

Use this Benefits eForm to change your Health Savings Account (HSA) enrollment.

Menu Navigation:



Forms Library > Access Forms > **Benefits eForms: Submit New Form**

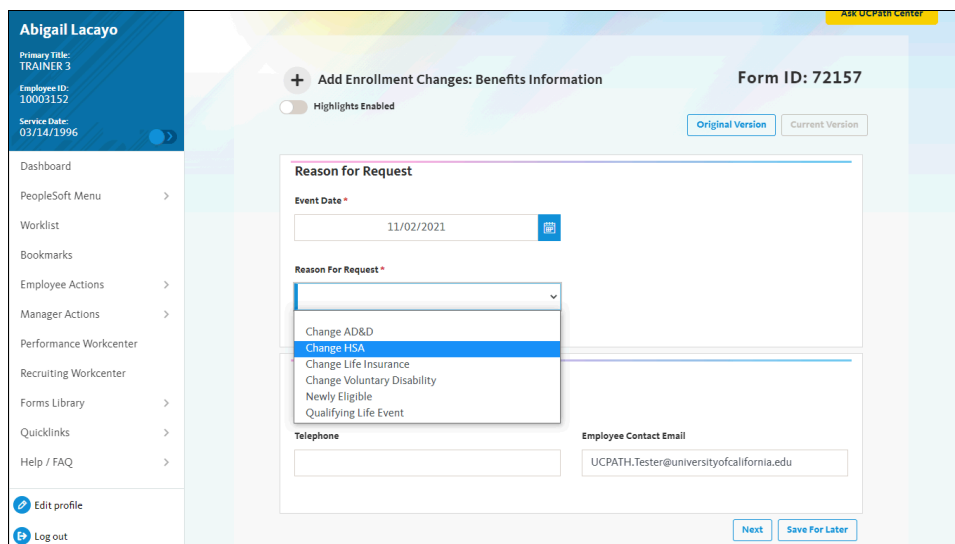
Detailed information and guides for UC Benefits Plans is available on UCnet:
<https://ucnet.universityofcalifornia.edu/compensation-and-benefits/index.html>

Note: This example uses sample images as seen on a computer. Sample images appear differently on a tablet or smartphone, but the steps remain the same.

The screenshot shows the UCPath web interface for submitting a form. On the left is a navigation menu for user Abigail Lacayo, with options like Dashboard, PeopleSoft Menu, Worklist, and Edit profile. The main content area is titled "Add Enrollment Changes: Benefits Information" and includes a "Form ID: 72157" and "Highlights Enabled" toggle. The form contains two sections: "Reason for Request" with an "Event Date" field (placeholder: MM/DD/YYYY) and a "Reason For Request" dropdown; and "Employee Contact Information" with fields for "Telephone" and "Employee Contact Email" (pre-filled with UCPATH.Tester@universityofcalifornia.edu). Buttons for "Original Version", "Current Version", "Next", and "Save For Later" are visible.

UCPath Task:
Benefits eForms: Submit Form to Change HSA
Enrollment

Step	Action
1.	Click in the Event Date field. 
2.	Enter the desired information into the field. Enter " 11/02/2021 ".
3.	Click the button to the right of the Reason For Request field. 



Abigail Lacayo
Primary Title: TRAINER 3
Employee ID: 10003152
Service Date: 03/14/1996

+ Add Enrollment Changes: Benefits Information Form ID: 72157
Highlights Enabled

Original Version Current Version


Reason for Request

Event Date *
11/02/2021

Reason For Request *
Change AD&D
Change HSA
Change Life Insurance
Change Voluntary Disability
Newly Eligible
Qualifying Life Event

Telephone Employee Contact Email
UCPATH.Tester@universityofcalifornia.edu

Next Save For Later

Step	Action
4.	Click the Change HSA list item. 

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+ Add Enrollment Changes: Benefits Information Form ID: 72157

Highlights Enabled Original Version Current Version

Reason for Request

Event Date *
11/02/2021

Reason For Request *
Change HSA

Based on your selections above you may be able to complete your enrollment using UCPath self-service, by Navigating to the UCPath portal, clicking on Employee Actions, clicking on Health & Welfare, and selecting the applicable event.

If you wish to continue using form to enroll, please provide details.

Please Explain Why You Are Using This Form

Edit profile
Log out

Step	Action
5.	Click the scrollbar.

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Based on your selections above you may be able to complete your enrollment using UCPath self-service, by Navigating to the UCPath portal, clicking on Employee Actions, clicking on Health & Welfare, and selecting the applicable event.

If you wish to continue using form to enroll, please provide details.

Please Explain Why You Are Using This Form

Employee Contact Information

Please provide your preferred contact information.

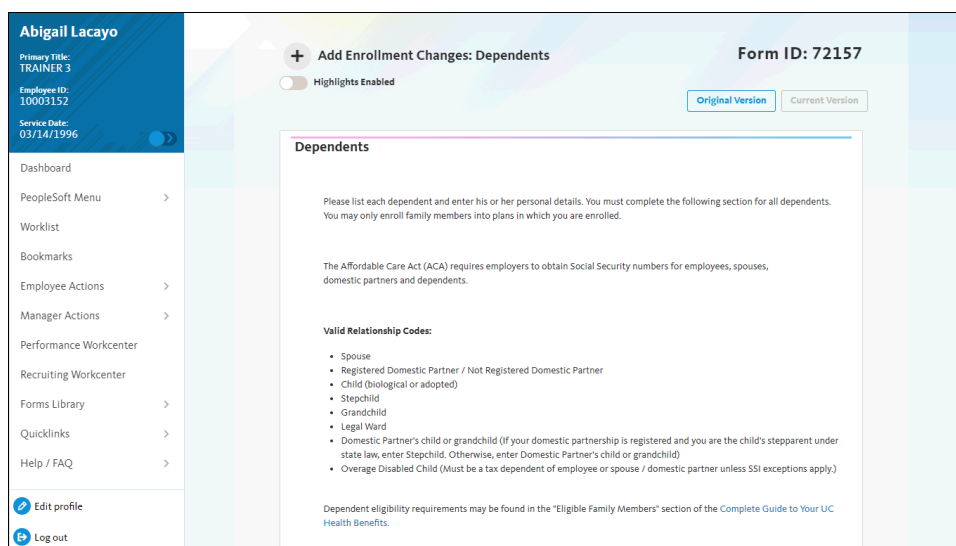
Telephone Employee Contact Email

Next Save For Later

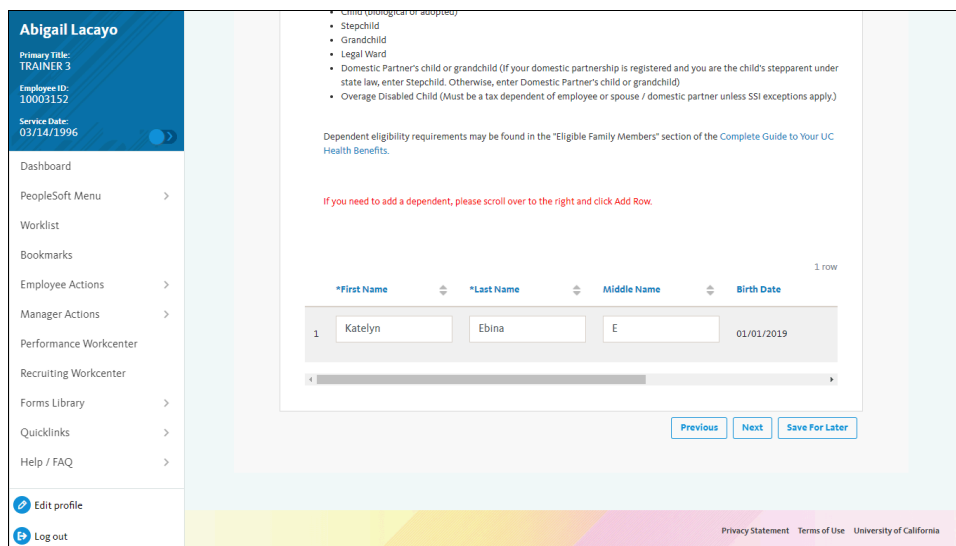
Edit profile
Log out

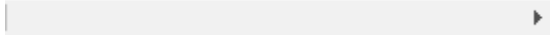
Step	Action
6.	Use this text box to let UCPath Production know the reason for using the Benefits eForm instead of the Health & Welfare options on the UCPath Self Service Dashboard.
7.	Enter your preferred contact information if needed.

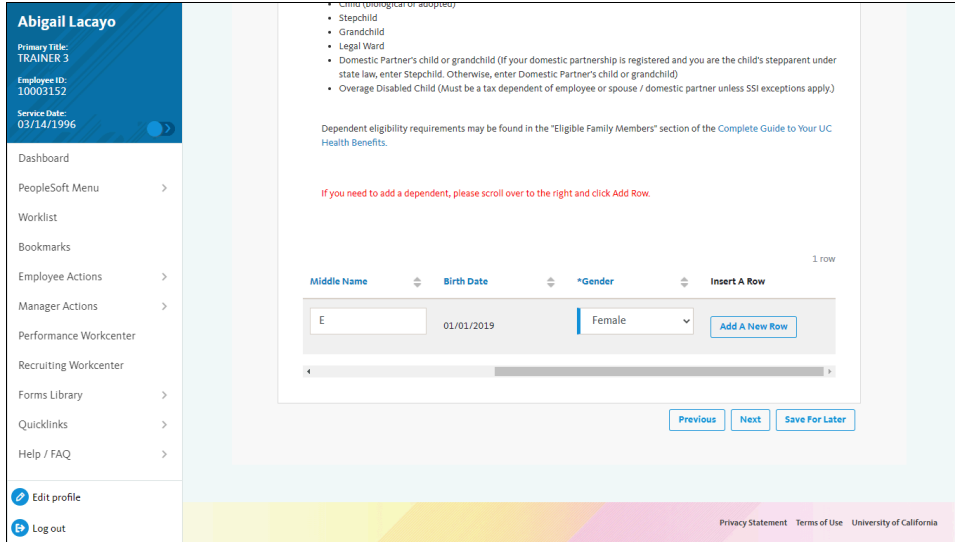
Step	Action
8.	The Save For Later button is available on every page of the eForm.
9.	Click the Next button.



Step	Action
10.	The Dependents page appears for you to review dependent information and add new dependent(s) if needed.
11.	Click the scrollbar.



Step	Action
12.	Click the scrollbar to see additional information or to add a new dependent. 



Abigail Lacayo
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- Stepchild
- Grandchild
- Legal Ward
- Domestic Partner's child or grandchild (if your domestic partnership is registered and you are the child's stepparent under state law, enter Stepchild. Otherwise, enter Domestic Partner's child or grandchild)
- Overage Disabled Child (Must be a tax dependent of employee or spouse / domestic partner unless SSI exceptions apply)

Dependent eligibility requirements may be found in the "Eligible Family Members" section of the [Complete Guide to Your UC Health Benefits](#).


If you need to add a dependent, please scroll over to the right and click **Add Row**.

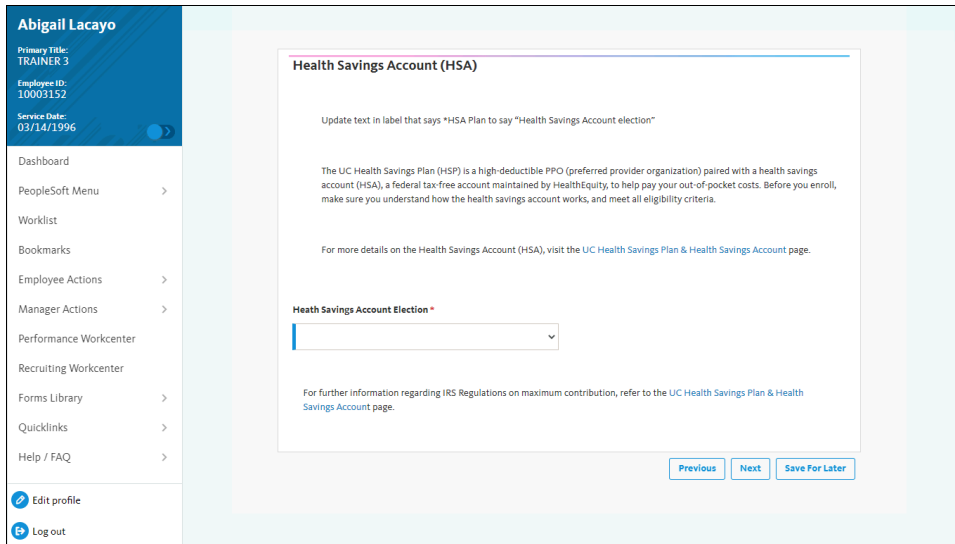
Middle Name	Birth Date	*Gender	Insert A Row
E	01/01/2019	Female	Add A New Row

1 row

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Step	Action
13.	Click the Add A New Row button if you need to add new dependent information.
14.	Click the Next button. 



Abigail Lacayo
 Primary Title: TRAINER 3
 Employee ID: 10003152
 Service Date: 03/14/1996

Health Savings Account (HSA)

Update text in label that says "HSA Plan to say "Health Savings Account election"


The UC Health Savings Plan (HSP) is a high-deductible PPO (preferred provider organization) paired with a health savings account (HSA), a federal tax-free account maintained by HealthEquity, to help pay your out-of-pocket costs. Before you enroll, make sure you understand how the health savings account works, and meet all eligibility criteria.

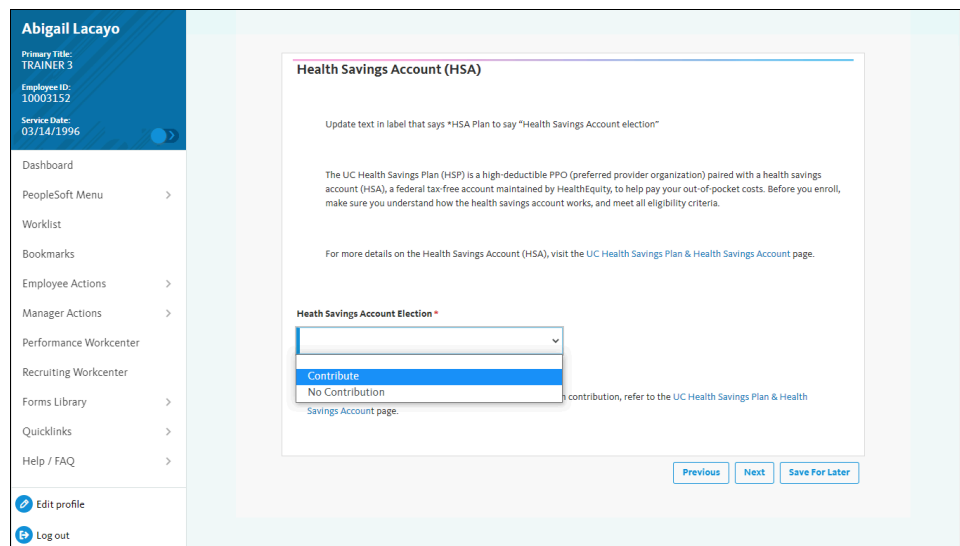
For more details on the Health Savings Account (HSA), visit the [UC Health Savings Plan & Health Savings Account page](#).


Health Savings Account Election *

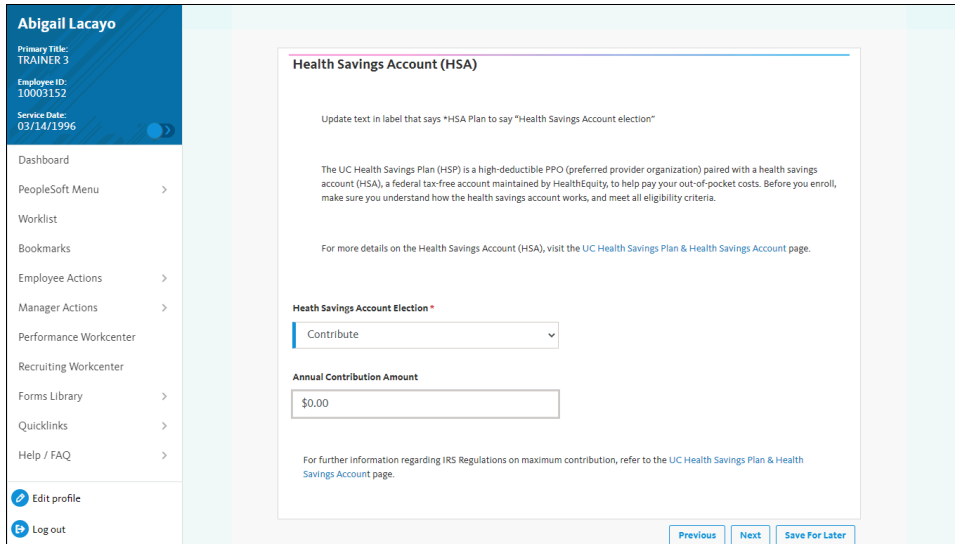
For further information regarding IRS Regulations on maximum contribution, refer to the [UC Health Savings Plan & Health Savings Account page](#).

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Step	Action
15.	<p>The Health Savings Account (HSA) is applicable <u>if you are enrolled in the UC Health Savings Plan (HSP)</u>, PPO medical benefit plan.</p> <p>Please refer to the "UC Health Savings Plan & Health Savings Account" page in UCnet for detailed HSA information or, if you are <u>not</u> enrolled in UC Health Savings Plan, please refer to the "Flexible Spending Accounts" page in UCnet.</p>
16.	<p>Click the button to the right of the Health Savings Account Election field.</p> 



Step	Action
17.	Click the Contribute list item. 



Abigail Lacayo
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 Service Date: 03/14/1996

Dashboard
 PeopleSoft Menu >
 Worklist
 Bookmarks
 Employee Actions >
 Manager Actions >
 Performance Workcenter
 Recruiting Workcenter
 Forms Library >
 Quicklinks >
 Help / FAQ >

Edit profile
 Log out

Health Savings Account (HSA)

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For more details on the Health Savings Account (HSA), visit the [UC Health Savings Plan & Health Savings Account page](#).

Health Savings Account Election *


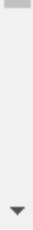
Contribute

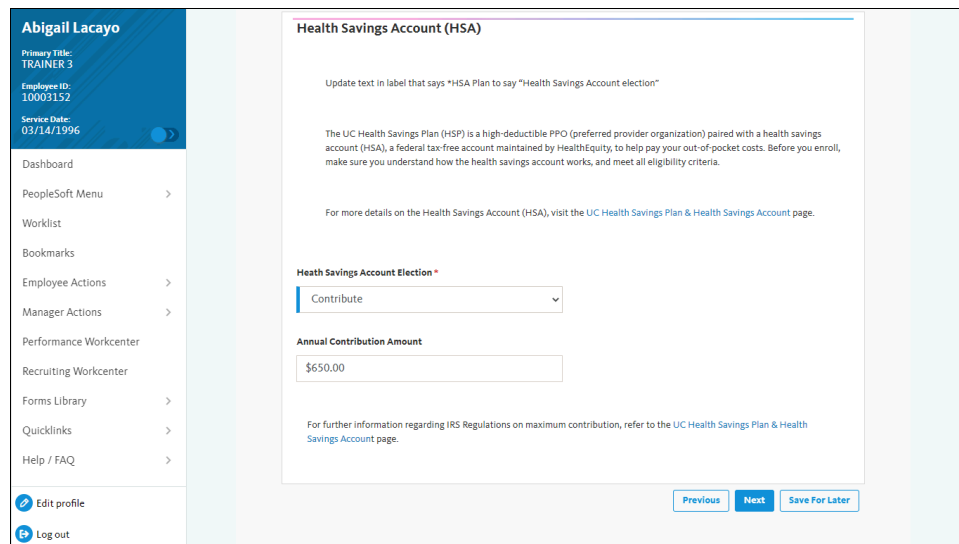
Annual Contribution Amount

\$0.00

For further information regarding IRS Regulations on maximum contribution, refer to the [UC Health Savings Plan & Health Savings Account page](#).

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Step	Action
18.	Click in the Annual Contribution Amount field. 
19.	Enter the desired information into the Annual Contribution Amount field. For this example, enter " 650.00 ".
20.	Click the scrollbar. 



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For more details on the Health Savings Account (HSA), visit the [UC Health Savings Plan & Health Savings Account page](#).

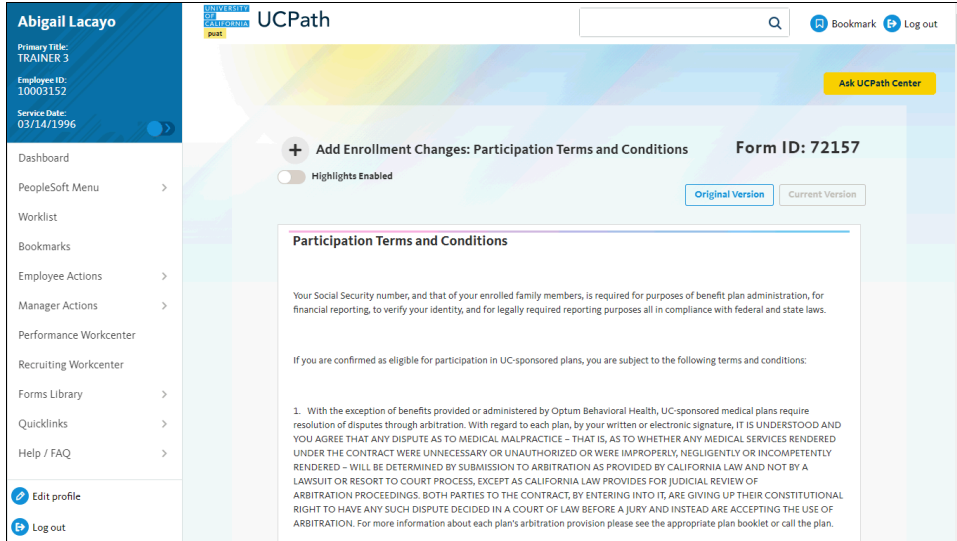
Health Savings Account Election *
Contribute

Annual Contribution Amount
\$650.00

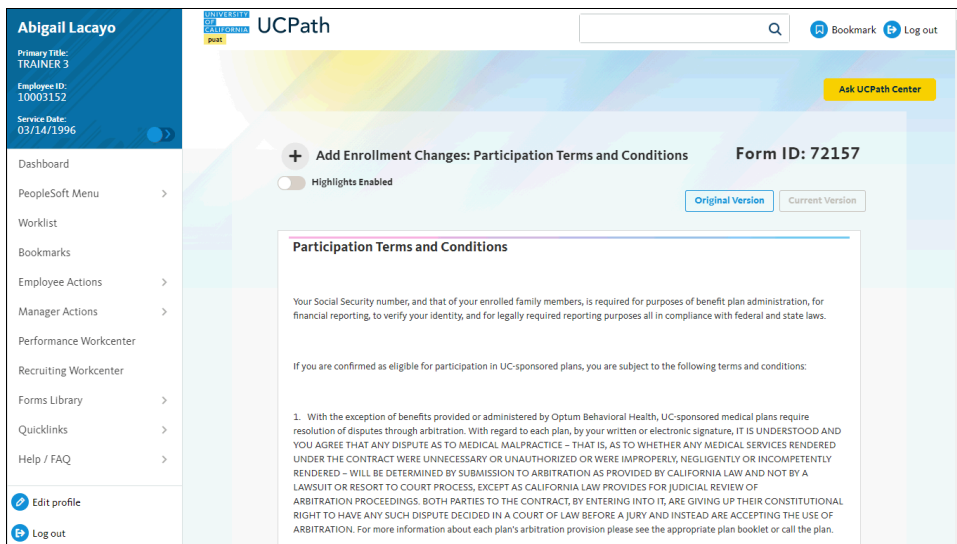
For further information regarding IRS Regulations on maximum contribution, refer to the [UC Health Savings Plan & Health Savings Account page](#).

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Step	Action
21.	Click the Next button. 

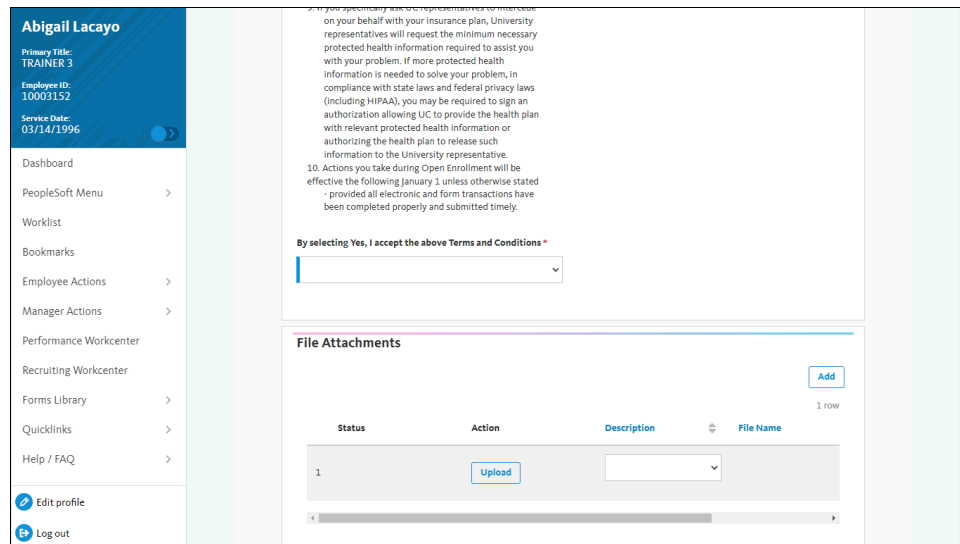


Step	Action
22.	Read all of the Participation Terms and Conditions sections as you scroll down this page. Note: This simulation does not show all of the page content and skips to the next action item.

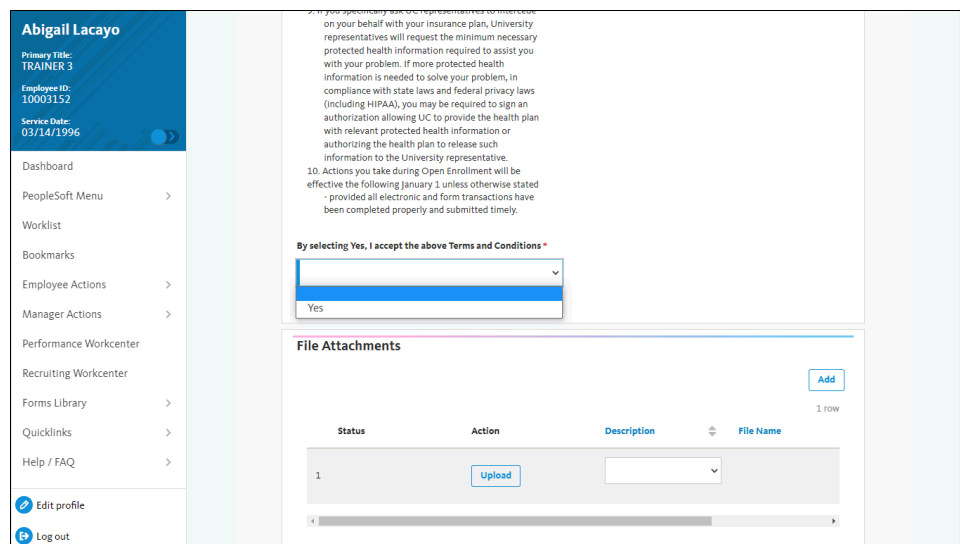


**UCPath Task:
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Enrollment**

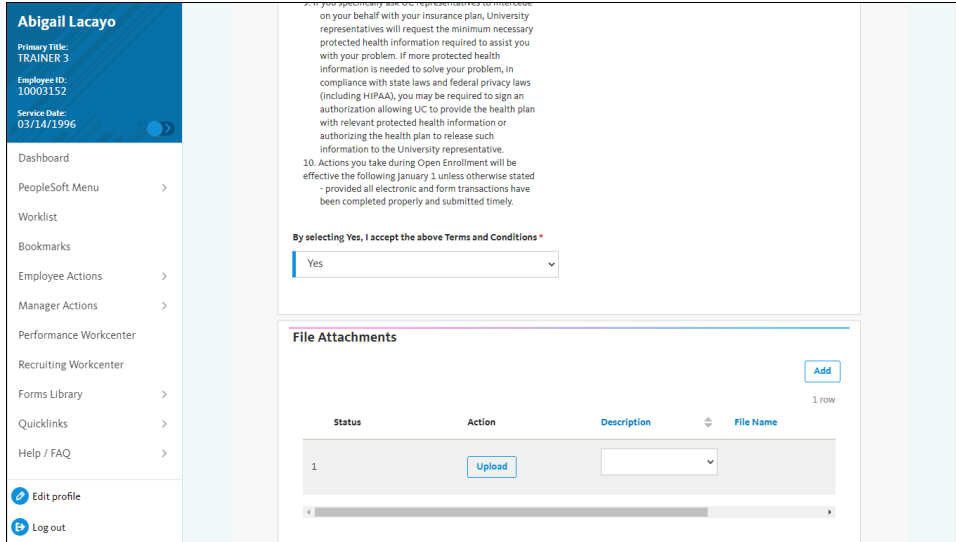
Step	Action
23.	Click the scrollbar.



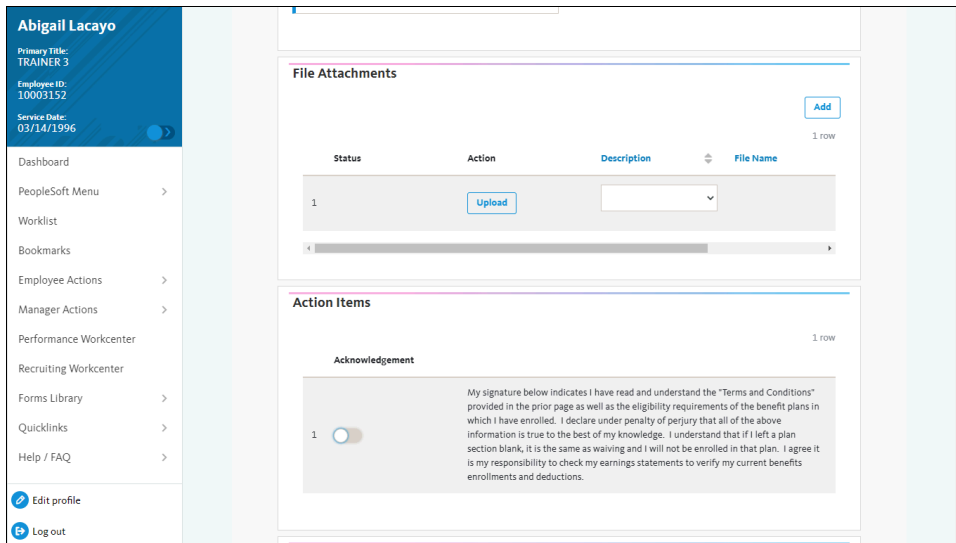
Step	Action
24.	Click the button to the right of the By selecting Yes, I accept the above Terms and Conditions field.




Step	Action
25.	Click the Yes list item. Yes

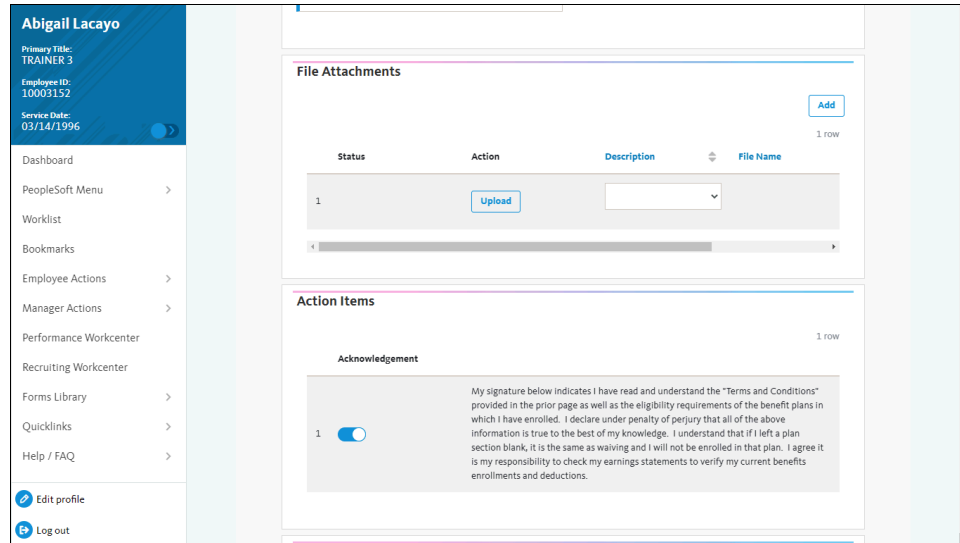



Step	Action
26.	Click the scrollbar.

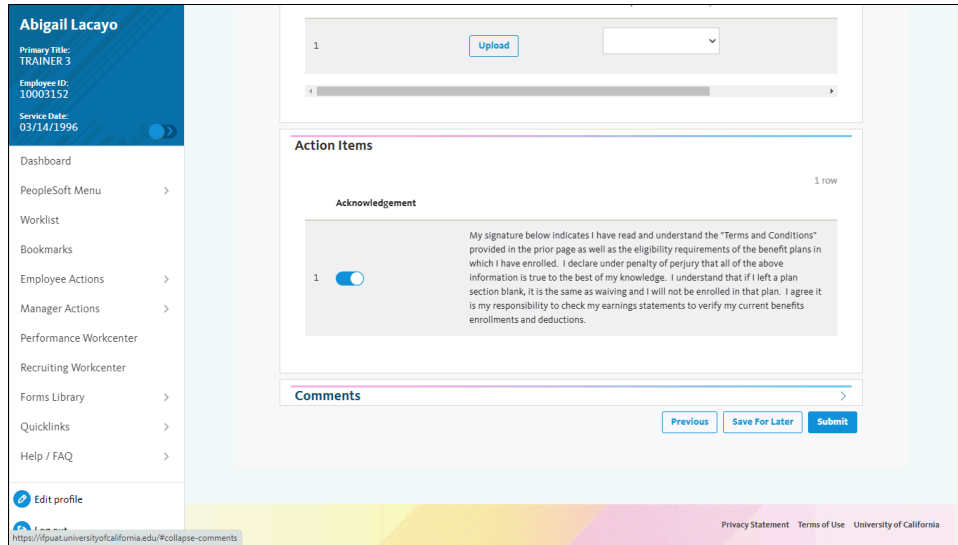



UCPath Task:
Benefits eForms: Submit Form to Change HSA Enrollment

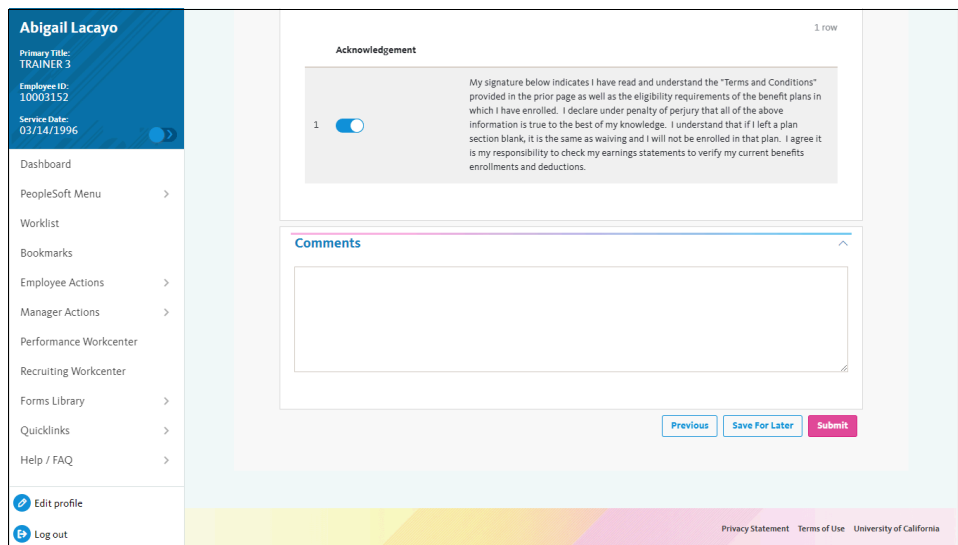
Step	Action
27.	Use the File Attachments section to upload supporting documentation. - Use the Upload button to add one file at a time. - Use the Add button to create new rows to add additional files if needed.
28.	Click the Acknowledgement button. 



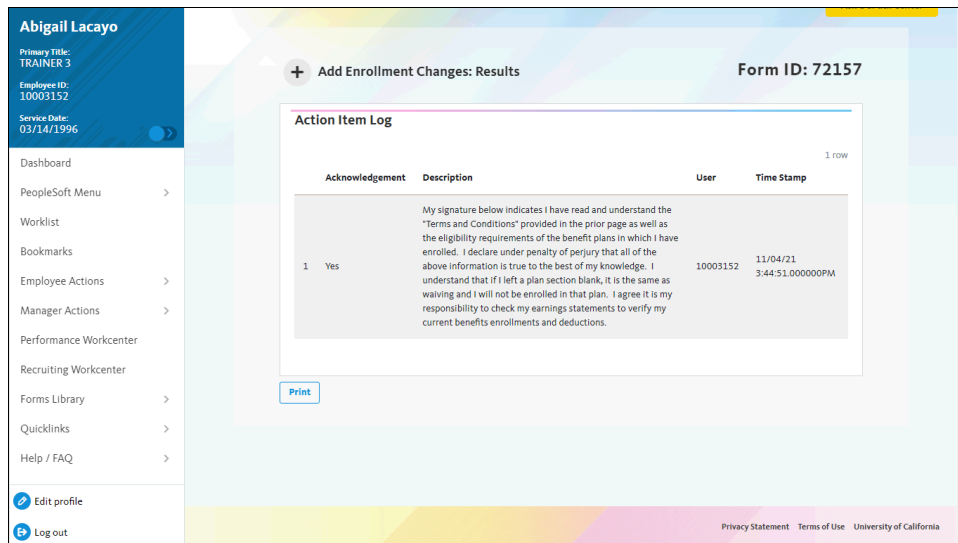
Step	Action
29.	Click the scrollbar. 



Step	Action
30.	Click the button to the right of the Comments field to open the comments text box. 



Step	Action
31.	If needed, add comments to the form prior to submitting.
32.	Click the Submit button.



Step	Action
33.	The Action Item Log provides a Time Stamp confirmation. Use the Print button to create a PDF of the submitted form to keep for your records.
34.	You have completed the Benefits eForm to change your Health Savings Account (HSA) enrollment. End of Procedure.