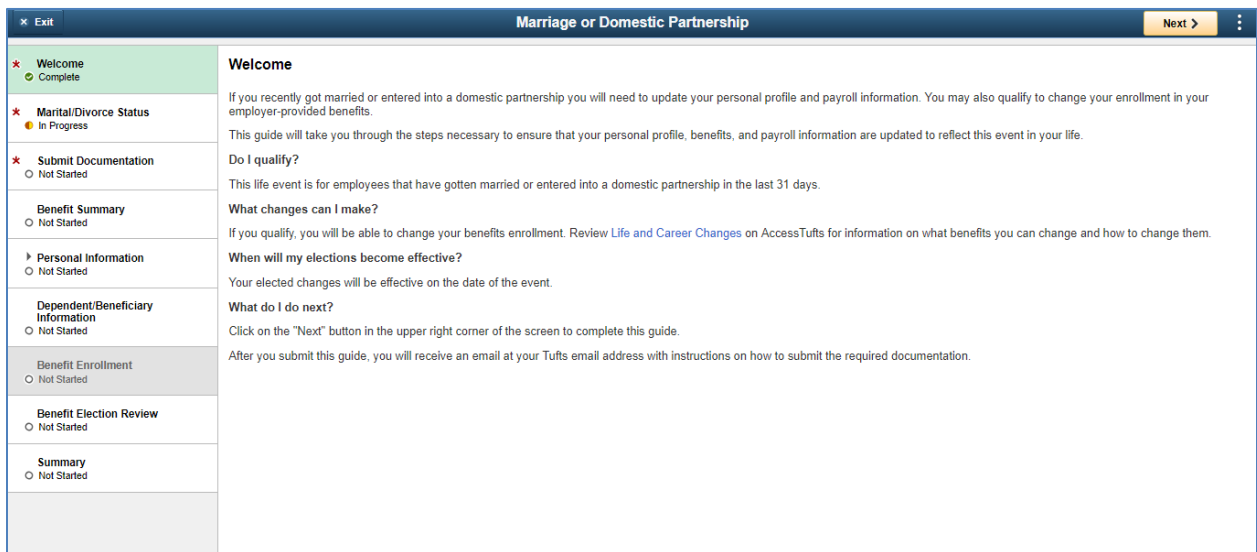
1. Employee Logs into Employee Self Service / Benefits Information Tile to begin their Life Event.



2. Employee selects Life Events from the left-hand navigation and then chooses the type of Life Event. Employee enters the As of Date of the event or selects the date by using the calendar feature. Employee tabs out of the date field and selects the green **Start Life Event** button to continue.



3. Welcome Page appears with instructions to the employee and the steps for the Life Event are listed on the left-hand navigation side which will guide the employee through to successfully submit a Life Event. Steps in progress will be yellow and each step will turn to green when it has been completed. Red star items are required by an Employee and must be completed during the Life Event. The number of steps available will differ depending on the type of Life Event the employee is processing. The employee must complete and submit the event when they are done.



4. An employee is only able to change their **Marital Status** on events that allow it - marriage and divorce. If they are changing their Marital Status during a Life Event, they must select their new marital status from the drop-down list in the New Status and then enter the As of Date and select the green button to Submit the status for approval.

Marriage or Domestic Partnership

Current Married

Change Marital Status

\*New Status

\*As Of

\* required steps

Submit

- The employee will see that their **Marital Status** was submitted successfully and can either use the Next button on the top right-hand side or click the steps on the left-hand side to continue with their Life Event.

Marriage or Domestic Partnership

The Submit was successful.

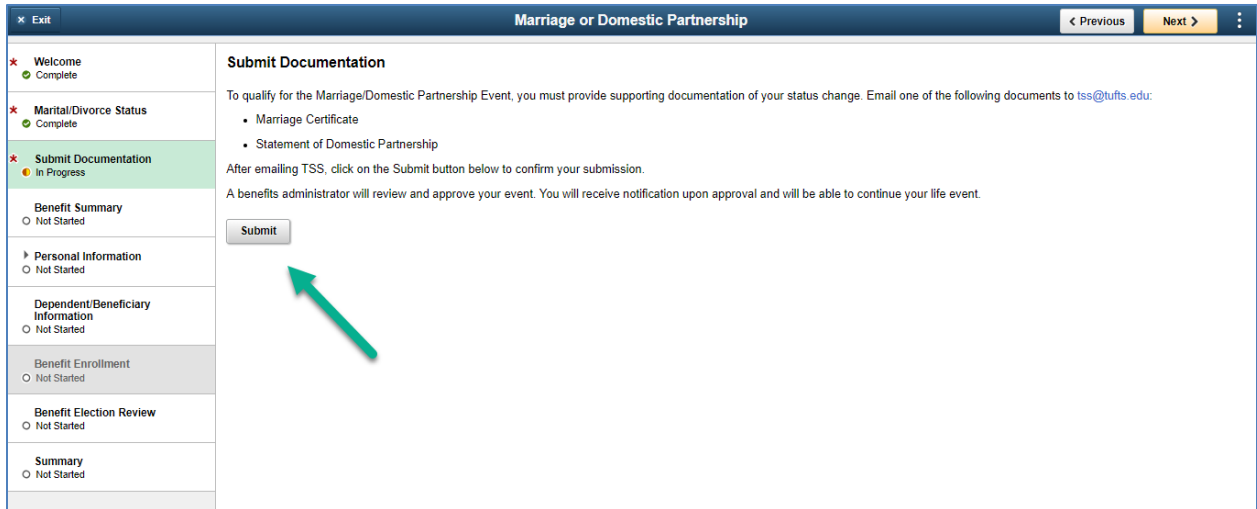
Current Married

Change Marital Status

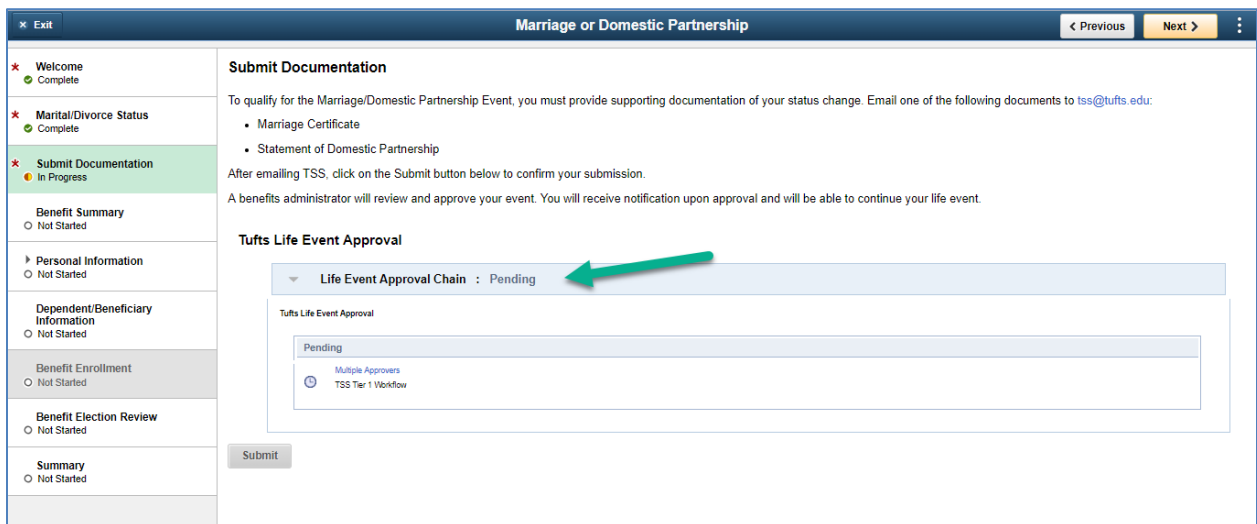
\*New Status Divorced

\*As Of 03/26/2019

- The employee will need to select the **“Submit Documentation”** step and email TSS the appropriate proof of documentation. Once they have acknowledged they have done this they will select the **Submit** button which will send a notification email and approval to a Benefits Administrator.

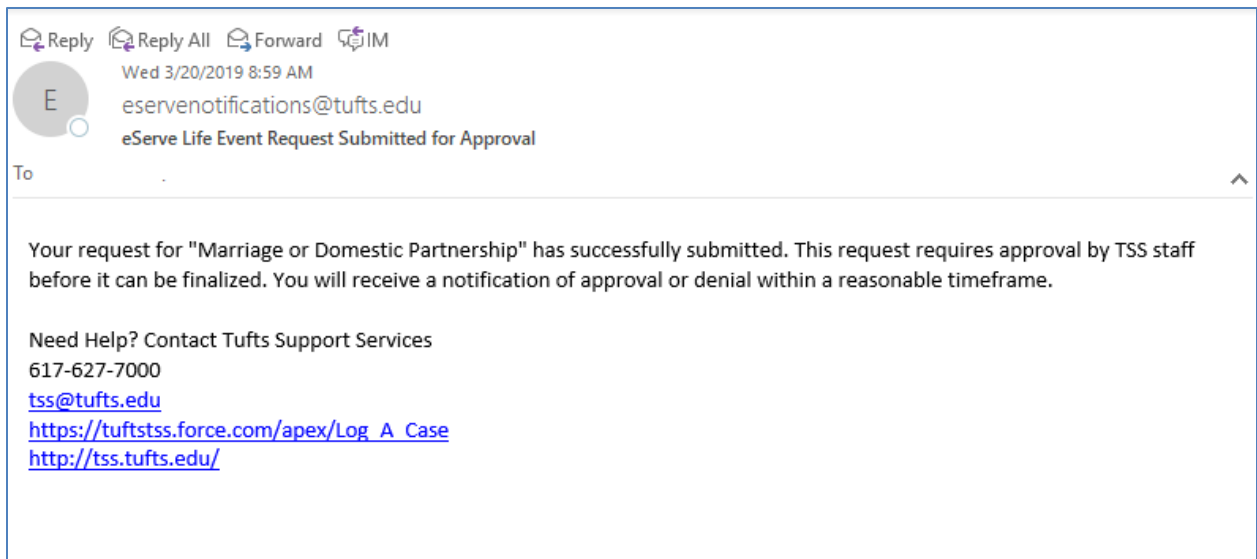


- The employee can click on the Pending Multiple Approvers to see who it went to for approval. The employee will receive an email that their event has been routed for approval and until it is approved, they are unable to make **“Benefit Enrollment”** changes.

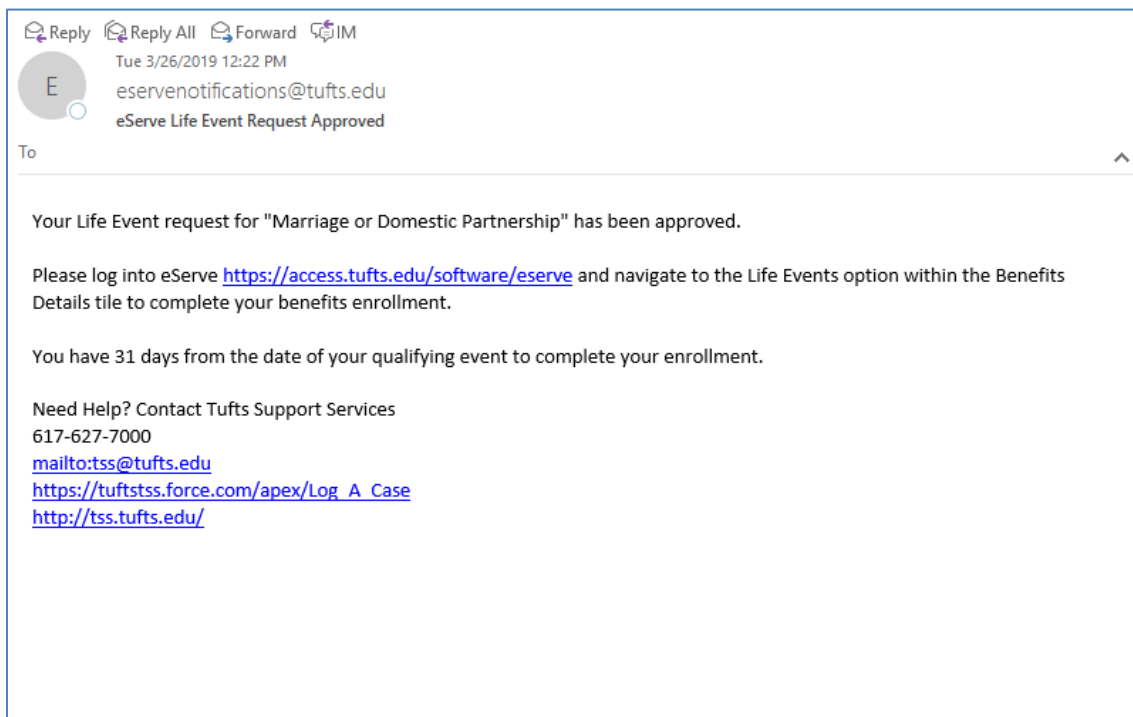


- The employee will receive an email that their event has been routed for approval and another one upon approval. Once it has been approved, they can begin making their changes on the **“Benefit Enrollment”** step and will also now have the option for a Name Change under Personal Information if this is a Marital/Divorce Status change.

Life Event Pending Approval Email Notification to Employee



### Life Event Approval Email Notification to Employee



9. The employee can select the “**Benefit Summary**” step from the left-hand side or use the Next button in the top-right which will provide them with a view of what type of Benefits they currently have or then can change the As of Date to get an earlier date in time.

The screenshot shows a web application window titled "Marriage or Domestic Partnership". On the left is a navigation menu with steps: Welcome (Complete), Marital/Divorce Status (Complete), Submit Documentation (In Progress), Benefit Summary (Visited), Personal Information (Not Started), Dependent/Beneficiary Information (Not Started), Benefit Enrollment (Not Started), Benefit Election Review (Not Started), and Summary (Not Started). The main content area is titled "Benefit Summary" and includes a date selector "As Of" set to "03/26/2019" with a "Refresh" button. Below is a table of benefits:

Type of Benefit	Plan Description	Coverage or Participation
Health Insurance		Waived
Dental Insurance		Waived
Same Sex Dom Part Med		Waived
Life	Basic Life Insurance	Salary X 1 >
Long-Term Disability	Long Term Disability 60%	0.6% of Salary >
Self-Funded Retirement Plan	403(b) Voluntary Ret Plan	\$120 Before Tax >
Univ-Funded Retirement Plan	Basic Retirement Plan Over 40	
MetLaw	MetLaw Legal Services	Participating

10. For Life Events in which it is available, the employee can select the **“Personal Information”** step from the left-hand side or use the Next button in the top-right to view and or update their Personal Information such as name, mailing address and emergency contacts. If they are processing a Marriage or Divorce Life Event, they will have the ability to update their name once the **“Submit Documentation”** step has been approved.

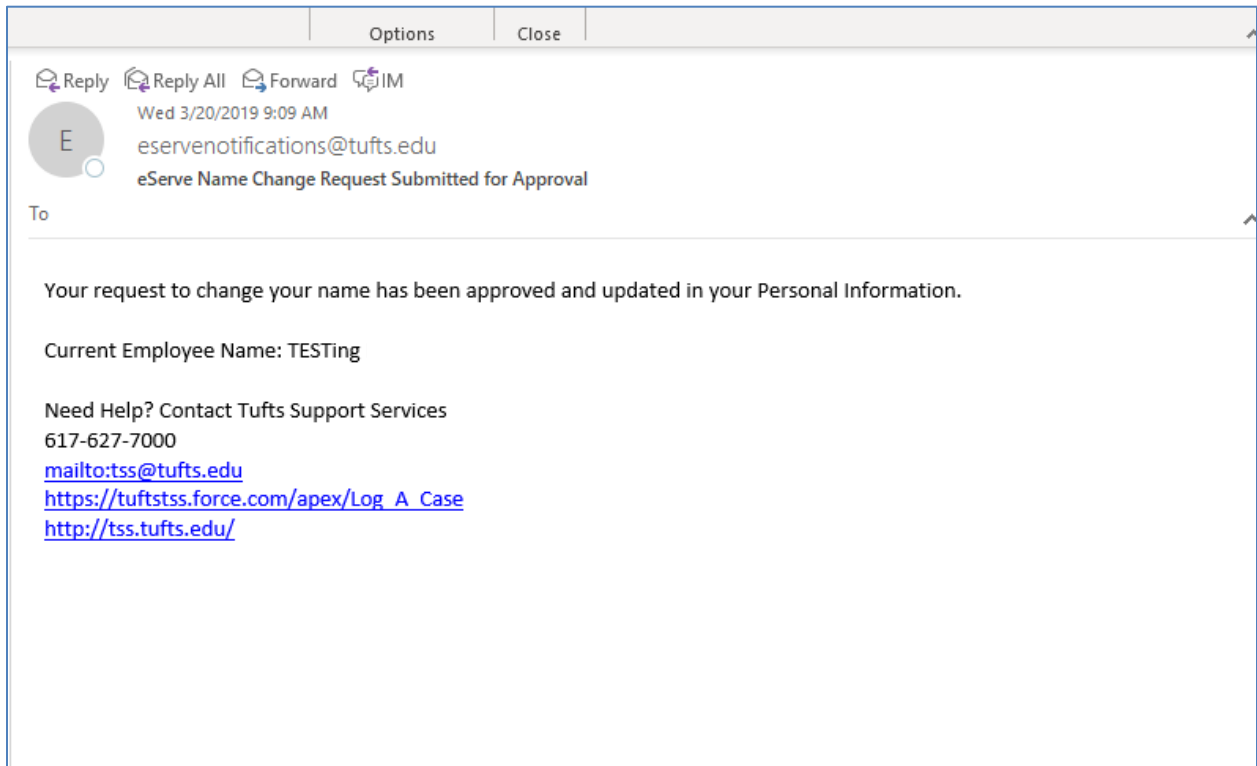
The screenshot shows a web application window titled "Divorce or Separation". The navigation menu on the left includes: Welcome (Complete), Marital/Divorce Status (In Progress), Submit Documentation (Not Started), Benefit Summary (Visited), Personal Information (Visited), Name (Visited), Home and Mailing Address (Not Started), Contact Information (Not Started), Emergency Contact (Not Started), Dependent/Beneficiary Info (Visited), and Benefit Enrollment (Not Started). The main content area is titled "Personal Information - Name" and contains a text input field with the value "Employee Name" and a "Current" label, followed by a right-pointing arrow button.

11. The employee can select the **“Name”** step from the left-hand side or use the Next button in the top-right to view and or update their Name. If they are processing a marriage or divorce Life Event, they will have the ability to update their name once the **“Submit Documentation”** step has been approved. All other events are not set up to allow name changes.

Once the Name has been changed the employee will receive an email confirmation letting them know that the database has been updated to the database.



## Name Change Updated to Database Email Notification to Employee



12. The employee can select the “**Dependent / Beneficiary Info**” step from the left-hand side or use the Next button in the top-right to view, add or update their Dependents and Beneficiaries. Select the dependent / beneficiary they wish to make changes on, and a new window will open where they can review existing information and update it. Select the Add Individual button and a new window will open where the employee can add a new dependent / beneficiary. Note that once a dependent/beneficiary is added to this table, it cannot be removed, but can be removed from each individual benefit.

**Divorce or Separation** < Previous Next >

- Welcome  Complete
- Marital/Divorce Status  Not Started
- Submit Documentation  Not Started
  - Benefit Summary  Not Started
- Personal Information  Not Started
- Dependent/Beneficiary Info  Visited**
- Benefit Enrollment  Not Started
- Benefit Election Review  Not Started
- Summary  Not Started

**Dependent and Beneficiary Information**

Add Individual

Name	Relationship	Beneficiary	Dependent
	Child	✓	✓
	Child	✓	✓

Adding a Dependent / Beneficiary Information once selecting the “**Add Individual**” will open a new window allowing the employee to add new individuals. Employees are not allowed to remove a dependent / beneficiary as it is kept in the system for historical purposes.

**Individual Dependent/Beneficiary Information** Cancel Save

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Mar 22, 2019.

**Name**

Add Name

**Personal Information**

Date of Birth

\*Gender

\*Relationship to Employee

Dependent

Beneficiary

\*Student  As of

\*Disabled  As of

**Address**

Home Same as mine >

**National ID**

No data exists

Add National ID

13. Once the employee has submitted appropriate documentation and the event has been approved by a Benefits Administrator, they can begin their benefit election changes by selecting the “**Benefit Enrollment**” step on the left-hand navigation side or use the Next button on the top right-hand side. The employee can either go back directly into the system and continue their Life Event or they can use the link that was provided to them in the approval email.

## Start My Enrollment

**Benefit Enrollment**

The system will process your benefit options, based upon the Life Event you have selected. Select the **Start My Enrollment** button below to begin your benefit enrollment. Once you click the below button, it may take a few seconds to process.

**Start My Enrollment**

## Select the “Family Status Change” event that is open

Event Description	Event Date	Event Status	Job Title	
Open Enrollment	01/01/2019	Submitted		Select
Family Status Change	03/15/2019	Closed		
Family Status Change	03/25/2019	Open		Select

Once you click Select, it will take a few seconds for your benefits enrollment information to load.

## Select the “Edit” button to begin making benefit election changes

Birth

Benefits Enrollment  
Family Status Change

Your recent family status change event allows you to modify your current benefit choices. You will have 31 days from the event date to update your benefits enrollment and submit your new choices. 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.

**Enrollment Summary**

Health Insurance	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Dental Insurance	Before Tax	After Tax	Edit
Current: Delta Premier USA Two Person			
New: Delta Premier USA Two Person	10.88		
Vision Insurance	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Domestic Partner Health Ins	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Domestic Partner Dental Ins	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Domestic Partner Vision Ins	Before Tax	After Tax	Edit
Current: Waive			
New: Waive			
Supplemental Life - Please add your Beneficiary Information	Before Tax	After Tax	Edit
Current: No Coverage			

**Edit button will open up each plan and allow you to make selections and add dependents**

Select the **“Add / Review Dependents”** button to review or add dependents

Divorce or Separation

Individual			
Individual	\$23.02	Before-Tax	
Two Person	\$121.78	Before-Tax	
Family	\$152.75	Before-Tax	
Two Person (Ex-Spouse)	\$121.78	Before and After Tax	
New to Family (Ex-Spouse)	\$152.75	Before and After Tax	
Family (Ex-Spouse)	\$152.75	Before-Tax	

Waive

**Enroll Your Dependents**

Below are the dependents who are eligible for this plan. If a dependent is missing from this list, click the **Add/Review Dependents** button to update this information.

**Important Notes:**

- If you are enrolling a **Spouse** or **eligible child** your dependent(s) name will appear below.
- If you are enrolling a **Domestic Partner**, your dependent(s) name will appear under the Domestic Partner Health, Dental, and/or Vision Plan(s) options.

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

The following lists your dependents who are on file and are eligible for this plan. If an individual is missing from this list, click Add/Review Dependents to update this information.

Enroll	Name	Relationship
<input type="checkbox"/>		

**Add/Review Dependents**

**Store** **Cancel**

Click **Store** to hold your choice until you are ready to submit your final enrollment on the Enrollment Summary.

**Select to add dependents to the plan**

14. For Events in which it is available, The employee can select the **“Personal Information”** step from the left-hand side or use the Next button in the top-right to view and or update their Personal Information such as name, mailing address and emergency contacts

**Divorce or Separation** < Previous    Next >

- ★ Welcome ✔ Complete
- ★ Marital/Divorce Status ✔ Complete
- ★ Submit Documentation ✔ Complete
- Benefit Summary ○ Visited
- ▶ Personal Information ○ Visited
- Dependent/Beneficiary Info ○ Visited
- Benefit Enrollment ○ Visited
- Benefit Election Review ○ Visited
- Summary ○ Not Started

### Benefits Election Review

Review all your changes with the information provided. Select the appropriate task on the navigation bar to make changes. Print

**Personal Information**

Current Name  
Home Address  
Mailing Address  
Home Phone  
Business Phone  
Emergency Contact

**Dependent Information**

Name	Date of Birth	Sex	Relationship	Marital Status

**Your Benefit Choices**

Benefit Plan	Benefit Option	Coverage / Category Base	Flat Amount / Percentage
Health Insurance	TRP	Individual	
Dental Insurance	Delta	Individual	

15. The employee can select the **“Summary”** step from the left-hand side or use the Next button in the top-right to view what steps they have completed or visited and if they have missed a step, they can click the **“Go to Step”** to review or complete that step again.

**Divorce or Separation** < Previous    Complete

- ★ Welcome ✔ Complete
- ★ Marital/Divorce Status ✔ Complete
- ★ Submit Documentation ✔ Complete
- Benefit Summary ○ Visited
- ▶ Personal Information ○ Visited
- Dependent/Beneficiary Info ○ Visited
- Benefit Enrollment ○ Visited
- Benefit Election Review ○ Visited
- Summary ○ Visited

### Summary

To finish your Life Event request, click the **“Complete”** button in the top right-hand corner of this page. Complete

**Supplemental Life and Dependent Life Insurance**  
If you changed your Supplemental Life Insurance coverage, you will receive an email from Prudential Life Insurance to your Tufts email account requesting that you complete a health questionnaire. Coverage will be effective on the date of Prudential's approval.

**Other things to consider**  
For additional resources around counseling, legal, and financial considerations review the [Life and Career Changes](#) page on AccessTufts.

**Steps** 11 rows

Step	Status	Date Completed	Required	Go to Step
Welcome	✔ Complete	03/27/2019	Yes	Go to Step
Marital/Divorce Status	✔ Complete	03/27/2019	Yes	Go to Step
Submit Documentation	✔ Complete		Yes	Go to Step
Benefit Summary	○ Visited		No	Go to Step
Name	○ Visited		No	Go to Step
Home and Mailing Address	○ Not Started		No	Go to Step
Contact Information	○ Not Started		No	Go to Step
Emergency Contact	○ Not Started		No	Go to Step
Dependent/Beneficiary Info	○ Visited		No	Go to Step

16. The employee **MUST** select the green **“Complete”** button in the top right-hand side to complete their Life Event.

Complete Button

- ✖ Exit
- ★ Welcome ✔ Complete
- ★ Marital/Divorce Status ✔ Complete
- ★ Submit Documentation ✔ Complete
- Benefit Summary ○ Visited
- Personal Information ○ Visited
- Dependent/Beneficiary Info ○ Visited
- Benefit Enrollment ○ Visited
- Benefit Election Review ○ Visited
- Summary ○ Visited

**Summary** Complete

To finish your Life Event request, click the "Complete" button in the top right-hand corner of this page.

**Supplemental Life and Dependent Life Insurance**  
 If you changed your Supplemental Life Insurance coverage, you will receive an email from Prudential Life Insurance to your Tufts email account requesting that you complete a health questionnaire. Coverage will be effective on the date of Prudential's approval.

**Other things to consider**  
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**Steps** 11 rows

Step	Status	Date Completed	Required	Go to Step
Welcome	✔ Complete	03/27/2019	Yes	<input type="button" value="Go to Step"/>
Marital/Divorce Status	✔ Complete	03/27/2019	Yes	<input type="button" value="Go to Step"/>
Submit Documentation	✔ Complete		Yes	<input type="button" value="Go to Step"/>
Benefit Summary	○ Visited		No	<input type="button" value="Go to Step"/>
Name	○ Visited		No	<input type="button" value="Go to Step"/>
Home and Mailing Address	○ Not Started		No	<input type="button" value="Go to Step"/>
Contact Information	○ Not Started		No	<input type="button" value="Go to Step"/>
Emergency Contact	○ Not Started		No	<input type="button" value="Go to Step"/>
Dependent/Beneficiary Info	○ Visited		No	<input type="button" value="Go to Step"/>

