



Title: Initiate a Life Event on Behalf of an Employee
Functional Area: Benefits Administration
Role: Agency Benefit Coordinators

Initiate a Life Event On Behalf of an Employee

Use this procedure to initiate a life event on behalf of an employee. Examples of life events include birth/adoption, marriage, divorce, death of dependent, etc. When you perform this initial task, you are initiating the event and submitting the applicable documentation. You will have an opportunity later in the process to change your benefit elections.

Procedure:

1. Search for the employee.
2. Click the **Related Actions and Preview** icon next to the employee's name. In the menu, hover over **Benefits** and then click the **Change Benefits** icon.

Change Benefits Christopher King (W2009364) Actions

Benefit Event Type * select one

Benefit Event Date * MM / DD / YYYY

Submit Elections By (empty)

Enrollment Offering Types (empty)

Attachments

Drop files here

or

Select files

enter your comment

Submit Save for Later Cancel

3. Select the applicable **Benefit Event Type** from the drop down box.

*Note that as an ABC, you should only be selected Benefit Event Types that start with the word **Employee**.*



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Benefit Event Type	Required Documentation
Employee: Birth/Adoption	<p>Biological child:</p> <ul style="list-style-type: none"> • Copy of child's official state birth certificate with name of employee listed as child's parent. <p>Acceptable Temporary Documentation Examples:</p> <ul style="list-style-type: none"> • Copy of crib card, copy of newborn's discharge documents, copy of newborn's hospital bracelet. <p>** Official birth certificate required within 60 days</p> <p>Adopted Child:</p> <ul style="list-style-type: none"> • Pending Adoption: Notice of placement for adoption on adoption agency letterhead or copy of court order placing child pending final adoption. • Final Adoption: Copy of final adoption decree signed by a judge or a state-issued birth certificate showing employee as parent. <p>Step-Child:</p> <ul style="list-style-type: none"> • Copy of child's official state birth certificate with name of spouse of employee listed as child's parent • Copy of employee's official state marriage certificate signed by clerk of
Employee: Change in Dependent Daycare	<p>To Reduce the Annual Amount:</p> <ul style="list-style-type: none"> • Letter from the daycare provider on letterhead indicating a reduction in rate or a reduction in hours with the effective date of the change. <p>To Cancel:</p> <ul style="list-style-type: none"> • Letter from the daycare provider on letterhead indicating the last day the dependent attended the daycare.
Employee: Child Support Order	Copy of child support order
Employee: Death of Dependent	Death certificate
Employee: Dependent Arriving in US	<p>In addition to the documentation required to show proof of relationship, a copy of the passport with the arrival date indicated and proof of permanent residency.</p> <p>For children:</p> <ul style="list-style-type: none"> • One of the following – letter from school, daycare provider or pediatrician on letterhead indicating address on file, driver's license/identification card, or lease agreement. <p>For spouse:</p> <ul style="list-style-type: none"> • One of the following – driver's license/identification card, mortgage/lease agreement, letter from employer on letterhead indicating address on file.



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Employee: Dependent Leaving US	<p>One of the following –</p> <ul style="list-style-type: none"> • Copy of flight itinerary, • Copy of Lease agreement or mortgage. • Letter from employer on letterhead indicating permanent address on file. <p>For children - letter from school/daycare on letterhead indicating permanent address on file.</p>
Employee: Divorce	Divorce decree
Employee: Gains Coverage Elsewhere	<p>Letter from other employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents and the effective date of the new coverage.</p> <p>Copy of the child’s official state birth certificate.</p>
Employee: Legal Guardianship	Copy of Legal Ward/Testamentary court document, signed by a judge.
Employee: Loses Coverage Elsewhere	Letter from previous employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents and the effective date of the loss of coverage.
Employee: Marriage	Official State marriage certificate (must be a certified copy and dated by the appropriate State or County official after the date of marriage, such as the Clerk of Court).

4. Enter or select the **Benefit Event Date**.



This is the date that the life event occurred. For example, a child was born on January 15th – the **Benefit Event Date** is January 15th.

The **Submit Elections By date** will automatically populate based on the date entered for the **Benefit Event Date**. It will populate to 60 days after the **Benefit Event Date**.

In general, the Benefit Event Date can NOT be greater than 60 days in the past except for the following:

Benefit Event Type	Benefit Event Date
Employee: Death of Dependent	Date can be > 60 days in the past
Employee: Divorce	Date can be > 60 days in the past
Employee: Gains Coverage Elsewhere	Date can be in the future
Employee: Loses Coverage Elsewhere	Date can be in the future



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Change Benefits - Workday

Change Benefits Christopher King (W2009364) Actions

Benefit Event Type * Birth/Adoption (Employee) ▾

Benefit Event Date * 12 / 01 / 2017 📅

Submit Elections By 01/29/2018

Enrollment Offering Types Spouse Life
Prescription Medical
Life Ins - Supplemental
Life Ins - Guaranteed
More (5)

Attachments

Drop files here

or

Select files

Select files

enter your comment

Submit Save for Later Cancel

5. Attach the applicable document for the event.

- In the **Attachments** section, click the **Select Files** Select files button.
- Browse to the document on your computer and select it.
- Click the Open Open button to attach the required documentation.



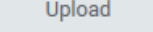
See the table in step 3 for details on which documents should be attached for each **Benefit Event Type**.



Title: Change Benefits (Initiate a Life Event)
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The document that you attached will be displayed in the **Attachments** section.

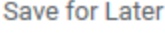



If you need to attach additional documents, click the **Upload**  button. You can attach one additional document at a time or select multiple documents to attach at once.

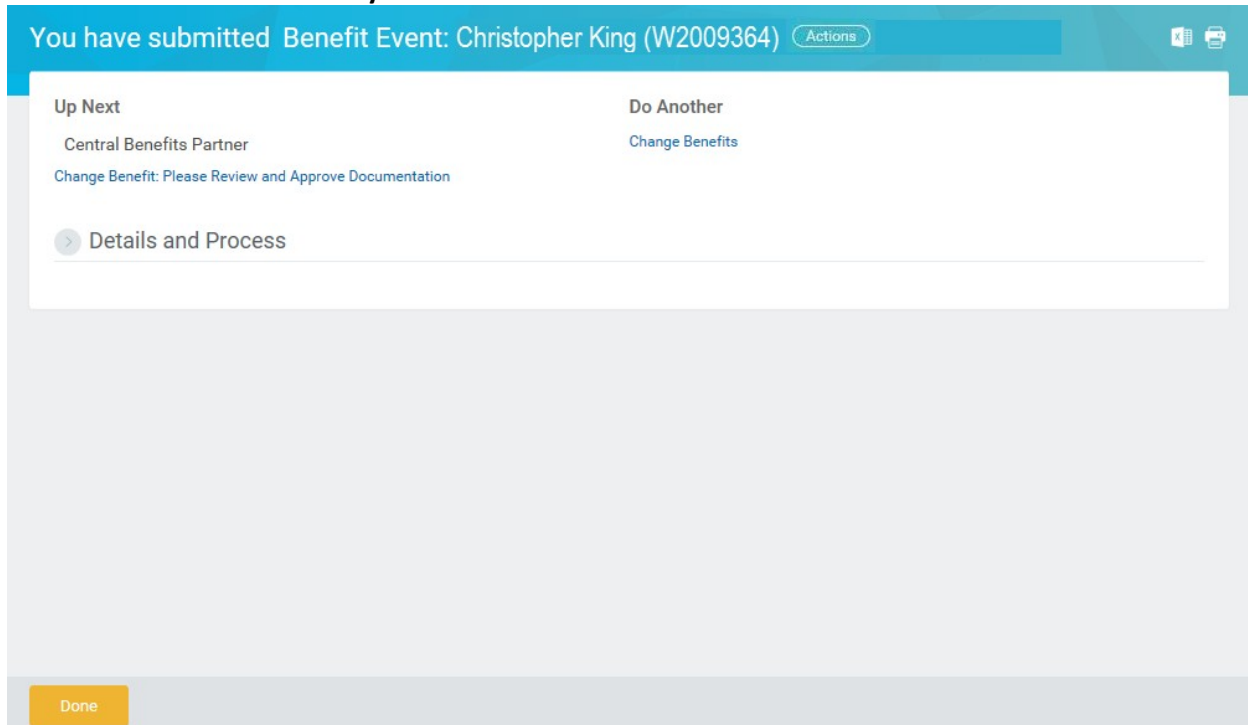
6. Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click the **Save for Later**  button to save your changes but not submit. You can find this task in your Workday Inbox later to complete it.
- Click the **Cancel**  button to cancel the process and start at another time.

You have submitted - Workday



The screenshot shows a Workday interface with a teal header bar. The header text reads "You have submitted Benefit Event: Christopher King (W2009364)" followed by an "Actions" button. Below the header, there are two columns of options: "Up Next" with "Central Benefits Partner" and "Change Benefit: Please Review and Approve Documentation", and "Do Another" with "Change Benefits". A "Details and Process" link is also visible. At the bottom left, there is a yellow "Done" button.

7. Click the **Done**  button.



The life event change that you initiated will be routed to the Central Benefits Partner at the Employee Benefits Division to review and approve the documentation. Once the event is approved, you will receive a task in your Workday Inbox to change benefit elections. See the [Elect or Change Benefit Elections](#) job aid for instructions on how to complete this.

8. The System Task is complete.
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