

Remove or Maintain an Overage Dependent

Reference Guide

Remove or Maintain an Overage Dependent

Purpose:

This reference guide provides you with the steps to remove or maintain an overage dependent from your benefits coverage.

Dependents age **21 to 24** are only eligible to remain on your coverage if they are full-time students, enrolled in an accredited post-secondary institution (proof of enrolment may be requested each year). Alternatively, a dependent is eligible to remain on your coverage if they are dependent upon you by reason of a mental or physical disability, and became totally disabled prior to attaining age 21, and who have been continuously disabled since that time.

Dependents **25 and older** are only eligible to remain on your coverage if they meet the definition

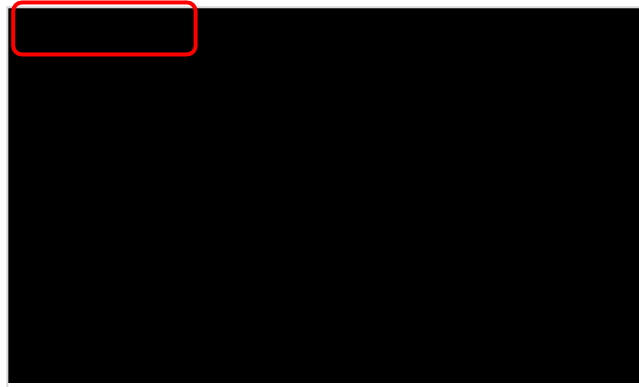
Remove an Overage Dependent

The following steps are applicable if any of your dependents are age **21 to 24** and are not enrolled in an accredited educational institution, college, or university on a full-time basis.

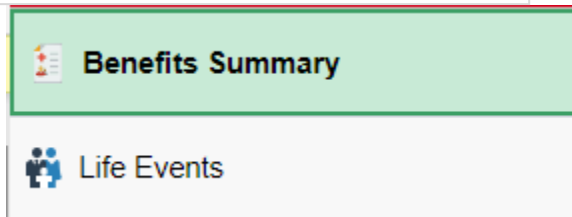
Overage Dependents who are dependent on you by reason of a mental or physical disability are eligible to remain on your coverage. Contact totalrewards@ucalgary.ca for details.

Step 1: Navigate to the Family Status Change Page

1. From the My UCalgary Portal, follow the path: **All about me > My benefits > Benefit details**



2. On the **Benefits** page, click **Life Events**.



3. On the **Life Events** page, select your event based on **if your family status will/will not change**:

Family Status:

Single	Coverage is only for you , the employee. You have no spouse or dependents.	
Couple	You, plus one other individual. Second individual could be spouse/partner, or a dependent child.	
Family	You, plus at least two other individuals. This	

If by removing your overage dependent, **your family status will change**:

- I.e. changing from Family to Couple status, or from Couple to Single status then select **Family Status Change**:

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If by removing your overage dependent, **your family status will NOT change:**

- I.e. changing from 3 eligible children to 2 children (remaining as Family Status)

then select **Dependent/Beneficiary Update:**

4. In the **Change Status Date**

Step 2: Update Family Status Information

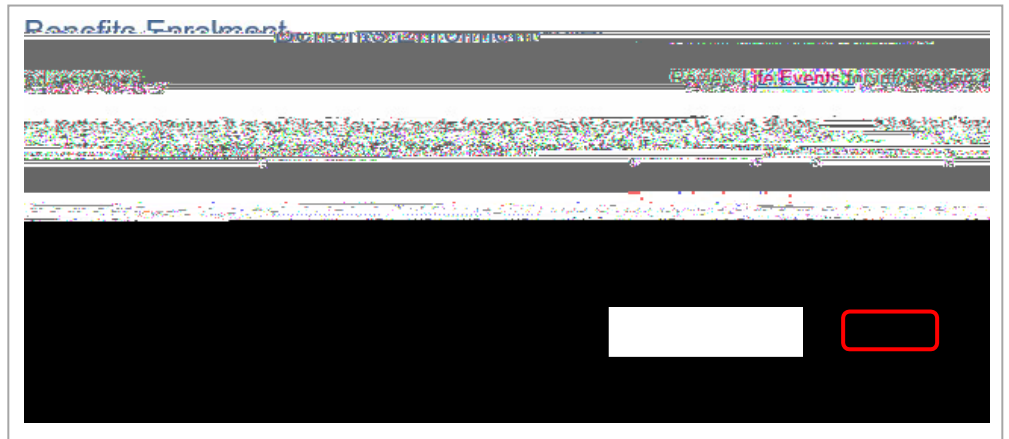
1. On the **Family Status Change** page, click the **Next** button.

1.

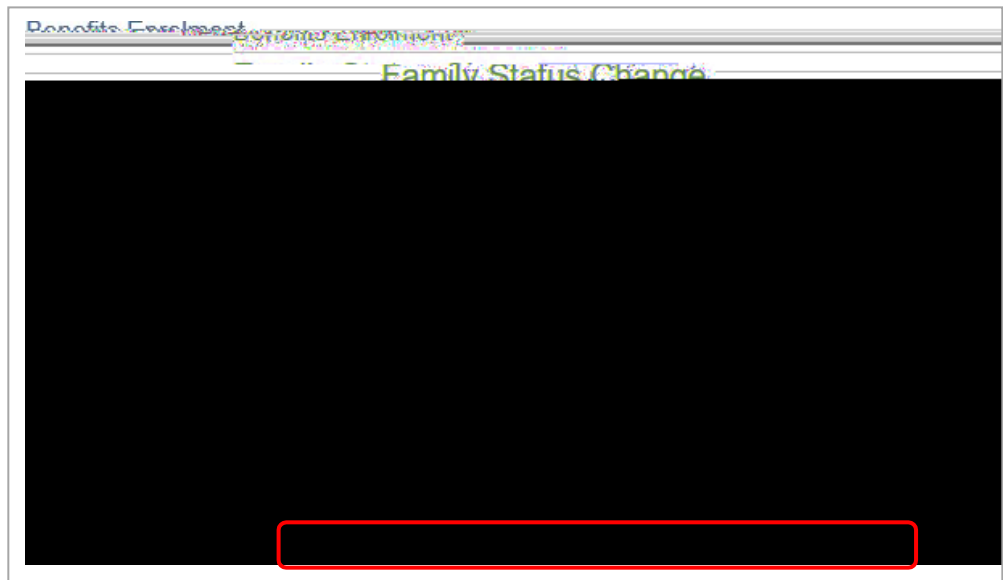
- 6. Click on **Start My Enrolment**.



- 7. Click the **Select** button.



- 8. Click **Review/Update Dependent Data**.



9. Click the name of the adult child that requires updating.

Add/Review Dependent/Beneficiary

Scott W Sun

A list of your dependent/beneficiary. You will designate your benefit allocations later in the enrolment. All individuals on the list must remain for historical record purpose. To make limited changes to an existing dependent/beneficiary, click the person's name. To make more significant changes email benefits@ucalgary.ca. To add new dependents and/or beneficiaries click the "Add a dependent or beneficiary" button. When additions and edits are complete, click "Return to Event Selection".

Name	Relationship to Employee	Date of Birth	Marital	Marital Status	Student	Disabled	Dependent	Beneficiary
Valerie Sun	Domestic Partner Adult	1960/01/01	Married	2016/01/01	No	No	Yes	Yes
Daniel Sun	Child	1998/06/07	Single		No	No	Yes	Yes

10. On the **Dependent/Beneficiary Personal Information** page, scroll to the bottom and click the **Edit** button.

Personal Information

11. Under **Personal Information**, use the **Relationship to Employee** drop down menu to select **Adult Child**.

Personal Information

*First Name

Middle Name

*Last Name

Name Prefix

Name Suffix

Date of Birth

*Gender

Social Insurance Number

*Relationship to Employee

12. Under **Status Information**, ensure the **Student** drop-down is set to **No**.

Status Information

*Marital Status

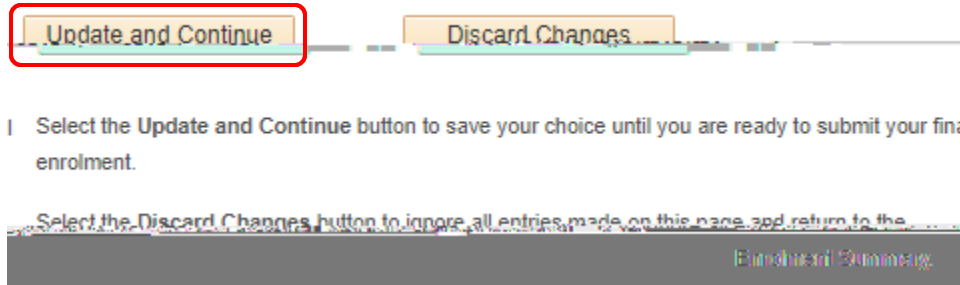
*Student

*Disabled

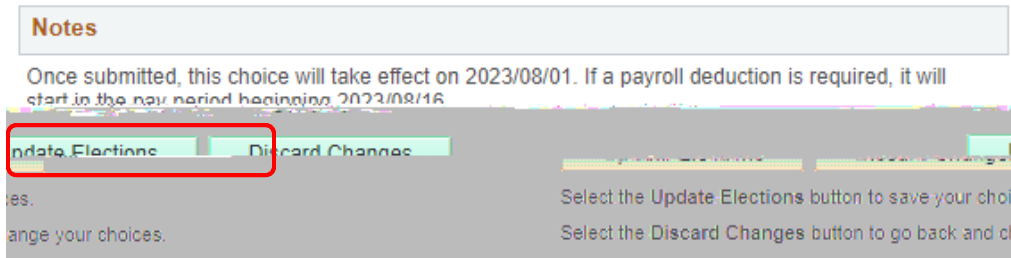
13. Click the **Save** button.

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17. Click **Update and Continue**.



18. Click **Update Elections**.

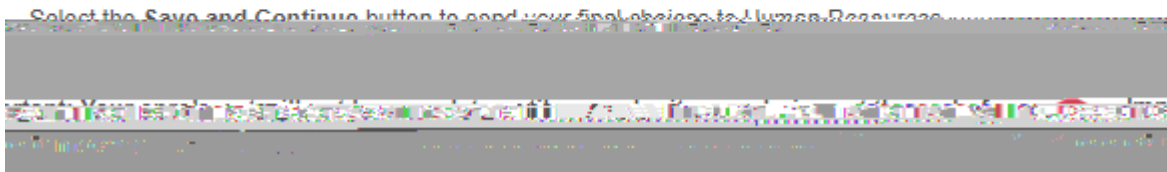


19. Continue steps 16 and 17 under each plan, and continue until **all four (Health, Dental, Wellness Spending Account, Health Spending Account) benefits** have been reviewed.

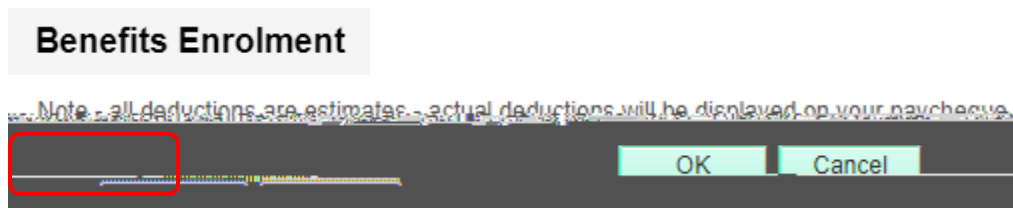
Note: your benefit event will not finalize if steps 15-18 are missed for any of the four benefits.

20. Click **Save and Continue**.

Note: **Save and Continue** will be greyed out (cannot select) if steps 15-18 are not completed.



21. **Benefits Enrolment** window will open outlining your benefits selections. Click **OK**.



22. **Submit Benefits:**

- a) Click the

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Next Steps

If your overage dependent's status has changed and now meets the definition of eligible dependent, and they are under the age of 25, enrol them in your benefits:

- On the **Benefits Enrolment** screen, select Enrol for each category (Health, Dental, Health and Wellness Spending Accounts) to enrol your dependent in available benefits and ensure your dependent and beneficiary information is accurate. For further assistance, contact UService at hr@ucalgary.ca.

To review your benefits at any time, access the following reference guides or contact UService at hr@ucalgary.ca.

Benefits Enrolment reference guides:

- [Support](#)

Maintain an Overage Dependent

Dependents **21 and older** are eligible to remain on your coverage if they are attending an accredited educational institution, college or university on a full-time basis, or are dependent on you by reason of a mental or physical disability, and became totally disabled prior to attaining age 21, and who have been continuously disabled since that time.

Note: If your overage dependent was a student, but is **no longer one**, change their student status to 'No' in Peolihpgew- df844



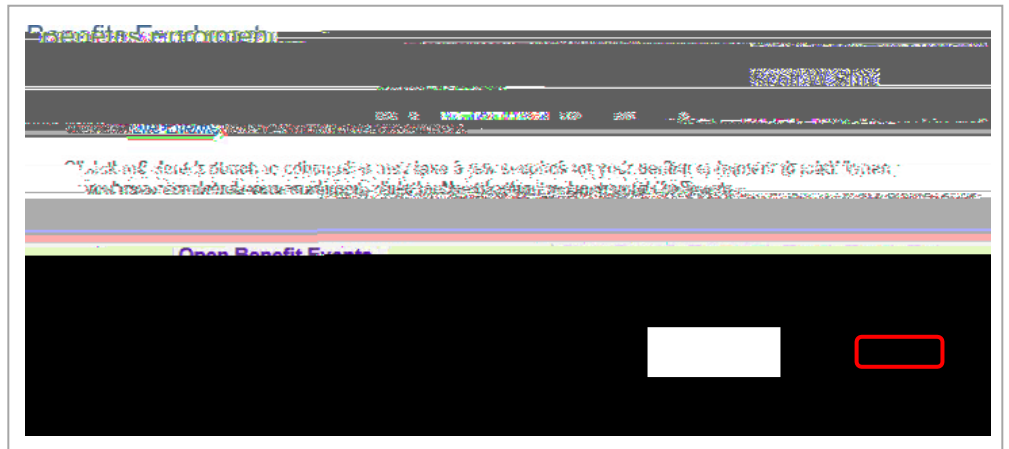
Step 2: Update Dependent Information

1. On the **Dependent or Beneficiary Update** page, click the **Next** button.

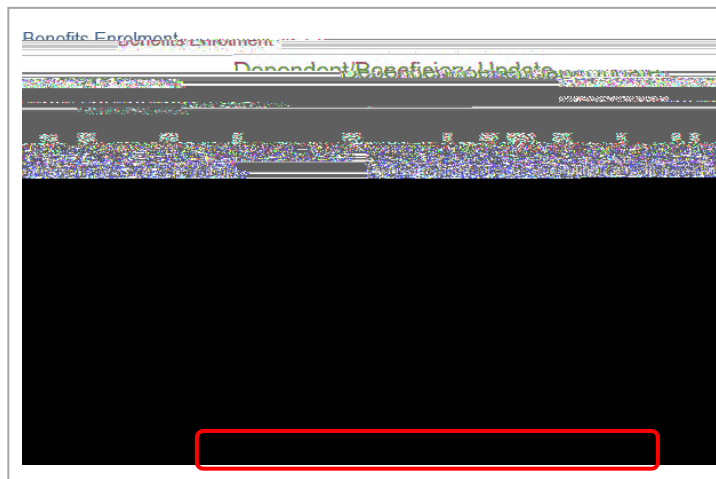
2. Confirm the date the change takes effect (first day of the month)

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7. Click the **Select** button.



8. Click **Review/Update Dependent Data**.



9. Click the name of the adult child to change the status.

Add/Review Dependent/Beneficiary

Scott W Sun

A list of your dependent/beneficiary. You will designate your benefit allocations later in the enrolment. All individuals on the list must remain for historical record purposes. To make limited changes to an existing dependent/beneficiary, click the person's name. To make more significant changes email benefits@ucalgary.ca. To add new dependents and/or beneficiaries click the "Add a dependent or beneficiary" button. When additions, deletions, or edits are complete, click "Return to Event Selection".

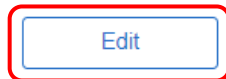
Dependent and Beneficiary Information

Name	Relationship to Employee	Date of Birth	Marital Status	Marital Status Date	Student	Disabled	Dependent	Beneficiary
Valerie Sun	Domestic Partner Adult	1960/01/01	Married	2016/11/01	No	No	Yes	Yes
Daniel Sun	Child	1998/05/07	Single		No	No	Yes	Yes

10. On the **Dependent/Beneficiary Personal Information** page, scroll to the bottom and click the **Edit** button.

Dependent/Beneficiary Personal Information

This is your Dependent/Beneficiary's personal information as of [date]. Use the Edit button on this page to update the information. You must enter birth date for every dependent/beneficiary.



11. Under **Personal Information**:

- If maintaining a dependent, **Relationship to Employee = Child**
- If removing an overage dependent, **Relationship to Employee = Adult Child**

12. Under **Status Information**, use the **Student** drop-down menu to change the status as needed.

- If maintaining a dependent, **Student = Yes**
- If removing an overage dependent, **Student = No**

Status Information

Note: A red box highlights the Student dropdown menu in the original image.

13. Confirm the **As of Date** (same as event date).

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14. Click the **Save** button.

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15. On the **Save Confirmation** page, click the **OK** button.

16.



27. **Submit Benefits:**

1. Click the **Beneficiary Designation** form link to print and sign your updated beneficiary form
2. Click **Submit** to finalize your Dependent/Beneficiary Update

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Next Steps

If your overage dependent is no longer a student, [remove them from your group extended health care and dental care benefits](#).

If your overage dependent's status has changed, and now meets the definition of eligible dependent, and they are under the age of 25, enrol them in your benefits:

- On the **Benefits Enrolment** screen, select Enrol for each category (Health, Dental, Health and Wellness Spending Accounts) to enrol your dependent in available benefits and ensure your dependent and beneficiary information is accurate.

For the steps to update your benefits, access the following reference guides or contact hr@ucalgary.ca

Benefits Enrolment reference guides:

- [Support Staff](#)
- [MaPS](#)
- [Academics](#)