



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)

W

Click on the employee name in the Search Results.

Search Results

Categories

- Common
- Organizations
- People
- Processes
- Procurement

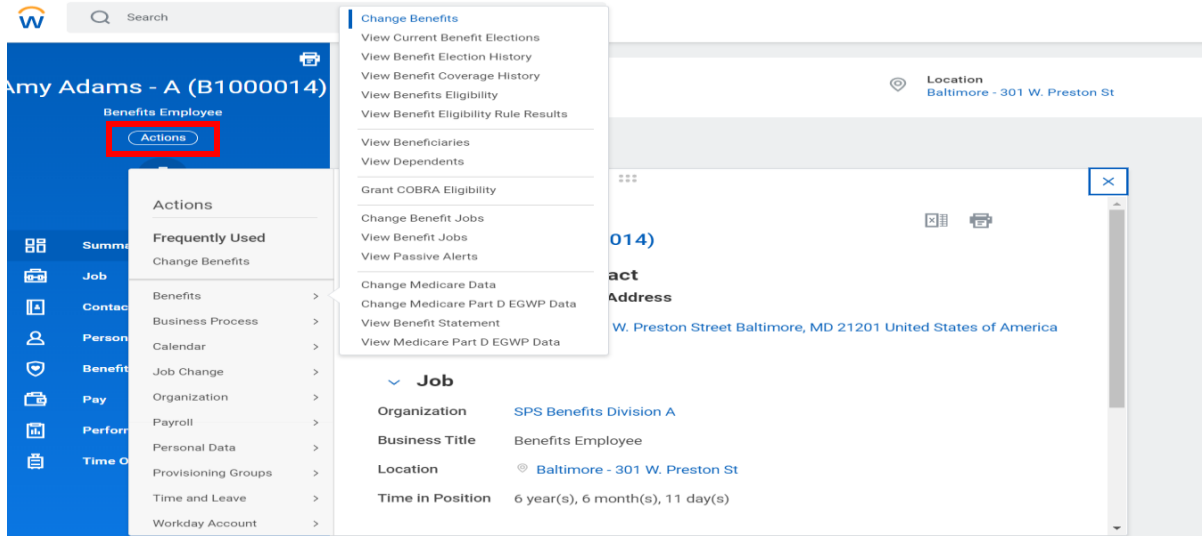
Search Results 1 items

Common

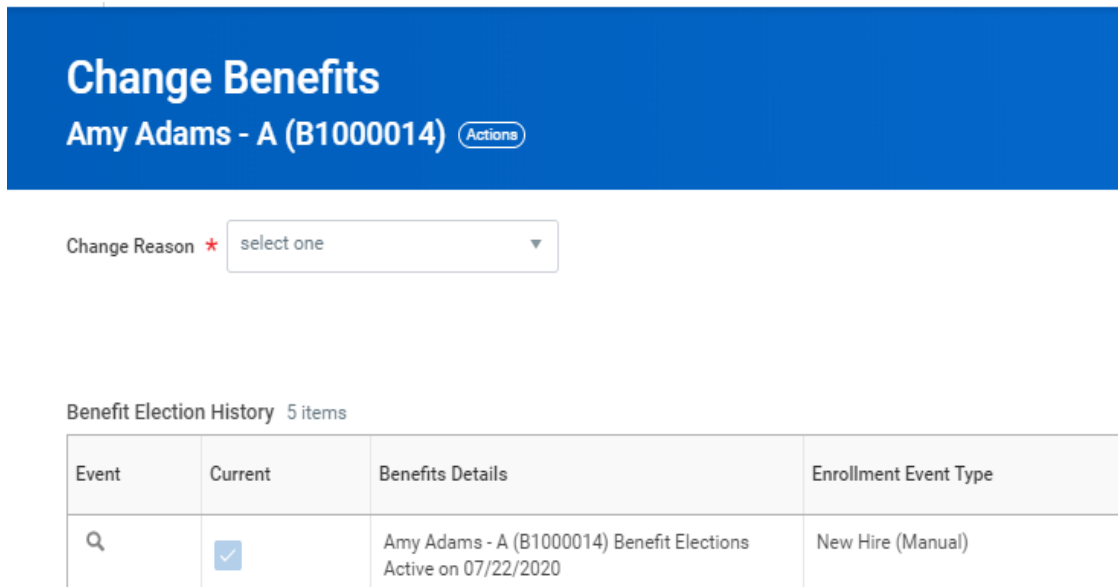
Amy Adams - A (B1000014)
Benefits Employee | SPS Benefits Division A | Baltimore - 301 W. Preston St
Employee

Tip: try selecting another category from the left to see other results

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



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



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.



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

| Benefit Event Type/Change Reason | 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 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 |
| 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 <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 |

| | |
|---|--|
| 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** by either directly keying the date or using the calendar to select the 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 |

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)

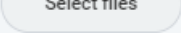
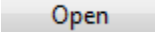
Attachments

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](#)

Change Reason * Employee: Birth/Adoption ▼

Benefit Event Date * 08 / 03 / 2020 

Submit Elections By * 10 / 01 / 2020 

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Attachments

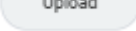


CribCard.jpg

Comment

The document that you attached will be displayed in the **Attachments** section.

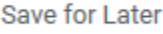



If you need to attach additional documents, click the **Upload**  button. You can attach additional documents one at a time, or select multiple documents to attach at once.

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 **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 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

- 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 SPS Inbox 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 [X]

| 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 | Abimbola Ajaiyeoba (W2013117) Britney Davis (W1088367) Cheryl Hill (W1066244) Delphine TUCKER-MBAH (W1074153) DEVIN BUTLER (W2118012) More (22) |

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