

Section 1 Personal Info

- Make sure all requested information is filled out
- If employee does not have a Social Security Number (SSN) make a note in the "comments" and direct them to the Social Security Administration website to learn how to obtain one
- Have them bring a copy of their SSN (and family members) back to you and submit a new form with the numbers

Section 2 Employee Actions

- Assist employee in selecting a reason for submitting the UPAY 850. This would be a qualifying event that creates a Period of Initial Eligibility (PIE) for 31 days
- All qualifying events are listed- check one that applies
- Use the comments box if needed

Section 2A Opt Out

- If employee has other coverage and wants to decline UC Medical, Dental and/or Vision, make sure the boxes are checked for the coverages they will decline. Otherwise, the employee will default into CORE medical, Delta & VSP benefits (family members will not be covered)
- Duplicate UC Insurance coverage is not allowed- see page 3 of Your Group Insurance Plans

Section 3 Medical, Dental, Vision, Legal

- This section is to enroll, change or cancel benefit plans for employees only (use Section 5 for dependents)
- If employee is canceling coverage for themselves, enrolled family members will also be de-enrolled

Section 4 Other Insurance Plans

- Enrollment in Supplemental Disability, Life and Dependent Life Insurance does not require a Statement of Health when employees are initially hired
- Enrollment in Supplemental Disability & Supplemental Life at later time requires a Statement of Health acceptable to insurance carriers. Denial is possible
- Enrollment in Accidental Death & Dismemberment is allowed anytime

Section 5 Eligible Family Members

- Make sure all boxes are filled in for adult & child (ren)
- Boxes for Med-Dent-Vis-Legal must be checked to indicate coverage desired for each family member listed
- Assist employee in determining Primary Care Physician or Medical Group ID for all medical plans (except Kaiser & Anthem Blue Cross PPO) for each family member
- Primary Care Physician will be assigned by carrier if not selected