BENEFITS Enrollment Guidelines Click on any web address in the table to go directly to that website.

BENEFIT	IS ENROLLMENT REQUIRED?	CAN I ENROLL ON SELF SERVICE?	IS PAPER ENROLLMENT AN OPTION?
Health Insurance Dental Insurance Vision Insurance	Yes, even if you are electing to decline coverage	Yes, during the initial 60 days of eligible employment, marriage or birth/adoption of a child; and annually during Open Enrollment. Enrollment at any other time must be done via paper enrollment form.	Yes. Use the RF Benefits Enrollment form.
Basic Life and AD&D Coverage	No, coverage is automatic.	Yes and no. Coverage is automatic, so you will not have to enroll, but you may designate or change beneficiaries during the initial 60 days of eligible employment and annually during Open Enrollment. Beneficiary changes at any other time must be made via paper enrollment form.	Yes and no. Coverage is automatic, so you will not have to enroll, but you may designate or change beneficiaries using the RF Benefits Enrollment form.
Optional Life and AD&D Coverage	Yes.	Yes, during the initial 60 days of eligible employment. At any other time, coverage and beneficiary changes must be made via paper enrollment form.	Yes. Use the RF Benefits Enrollment form. Evidence of insurability is also required for coverage increases and late enrollments.
Optional Dependent Life and AD&D Coverage	Yes.	Yes, during the initial 60 days of eligible employment. At any other time, coverage changes must be made via paper enrollment form.	Yes. Use the RF Benefits Enrollment form and Optional Dependent Life Enrollment form. Evidence of insurability is required for dependent or spouse coverage greater than $20,000 and for coverage changes.
NY SDI/ PFL	No, coverage is automatic.	No, coverage is automatic.	No, coverage is automatic.
Voluntary Short-Term Disability	Yes.	Yes, during the initial 60 days of eligible employment. At any other time, coverage changes must be made via paper enrollment form.	Yes. Use the RF Benefits Enrollment form and Voluntary Short-Term Disability Enrollment form. Evidence of insurability is also required for coverage increases and late enrollments.
Long-Term Disability	No, coverage is automatic.	No, coverage is automatic.	No, coverage is automatic.
Basic Retirement	No. Contributions begin automatically after you satisfy the eligibility requirements.	No. However, you should log on to the vendor website (www.tiaa.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).	No. However, you should log on to the vendor website (www.tiaa.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).
Optional Retirement	Yes.	Yes, at any time during the year. However, you should log on to the vendor website (www.tiaa.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).	Yes. Use the RF Salary Reduction Agreement form. However, you should log on to the vendor website (www.tiaa.org/rfsuny) to designate your beneficiary and/or if you would like to choose an investment option other than the default (age-based target date fund).
Deferred Compensation (special eligibility rules apply)	Yes.	No. Paper enrollment form only.	Yes. Complete the voluntary salary deferral agreement and the TIAA enrollment form.
Health and Dependent Care Flexible Spending Accounts	Yes.	Yes, during the initial 60 days of eligible employment and annually during Open Enrollment. At any other time, coverage changes must be made via paper enrollment form.	Yes. Use the Flexible Spending Account Enrollment form.
RF Ride Transit Benefit	Yes.	Yes, but log in via the vendor website (www.payflex.com).	No.

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LOG INTO THE ORACLE BUSINESS SYSTEM

How to Access, Log In and Navigate

You can access Self Service from anywhere you have Internet access. You will need your username and password. If you are a first-time user, you will need to set up an account.
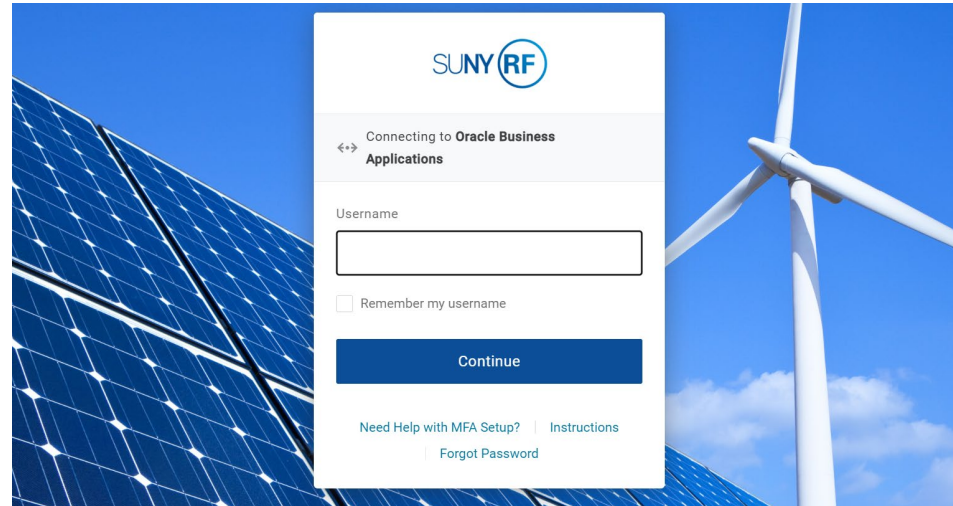
1. Go to Employee Self Service
2. Click **Access Employee Self Service**
3. Enter your Research Foundation ID Number as your username. If you are an RF employee this was sent to you via email when you were first hired. (If you are not contact your campus information security administrator for this number.)
4. Enter your password.
   Tip! *If you have forgotten your password, click "Forgot Your Password" on the login screen. Your information will be emailed to you.*
5. Enter your OneLogin Protect Code. *To set this up, please see the MFA Quick Start Guide.*
6. Go to the Business Applications portlet and click **Self Service** link.

Site Availability

The Self Service website undergoes daily planned system maintenance, from 6:00 to 6:30 p.m. and 2:00 to 4:00 a.m. EST. If you attempt to log in during these times, you will encounter a message that reads, "Employee Self Service Unavailable."

Log Out to Protect Your Personal Information!

When you've completed your session, click **Logout** in the list of links in the upper right corner of the screen. This will help prevent

unauthorized access to your information.

If you need help with Self Service, contact Customer Services at: customerservices@rfsuny.org or (518) 434-7222.

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BENEFITS How to View Your Benefits

GO TO: Employee Self Service Home > Main Menu >
Employee Self Service > My Benefits

1. **Accept** the Legal Disclaimer verifying that you are
   providing accurate information and click **Next**.

2. On the Dependents and Beneficiaries page, you can
   review your dependent and beneficiary information. If
   you need
   to update this information see *How to Enroll in or Make
   Changes to Benefits* on the next page. Click **Next**.

3. Select the program you wish to review and click **Next**.

4. Click the **Current Benefits** tab and use the drop-down
   menu to select the effective date of the benefits you
   would like to review.

5. Click **Go**.

BENEFITS How to Enroll in or Make Changes to Benefits

1. **Accept** the Legal Disclaimer verifying that you are providing accurate information and click **Next**.

2. On the Dependents and Beneficiaries page, you can add or update your dependent and beneficiary information.
   To add dependents and/or beneficiaries:
   Tip! *Before getting started, be sure you have your dependent's or beneficiary's full legal name, date of birth and Social Security number (if one has been assigned).*

   a. Click **Add Another Person**.

   b. Enter information in all the required (*) fields following the guidelines below. Social Security numbers are required unless your dependent has not yet been issued one.
   If you are a new employee, the relationship start date is your date of hire.
   If you have a new child, the relationship start date is your child's date of birth/adoption.
   If you are adding a spouse, the relationship start date is your date of marriage.
   If you have dependent changes for any other reason, contact your campus Benefits Office.

   c. Click **Apply** at the bottom of the screen to save your changes.

   d. Repeat these steps to add more dependents or beneficiaries. *Continues next page >>*

! *Be very careful to enter your correct relationship start date. An error in this early step will create issues throughout your enrollment process that may force you to re-start or disqualify your enrollment.*

When you add dependents any time after initial or open enrollment ends, your new dependents will need to be certified. When off-cycle changes are necessary to your dependents list due to birth, adoption, or marriage, you must submit legal documentation for the changes. Acceptable proof includes marriage and birth certificates or adoption documentation.

Your campus Benefits Office must receive certification of your dependent changes before coverage will be effective.

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To update information for a current dependent and/or beneficiary:

a. Click the pencil icon in the row in which the person's name appears.

b. Update the information as needed.

c. Click **Apply** at the bottom of the screen to save your changes.

d. Repeat these steps to update more dependents and beneficiaries.

3. When you are finished adding/updating your dependents and beneficiaries, click **Next**.

4. Select the **Benefits** program for the following benefits.

Enrolling In …	Choose Program Name …
Medical, Dental, Vision, Voluntary Life and AD&D Insurance, Voluntary Short-term Disability, Flexible Spending Accounts *Note: Basic Life and AD&D, Short-term Disability, Paid Family Leave, and Long-term Disability are automatic benefits and do not require enrollment.*	Benefits
Qualified Transportation Benedit	See carrier website to enroll, you will not be able to enroll here.

5. Click **Next**.

Continues next page >>

6. On the Benefits Enrollment page is a summary of your current benefit elections. All newly eligible employees will default to "Waived" for Health, Dental and Vision coverage. To make your elections, click **Update Benefits** on the bottom right. For more information about your options, visit www.rfsuny.org/benefits.

7. Use the checkboxes and fields to enter your elections for each benefit. Benefit levels with a certificate icon next to them require certification. Also, some benefits are provided to you automatically at no charge. You will not be able to change those elections.
Tip! Select the pre-tax option to ensure your benefits are exempt from taxes.

> If you don't see the benefit options you're looking for, make sure you have added all your dependents and their birth dates. If you go back to add dependents or beneficiaries, your Benefits Enrollment changes will not be saved. If you are not eligible for a certain option and you think you should be, contact your campus Benefits Office.

⚠ *Your Dependent Care and/or Health Care Spending elections must be entered annually. The amount you enter for dependent care should not include the employer subsidy. To receive the subsidy, you must check the Dependent Care Spending Employer Subsidy box.*

8. When you're ready to elect coverages for specific dependents, click **Next**.

Continues next page >>

9. Use the checkboxes to designate which dependents receive which coverages.

10. Once you have made your elections, click **Next**.

11. On the Beneficiary Selection page, update your beneficiary designations. Click **Recalculate** to ensure your totals do not exceed 100%.
    Tip! If you would like some or all of your benefits to go to your estate, assign the percentage to your own name.

12. Once you have entered your beneficiary designations, click **Next**.

13. On the Confirmation Statement, you can review your elections to confirm they are accurate.

    a. **To print your Confirmation Statement**, click **Confirmation Statement**, and then use your browser's print function.

    ⚠️ *You will not have a chance to review your confirmation statement again, so be sure to print it now for future reference.*

    b. **To make changes to your elections**, click **Back**.

    c. **To complete the enrollment process**, click **Finish**.

    > **On the Confirmation Statement page, you may see warnings indicating that proper certification is required before coverage can begin for your dependents. Please contact your campus Benefits Office for more details.**

    *Tip! To enroll in Optional Retirement, click the **Change Program** tab at the top of the page to switch the benefits program to Optional Retirement and start at step 3 in the Optional Retirement section.*

BENEFITS How to Enroll in or Make Changes to Optional Retirement

GO TO: Employee Self Service Home > Main
Menu > Employee Self Service > My Benefits

1. **Accept** the Legal Disclaimer verifying that you are providing accurate information and click **Next**.

2. On the Dependents and Beneficiaries page, click **Next**.

3. Select the **Optional Retirement** program and click **Next**.

4. On the Benefits Enrollment page is a summary of your current Optional Retirement election (stated as a percentage of gross pay). To enroll or update this amount, click **Update Benefits** on the bottom right.

5. Enter the percent of gross pay you would like to contribute and click **Next**.

6. Click **Next** again as there are no covered dependents for this program and beneficiaries must be designated at TIAA-CREF.

7. On the Confirmation Statement, you can review your elections to confirm they are accurate.

   a. **To print your Confirmation Statement**, click **Confirmation Statement**, and then use your browser's print function.

   ⚠ *You will not have a chance to review your confirmation statement again, so be sure to print it now for future reference.*

   b. **To make changes to your elections**, click **Back**.

   c. **To complete the enrollment process**, click **Finish**.

This deduction will take place immediately, and be processed in the first pay period to be run after you have made your election.

Note that you can review your dependent and beneficiary information, but all beneficiaries for Optional Retirement must be managed at TIAA-CREF.

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