

Qualifying Event Checklist

Employee Name (Please Print)

Employee Number#

--	--

Generally, benefit decisions can be made during your first thirty days of initial employment and during our open enrollment period. Benefit decisions made at open enrollment become effective January 1st and remain in effect until December 31st of that year. The following are qualifying midyear events recognizes as Special enrollment events during which time exemption from the consistency rule can be waived and certain benefit changes may be allowed outside of the open enrollment period. During most special enrollment events you have only thirty-one days from the date of the event to make the requested changes.

Change in Legal Marital Status	Date of Event	Required Documents
<input type="checkbox"/> Marriage		Marriage certificate. Updated enrollment forms for all benefits requiring a change.
<input type="checkbox"/> Divorce/Annulment		Divorce decree/Court ruling for annulment. Updated enrollment forms for all benefit requiring a change.
<input type="checkbox"/> Death of spouse		Death certificate. Updated enrollment forms for all benefits requiring a change.
Change in Number of Dependents	Date of Event	Required Documents
<input type="checkbox"/> Birth		Birth certificate. Social Security Card as soon as it is available. Updated enrollment forms for all benefits requiring a change.
<input type="checkbox"/> Death		Death certificate. Updated enrollment forms for all benefits requiring a change.
<input type="checkbox"/> Adoption/Placement for adoption		Court order for adoption/placement for adoption. Updated enrollment forms for all benefits requiring a change.
Gain or Loss Eligibility for Other Group Coverage (HIPAA special enrollment)	Date of Event	Required Documents
<input type="checkbox"/> Group health plan		Documentation from plan or issuer regarding change in eligibility (with effective date).

		Updated enrollment forms for all benefits requiring a change.	
Change in Employment Status of Employee or Spouse		Date of Event	Required Documents
<input type="checkbox"/>	Loss of employment		Termination documents or unemployment application. Updated enrollment forms for all benefits requiring a change.
<input type="checkbox"/>	Start of employment		Employer documentation of employment start date. Updated enrollment forms for all benefits requiring a change.
Entitlement to Medicare or Medicaid		Date of Event	Required Documents
<input type="checkbox"/>	Employee, spouse or dependent becomes covered under Medicare or Medicaid or loses eligibility for his or her Medicare or Medicaid coverage (including coverage under a state Children's Health Insurance Program, or CHIP)		Government verification that coverage was gained or lost. Updated enrollment forms for all benefits requiring a change.
Other		Date of Event	Required Documents
<input type="checkbox"/>	Change of custody, judgment, court order or decree requiring health coverage		Court documentation, including qualified medical child support order (QMCSO). Updated enrollment forms for all benefits requiring a change.
<input type="checkbox"/>	Eligibility for premium assistance subsidy through a Medicaid plan or CHIP		Government verification of eligibility for subsidy (with effective date)
<input type="checkbox"/>	Exchange enrollment		Employee representation regarding enrollment in a plan under an Exchange

Note: Please remember to consider all benefits that may require changing (health, dental, flexible medical or dependent care spending accounts through a cafeteria plan, change in life insurance and beneficiaries, etc.) and make sure your instructions are clear. Following changes, remember to check your pay vouchers over the next thirty to sixty days to make sure premium changes, additions or deletions have taken place. If they have not, please contact the HR Office.

*Reminder: If you miss a special enrollment opportunity; including failing to provide **all of the required documentation for changes**, the next opportunity to make changes will be during the next open enrollment or during another qualifying mid-year event; whichever comes first.*

Please sign, date and return this form and all required documentation including updated enrollment or other benefit forms requiring changes. Said information must be returned with thirty-one days of the qualifying special enrollment event to the HR Department.

Employee Signature

Date

