

Qualifying Life Events

When Can You Change Your Benefits?

Your election in Paylocity must be made within 31 days of the Qualified Life Event and supported by the necessary documentation. Please see the following page of this document for step-by-step instructions. If your change is approved by HALO benefits, coverage will begin on the first day of the month following the event. For birth or adoption of a child, coverage will begin on the date of the event.

If you experience a Special Enrollment Event related to Medicaid or Child Health Insurance Plan (CHIP) you will be given 60 days to make your election in Paylocity.

If you experience a Qualifying Life Event, use the chart below to determine the coverages you can update, required documentation, and the effective date.

Qualifying Life Event	Coverage Effective Date	Benefits Allowed to Change				
		Medical	Dental/ Vision	Health FSA	Dependent Care FSA	Life Insurance
Change in marital status • Marriage • Divorce/annulment/legal separation • Death of spouse Required documentation: marriage certificate, divorce decree, or death certificate	1st of the month following event	✓	✓	✓	✓	✓
Change in the number of your dependents • Birth or adoption • Custody change/ divorce decree • Death of a dependent Required documentation: birth certificate, divorce decree, death certificate or adoption decree	Date of event	✓	✓	✓	✓	✓
Change to dependent eligibility requirements • Due to age/student status Required documentation: proof of registration and acceptance from educational institute *No documentation required for loss of coverage due to age	1st of the month following event	✓	✓	✓	✓	
Change employee's, spouse's or dependent's employment status • Termination/commencement of employment • Commencement/ return of unpaid leave • Change in employment status (part to full-time) Required documentation for loss of spouse's employment or decrease in hours: notice from the spouse's employer Required documentation for gain of spouse's employment or increase in hours to make them eligible for benefits: notice from the spouse's employer	1st of the month following event	✓	✓	✓	✓	✓
Employee or dependent becomes eligible for COBRA Required documentation: copy of COBRA documentation	1st of the month following event	✓	✓	✓		
Change in eligibility for Medicare/Medicaid Required documentation: letter from social security administration or other government agency	1st of the month following event	✓		✓		
Change in cost or nature of employee or spouse's healthcare plan Required documentation: Plan documentation showing change in cost/nature	1st of the month following event	✓	✓		✓	

Please be aware that failure to remove an ineligible dependent within 31 days from the date they become ineligible jeopardizes their eligibility for COBRA coverage AND does not mean they are covered under the Plan because they have not been removed.

QUALIFYING LIFE EVENTS

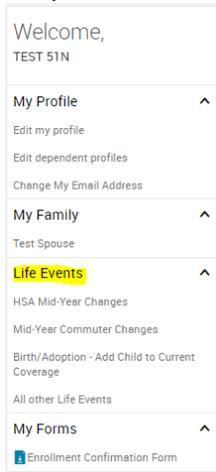
When Can You Change Your Benefits?

Outside of Annual Enrollment, to change your benefits due to a Qualified Life Event, you must log into Paylocity and submit your request and required documentation.

Your election in Paylocity must be made within 31 days of the Qualified Life Event and supported by the necessary documentation.

Follow the steps below to submit the change to the benefits team for review.

1. Login to Paylocity at: access.paylocity.com
2. Click on the 'hamburger menu' in the upper-left-hand corner and select **Bswift Benefits**.
3. Select the appropriate Life Event or select **Other Life Events** to view a list of all available life event options. Contact the HR department if the applicable life event is not listed.



Life Event

If you had a recent life event such as a birth of a child or a marriage, you may be eligible to change your benefit elections. Please enter all information requested to complete your change in coverage.

STEP 1 Please select your life event

> HSA Mid-Year Changes

> Mid-Year Commuter Changes

Other life events... ▾

4. Enter the Effective Date of the Life Event.

Life Event

If you had a recent life event such as a birth of a child or a marriage, you may be eligible to change your benefit elections. Please enter all information requested to complete your change in coverage.

STEP 2 Enter your life event information

Birth/Adoption - Add Child to Current Coverage Change life event

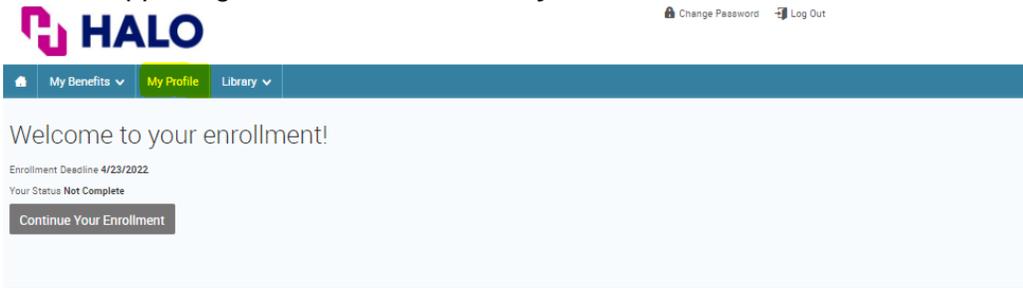
When did your life event take place?

Enter a date

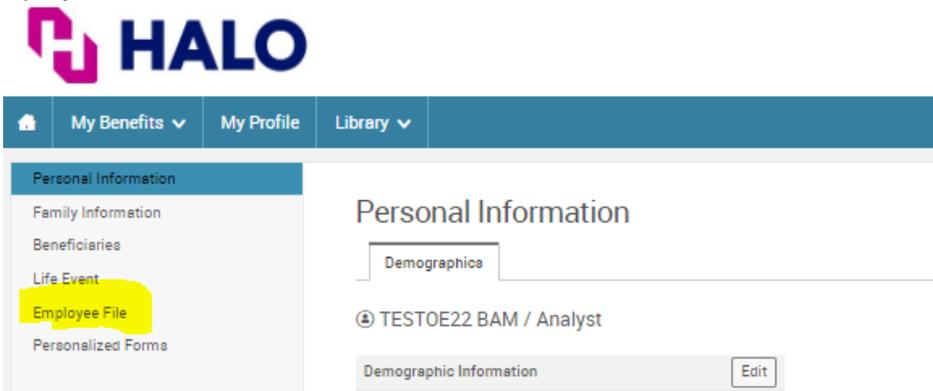
Enter your new dependent's information:

Name	Relationship	Date of Birth	Age	Gender
Add at least one dependent to continue				

5. Select Add Dependent if the Life Event includes adding a dependent.
6. Select the dependent to remove from coverage if the Life Event includes removing a dependent.
7. Select Continue.
8. Select I agree that the above information is accurate.
9. Select Save and Start Life Event Enrollment.
10. You may now make the applicable changes to your coverage. For these changes, you will need to submit supporting documentation to have your change approved (except for an HSA mid-year change).
11. To upload the supporting documentation, click **My Profile**.



12. Click Employee File



- Depending on who the Life Event is for, select **View and Upload Documents**, for the applicable family member.

Employee File

TESTOE22 BAM / Analyst Employee

Name	Relationship	Date of Birth	View and Upload
TESTOE22 BAM / Analyst	Employee	06/15/1990	View and Upload Documents
Test Spouse	Spouse	01/01/1990	View and Upload Documents
TestOE Child	Child	01/01/2021	View and Upload Documents

Uploaded Documents

Search for Uploaded Documents

Title

Description

Document Type 

[Reset Fields](#)

- Click Choose **File**, and underneath, give the document a title. Once this has been submitted, the request will be reviewed & approved.