Student Health Insurance Guide

Reappointed Graduate Assistants, Graduate Fellows, Graduate Trainees

This Student Health Insurance Plan (SHIP) guide is intended for graduate students who were previously appointed as a Graduate Assistant, Graduate Fellow, and Graduate Trainee in the Spring semester and are being reappointed in the Fall semester.

Your current benefit elections will carry over from the Spring semester to the Fall semester. **If you do not need to make any changes to your benefit elections from the Spring semester, no further action is required. If you need to change your benefits, please follow the guide below.**

Navigating to Workday

SHIP benefits are managed via Workday.

To access Workday:

1. Visit WorkLion (worklion.psu.edu) and log in.
2. On the WorkLion portal landing page, click the **Workday** link in the left navigation menu.
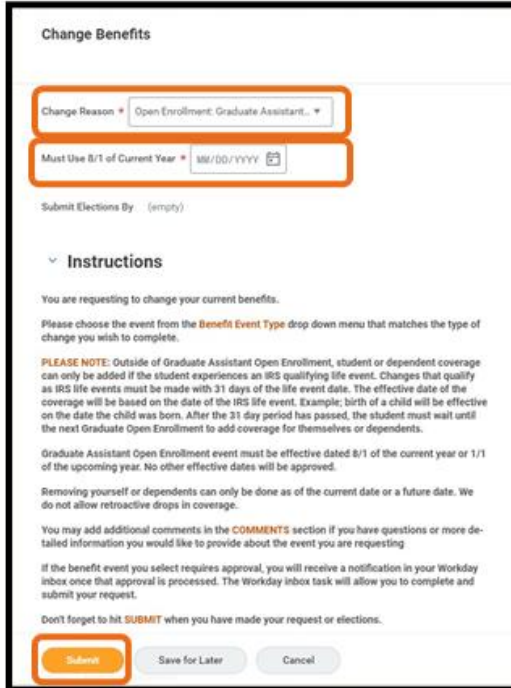
Make a Change to Your Benefits

Step 1: Initial Request to Change Your Benefits

If you need to make a change to your benefits, you will need to request a change by following the steps outlined below.

1. Click **Menu** in the top left corner of the Workday homepage and select the **Benefits and Pay** app.

2. In the **Tasks and Reports** section, select **Change Benefits**.
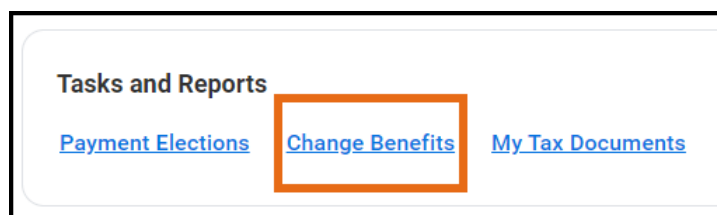
3. On the **Change Benefits** page, select: *Open Enrollment: Graduate Assistant, Fellow, Trainee* as the **Change Reason** and enter 8/1 of the current year in the date field. Click **Submit** to send the request to the Student Health Insurance Office in University Health Services.


IMPORTANT! You still must complete the remaining steps to change your benefit elections. This initial request is ONLY to notify the Student Health Insurance Office that you wish to make changes to your benefit elections.

The Student Health Insurance Office will review the information you provided in your request and make corrections, if necessary. Once they approve your request, you will be notified to proceed with the benefit election update/change. At this point, you may log out of Workday and wait for an email notification for next steps.

Step 2: Elect Your Benefits

After the Student Health Insurance Office approves your request, you will receive a Workday task to continue your benefit change. You will receive notification of this task in your Penn State email.

1. Return to Workday.
2. Open the **Elect Student Health Insurance: Your Name** task. You may see this task in the **Awaiting Your Action** card on the Workday homepage, or, if you have more than three outstanding tasks, you may need to navigate to **My Tasks** in the top right corner of the homepage.
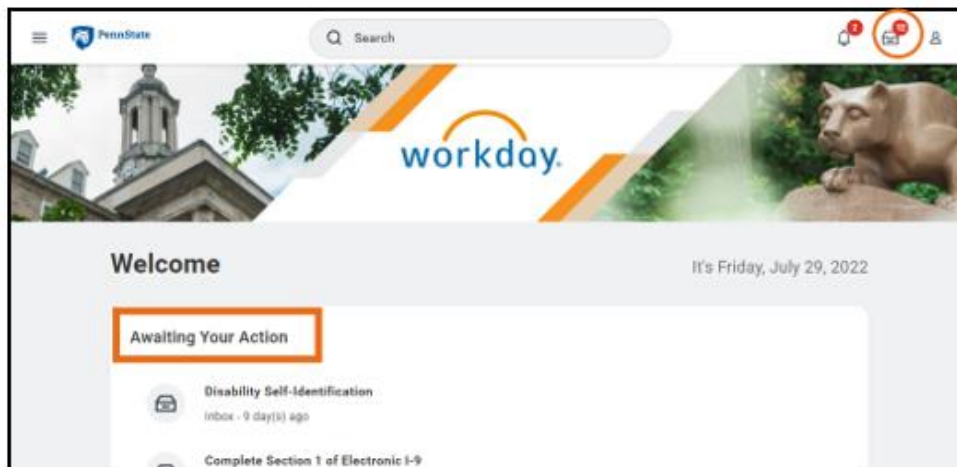

3. Click on the **Let's Get Started** button in the task to start making changes to your benefit elections.

4. The Graduate Assistant, Fellow, Trainee Open Enrollment screen will open. To waive your coverage, continue to the *How to Waive SHIP Coverage* section. To enroll dependents, skip to the *How to Enroll Dependents* section.

How to Waive SHIP Coverage

If you wish to waive enrollment in the Student Health Insurance Plan, please follow the steps below. Please be aware that there are certain health insurance requirements for international students.

1. Each benefit card on the Graduate Assistant, Fellow, Trainee Open Enrollment page will have a Manage, Enroll, or View option. Click on **Manage** or **Enroll** for any benefit that you wish to modify.
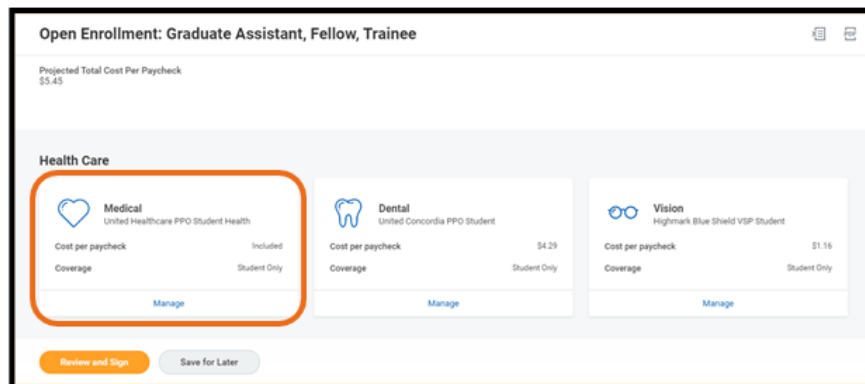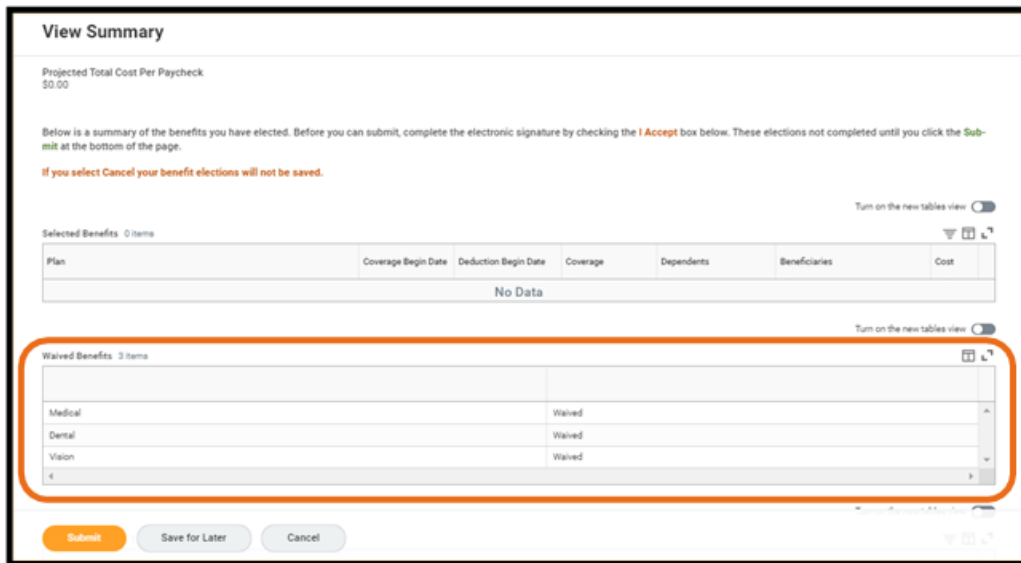

2. To waive coverage, select **Waive** in the Selection column of the table. Click **Confirm and Continue.**
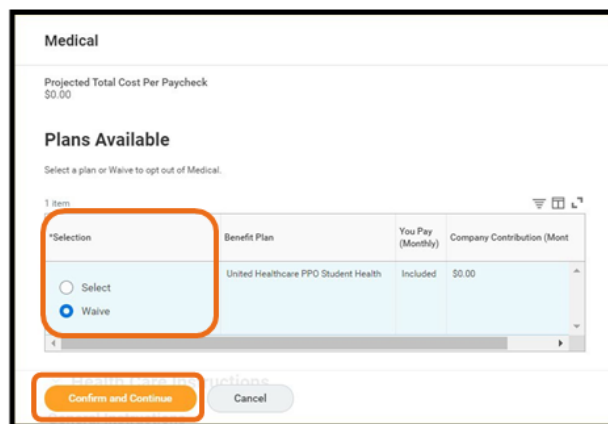
3. You will return to the Graduate Assistant, Fellow, Trainee Open Enrollment screen. Repeat this process for each benefit on the Open Enrollment screen you wish to waive (ex. Dental or Vision).

4. When you have made all your changes, click the **Review and Sign** button.

5. You will see a confirmation page with a summary of the benefit plans that you chose to waive.

6. Scroll to the bottom of the confirmation page. Click the **I Agree** checkbox and then **Submit**. This serves as your electronic signature for your benefit elections.

7. The next screen indicates that you have completed your benefit selections. Click the **View 20XX Benefit Statement** button for a summary of your benefit elections. The screen text will read "You have successfully submitted your benefits enrollment." This is the default text. **It will say this even if you waived coverage.**

   You can print this confirmation screen for your reference. You will **not** receive a

confirmation email when you complete your benefit elections. Current benefit election information is available in Workday in the **Benefits and Pay** app.
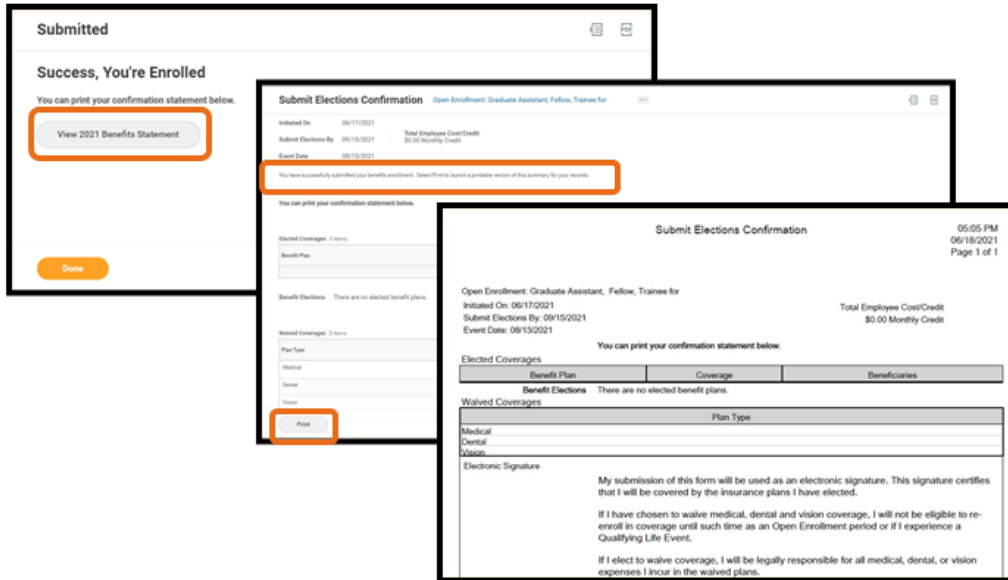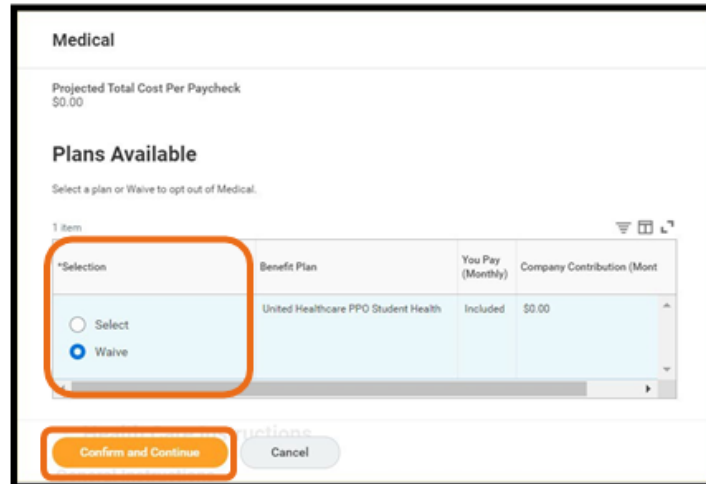

How to Enroll Dependents

1. Each benefit card on the Graduate Assistant, Fellow, Trainee Open Enrollment screen will have a Manage, Enroll, or View option. Click **Manage** on the benefit card you wish to add dependents to. If you are not already enrolled in the benefit, you will need to enroll in the benefit first.
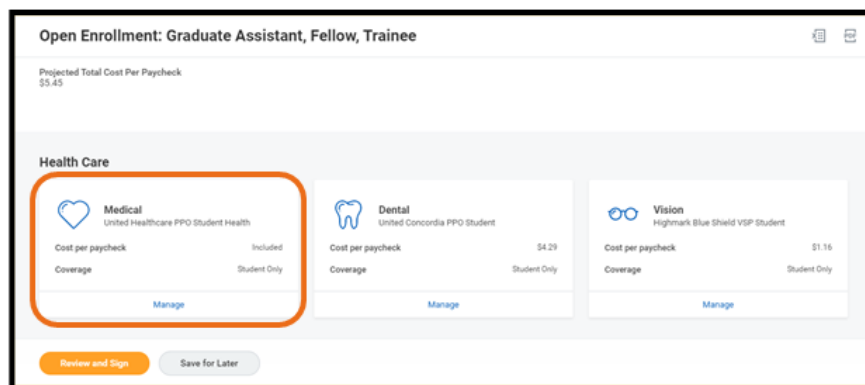
2. In the Selection column of the benefit table, ensure **Select** is activated. Click **Confirm and Continue**. You must elect a benefit to add dependents to the coverage.
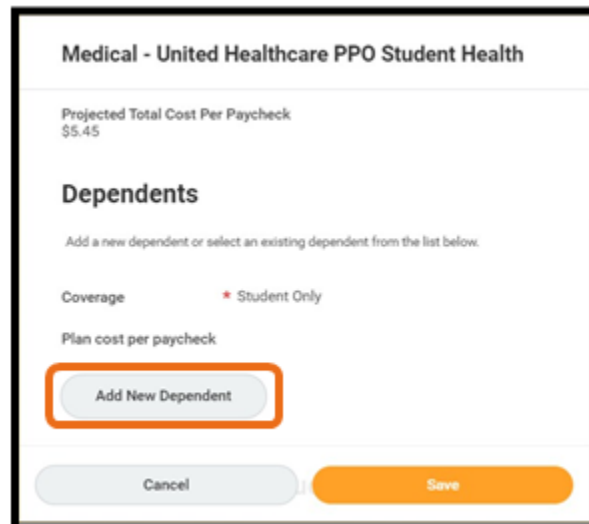
3. Click the **Add New Dependent** button.

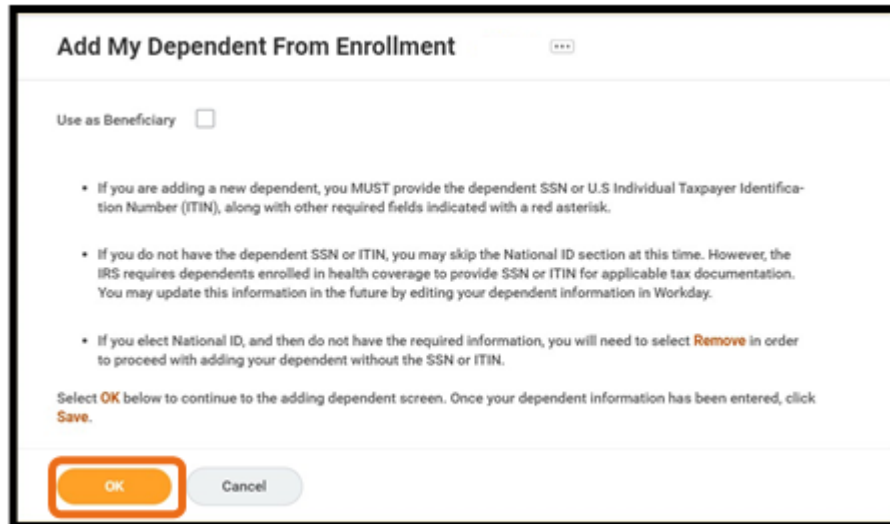4. When you Add New Dependent, you will see the *Add My Dependent From Enrollment* window. An option to "use as a beneficiary" will appear at the top; this option is not relevant for graduates. **Please ignore this option.**

   This screen also provides guidance on providing a Social Security Number (SSN) or U.S. Individual Taxpayer Identification Number (ITIN). If you do not have the dependent's SSN or ITIN, you may skip the National ID section at this time. However, the IRS requires dependents

enrolled in healthcare coverage to provide SSN or ITIN for applicable tax documentation. You may update this information in the future by editing your dependent information in Workday.
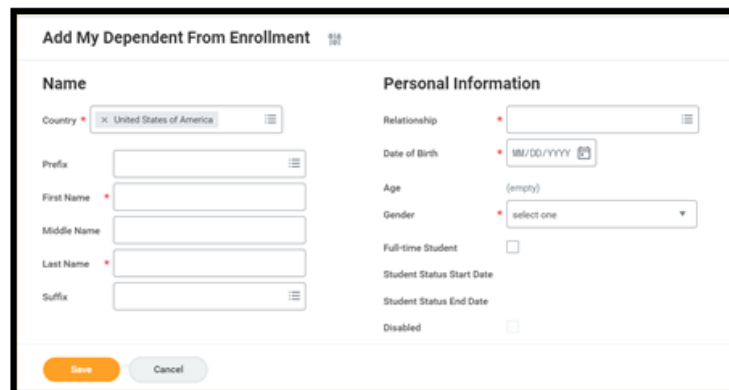
Click **OK.**

5. You will be asked to provide information about your dependent. The **red asterisk** denotes required information. When you are finished entering the information, **scroll down**.
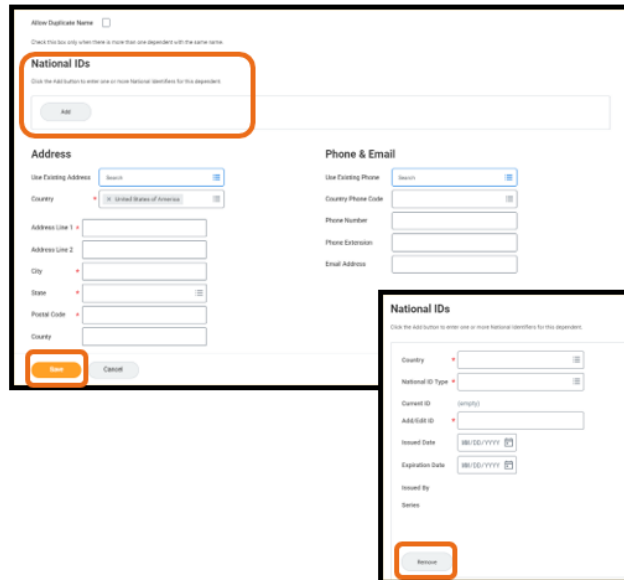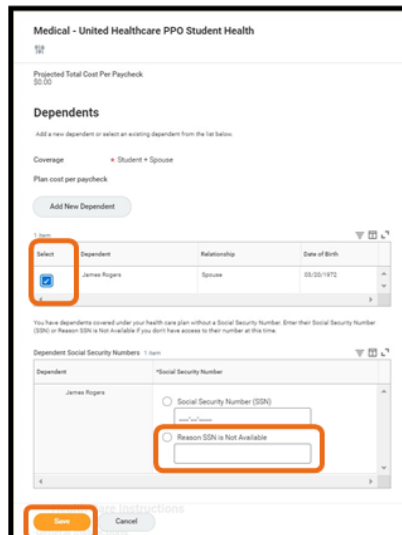
6. Approximately halfway down on the page, you will be asked to provide a National ID for your dependent. If you are an international student **or** if you do not wish to enter an SSN for your dependent at this time, do not click the Add button.

   Note: If you click Add to begin the National ID process, but do not wish to provide the number at this time, click the **Remove** button at the bottom of the National ID portion of the screen.

7. Complete the **Address** and **Phone & Email** sections. The **red asterisk** denotes required information. When you are finished, click the **Save** button.

8. Once you have added your dependent, you will return to the benefit enrollment screen. Your dependent will **automatically be checked** to be added to your benefit plan.

   If you chose not to add a National ID in the previous step, click the radio button to the left of **Reason SSN is Not Available** and **enter a reason** for not including an ID with your dependent. Click **Save**.

9. Repeat this process to add your dependents to any other applicable benefits on the Open Enrollment screen (ex. Dental or Vision). Dependents you previously added will be listed in the Dependents table. You will just need to click the checkbox to add them to the benefit.

10. To add dependents to the Vision and Dental plans, you must also select a **Coverage**. Click the **list icon** and select an **option** from the dropdown list before clicking **Save**.
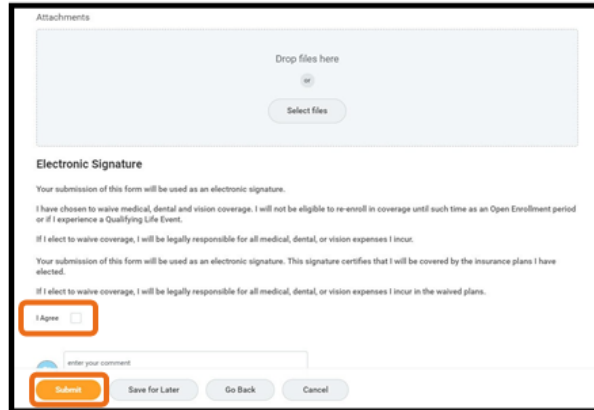
11. When you have made all the necessary changes, click **Review and Sign**.

12. A confirmation page will provide an overview of your benefits and dependents.

13. Scroll to the bottom of the page. Click the **I Accept** checkbox and then click **Submit**. This serves as your electronic signature for your benefit elections. You can ignore the Attachments section, as you do not need to upload any documents or files.
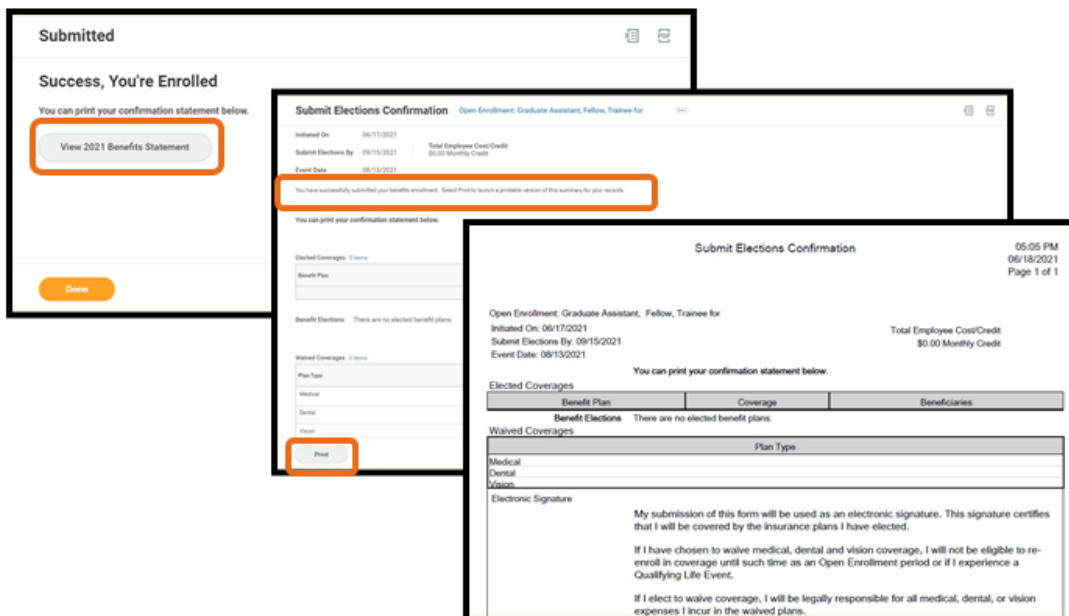

14. The next screen indicates that you have completed your benefit selections. Click the **View 20XX Benefit Statement** button for a summary of your benefit elections.

You can print this screen for your records. You will **not** receive a confirmation email when you complete your benefit elections. Current benefit election information is available in Workday in the **Benefits and Pay** app.

Questions?

- If you have questions about the Student Health Insurance Plan or about how to complete your benefit elections, please contact University Health Services - Student Health Insurance at 814-865-7467 or uhs- insurance@psu.edu.

- Questions about the terms and conditions of your graduate assistantship, graduate fellowship, or graduate traineeship appointment should be directed to your graduate program staff.