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

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 portal images as seen on a computer. Portal 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>In this scenario, the employee has adopted their grandchild. The employee must update tax and dependent information and update their benefit plan coverages.</td>
</tr>
<tr>
<td>2.</td>
<td>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.</td>
</tr>
<tr>
<td>3.</td>
<td>Click the Adoption option.</td>
</tr>
<tr>
<td>4.</td>
<td>Click in the Date Change Will Take Effect field.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>5.</td>
<td>Use the calendar to enter the date of the adoption. In this example, the date will be entered for you.</td>
</tr>
<tr>
<td>6.</td>
<td>Click the <strong>OK</strong> button.</td>
</tr>
<tr>
<td>7.</td>
<td>Use the <strong>Cancel</strong> button to stop and delete the life event. Use the <strong>Continue Later</strong> button to save your entries and return later.</td>
</tr>
</tbody>
</table>
### Step 8
Click the **Show Progress** button to see all the steps for this life event.

### Step 9
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.

### Step 10
Click the **Close** button to hide the steps.
Step | Action
--- | ---
11. | Use the **Previous** and **Next** buttons to navigate through the transaction steps.
12. | Click the **Next** button.

---

Step | Action
--- | ---
13. | On the **Benefits Summary** page, review your current benefits elections.

Click the **Next** button.
Step 14. On the **Dependent Coverage Summary** page, review the current benefits coverage for each of your dependents.

Click the **Next** button.
### Step 15.
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.

![W-4 Tax Information Form](image)

### Step 16.
Click the **Delete** button.

![Delete Button](image)

### Step 17.
Enter the desired information into the **Enter total number of Allowances you are claiming** field. For this example, enter 2.

### Step 18.
Click the scroll bar.

### Step 19.
Click the **Submit** button.
Step | Action
--- | ---
20. | A confirmation message appears. Changes may not appear on the next paycheck depending on timing of your changes. Click the **OK** button.

21. | Click the **Next** button.
### Step 22.

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.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 23.  | 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>24.</td>
<td>To review your progress, click the <strong>Show Progress</strong> button.</td>
</tr>
</tbody>
</table>
**Step** | **Action**
--- | ---
25. | Click the scroll bar.

---

26. | You have completed six steps and are currently on **Step 7**.

27. | Click the **Close** button to hide the steps.
<table>
<thead>
<tr>
<th>Step</th>
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<tbody>
<tr>
<td>28.</td>
<td>Enroll your new family member(s) in the appropriate benefit plans. Click the <strong>Start My Enrollment</strong> button.</td>
</tr>
<tr>
<td>29.</td>
<td>Click the <strong>Next</strong> button.</td>
</tr>
<tr>
<td>30.</td>
<td>The <strong>Benefits Enrollment</strong> page appears. Click the scroll bar.</td>
</tr>
</tbody>
</table>
Step 31. 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.
### Step 32.

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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>32.</td>
<td>The <strong>Current Enrollment Summary</strong> displays your current elections. Make changes by clicking the <strong>Edit</strong> button next to each plan. After you make all election changes, return to this page to submit your changes.</td>
</tr>
</tbody>
</table>

### Step 33.

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

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

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>33.</td>
<td>In this example, the employee chooses to enroll their grandchild in <strong>Medical</strong> coverage. To change <strong>Medical</strong> coverage, click the <strong>Edit</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
34. | The Medical page appears. Click the scroll bar.

35. | In this example, add your new dependent to the existing medical plan, Kaiser North. Click the **Add/Review Family Members** button.
<table>
<thead>
<tr>
<th>Step</th>
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</thead>
<tbody>
<tr>
<td>36.</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>
<tr>
<td>37.</td>
<td>The <strong>Dependent Personal Information</strong> page appears. Click in the <strong>First Name</strong> field.</td>
</tr>
<tr>
<td>38.</td>
<td>Enter the desired information into the <strong>First Name</strong> field. For this example, enter <strong>Ashley</strong>.</td>
</tr>
<tr>
<td>39.</td>
<td>Click in the <strong>Last Name</strong> field.</td>
</tr>
<tr>
<td>Step</td>
<td>Action</td>
</tr>
<tr>
<td>------</td>
<td>--------</td>
</tr>
<tr>
<td>40.</td>
<td>Enter the desired information into the <strong>Last Name</strong> field. For this example, enter <em>Davis</em>.</td>
</tr>
<tr>
<td>41.</td>
<td>Click in the <strong>Date of Birth</strong> field.</td>
</tr>
<tr>
<td>42.</td>
<td>Use the calendar to enter the date of birth. In this example, the date will be entered for you.</td>
</tr>
</tbody>
</table>
| 43.  | In this example the grandchild is female.  
   Click the button to the right of the **Gender** field. |
| 44.  | Click the **Female** list item. |
| 45.  | While the **SSN** field is not required, you should enter the dependent’s Social Security number, if known.  
   Click in the **SSN** field. |
| 46.  | Enter the desired information into the **SSN** field. For this example, enter *111-99-1919*. |
| 47.  | Click the button to the right of the **What Relationship do you have with this dependent?** field. |
| 48.  | Select the appropriate relationship.  
   For this example, click the **Grand Child / Step Grand Child** list item. |
<table>
<thead>
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<tbody>
<tr>
<td>49.</td>
<td>Click the button to the right of the <strong>Is this dependent claimed on your or your spouse / domestic partner's tax return?</strong> field.</td>
</tr>
</tbody>
</table>
| 50.  | Select the appropriate tax return status.  
For this example, click the **This is my tax dependent** list item. |
| 51.  | Click the scroll bar. |

<table>
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<tr>
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</thead>
<tbody>
<tr>
<td>52.</td>
<td>Review the address and phone information for the dependent. If necessary, make changes.</td>
</tr>
<tr>
<td>53.</td>
<td>Click the <strong>Save</strong> button.</td>
</tr>
</tbody>
</table>
54. A confirmation message appears.

Click the OK button.

OK

55. Your new dependent appears in the list.

Click the Return to Event Selection button.
### Step 56

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

**Click the scroll bar.**

### Step 57

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>
<tr>
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</tr>
</thead>
</table>
| 58.  | 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. |
| 59.  | UCPath displays your estimated pay period cost for the benefit election and covered dependents.  
   Click the scroll bar. |
60. Click the Save Changes button.

Step | Action
--- | ---
61. The **Current Enrollment Summary** 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 **Edit** button.

Click the scroll bar.
Step | Action
---|---
62. | In this example, the employee chooses to enroll their grandchild in **Dental** coverage.

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

63. | The **Dental** page appears.

Click the scroll bar.
64. 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.

65. Some dental plans require you to specify a primary care provider for each dependent.

66. Click the **Dependent Provider List** button.

---

67. In this example, the spouse already has a primary care provider. You must add a provider for the grandchild.

   Click in the **Health Provider ID** field for Ashley Davis.

68. Enter the desired information into the **Health Provider ID** field. For this example, enter **123456**.

69. If the dependent is already a patient of the health provider, click the **Previously Seen** option.

   For this example, click the **Previously Seen** option.

70. Click the **Save** button.
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>71.</td>
<td>UCPath displays your estimated pay period cost for the benefit election and covered dependents.  &lt;br&gt;Click the scroll bar.</td>
</tr>
<tr>
<td>72.</td>
<td>Click the <strong>Save Changes</strong> button.</td>
</tr>
</tbody>
</table>
Step | Action
--- | ---
73. | The **Current Enrollment Summary** page appears again. The details for your dental election have been updated. Click the scroll bar.

Step | Action
--- | ---
74. | To change **Vision** coverage for this example, click the **Edit** button.
### Step 75.
The **Vision** page appears.

Click the scroll bar.

### Step 76.
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 77.
Click the **Save and Continue** button.
### Step 78
UCPath displays your estimated pay period cost for the benefit election and covered dependents.

Click the scroll bar.

### Step 79
Click the Save Changes button.
Step | Action
--- | ---
80. | The **Current Enrollment Summary** page appears again. The details for your vision election have been updated.
 | Click the scroll bar.

81. | 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.
<table>
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</tr>
</thead>
<tbody>
<tr>
<td>82.</td>
<td>After all benefit plans have been updated for your life event, click the <strong>Submit</strong> button.</td>
</tr>
<tr>
<td>83.</td>
<td>The <strong>Submit Benefit Choices</strong> page appears. Click the <strong>I agree to the terms and conditions listed here.</strong> option.</td>
</tr>
<tr>
<td>84.</td>
<td>Click the <strong>Submit</strong> button.</td>
</tr>
</tbody>
</table>
### Step 85
The **Enrollment Submit Confirmation** page appears.
   
   Click the **OK** button.

### Step 86
The **Submit Confirmation** page appears.
   
   Click the **OK** button.
Step | Action
--- | ---
87. | The **Benefits Enrollment** page appears again. Click the scroll bar.

88. | The **Open Benefit Events** section displays the **Submitted** status for the **Birth** event.

89. | Return to the top of the page. Click the scroll bar.
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>90.</td>
<td>To review your progress, click the <strong>Show Progress</strong> button.</td>
</tr>
</tbody>
</table>

<table>
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<tr>
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<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>91.</td>
<td>After you click the <strong>Next</strong> button to finish <strong>Step 7, Benefit Enrollment</strong>, you have one more step to close your life event. You must complete this step.</td>
</tr>
<tr>
<td>92.</td>
<td>Click the <strong>Close</strong> button to hide the steps.</td>
</tr>
</tbody>
</table>
### Step 93
**Action:**
Click the **Next** button.

### Step 94
**Action:**
The Event Completion and Exit page appears.
Click the **Complete** button.

**Action:**
You have submitted your changes for the adoption life event. You will receive an email when your changes are finalized.

**End of Procedure.**