



Qualifying Events for Benefit Changes

Benefit changes can be made within 30 days of a qualifying event.

Documentation Required for Qualifying Events

Event	Documentation required
Adoption/placement for adoption	Legal documentation from the court
Birth	Copy of certified state-issued birth certificate or copy of hospital keepsake
Death	Copy of Certified state-issued death certificate
Divorce/annulment/legal separation	Legal documentation signed by the court; full divorce decree must be submitted.
Marriage	Copy of certified state-issued marriage certificate
Employee/Spouse/Child gains or loses coverage from another source: 1. Approved for Medicare 2. Gain or loss of Medicaid 3. Change in employee/spouse/child's employment status resulting in termination of coverage 4. Change in employee/spouse/child's employment status resulting in start of new coverage 5. Employee/Spouse/Child's annual enrollment 6. Employee's loss of coverage under parent's plan due to attainment of age 26	 1. Approval letter from the approving agency. Medicare ID cards will not be accepted. 2. Letter from the agency documenting either the gain or loss of the benefit. Medicaid ID cards will not be accepted. 3. Letter from employee/spouse/child's employer indicating both the reason for termination of coverage and date of the loss of coverage. This must be on company letterhead with a signature. 4. Letter from employee/spouse/child's employer indicating both the date employment began and the date the coverage begins. 5. Documentation from employee/spouse/child's employer indicating the dates of annual enrollment, when the elected benefit(s) become effective and proof that you or dependent is being added or terminated from that plan. 6. Letter from parent's employer indicating the reason for termination of coverage and date of the loss of coverage. This must be on company letterhead with a signature.

Qualifying event effective dates:

- Adding coverage for medical, dental, vision and flexible spending accounts will take effect on the first day of the month following the date of the qualified event
- Coverage for a newborn child will take effect on the date of birth, provided the employee has current coverage on the date of birth. Otherwise, additional changes to coverage would be effective the first day of the month following the newborn's date of birth
- Reductions or cancellation to benefit plans included on this form will take effect on the last day of the month in which the qualified event occurred

ADDING A NEW DEPENDENT TO WORKDAY - You must first add your dependent to Workday prior to changing your benefits and adding dependent coverage. Follow the steps below to add your dependent and change your benefits due to a qualifying event.

Step One (Colleague): Adding your new dependent to Workday

- Click on your Benefits and Pay Application on your Workday menu
- Under Benefits, click on Dependents

- Click on the Add button
- Complete each section noted with the red *
- Attach the required documents as noted above
- Choose Benefits as the category
- Click Submit
- There will be a pop-up Alert to remind you to double check the effective date. If the effective date is accurate, Click Submit > Done.

Step Two (HR Service Center): Review for approval or denial

- Your request will be routed to the HR Service Center for review. After your request has been approved, you will receive a notification in your Workday account. See the bell on the top right-hand side of your Workday front screen/dashboard for the Dependent Event notification. This approval can take up to two business days. You will also be notified if the documentation submitted is not acceptable.

Step Three (Colleague): Adding the Dependent to your plan(s)

- Click your Benefits and Pay Application on your Workday menu
- Under Benefits, click on Benefit Elections
- Click on the Change Benefits at the top of the screen
- Select the correct Benefit Event Type for your situation
- Click the calendar icon to enter the date of the Benefit Event Date when the change occurred
- Attach the required documents as noted on first page
- Click Submit > Done

Step Four (HR Service Center): Review for approval or denial

- Your request will be routed to the HR Service Center for review. After your request has been approved, you will receive a notification in your Workday Inbox. This approval can take up to two business days.

Step Five (Colleague): Make and submit changes

- Navigate to your Workday inbox
- Click the Benefit Change task
- Review each benefit plan and enroll the new dependent from the drop-down box
- Continue through all the benefit plans
- Review your elected benefits
- Check the I Agree box to confirm your changes
- Click Submit > Done

The required documentation must be submitted prior to being able to make changes to your benefits. Allow up to two business days for your documentation to be approved by the HR Service Center. Elections need to be made within 30 days of the qualifying life event, with the date of the event counting as day one. Please take the two-day turn around into consideration for your deadline.

NOTE: YOUR COVERAGE WILL NOT CHANGE AND DEPENDENTS WILL NOT BE ADDED TO YOUR COVERAGE UNTIL ALL THE STEPS ABOVE ARE COMPLETED AND APPROVED.

NOT ADDING A NEW DEPENDENT TO WORKDAY– Follow the steps below to change your benefits due to a qualifying event in Workday.

Step One (Colleague): Request for change

- Click your Benefits and Pay Application on your Workday menu
- Under Benefits, click on Elections
- Select the Change Benefits at the top of the screen
- Select the correct Benefit Event Type for your situation
- Click the calendar icon to enter the date of the Benefit Event Date when the change occurred
- Attach the required documents as noted on first page
- Click Submit > Done

Step Two (HR Service Center): Review for approval or denial

- Your request will be routed to the HR Service Center for review. After your request has been approved, you will receive a notification in your Workday Inbox. This approval can take up to two business days.

Step Three (Colleague): Make and submit benefit changes

- Navigate to your Workday inbox
- Click the Benefit Change task
- Review each benefit plan and enroll the dependent (if applicable) from the drop-down box
- Continue through all the benefit plans
- Review your elected benefits
- Check the I Agree box to confirm your changes
- Click Submit > Done

The required supporting documentation must be submitted prior to being able to make changes to your benefits. Allow up to two business days for your documentation to be approved by the HR Service Center. Elections need to be made within 30 days of the qualifying life event, with the date of the event counting as day one. Please take the two-day turn around into consideration for your deadline.

For questions or further information, contact the HR Service Center at 402-552-6947