



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations  
Okanagan Campus

# Workday Wednesday: Benefits

December 1<sup>st</sup>, 2021





# RESOURCES AVAILABLE

How Do I Enroll in Benefits and Pension as a New Hire?

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=41d8858d1bb320509068c992604bcbe7&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=41d8858d1bb320509068c992604bcbe7&table=kb_knowledge)

How Do I View My Benefits?

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=7445eca01b10e814b2eda8ecbc4bcb60&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=7445eca01b10e814b2eda8ecbc4bcb60&table=kb_knowledge)

How Do I Enroll, Waive, or Add/Remove a Dependent From My Health Benefits Coverage?

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=8de786d71baae05027278556cc4bcb83&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=8de786d71baae05027278556cc4bcb83&table=kb_knowledge)

How Do I Add/Create a New Dependent?

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sysparm\\_article=KB0016816&sys\\_kb\\_id=081da1d91b732450ba8f539f034bcbfc&spa=1](https://ubc.service-now.com/selfservice?id=kb_article&sysparm_article=KB0016816&sys_kb_id=081da1d91b732450ba8f539f034bcbfc&spa=1)

# AGENDA

- 1 | Enrolling in Benefits/Pension as a New Hire
- 2 | How Do I View My Benefits?
- 3 | How Do I Enroll, Waive, or Add/Remove a Dependent From My Health Benefits Coverage?
- 4 | Q+A





# **ENROLLING IN BENEFITS/PENSION AS A NEW HIRE**

# ENROLLING AS A NEW HIRE



New hires must complete onboarding tasks in order! Onboarding tasks are sent in batches – new hires will not see benefits enrolment task until they complete first batch.

If the onboarding task has expired and is no longer in the new hire's inbox, please **proceed to these steps**.

If eligible for benefits, as a new employee, the new employee will receive a message in their Workday inbox with steps to enroll for and change benefits.

The screenshot displays the Workday portal for The University of British Columbia. At the top, there is a search bar and a notification icon with a red box around it and a callout bubble saying "Click on Inbox Icon". Below the header, the main navigation area includes "Welcome," and a "Go to Inbox" link. The central dashboard features icons for "Inbox" (10 items), "Applications" (15 items), "Pay", "Purchases", "Expenses", and "Personal Information". A callout bubble points to the "Inbox" icon. Below the dashboard, the "Inbox" section is visible, showing a list of tasks. One task, "Change Benefits for Life Event", is highlighted. A callout bubble points to the "Let's Get Started" button in the task details.

Click on Inbox Icon

THE UNIVERSITY OF BRITISH COLUMBIA

Welcome,

Inbox  
10 items

Applications  
15 items

Pay Purchases Expenses Personal Information

Go to Inbox

Inbox

Change Benefit Elections  
6 second(s) ago - Due 2020-10-01; Effective 2020-09-28

Initiated On 2020-09-28  
Submit Elections By 2020-11-11

Let's Get Started

Click Let's Get Started


# ENROLLING AS A NEW HIRE

This will bring them to the main page for making benefits elections for Health Care, Insurance and Retirement, and Additional Benefits

Hire/Rehire

Hire/Rehire for Employee ABC [Actions](#)


Health Care



Extended Health with Health Spending Account

Waived


Enroll



Dental

Waived

Enroll



Employee and Family Assistance Program

LifeWorks by Morneau Shepell

Cost per paycheck


\$0.60

Coverage

EFAP Single

Manage

Insurance and Retirement



Basic Group Life

Sun Life Schedule 3 - Age 45 and Under (Employee)


Cost per paycheck

Included

Coverage

4 X Salary


Manage



Employee Optional Life (includes Child Optional Life)

Waived


Enroll



Employee Optional AD&D - coverage must match Employee Optional Life

Waived


Enroll



Spouse Optional Life

Waived


Enroll



Spouse Optional AD&D - coverage must match Spouse Optional Life

Waived

Enroll




Staff Pension Plan

UBC Staff

Company Contribution

Manage

Additional Benefits



Disability Benefit Plan (Staff)

Sun Life -60% of monthly salary Maximum: \$3,500/month

Cost per paycheck

Included

Manage

Review and Sign

Save for Later

# ENROLLING AS A NEW HIRE

Be sure to enter Personal Health Number (PHN) to ensure Extended Health coverage is complete.

Extended Health with Health Spending Account

Hire/Rehire for Employee ABC Actions

Projected Total Cost Per Paycheck  
\$0.60

Plans Available

Select a plan or Waive to opt out of Extended Health with Health Spending Account. The displayed cost of waived plans assumes coverage for Single.

1 item

*Selection	Benefit Plan	You Pay (Semimonthly)	Company Contribution (Semimonthly)
<div><div>Select</div><div>Waive</div></div>	Sun Life	Included	\$39.49

Click Select

If you do not click Select, the default is Waive.

Health Care Instructions

General Instructions

For your [Extended Health, Dental](#) and [Employee and Family Assistance Program](#), you may cover the following dependent (s):

Spouse or Common-law Partner:  
Your spouse or common-law partner is considered your dependent if:

- they are your spouse by marriage or under any other formal union recognized by law, or
- they are your common-law partner of the opposite sex or the same sex who is publicly represented as your spouse.

You can only cover one spouse or common-law partner at a time. There is no required cohabitation period for adding your common-law partner to your benefits. If you are married and separated and not yet divorced, your spouse can remain covered under the benefit plans as long as you remain legally married. However, if you are separated and enter a new common-law relationship, you can cover your new partner only if you remove your former spouse from the plan.

Dependent Children  
A dependent child under the age of 19, or between the ages of 19 and 25 if they are a full-time student attending an educational institution recognized under the *Income Tax Act (Canada)*, and not married or in any other formal union recognized by law, and entirely dependent on you for financial support, and defined as:

- your child,
- your spouse or common-law partner's child, or
- a child for whom you or your spouse is the primary caregiver (other than a foster child) and granted custody and control; if this applies to your situation, you will need to submit a legal document outlining this arrangement.

If your dependent child is incapable of financial self-support because of a physical or mental disability that is diagnosed between the ages of 19 and 25, you will need to apply to Sun Life for Disabled Child Coverage. If approved, your child may be covered until the date specified by Sun Life.

For your [Employee and Family Assistance Program](#) only, you may also cover your dependent parent (s):

Dependent Parents  
Your parents are considered your dependents only if they live with you and financially dependent on you and defined as:

- your parent (s), or
- your spouse or common-law partner's parent (s).

Click Confirm and Continue

Confirm and Continue

Cancel

At the next step, you will have the option to add dependents. Read the information to the right for who can be added as a dependent.

# ENROLLING AS A NEW HIRE

Extended Health with Health Spending Account - Sun Life

Hire/Rehire for Employee ABC [Add New](#)

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage

Single

Plan cost per paycheck

Add New Dependent

Read information on who you can add as a dependent. Click Add New Dependent.

Health Care Instructions

Provider Website [Sun Life](#)

General Instructions

For your [Extended Health](#), [Dental](#) and [Employee and Family Assistance Program](#), you may cover the following dependent (s):

Spouse or Common-law Partner:  
Your spouse or common-law partner is considered your dependent if:

- they are your spouse by marriage or under any other formal union recognized by law; or
- they are your common-law partner of the opposite sex or the same sex who is publicly represented as your spouse.

You can only cover one spouse or common-law partner at a time. There is no required cohabitation period for adding your common-law partner to your benefits. If you are married and separated and not yet divorced, your spouse can remain covered under the benefit plans as long as you remain legally married. However, if you are separated and enter a new common-law relationship, you can cover your new partner only if you remove your former spouse from the plan.

Dependent Children  
A dependent child under the age of 19, or between the ages of 19 and 25 if they are a full-time student attending an educational institution recognized under the *Income Tax Act (Canada)*, and not married or in any other formal union recognized by law, and entirely dependent on you for financial support, and defined as:

- your child,
- your spouse or common-law partner's child, or
- a child for whom you or your spouse is the primary caregiver (other than a foster child) and granted custody and control; if this applies to your situation, you will need to submit a legal document outlining this arrangement.

If your dependent child is incapable of financial self-support because of a physical or mental disability that is diagnosed between the ages of 19 and 25, you will need to apply to Sun Life for Disabled Child Coverage. If approved, your child may be covered until the date specified by Sun Life.

For your [Employee and Family Assistance Program](#) only, you may also cover your dependent parent (s):

Dependent Parents  
Your parents are considered your dependents only if they live with you and financially dependent on you and defined as:

- your parent (s), or
- your spouse or common-law partner's parent (s).

Projected Total Cost Per Paycheck

\$0.60

If enrolling for single coverage (if no dependents), click Save.

Save

Cancel



# ENROLLING AS A NEW HIRE

Hire/Rehire

Hire/Rehire for Employee ABC

Your Extended Health with Health Spending Account changes have been updated, but not submitted  
Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

Projected Total Cost Per Paycheck \$0.60

Health Care

Extended Health with Health Spending Account

Sun Life

Cost per paycheck Included

Coverage Family

Dependents 3

Manage

Dental

Waived

Enroll

Employee and Family Assistance Program

LifeWorks by Momeau Shepell

Cost per paycheck \$0.60

Coverage EFAP Single

Manage

Insurance and Retirement

Basic Group Life

Sun Life Schedule 3 - Age 45 and Under (Employee)

Cost per paycheck Included

Coverage 4 X Salary

Manage

Employee Optional Life (includes Child Optional Life)

Waived

Enroll

Employee Optional AD&D - coverage must match Employee Optional Life

Waived

Enroll

Spouse Optional Life

Waived

Enroll

Spouse Optional AD&D - coverage must match Spouse Optional Life

Waived

Enroll

Staff Pension Plan

UBC Staff

Company Contribution

Manage

Additional Benefits

Disability Benefit Plan (Staff)

Sun Life -60% of monthly salary Maximum: \$3,500/month

Cost per paycheck Included

Manage

This brings you back to the enrollment page.  
Repeat these steps for each benefit type.

Review and Sign

Save for Later

# ENROLLING AS A NEW HIRE

Dental - Sun Life

Hire/Rehire for Employee ABC

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage Family

Plan cost per paycheck

Add New Dependent

3 items

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Spouse ABC	Spouse	1990-04-04
<input checked="" type="checkbox"/>	Son ABC	Son	2018-01-01
<input checked="" type="checkbox"/>	Daughter ABC	Daughter	2020-09-01

Health Care Instructions

Provider Website [Sun Life](#)

General Instructions

For your [Extended Health](#), [Dental](#) and [Employee and Family Assistance Program](#), you may cover the following dependent (s):

Spouse or Common-law Partner:  
Your spouse or common-law partner is considered your dependent if:

- they are your spouse by marriage or under any other formal union recognized by law, or
- they are your common-law partner of the opposite sex or the same sex who is publicly represented as your spouse.

You can only cover one spouse or common-law partner at a time. There is no required cohabitation period for adding your common-law partner to your benefits. If you are married and separated and not yet divorced, your spouse can remain covered under the benefit plans as long as you remain legally married. However, if you are separated and enter a new common-law relationship, you can cover your new partner only if you remove your former spouse from the plan.

Dependent Children  
A dependent child under the age of 19, or between the ages of 19 and 25 if they are a full-time student attending an educational institution recognized under the *Income Tax Act (Canada)*, and not married or in any other formal union recognized by law, and entirely dependent on you for financial support, and defined as:

- your child,
- your spouse or common-law partner's child, or
- a child for whom you or your spouse is the primary caregiver (other than a foster child) and granted custody and control; if this applies to your situation, you will need to submit a legal document outlining this arrangement.

If your dependent child is incapable of financial self-support because of a physical or mental disability that is diagnosed between the ages of 19 and 25, you will need to apply to Sun Life for Disabled Child Coverage. If approved, your child may be covered until the date specified by Sun Life.

For your [Employee and Family Assistance Program](#) only, you may also cover your dependent parent (s):

Dependent Parents  
Your parents are considered your dependents only if they live with you and financially dependent on you and defined as:

- your parent (s), or
- your spouse or common-law partner's parent (s).

Projected Total Cost Per Paycheck

\$0.60

Save

Cancel

You will see the dependents that you added for Extended Health. Check the boxes to enroll your dependents for Dental as well.

Click Save

If you added dependents previously, you will see them at this page when enrolling for all other benefit types.

# ENROLLING AS A NEW HIRE

**Hire/Rehire**  
Hire/Rehire for Employee ABC [\(Active\)](#)

Your Employee and Family Assistance Program changes have been updated, but not submitted.  
Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

Projected Total Cost Per Paycheck \$0.60

### Health Care

Plan Name	Status	Coverage	Dependents	Action
Extended Health with Health Spending Account <small>Sun Life</small>	Included	Family	3	<a href="#">Manage</a>
Dental <small>Sun Life</small>	Included	Family	3	<a href="#">Manage</a>
Employee and Family Assistance Program <small>Lifeworks by Momeau Shapel</small>	\$0.66	EMP Family	3	<a href="#">Manage</a>

### Insurance and Retirement

Plan Name	Status	Action
Basic Group Life <small>Sun Life Schedule 3 - Age 25 and Under (Employee)</small>	Included 4 X Salary	<a href="#">Click Manage</a>
Employee Optional Life (includes Child Optional Life) <small>Waived</small>	Waived	<a href="#">Enroll</a>
Employee Optional AD&D - coverage must match Employee Optional Life <small>Waived</small>	Waived	<a href="#">Enroll</a>
Spouse Optional Life <small>Waived</small>	Waived	<a href="#">Enroll</a>
Spouse Optional AD&D - coverage must match Spouse Optional Life <small>Waived</small>	Waived	<a href="#">Enroll</a>
Staff Pension Plan <small>UGC Staff</small>	Company Contribution	<a href="#">Manage</a>

### Additional Benefits

Plan Name	Status	Action
Disability Benefit Plan (Staff) <small>Sun Life 60% of monthly salary Maximum: \$3,500/month</small>	Included	<a href="#">Manage</a>

[Review and Sign](#) [Save for Later](#)

The Basic Group Life Insurance and Disability Benefit Plan coverage is mandatory, so you will not see the option to waive.

# ENROLLING AS A NEW HIRE

At this step, new hires can designate their beneficiary.

*Please designate a beneficiary as this is required by UBC.*

## Basic Group Life - Sun Life Schedule 3 - Age 45 and Under (Employee)

Hire/Rehire for Employee ABC [Active](#)

### Coverage

Coverage 4 X Salary  
Calculated Coverage \$157,708.80  
Plan cost per paycheck Included

### Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries: 1 item

UBC	Beneficiary	Percentage
		No Data

Secondary Beneficiaries: 0 items

Beneficiary	Percentage
	No Data

Click + to add

Read important information about Beneficiary Designation - scroll down to read all details

Click Save

### Insurance Instructions

Provider Website: [Sun Life](#)

#### General Instructions

##### Basic Life Insurance

Coverage under this plan is mandatory. You are unable to Waive coverage, you must Elect coverage.

##### Employee Optional Life (Includes Child Optional Life) and Employee Optional AD&D

You may elect Employee Optional Life in units of \$25,000 to a maximum of \$750,000. The Employee Optional Life benefit is payable to your designated beneficiary if you die. If no beneficiary is designated, the benefit is paid to your estate.

All applications for Employee Optional Life require you to complete an online Health Statement to Sun Life (benefits provider). Sun Life will review your application and inform you (and UBC) of their decision. If approved, UBC's Benefits Partner will enroll you using the effective date indicated in Sun Life's letter. Your premium is based on your age, coverage and whether you are a non-smoker or smoker.

Effective March 1, 2015, your dependent children are automatically approved for Child Optional Life coverage if you are approved for coverage. For each \$25,000 unit of Employee Optional Life, you will receive \$5,000 of Child Optional Life coverage for each eligible dependent child at no extra cost. For example, if you are approved for \$750,000 Employee Optional Life, each dependent child is covered for \$150,000.

If you have an eligible spouse or common-law partner who was approved for Spouse Optional Life insurance before March 1, 2015, you will receive \$5,000 of Optional Life coverage for each eligible dependent child for each \$25,000 unit of Spouse Optional Life coverage at no extra charge.

You may elect Employee Optional AD&D if you are approved for Employee Optional Life. Your Optional AD&D coverage amount is the same as your Optional Life.

##### Spouse Optional Life and Spouse Optional AD&D

You may elect Spouse Optional Life in units of \$25,000 to a maximum of \$750,000 for your spouse or common-law partner. The Spouse Optional Life benefit is payable to your spouse or common-law partner's designated beneficiary if they die. If no beneficiary is designated, the benefit is paid to your spouse or common-law partner's estate. The premium for your spouse or common-law partner is based on their age, coverage and whether they are a non-smoker or smoker.

All applications for Spouse Optional Life require your spouse or common-law partner to complete an online Health Statement to Sun Life (benefits provider). Sun Life will review their application and inform you (and UBC) of their decision. If approved, UBC's Benefits Partner will enroll your spouse or common-law partner using the effective date indicated in Sun Life's letter.

Effective March 1, 2015, your dependent children are automatically approved for Child Optional Life coverage if you are approved for coverage - see Employee Optional Life (includes Child Optional Life). However, if you have an eligible spouse or common-law partner who was approved for Spouse Optional Life insurance before March 1, 2015, your dependent children are covered under your spouse or common-law partner (for each \$25,000 unit of Spouse Optional Life, you will receive \$5,000 of Child Optional Life coverage for each eligible dependent child at no extra cost).

You may elect Spouse Optional AD&D if your spouse or common-law partner is approved for Spouse Optional Life. Your spouse or common-law partner's Optional AD&D coverage amount is the same as their Optional Life.

#### Beneficiary Designation

##### Life Insurance (Basic and Optional) Beneficiary

It is important to keep the beneficiary of your life insurance policies up to date, so that in the event of your death (or your spouse or common-law partner's death for Spouse Optional Life Insurance), the benefit is paid to the correct individual(s) or organization.

If you are electing Employee Optional AD&D, your beneficiary is the same as your Employee Optional Life. If you are electing Spouse Optional AD&D, your beneficiary is the same as your Spouse Optional Life.

You may designate a primary beneficiary and a secondary beneficiary. If your primary beneficiary has pre-deceased you, your secondary beneficiary will receive the benefit.

If you are designating your Estate as beneficiary, enter Estate as the first and last name and use your contact details. If you are designating a Charity, enter the name of the Charity as the first and last name.

If you do not designate a beneficiary, the life insurance benefit will be paid to your Estate in the event of your death (or your spouse or common-law partner's Estate in the event of their death and if they hold Spouse Optional Life Insurance).

UBC's group-term life insurance is a temporary life insurance policy that provides a death benefit to your designated beneficiary. The death benefit is paid to your designated beneficiary upon your death. The death benefit is paid to your designated beneficiary upon your death. The death benefit is paid to your designated beneficiary upon your death.

Save

Cancel

# ENROLLING AS A NEW HIRE

After repeating these steps for all relevant benefit types, click Review and Sign.

Hire/Rehire  
Hire/Rehire for Employee ABC (Active)

Projected Total Cost Per Paycheck  
\$0.60

### Health Care

Plan Details	Status	Cost
<b>Extended Health with Health Spending Account</b> <small>Sun Life</small> Cost per paycheck: Included Coverage: Family Dependents: 2	Included	
<a href="#">Manage</a>		

Plan Details	Status	Cost
<b>Dental</b> <small>Sun Life</small> Cost per paycheck: Included Coverage: Family Dependents: 2	Included	
<a href="#">Manage</a>		

Plan Details	Status	Cost
<b>Employee and Family Assistance Program</b> <small>Lifeline by Monneau Shapell</small> Cost per paycheck: \$0.60 Coverage: EHP Family Dependents: 2		\$0.60
<a href="#">Manage</a>		

### Insurance and Retirement

Plan Details	Status	Cost
<b>Basic Group Life</b> <small>Sun Life Schedule D - Age 45 and Under (Employee)</small> Cost per paycheck: Included Coverage: 4 X Salary	Included	
<a href="#">Manage</a>		

Plan Details	Status	Cost
<b>Employee Optional Life (includes Child Optional Life)</b> <small>Manulife</small>		
<a href="#">Enroll</a>		

Plan Details	Status	Cost
<b>Employee Optional AD&amp;D - coverage must match Employee Optional Life</b> <small>Manulife</small>		
<a href="#">Enroll</a>		

Plan Details	Status	Cost
<b>Spouse Optional Life</b> <small>Royal LePage</small>		
<a href="#">Enroll</a>		

Plan Details	Status	Cost
<b>Spouse Optional AD&amp;D - coverage must match Spouse Optional Life</b> <small>Manulife</small>		
<a href="#">Enroll</a>		

Plan Details	Status	Cost
<b>Staff Pension Plan</b> <small>USC Staff</small> Company Contribution		
<a href="#">Manage</a>		

### Additional Benefits

Plan Details	Status	Cost
<b>Disability Benefit Plan (Staff)</b> <small>Sun Life - 60% of monthly salary Maximum: \$3,500/month</small> Cost per paycheck: Included	Included	
<a href="#">Manage</a>		

Click Review and Sign


Review and Sign
Save for Later



# ENROLLING AS A NEW HIRE

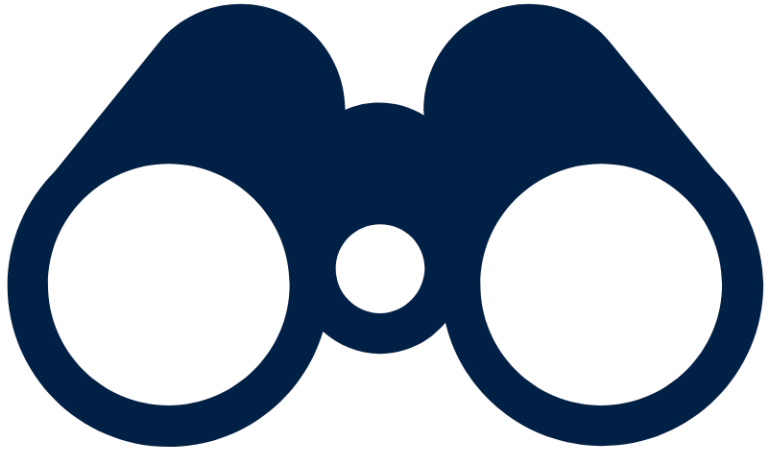
[illegible]

Check the 'I Accept' box and click Submit. From there, you'll be able to view your benefits statement.



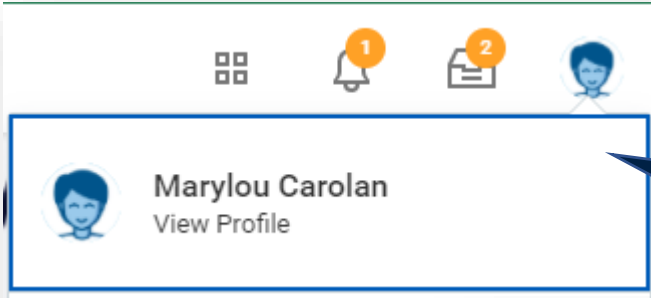
Employees need to wait at least five business days for this information to be transmitted to the SunLife system to then register an account with SunLife.

Please refer to the [Knowledge Base article](#) for additional information



**HOW DO I VIEW MY  
BENEFITS?**

# VIEWING YOUR BENEFITS



Click on your profile from the Workday homepage



Click on Benefits

This page displays your benefits with the option to view your dependent and beneficiary information as well

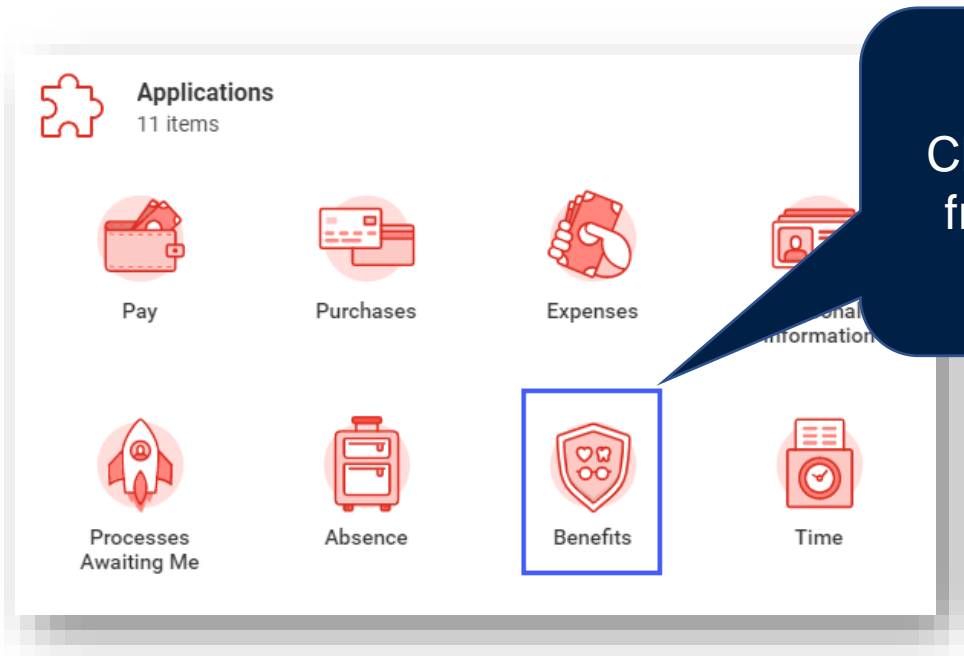
Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Semimonthly)
Dental - Sun Life	2020-08-20	2020-08-20	Employee + 1	<a href="#">April May</a>		
Employee and Family Assistance Program - LifeWorks by Morneau Shepell	2020-08-29	2020-08-29	EFAP Family	<a href="#">April May</a>		\$0.60
Employee Optional AD&D - coverage must match Employee Optional Life - Sun Life (Employee)	2020-08-14	2020-09-01				
Staff Pension Plan - UBC Staff	2020-08-14	2020-08-14				
Disability Benefit Plan (Staff) - Sun Life -60% of monthly salary Maximum: \$3,500/month	2020-07-29	2020-07-29				
Total:						\$0.60



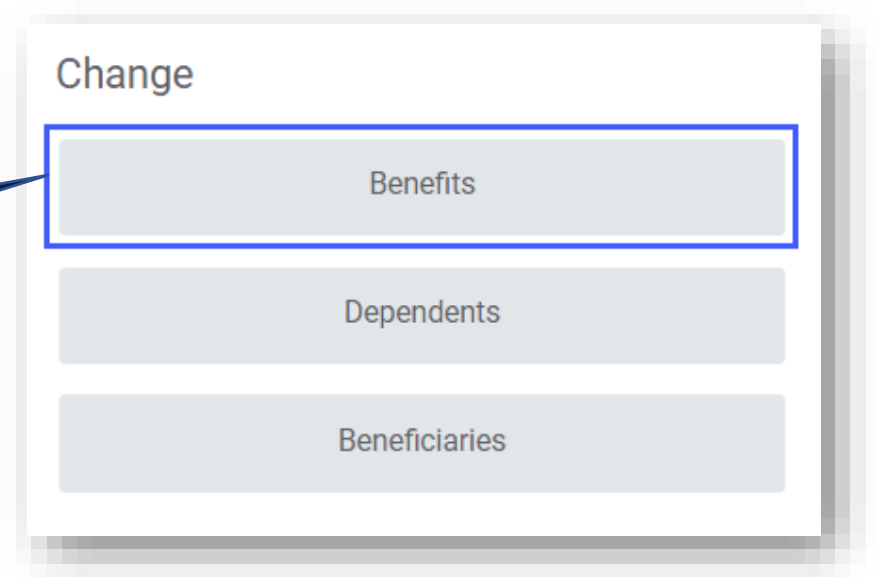
In this particular screenshot, you can see only Dental coverage appears, not Extended Health. Please review your benefits summary to ensure everything is correct and add your Personal Health Number (PHN) to your Personal Information on your Workday profile. Your PHN is required for Extended Health.



**HOW DO I ENROLL,  
WAIVE, OR ADD/REMOVE  
A DEPENDENT FROM MY  
HEALTH BENEFITS  
COVERAGE?**



Click on the Benefits application from your Workday homepage



Under the 'Change' header, click on 'Benefits'.



## Change Benefits

Actions

- Change Reason \*
- ☐ Change Beneficiary - Life Insurance
  - ☐ Change Beneficiary - Staff Pension Plan ONLY
  - ☐ Enroll/Change/Cancel – Faculty Voluntary Contribution
  - ☐ Enroll/Change - Optional Life/AD&D
  - ☐ Enroll/Change - Retirement & Survivor Benefits
  - ☒ Enroll/Waive/Add or Remove Dependent (Other than Divorce/Separation/Death) - Health Benefits
  - ☐ Enroll – Faculty Pension Plan ONLY
  - ☐ Waive - Optional Life/AD&D
  - ☐ Waive - Retirement & Survivor Benefits

The Change Benefits page opens.  
From the Change Reason list, select  
Enroll/Waive/Add or Remove  
Dependent (Other than  
Divorce/Separation/Death) – Health  
Benefits.

By selecting a Change Reason, the  
Benefit Event Date field will appear.  
Manually type in the Benefit Event  
date, or click on the calendar icon and  
select the date from the pop-up  
calendar.

Benefit Event Date \* YYYY-MM-DD



Submit Elections By (empty)

enter your comment

January 2021						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Benefit Event Date \* 2021-01-11

Submit Elections By 2021-01-11

Benefits Offered  
Dental  
Employee and Family Assistance Program  
Extended Health with Health Spending Account

### Attachments

Drop files here

or

Select files

enter your comment

Submit

Save for Later

Cancel

Click Submit

Note: the date selected cannot go back more than 45 days.  
If you would like to go back more than 45 days, please  
contact [Jacky.Ivans@ubc.ca](mailto:Jacky.Ivans@ubc.ca) for an exception.

You have submitted

Benefit Event:

Up Next

Change Benefit Elections

Open

Once you have submitted your Benefit Event request successfully, click Open to view the next Action Items.

Change Benefit Elections

Initiated On2021-02-23

Submit Elections By2021-01-11

Let's Get Started

Click Let's Get Started

## Enroll/Waive/Add or Remove Dependent (Other than Divorce/Separation/Death) - Health Benefits

This is the Health Care main page where changes can be made for all health benefit types.

### Health Care



#### Extended Health with Health Spending Account Sun Life

Cost per paycheck

Included

Coverage

Single

Manage



#### Dental Sun Life

Cost per paycheck

Included

Coverage

Single

Manage



#### Employee and Family Assistance Program LifeWorks by Morneau Shepell

Cost per paycheck

Included

Coverage

EFAP Single

Manage

Projected Total Cost Per Paycheck  
\$0.00

Click Manage under Extended Health with Health Spending Account (note: this may appear as Extended Health for some).

In this example, the employee is enrolled for single coverage and would like to add a dependent to their health care plans. Click Select, then Confirm and Continue.

## Extended Health with Health Spending Account

### Plans Available

Select a plan or Waive to opt out of Extended Health with Health Spending Account.

1 Item

*Selection	Benefit Plan	You Pay (Semimonthly)	Company Contribution (Semimonthly)	
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Sun Life	Included	\$40.65	

Confirm and Continue

Cancel

## Extended Health with Health Spending Account - Sun Life

### Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage \* Single

Plan cost per paycheck

Add New Dependent

Save

Cancel

Read the information to the right side of the screen, which describes who you can add as a dependent.

Click on Add New Dependent. [Refer to How do I add or create a dependent?](#) for further instructions.

Once the new dependent(s) have been added, click Save.

The Health Care main page appears again. The Extended Health with Health Spending Account section has updated with the added Dependent.

## Enroll/Waive/Add or Remove Dependent (Other than Divorce/Separation/Death) - Health Benefits



Projected Total Cost Per Paycheck  
\$0.00

### Health Care



#### Extended Health with Health Spending Account Sun Life

Cost per paycheck Included

Coverage Employee + 1

Dependents 1

[Manage](#)



#### Dental Sun Life

Cost per paycheck Included

Coverage Single

[Manage](#)



#### Employee and Family Assistance Program LifeWorks by Morneau Shepell

Cost per paycheck Included

Coverage EFAP Single

[Manage](#)

Repeat these steps for each benefit type.



## Enroll/Waive/Add or Remove Dependent (Other than Divorce/Separation/Death) - Health Benefits



Projected Total Cost Per Paycheck  
\$0.00

### Health Care



#### Extended Health with Health Spending Account Sun Life

Cost per paycheck Included

Coverage	Employee + 1
Dependents	1

[Manage](#)



#### Dental Sun Life

Cost per paycheck Included

Coverage	Employee + 1
Dependents	1

[Manage](#)



#### Employee and Family Assistance Program LifeWorks by Morneau Shepell

Cost per paycheck Included

Coverage	EFAP Family
Dependents	1

[Manage](#)

[Review and Sign](#)

[Save for Later](#)

After you've enrolled for each benefit type, click Review and Sign.

Check the 'I Accept' box and click Submit

### Electronic Signature

The personal information you provide is collected pursuant to Section 26 of the Freedom of Information Act, for the purposes of benefits and pension administration, payment of benefits and claims, and to make disclosures to external third parties unless permitted by law. If you have any questions about the collection of your information, please contact the University of British Columbia.

You must be authorized to disclose information about your spouse and dependent children.

By enrolling, you agree that all information you provide is true and complete and authorize the following:

- Benefit Providers, their agents and service providers to use and exchange information for the purpose of administering benefits and pension plans.
- Any benefits and claims that are payable in the event of your death will be paid to the designated beneficiary, claims that are payable in the event of your death will be paid to the designated beneficiary.
- UBC to use the information for benefits and pension administration and to make disclosures to external third parties unless permitted by law.

If you are enrolling for the Leave of Absence Benefit Plans, you authorize the following:

- Sun Life Assurance Company of Canada, its agents and service providers to use and exchange information for the purpose of administering benefits and pension plans.
- The University of British Columbia (the "Payee") to use the account information for the purpose of administering benefits and pension plans.

I certify that all information contained in this form is accurate and complete. I agree to the terms and conditions of the agreement. I acknowledge my Financial Institution is not required to verify that any information provided is accurate and complete. This Authorization is a condition to honouring a PAD issued by the Payee on our account. This Authorization is not valid for any third parties as may be required to process the PAD in accordance with the terms and conditions of the agreement. This authorization is as valid as the original.

I Accept ☐

[Submit](#)

[Save for Later](#)

[Cancel](#)

Submitted

Success, You're Enrolled

To verify your enrollment, click on the Cloud (right corner), View Profile, Benefits (to your left).

If you've enrolled for Extended Health and Dental, take note of the details below. Sun Life should have your enrollment information approximately 5-7 days from the date you submit your enrollment in Workday.

Extended Health & Dental Provider: Sun Life  
Active Plan Group Number: **025205**  
Member ID: **your 7-digit UBC employee ID number**

For more information on how to make claims, please visit: <https://hr.ubc.ca/benefits/claims-forms>.

View 2021 Benefits Statement

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Extended Health & Dental Provider: Sun Life  
Active Plan Group Number: 025205  
Member ID: **your 7-digit UBC employee ID number**

For more information on how to make claims, please visit: <https://hr.ubc.ca/benefits/claims-forms>.

[View 2021 Benefits Statement](#)

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[View 2021 Benefits Statement](#)

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Active Plan Group Number: **025205**  
Member ID: **your 7-digit UBC employee ID number**

For more information on how to make claims, please visit: <https://hr.ubc.ca/benefits/claims-forms>.

[View 2021 Benefits Statement](#)

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Active Plan Group Number: 025205  
Member ID: **your 7-digit UBC employee ID number**

For more information on how to make claims, please visit: <https://hr.ubc.ca/benefits/claims-forms>.

[View 2021 Benefits Statement](#)

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Active Plan Group Number: 025205  
Member ID: **your 7-digit UBC employee ID number**

For more information on how to make claims, please visit: <https://hr.ubc.ca/benefits/claims-forms>.

[View 2021 Benefits Statement](#)

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[View 2021 Benefits Statement](#)

For more information on how to make claims, please visit: <https://hr.ubc.ca/benefits/claims-forms>.

[View 2021 Benefits Statement](#)

[View 2021 Benefits Statement](#)

*Student Status for eligible coverage dependents (19-25) needs to be updated annually in the month of their birth date. This can be completed via the Benefits Summary from the employee profile in Workday.*

You can view your Benefits Elections (including Dependent and Beneficiary details) at any time from your employee profile in Workday.

You'll then be taken to a page indicating your enrolment was successful. You can view your benefits statement from here.

[Benefits](#) | 
 [My Dependents](#) | 
 [My Beneficiaries](#)

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**Benefits**    7 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Contribution (Semimonthly)
Extended Health with Health Spending Account - Sun Life	2021-01-11	2021-01-11	Employee + 1				\$101.50
Dental - Sun Life	2021-01-11	2021-01-11	Employee + 1				\$63.11
Employee and Family Assistance Program - LifeWorks by Morneau Shepell	2021-01-11	2021-01-11	EFAP Family				\$2.00
Basic Group Life - Sun Life Schedule 3 - Age 45 and Under (Employee)	2021-01-04	2021-01-04	4 X Salary	\$300,000.00			\$13.50
Staff Pension Plan - UBC Staff	2021-01-04	2021-01-04					
Disability Benefit Plan (Staff) - Sun Life Benefit Plan Name - 70% of the first \$1,110 of your basic monthly salary, plus 60% of the next \$1,110 of your basic monthly salary, plus 40% of your monthly salary in excess of the first \$2,220 maximum; \$30,000 (M&P and Admin Exec)	2021-01-04	2021-01-04					
Benefit Jobs - UBC	2021-01-04	2021-01-04					
<b>Total:</b>							<b>\$180.11</b>



**Next Workday Wednesday:** December 8<sup>th</sup> from 10:00 –  
11:00am

**Topic:** HR and Finance Q+A

[Registration link](#)

