



**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 the benefit elections after DBM Employee Benefits Division has reviewed and approved the benefit event.

### Procedure:

1. **Search for the employee** by typing the name or W# in the Search Box and hitting the **Enter** key.

On behalf of: Benefits Coordinator - A01 (B2000001)

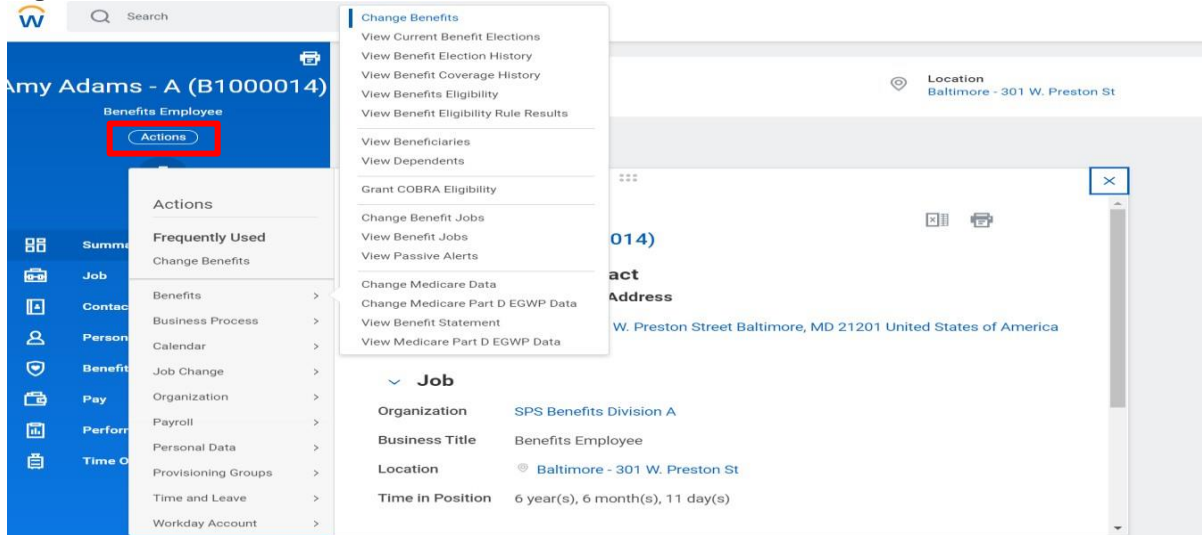


Click on the employee name in the Search Results.

### Search Results

Categories	Search Results 1 items
Common	Common
Organizations	<b>Amy Adams - A (B1000014)</b> Benefits Employee   SPS Benefits Division A   Baltimore - 301 W. Preston St Employee
People	
Processes	
Procurement	Tip: try selecting another category from the left to see other results

2. Click the **Actions** icon below the employee's name. In the menu, hover over **Benefits** and then click the **Change Benefits** icon.



3. On the **Change Benefits** page, select the applicable **Change Reason** from the drop down box.

## Change Benefits

Amy Adams - A (B1000014) Actions

Change Reason \* select one

Benefit Election History 5 items

Event	Current	Benefits Details	Enrollment Event Type
	<input checked="" type="checkbox"/>	Amy Adams - A (B1000014) Benefit Elections Active on 07/22/2020	New Hire (Manual)

**Note that as an ABC, you should only be selecting a Change Reason that starts with "Employee:".**

**The table below identifies the required supporting documentation that is required for each Change Reason.**

# Qualifying Life Event Required Supporting Documentation

## QUICK REFERENCE GUIDE



Change Reason/Life Event Type	Required Documentation	SHARED04
<b>Employee: Birth/Adoption</b> <b>Retiree: Birth/Adoption</b>	<p><b>Biological Child:</b></p> <ul style="list-style-type: none"> <li>Copy of child's official state birth certificate with name of employee listed as child's parent.</li> <li>** Official birth certificate required within 60 days</li> </ul> <p><b>Adopted Child:</b></p> <p><b>Pending Adoption:</b></p> <ul style="list-style-type: none"> <li>Notice of placement for adoption on adoption agency letterhead or copy of court order placing child pending final adoption.</li> </ul> <p><b>Final Adoption:</b></p> <ul style="list-style-type: none"> <li>Copy of final adoption decree signed by a judge or a state-issued birth certificate showing employee as parent</li> </ul> <p><b>Stepchild:</b></p> <ul style="list-style-type: none"> <li>Copy of child's official birth certificate with name of spouse of employee listed as child's parent</li> <li>Copy of employee's official marriage certificate signed by Clerk of the Court, Registrar, etc</li> </ul>	
<b>Employee: Change in Dependent Daycare</b>	<p><b>To Reduce the Annual Amount:</b></p> <ul style="list-style-type: none"> <li>Letter from the daycare provider on letterhead indicating a reduction in rate or a reduction in hours with the effective date of the change.</li> </ul> <p><b>To Increase the Annual Amount:</b></p> <ul style="list-style-type: none"> <li>Letter from the daycare provider on letterhead indicating an increase in rate or an increase in hours with the effective date of the change.</li> </ul> <p><b>To Cancel:</b></p> <ul style="list-style-type: none"> <li>Letter from the daycare provider on letterhead indicating the last day the dependent attended the daycare.</li> </ul>	
<b>Employee: Child Support Order</b> <b>Retiree: Child Support Order</b>	Copy of child support order	
<b>Employee: Death of Dependent</b> <b>Retiree: Death of Dependent</b>	Death certificate	

Change Reason/Life Event Type	Required Documentation
<b>Employee: Dependent Arriving in US</b> <b>Retiree: Dependent Arriving in US</b>	<p>In addition to the documentation required to show proof of relationship, a copy of the passport with the arrival date indicated or a copy of I-94, along with proof of residence in USA.</p> <p><b>For children:</b></p> <ul style="list-style-type: none"> <li>• 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.</li> </ul> <p><b>For spouse:</b></p> <ul style="list-style-type: none"> <li>• One of the following – driver's license/identification card, mortgage/lease agreement, letter from employer on letterhead indicating address on file.</li> </ul>
<b>Employee: Dependent Leaving US</b> <b>Retiree: Dependent Leaving US</b>	<p>Copy of travel itinerary and one of the following to support a change in residence outside of the USA:</p> <ul style="list-style-type: none"> <li>• Copy of Lease agreement or mortgage.</li> <li>• Letter from employer on letterhead indicating permanent address on file.</li> <li>• For children - letter from school/daycare on letterhead indicating permanent address on file.</li> </ul>
<b>Employee: Divorce</b> <b>Retiree: Divorce</b>	<p>Divorce decree</p>
<b>Employee: Gains Coverage Elsewhere</b> <b>Retiree: Gains Coverage Elsewhere</b>	<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>
<b>Employee: Legal Guardianship</b> <b>Retiree: Legal Guardianship</b>	<p>Copy of Legal Ward/Testamentary court document, signed by a judge and proof of legal residency.</p>
<b>Employee: Loses Coverage Elsewhere</b> <b>Retiree: Loses Coverage Elsewhere</b>	<p>Letter from previous employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents*, the effective date of the loss of coverage, and reason for the loss.</p> <p>*Proof of relationship: certified marriage certificate and/or certified birth certificate</p>
<b>Employee: Marriage</b> <b>Retiree: Marriage</b>	<p>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).</p>

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

## Change Benefits

Amy Adams - A (B1000014) [Actions](#)

Change Reason \* Employee: Birth/Adoption ▼

Benefit Event Date \* 08 / 03 / 2020 

Submit Elections By \* 10 / 01 / 2020 

Open Elections for

- AD&D
- Child Life
- Dental
- Dependent Care FSA
- Healthcare FSA
-  More (5)


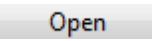
## Attachments

Drop files here

or

Select files

5. Attach the applicable document for the event.

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



See the table in step 3 for details on which documents should be attached for each **Change Reason**.

## Change Benefits

Amy Adams - A (B1000014) [Actions](#)

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### Attachments

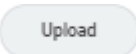


CribCard.jpg

Comment

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 additional documents one 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 **Cancel**  button to cancel the process and start at another time.

7. You will receive a message the event has been submitted to DBM Employee Benefits (EBD) and the Central Benefits Partner for review.

## You have submitted

Benefit Event: Amy Adams - A (B1000014) on 08/03/2020 Actions

## Up Next

Central Benefits Partner

[Change Benefit: Please Review and Approve Documentation \(Employee Event\)](#)

## > Details and Process


8. Click the **Done** 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 SPS My Tasks box to change benefit elections. See the [Elect or Change Benefit Elections](#) job aid for instructions on how to complete the elections.

In Job > Worker History you can view the event status and see the event has been routed to DBM Employee Benefits Division.

Worker History 12 items [i]

Business Process	Effective Date	Initiated On	Due Date	Completed On	Status	Assigned To
Benefit Event: Amy Adams - A (B1000014) on 08/03/2020	08/03/2020	08/03/2020 03:50:40 PM			In Progress	<div>Abimbola Ajaiyeoba (W2013117)</div> <div>Britney Davis (W1088367)</div> <div>Cheryl Hill (W1066244)</div> <div>Delphine TUCKER-MBAH (W1074153)</div> <div>DEVIN BUTLER (W2118012)</div> <div> More (22)</div>

9. The System Task **Initiating a Life Event on Behalf of an Employee** is complete.