Use this task to submit an adoption life event in UCPath.

Marriage, birth, adoption, divorce and benefit changes for AD&D, disability insurance or life insurance can be made by the employee via Employee Actions within designated time periods of the specific event. Benefit changes related to a loss or gain of outside coverage are not allowed in eBenefits Employee Actions. Employees must contact the UCPath Center for benefit changes related to loss or gain of outside coverage, such as with a spouse.

**Dashboard Navigation:**
Health and Welfare > Life Events / Benefit Changes

or

**Menu Navigation:**
Employee Actions > Health and Welfare > Life Events / Benefit Changes

**Note:** This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Before you enter a life event or benefits change, you must validate your identity. UCPath randomly displays one of the security questions set up on your profile. Click in the Security Question field. For this example click in the <strong>Who is your childhood best friend?</strong> field.</td>
</tr>
<tr>
<td>2.</td>
<td>Enter the desired information into the Security Question field. For this example, enter <strong>Molly</strong>.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
3. | Your answer appears as a series of dots.  
   Click the **Submit** button.

4. | If you answer the question correctly, UCPath displays the **Life Events** page, and you can make your changes.  
   If you answer incorrectly, an error message appears. You have three attempts to answer this question correctly. After three incorrect answers, UCPath displays the **Security Questions Setup** page. You must provide your date of birth and the last four digits of your Social Security number to validate your identity and then update your security questions and answers.
### Step | Action
--- | ---
5. | In this scenario, the employee has adopted their grandchild. The employee must update tax and dependent information and update their benefit plan coverages.
6. | Use the **Life Events** page to enter benefits changes related to the adoption of a child. You have 31 days from the date your new family members become eligible to make any permitted plan changes.
7. | Click the **Adoption** option.
8. | Click in the **Date Change Will Take Effect** field.
9. | Use the calendar to enter the date of the adoption. In this example, the date will be entered for you.
### Step 10
Click the **OK** button.

### Step 11
Use the **Cancel** button to stop and delete the life event. Use the **Continue Later** button to save your entries and return later.

### Step 12
Click the **Show Progress** button to see all the steps for this life event.
Step | Action |
--- | --- |
13. | The **Show Progress** pane guides you through the life event process. Each step is outlined in the pane on the left side of the page. Each step must be completed, including the last step. A green checkmark indicates the step is complete. An empty gray box indicates the step is incomplete. |
14. | Click the **Close** button to hide the steps. |
15. | Use the **Previous** and **Next** buttons to navigate through the transaction steps. |
<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
<tbody>
<tr>
<td>16.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
| ![UCPath Task: Enter Adoption Life Event](image1)

![UCPath Task: Enter Adoption Life Event](image2)

<table>
<thead>
<tr>
<th>Step</th>
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</tr>
</thead>
<tbody>
<tr>
<td>17.</td>
<td>On the <strong>Benefits Summary</strong> page, review your current benefits elections.</td>
</tr>
<tr>
<td></td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>
| ![UCPath Task: Enter Adoption Life Event](image3)

![UCPath Task: Enter Adoption Life Event](image4)
### Step 18
On the **Dependent Coverage Summary** page, review the current benefits coverage for each of your dependents.

Click the **Next** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>18.</td>
<td>On the <strong>Dependent Coverage Summary</strong> page, review the current benefits coverage for each of your dependents. Click the <strong>Next</strong> button.</td>
</tr>
</tbody>
</table>

### Step 19
If necessary, update your **Federal W-4 Tax Information** to reflect your new dependent.

In this example, the employee chooses to change their Federal withholding allowances.

Click in the **Enter total number of Allowances you are claiming** field.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>19.</td>
<td>If necessary, update your <strong>Federal W-4 Tax Information</strong> to reflect your new dependent. In this example, the employee chooses to change their Federal withholding allowances. Click in the <strong>Enter total number of Allowances you are claiming</strong> field.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>20.</td>
<td>Click the <strong>Delete</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>21.</td>
<td>Enter the desired information into the <strong>Enter total number of Allowances you are claiming</strong> field. For this example, enter <strong>2</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>22.</td>
<td>Click the scroll bar.</td>
</tr>
</tbody>
</table>
### UCPath Task: Enter Adoption Life Event

Last changed on: 6/10/19

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>23.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
</tbody>
</table>

A confirmation message appears. Changes may not appear on the next paycheck depending on timing of your changes.

Click the **OK** button.
Step 25. Click the **Next** button.
### Step 26 - Action

If necessary, update your **CA State W-4 Tax Information** to reflect your new dependent.

In this example, the employee chooses not to change their CA State W-4 withholding tax allowance.

Click the **Next** button.

### Step 27 - Action

If necessary, update your **Other State W-4 Tax Information** to reflect your new dependent.

Click the **Next** button.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>28.</td>
<td>To review your progress, click the <strong>Show Progress</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>29.</td>
<td>Click the scroll bar.</td>
</tr>
</tbody>
</table>
## Step 30
You have completed six steps and are currently on **Step 7**.

## Step 31
Click the **Close** button to hide the steps.

## Step 32
Enroll your new family member(s) in the appropriate benefit plans.

Click the **Start My Enrollment** button.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>30.</td>
<td>You have completed six steps and are currently on <strong>Step 7</strong>.</td>
</tr>
<tr>
<td>31.</td>
<td>Click the <strong>Close</strong> button to hide the steps.</td>
</tr>
<tr>
<td>32.</td>
<td>Enroll your new family member(s) in the appropriate benefit plans. Click the <strong>Start My Enrollment</strong> button.</td>
</tr>
</tbody>
</table>
### Step 33

- **Action**: Click the **Next** button.

### Step 34

- **Action**: The **Benefits Enrollment** page appears.
  
  - **Action**: Click the scroll bar.
### Step 35
The available benefit events appear at the bottom of the page. In this example, the birth event is open. The event is used for births and adoptions.

Click the **Open** button.

![Open button screenshot]

### Step 36
The **Current Enrollment Summary** displays your current elections.

Make changes by clicking the **Edit** button next to each plan. After you make all election changes, return to this page to submit your changes.

Click the scroll bar.
### Step 37

In this example, the employee chooses to enroll their grandchild in **Medical** coverage.

To change **Medical** coverage, click the **Edit** button.

### Step 38

The **Medical** page appears.

Click the scroll bar.
<table>
<thead>
<tr>
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<th>Action</th>
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</thead>
<tbody>
<tr>
<td>39.</td>
<td>In this example, add your new dependent to the existing medical plan, Kaiser North. Click the <strong>Add/Review Family Members</strong> button.</td>
</tr>
<tr>
<td>40.</td>
<td>The <strong>Add/Review Dependent</strong> page displays dependents already covered by the plan. Click the <strong>Add a Dependent</strong> button.</td>
</tr>
</tbody>
</table>
41. The **Dependent Personal Information** page appears.
   
   Click in the **First Name** field.

42. Enter the desired information into the **First Name** field. For this example, enter **Ashley**.

43. Click in the **Last Name** field.

44. Enter the desired information into the **Last Name** field. For this example, enter **Davis**.

45. Click in the **Date of Birth** field.

46. Use the calendar to enter the date of birth. In this example, the date will be entered for you.

47. In this example the grandchild is female.
   
   Click the button to the right of the **Gender** field.

48. Click the **Female** list item.
### Step 49
While the SSN field is not required, you should enter the dependent’s Social Security number, if known.

Click in the SSN field.

### Step 50
Enter the desired information into the SSN field. For this example, enter **111-99-1919**.

### Step 51
Click the button to the right of the **What Relationship do you have with this dependent?** field.

### Step 52
Select the appropriate relationship.

For this example, click the **Grand Child / Step Grand Child** list item.

### Step 53
Click the button to the right of the **Is this dependent claimed on your or your spouse / domestic partner’s tax return?** field.

### Step 54
Select the appropriate tax return status.

For this example, click the **This is my tax dependent** list item.

### Step 55
Click the scroll bar.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>56.</td>
<td>Review the address and phone information for the dependent. If necessary, make changes.</td>
</tr>
<tr>
<td>57.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>58.</td>
<td>A confirmation message appears. Click the <strong>OK</strong> button.</td>
</tr>
</tbody>
</table>
Step 59. Your new dependent appears in the list.

Click the Return to Event Selection button.

Step 60. The Medical page appears again and you must enroll the newly entered dependent(s).

Click the scroll bar.
Step | Action
--- | ---
61. | The newly entered dependent(s) appear in the **Dependent** list but are not yet enrolled in the plan. You must enroll the dependent(s).

Click the **Grandchild EE/SP/DP;EE TxDp NC** option.

62. | Use the **Save and Continue** button to submit your changes or use the **Cancel Changes** button to exit this page without saving your changes.

Click the **Save and Continue** button.
### Step 63

UCPath displays your estimated pay period cost for the benefit election and covered dependents.

Click the scroll bar.

### Step 64

Click the **Save Changes** button.
UCPath Task: Enter Adoption Life Event

<table>
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<tbody>
<tr>
<td>65.</td>
<td>The <strong>Current Enrollment Summary</strong> page appears again. The details for your medical election have been updated. For each benefit plan enrollment you want to update for your new dependent, click the <strong>Edit</strong> button. Click the scroll bar.</td>
</tr>
</tbody>
</table>

![Image of Current Enrollment Summary]

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>66.</td>
<td>In this example, the employee chooses to enroll their grandchild in <strong>Dental</strong> coverage. To change <strong>Dental</strong> coverage, click the <strong>Edit</strong> button.</td>
</tr>
</tbody>
</table>

![Image of Benefit Selection Screen]
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 67.  | The **Dental** page appears.  
Click the scroll bar. |
| 68.  | The newly entered dependent(s) appear in the **Dependent** list but are not yet enrolled in the plan. You must enroll the dependent(s).  
Click the **Grandchild EE/SP/DP;EE TxDp NC** option. |
<table>
<thead>
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<tbody>
<tr>
<td>69.</td>
<td>Some dental plans require you to specify a primary care provider for each dependent.</td>
</tr>
<tr>
<td>70.</td>
<td>Click the <strong>Dependent Provider List</strong> button.</td>
</tr>
</tbody>
</table>

<table>
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<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>71.</td>
<td>In this example, the spouse already has a primary care provider. You must add a provider for the grandchild.</td>
</tr>
<tr>
<td></td>
<td>Click in the <strong>Health Provider ID</strong> field for Ashley Davis.</td>
</tr>
<tr>
<td>72.</td>
<td>Enter the desired information into the <strong>Health Provider ID</strong> field. For this example, enter <strong>123456</strong>.</td>
</tr>
<tr>
<td>73.</td>
<td>If the dependent is already a patient of the health provider, click the <strong>Previously Seen</strong> option.</td>
</tr>
<tr>
<td></td>
<td>For this example, click the <strong>Previously Seen</strong> option.</td>
</tr>
<tr>
<td>74.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
### Step 75.
UCPath displays your estimated pay period cost for the benefit election and covered dependents.

Click the scroll bar.

### Step 76.
Click the **Save Changes** button.
77. The Current Enrollment Summary page appears again. The details for your dental election have been updated.

Click the scroll bar.

78. To change Vision coverage for this example, click the Edit button.
### Step 79. Action

The **Vision** page appears.

Click the scroll bar.

### Step 80. Action

The newly entered dependent(s) appear in the **Dependent** list but are not yet enrolled in the plan. You must enroll the dependent(s).

Click the **Grandchild EE/SP/DP;EE TxDp NC** option.

### Step 81. Action

Click the **Save and Continue** button.
### Step 82.
UCPath displays your estimated pay period cost for the benefit election and covered dependents.

Click the scroll bar.

### Step 83.
Click the **Save Changes** button.
Step | Action
--- | ---
84. | The **Current Enrollment Summary** page appears again. The details for your vision election have been updated. Click the scroll bar.

85. | Continue election and coverage updates for all other available benefit options.

Notice the **Behavioral Health** plan has automatically updated the **Optum Behavioral Health** plan to family coverage because you and your dependents are enrolled in **Medical**. The **Edit** button is not available for this plan type. Click the scroll bar.
Step 86. After all benefit plans have been updated for your life event, click the Submit button.

Step 87. The Submit Benefit Choices page appears. Review the Terms and Conditions, as well as the HIPAA Statement Confirmation.

Click the scroll bar.
### Step 88
Click the **By checking this box I accept the above Terms and Conditions** option.

- **By checking this box I accept the above Terms and Conditions**

### Step 89
Click the **Submit** button.

### Step 90
The **Enrollment Submit Confirmation** page appears.

- Click the **OK** button.
Step | Action
--- | ---
91. | The **Submit Confirmation** page appears.

Click the **OK** button.

92. | The **Benefits Enrollment** page appears again.

Click the scroll bar.
### Step 93
The **Open Benefit Events** section displays the **Submitted** status for the **Birth** event.

### Step 94
Return to the top of the page. Click the scroll bar.

### Step 95
To review your progress, click the **Show Progress** button.
Step | Action
---|---
96. | After you click the **Next** button to finish **Step 7, Benefit Enrollment**, you have one more step to close your life event. You must complete this step.
97. | Click the **Close** button to hide the steps.

**Step 98.**

Click the **Next** button.
<table>
<thead>
<tr>
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</tr>
</thead>
</table>
| 99.  | The **Event Completion and Exit** page appears.  
      | Click the **Complete** button. |
| 100. | You have submitted your changes for the adoption life event.  
      | A confirmation email is sent to the primary email address on your account. You can identify your primary email address under Employee Actions > Personal Information > **Personal Information Summary**.  
      | **End of Procedure.** |