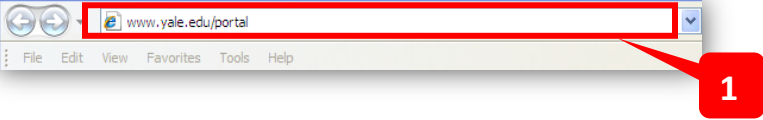
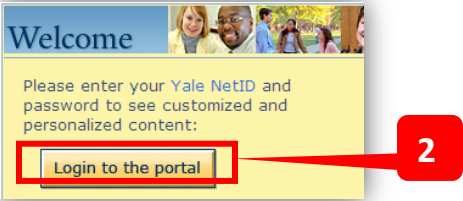

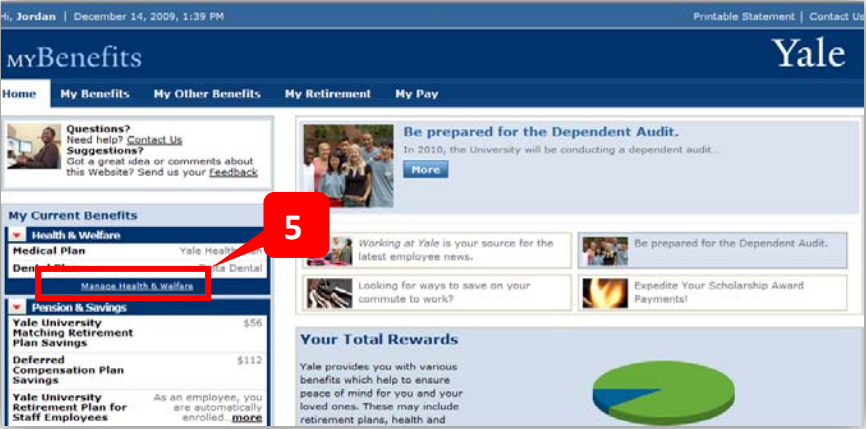


Life Event Quick Guide

<p>1 Open an internet browser and type in the following address to access the portal: www.yale.edu/portal.</p>	
<p>2 On the portal homepage click the Login to the portal button and you will be directed to the Yale authentication page to enter your NetID and password.</p>	
<p>3 Click the My Benefits link on the upper right hand corner of the Portal.</p> <p>4 Faculty will see a different menu pane.</p>	
<p>5 Click the Manage Health & Welfare link</p>	

6 Click **My Account**

The screenshot shows the Yale My Account page. The navigation bar includes links for Welcome, My Health & Welfare Benefits, My Other Benefits, My Retirement Plans, Benefits Estimator, and My Account. A red box highlights the 'My Account' link. A red callout box with the number '6' points to this link. The main content area features a 'Welcome to Annual Benefits Enrollment 2010' message for Jordan Colosi, stating that there are 58 days left to enroll. It provides instructions on how to add or modify dependent and beneficiary information, review benefit information, and enroll in or waive benefits for the 2010 plan year. A sidebar on the left lists various benefit options under 'My Health & Welfare Benefits'.

7 Click the **Add Life Status Change Event** link

The screenshot shows the 'Contact Information' section of the My Profile page. A red box highlights the 'Add Life Status Change Event' link in the left navigation menu. A red callout box with the number '7' points to this link. The contact information includes: Prefix (Ms.), First Name (Jordan), Middle (Ber), Last Name (Colosi), Suffix, Gender (F), Date of Birth (5/24/1986), Marital Status (Married), Medicare Eligible (No), Country (United States), Address One (590 East St), Address Two (Apt 2), City (New Haven), State (CT), Postal Code (06511), Home Phone, Work Phone (ext.), and Primary Email (anyone@rewardsplus.com).

8 Choose an **Event** from the drop down list
Enter the **Event Date** and click **Continue**

The screenshot shows the 'Life Status Change Event - Event Type and Date' form. A red box highlights the 'Choose an event' dropdown menu, the 'Enter Event Date' field (containing 12/02/2009), and the 'Continue' button. A red callout box with the number '8' points to the 'Continue' button. The form also includes a note: 'If you have already added the event, then click "My Life Status Change History" from the left navigation menu and follow the instructions shown.' The footer contains links for Privacy Policy, Terms & Conditions, and About Hewitt, along with a copyright notice for 2008, Hewitt Associates LLC.

9 Click **Add Dependent**

Yale

HELPS CONTACT CHAT FEEDBACK LOGOUT

Welcome My Health & Welfare Benefits My Other Benefits My Retirement Plans Benefits Estimator My Account

You Are Here: Welcome | My Account

Life Status Change Event - Add Dependent(s)
Click [here](#) to find out more about life status changes.

Congratulations on your marriage!

Your current dependents are shown in the table below.

- To add a new person, click **Add Dependent**.
- To proceed with the life status change event click **Continue**.

Important! You will have 30 days from the actual event date to make benefits changes and submit required documentation.

Event: Marriage
Event Date: 12/21/2009

Name	Relationship	Status	Birthdate
None on file			

Add Dependent Start Over Continue

10 Select the **Relationship** of the dependent and click **Continue**

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HELPS CONTACT CHAT FEEDBACK LOGOUT

Welcome My Health & Welfare Benefits My Other Benefits My Retirement Plans Benefits Estimator My Account

You Are Here: Welcome | My Account

Add Dependent Step 1 of 3 - Enter Information

To add a person, enter data into the open fields below and click **Continue**.

*Relationship: [Spouse] (dropdown menu open)

Spouse
Civil Union Spouse/Same Sex Child
Child
Child of Same Sex Spouse
Stepchild
Legal Dependent

Back Continue

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11 Enter the **Dependent's Information** and click **Continue**

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HELPS CONTACT CHAT FEEDBACK LOGOUT

Welcome My Health & Welfare Benefits My Other Benefits My Retirement Plans Benefits Estimator My Account

You Are Here: Welcome | My Account

Add Dependent Step 1 of 3 - Enter Information

To add a person, enter data into the open fields below and click **Continue**.

When the "Address same as employee" checkbox is selected address fields are not editable.

*Relationship: [Spouse] (dropdown menu open)

*First Name: John
Middle Name: []
*Last Name: Smith
Suffix: []
*SSN: [] - [] - [] 0000
*Confirm SSN: [] - [] - [] 0000
*Gender: Male (dropdown menu open)
*Date of Birth: 2 / 22 / []

*Fulltime Student: Yes No
*Disabled: Yes No
*Medicare Eligible: Yes No

Address same as your address:

*Country: United States (dropdown menu open)
*Address Line 1: 500 East St
Address Line 2: Apt 2
*City: New Haven
State: CT (dropdown menu open)
Postal Code: 06511 ext []

*Required Field When Available for Entry
If you do not have a Social Security Number for your dependent/beneficiary, please contact Human Resources for assistance.

Reset Fields Back Continue

12 Verify the information you entered is correct and click **Save**

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[Welcome](#)
[My Health & Welfare Benefits](#)
[My Other Benefits](#)
[My Retirement Plans](#)
[Benefits Estimator](#)
[My Account](#)

You Are Here: [Welcome](#) | [My Account](#)

Add Dependent Step 2 of 3 - Verify Information

Please verify the information below and click: **Save**.

****IMPORTANT: Adding a dependent, does not automatically enroll the dependent in benefit coverage. You must actively enroll this dependent in each benefit plan after your event has been approved.****

Relationship:	Spouse	Fulltime Student:	No
First Name:	John	Disabled:	No
Middle Name:		Medicare Eligible:	No
Last Name:	Smith	Address same as your address:	Yes
Suffix:		Country:	United States
SSN:	XXX-XX-1000	Address Line 1:	590 East St
Gender:	Male	Address Line 2:	Apt 2
Date Of Birth:	2/22/1981	Address Line 3:	
		City:	New Haven
		State/Region:	CT
		Postal Code:	06511

12

Save

13 To add another dependent click **Add Dependent** or to complete the process click **Continue**

Yale

[Welcome](#)
[My Health & Welfare Benefits](#)
[My Other Benefits](#)
[My Retirement Plans](#)
[Benefits Estimator](#)
[My Account](#)

You Are Here: [Welcome](#) | [My Account](#)

Add Dependent Step 3 of 3 - Confirmation

Your changes have been saved successfully.

To Add another Dependent, click: **Add Dependent**. Or click: **Continue**.

13

Add Dependent **Continue**

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14 Review the changes and click **Continue**

Yale

[Welcome](#)
[My Health & Welfare Benefits](#)
[My Other Benefits](#)
[My Retirement Plans](#)
[Benefits Estimator](#)
[My Account](#)

You Are Here: [Welcome](#) | [My Account](#)

Life Status Change Event - Add Dependent(s)

[Click here](#) to find out more about life status changes.

Congratulations on your marriage!

Your current dependents are shown in the table below.

- To add a new person, click: **Add Dependent**.
- To proceed with the life status change event click: **Continue**.

Important! You will have 30 days from the actual event date to make benefits changes and submit required documentation.

Event: Marriage
Event Date: 12/21/2009

Name	Relationship	Status	Birthdate
Smith, John	Spouse	Not Verified	02/22/1981

14

Add Dependent **Start Over** **Continue**

15 To start the enrollment process now click **Start Enrollment**.

To save and enroll later click **Continue**

The screenshot shows a web interface for benefit enrollment. On the left is a navigation menu with items: Benefit Selections, Beneficiary Designations, Dependent Information, Add Life Status Change Event, and My Life Status Change History. The main content area includes:

- Relevant Information:** IMPORTANT: Click **Start Enrollment** to update your benefits or click the **Continue** button to proceed to the My Life Status Change History Screen.
- A warning: In addition to making your benefit updates, please submit the required documentation noted below to the Yale Verification Team. Failure to do so will result in this event being denied.
- REQUIRED DOCUMENTATION:** Submit a copy of the marriage certificate.
- HOW TO SUBMIT REQUIRED DOCUMENTATION:**
 - Fax to: 1-866-879-0216
 - Mail to: Yale Benefits, c/o Hewitt Associates LLC, 10150 York Road, 3rd Floor, Hunt Valley, MD 21030
- A note: Faxed documentation must be submitted and mailed documentation must be postmarked, on or before 30 days from the date of the event.
- Dependents:** A table with columns: Name, Relationship, Status, Birthdate.
- At the bottom of the main content area are two buttons: **Start Enrollment** and **Continue**. A red callout box with the number '15' points to the **Start Enrollment** button.

At the bottom of the page is a footer with links for Privacy Policy, Terms & Conditions, and About Hewitt, and a copyright notice: Copyright © 2008, Hewitt Associates LLC.