

# Enrollment Checklist for New Faculty/Staff

Benefit Plan	Considerations	Resources
<ul style="list-style-type: none"> <li>• <b>Medical</b></li> </ul>	<ul style="list-style-type: none"> <li>○ Compare medical plan features and premiums and think about your likely usage of services.</li> <li>○ Check each plan's directory of participating clinics/providers to make sure your needs will be met.</li> <li>○ Decide whether to enroll in the PPO Plan, Health Savings Account Plan or the HMO. You can also waive medical coverage.</li> <li>○ Check <a href="#">eligibility</a> requirements for your dependents to be sure they may be enrolled.</li> <li>○ Check your home mail for a welcome packet within two weeks of your enrollment date.</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">'Plansource'</a> enrollment site</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Dental</b></li> </ul>	<ul style="list-style-type: none"> <li>○ Your dental plan choice is to enroll in coverage through Delta Dental or waive coverage.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Vision</b></li> </ul>	<ul style="list-style-type: none"> <li>○ You are eligible for vision benefits regardless of whether you've elected a University-provided medical plan.</li> <li>○ The core vision benefit plan is your default choice.</li> <li>○ Your option is to purchase the enhanced vision plan.</li> </ul>	
<ul style="list-style-type: none"> <li>• <b>Health Care Flexible Spending Account</b></li> <li>• <b>Dependent Care Flexible Spending Account</b></li> </ul>	<p>The Health Care flexible spending account is an option for you to save on taxes if you haven't already enrolled in the Health Savings Account</p> <ul style="list-style-type: none"> <li>○ Review health or dependent care costs that are eligible under the plan. Navia Benefits, our Spending Account administrator, is a useful resource to you.</li> <li>○ Calculate your estimated out-of-pocket health or dependent care expenses and your paycheck contribution amount through December 31.</li> <li>○ Watch your mail for a welcome packet and periodic account statements.</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">'Plansource'</a> enrollment site</li> </ul>

Remember to complete your Plansource enrollment within 30 days of your hire date.

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Benefit Plan	Considerations	Resources
<ul style="list-style-type: none"> <li>• <b>Life Insurance</b></li> <li>• <b>Accidental Death and Dismemberment</b></li> </ul>	<ul style="list-style-type: none"> <li>○ Decide if the University-paid basic insurance benefit provides enough protection for you.</li> <li>○ Consider the coverage needs of your family members.</li> <li>○ Be sure to file a copy of your beneficiary election with your other important records.</li> <li>○ Complete Cigna’s Evidence of Insurability process for optional coverage of \$200,000 or more (\$20,000 or more for a spouse/state registered domestic partner.) Check your mail for Cigna’s approval of your application.</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">‘Plansource’</a> enrollment site</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Retirement</b></li> </ul>	<ul style="list-style-type: none"> <li>○ Decide how much of your pay to set aside as retirement savings in the Employees Retirement Plan.</li> <li>○ Carefully review the investment information provided on the Fidelity site and select one or more of the available investment choices. (Fidelity Guidance and Planning Consultants are available by phone to answer your questions.)</li> <li>○ Designate a beneficiary for your Fidelity retirement account.</li> </ul>	<ul style="list-style-type: none"> <li>- Enroll directly with Fidelity: <a href="http://www.netbenefits.com/su">www.netbenefits.com/su</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>Commute Benefit</b></li> </ul>	<ul style="list-style-type: none"> <li>○ Decide whether to obtain a parking permit for your car or commute by transit with an Orca transit pass.</li> <li>○ If Orca is your choice, provide an HR voucher to the Transportation office and receive your pass.</li> </ul>	<ul style="list-style-type: none"> <li>- <a href="#">Orca Transit Info</a></li> <li>- <a href="#">Parking Permit Info</a></li> </ul>
<ul style="list-style-type: none"> <li>• <b>Other Benefits</b></li> <li>• <b>Privileges and Amenities</b></li> </ul>	<ul style="list-style-type: none"> <li>○ Familiarize yourself with the additional benefits and other programs that are available to you through SU including:             <ul style="list-style-type: none"> <li>- Tuition benefits,</li> <li>- Wellbeing resources including Resources for Living EAP, Cariloop caregiving coaches and much more</li> <li>- Eisiminger Fitness Center</li> <li>- Lemieux Library and other campus services.</li> </ul> </li> </ul>	

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