

LIFE EVENT USER GUIDE

When Life Changes

When your life changes — you get married, divorced or have a baby — your benefits need to change too. This is known as a qualifying life event. And it's the only time, outside of annual Open Enrollment, you can make changes to your benefits.

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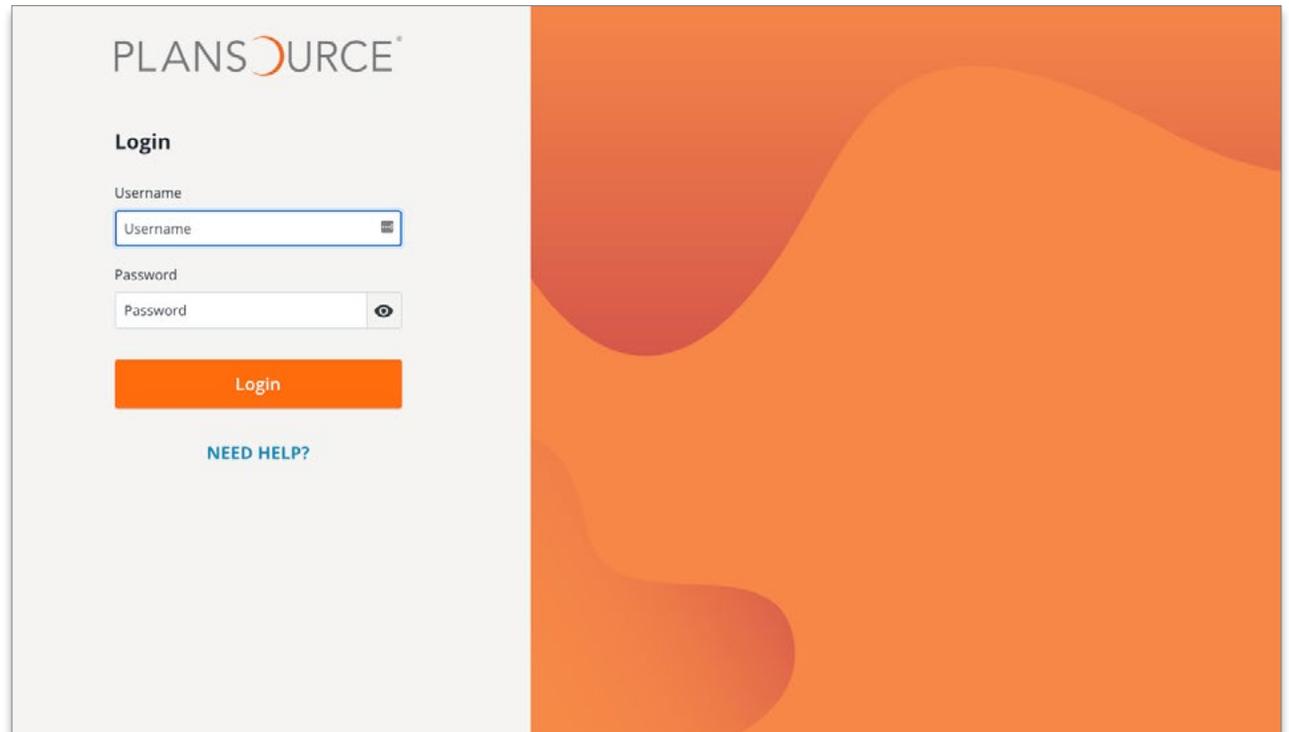
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Questions?

Create a Life Event

Create a Life Event

1. Log in to PlanSource at benefits.plansource.com.

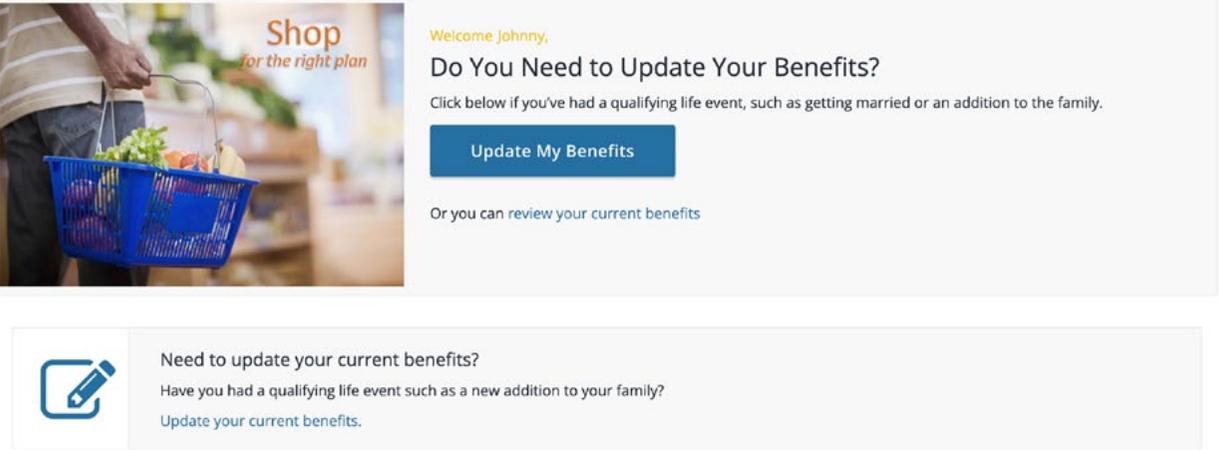
If you forgot your username or password, select **NEED HELP?**



The screenshot shows the PlanSource login interface. At the top left is the PlanSource logo. Below it is the heading "Login". There are two input fields: "Username" and "Password". The "Username" field contains the text "Username" and has a small icon on the right. The "Password" field contains the text "Password" and has an eye icon on the right. Below the input fields is an orange "Login" button. Underneath the button is a blue link that says "NEED HELP?". The background of the page is a light gray with a large orange abstract graphic on the right side.

Create a Life Event

2. Select **Update My Benefits** under the welcome message. You can also select **Update your current benefits**.



The screenshot shows a user interface for updating benefits. On the left, there is a photograph of a person's hands holding a blue shopping basket filled with fresh produce. Above the photo, the text reads "Shop for the right plan". To the right of the photo, the interface displays a personalized welcome message: "Welcome Johnny, Do You Need to Update Your Benefits?". Below this, a sub-header asks "Click below if you've had a qualifying life event, such as getting married or an addition to the family." A prominent blue button labeled "Update My Benefits" is centered below the text. Underneath the button, it says "Or you can review your current benefits". At the bottom of the screenshot, there is a separate section with a blue icon of a pencil and a document. This section contains the text: "Need to update your current benefits? Have you had a qualifying life event such as a new addition to your family? Update your current benefits."

KEEP IN MIND:

- To change your benefits, you must report life events within 30 days of the event.
- If both you and your spouse/domestic partner are in a UC training program, you cannot cover each other as dependents. You must each enroll in your own coverage.
- The premium that UC pays to cover your domestic partner is considered imputed income, which is taxable.

Create a Life Event

3. Select the applicable life event from the list.
4. Complete the required information and select **Continue**.

You'll need to provide your GME office with supporting documentation in order to add or remove a family member from coverage.

Report Life Event

Some changes in your life or employment can affect your benefits. For example, when you have a baby you may want to add him/her to your health coverage. Changes like these that are made outside of standard benefit enrollment are called Life Events. First, select the type of Life Event from the drop down list to indicate the reason you are making the change. When selecting a particular Life Event, you will be given additional information on the type of change for the Life Event.

Select Life Event

- Adoption
- Annulment
- Birth**
- Death of Dependent
- Dependent Student Status Change
- Divorce
- Domestic partnership creation
- Gain Custody of Dependent
- Legal Separation

Birth

Congratulations and best wishes to you and the newest member of your family. Birth is a qualified change in status, so you may make certain changes to your benefits. The coverage changes must be consistent with your change in status. Example: When you have a baby, you may change your medical coverage from single to family coverage.

PLEASE NOTE: When adding a new dependent, the new dependent won't be added to your benefits *automatically*. You will need to add the new dependent to any applicable benefits.

Event Date *

Notes

[← BACK](#) [Continue](#)

Verify Your Personal Information

Verify Your Personal Information

1. Edit as needed.
2. Once you verify the information is accurate, navigate to the bottom of the page and select **Next: Review My Family.**

Verify your Personal Information and make changes if needed

This information is used for:

- reporting to the benefit carriers
- to issue your ID cards and process your claims
- to process your payroll, taxes, etc.

If any of the information is incorrect and you are unable to change it on this page, please contact your Human Resources representative. You also certify each Social Security number submitted is true and correct.

[EDIT INFO](#)

Basic Information	
First Name *	Middle Name
Johnny	
Last Name *	SSN *
Appleseed	XXX-XX-9678

Personal Information	
Birthdate *	Gender *
01/02/1996	Male
Marital Status *	
Unreported	

Contact Information	
Address 1 *	Address 2
123 Main Street	
City *	State *
Anytown	California
Zip *	Country
12345	United States
Home Phone *	Cell
123-456-7890	
Office Phone	E-mail *
	email@email.com
Alternate E-mail	Preferred Mode Of Communication
email1@email.com	Email
I Consent To Receiving Text Messages	
No	

Other
Hire Date
08/19/2021

[← BACK](#) [Next: Review My Family](#)

Add Dependents

Add Dependents

1. Review your **current dependents'** information.

Update any **current dependent's** information, if necessary.

To **remove a current dependent**, create another life event.

2. Add a new dependent.

To add a dependent, select **+ Add Family Member**.

Review the Dependent Information on file below

Dependents must be listed on this page to be enrolled in coverage.

You may:

- Add New Dependents
- Edit Existing Dependent Information
- Remove Existing Dependent

By adding a dependent, you are confirming that this a legal dependent, eligible for benefits under one or more of your available plans. You also certify each Social Security number submitted is true and correct. When adding a new baby and the Social Security number field is left blank you will need to add it to the system as soon as it is available.

PLEASE NOTE: When adding a dependent and/or spouse, the dependent and/or spouse won't be added to your benefits *automatically*. You will need to add the dependent and/or to any applicable benefits.

Current Family Members

<p>Roncal Test</p> <p>Spouse</p> <p>Born 03/30/1987</p> <p>View Details</p> <p>Cannot Remove Edit</p>	<p>Elena Test</p> <p>Child</p> <p>Born 08/31/2022</p> <p>View Details</p> <p>Cannot Remove Edit</p>	<p>+ Add Family Member</p>
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[← BACK](#) [Next: Shop for Benefits](#)

Add Dependents

3. Enter your new dependent's information.

Enter all requested information. When you're done, select **Save**.

KEEP IN MIND

Adding a dependent's information registers them in the system but **does not enroll them in coverage**.

Select **Save**, then continue to the next page to choose the plans you want to cover your dependent under.

Please enter your Dependent Information

By adding a dependent, you are confirming that this is a legal dependent, eligible for benefits under one or more of your available plans. You also certify each Social Security number submitted is true and correct. When adding a new baby and the Social Security number is left blank you will need to add it to the system as soon as it is available.

PLEASE NOTE: When adding a new dependent, the new dependent won't be added to your benefits *automatically*. You will need to add the new dependent to any applicable benefits.

Basic Info		Additional Info	
First Name * Roncal	Middle Name	<input checked="" type="checkbox"/> Lives At Home	
Last Name * Appleseed	SSN XXX-XX-6798		
Gender * Male	Birthdate * 03/30/1987		
Relationship * Spouse			

CANCEL Save

Add Dependents

4. You should see all dependents listed — any existing dependents plus those you just added. Confirm the information shown and then select **Next: Shop for Benefits.**

Review the Dependent Information on file below

Dependents must be listed on this page to be enrolled in coverage.

You may:

- Add New Dependents
- Edit Existing Dependent Information
- Remove Existing Dependent

By adding a dependent, you are confirming that this a legal dependent, eligible for benefits under one or more of your available plans. You also certify each Social Security number submitted is true and correct. When adding a new baby and the Social Security number field is left blank you will need to add it to the system as soon as it is available. **PLEASE NOTE:** When adding a dependent and/or spouse, the dependent and/or spouse won't be added to your benefits *automatically*. You will need to add the dependent and/or to any applicable benefits.

Current Family Members

<p>Roncal Appleseed Spouse Born 03/30/1987</p> <p>View Details</p> <p><small>Cannot Remove</small> Edit</p>	<p>Julia Appleseed Child Born 01/07/2020</p> <p>View Details</p> <p>Remove Edit</p>	<p>Elena Appleseed Child Born 08/31/2022</p> <p>View Details</p> <p><small>Cannot Remove</small> Edit</p>	<p>+ Add Family Member</p>
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[← BACK](#) [Next: Shop for Benefits](#)

Choose Benefits

Choose Benefits

1. Choose **View or Change** to make your selections. **You must select** each family member you wish to be covered under the plan, including yourself.

Once you have selected the dependents you would like to cover for that benefit, select **Update Cart**.

Repeat this for all coverage you want to enroll this dependent in.

Current Benefit Elections

Review Profile Review Benefits Confirm Elections

Current Benefits Plan Year Effective from 07/01/2022 to 06/30/2023

Medical

Anthem Health. Join In. Anthem Blue Cross PPO 281636 View or Change

Dental

Medical: Anthem Blue Cross PPO 281636

< TO BENEFITS + ADD FAMILY MEMBER

Family Covered

<input checked="" type="checkbox"/> Yourself	<input checked="" type="checkbox"/> Roncal Applesseed	<input type="checkbox"/> Julia Applesseed	<input checked="" type="checkbox"/> Elena Applesseed
Employee Only		\$0.00 Per Pay Period	
Employee + 1 Dependent		\$0.00 Per Pay Period	
Employee + 2 or more Dependents		\$0.00 Per Pay Period	

Current Benefit Coverage effective from 08/19/2021 to 06/30/2023

Anthem Health. Join In. Anthem Blue Cross PPO 281636 \$0.00 Per Pay Period

Anthem Health. Join In. Anthem Blue Cross PPO 281636 \$0.00 Per Pay Period Update Cart

Choose Benefits

2. You'll receive an alert message indicating you have made a change. If the change is incorrect, select **CANCEL CHANGE**.

When you're done selecting coverage, select **Review and Checkout**.

Current Benefit Elections

Review Profile Shop Benefits Checkout

Current Benefits Plan Year Effective from 07/01/2022 to 06/30/2023

Medical

 Anthem Blue Cross PPO 281636 [View or Change](#)

You are changing from: Anthem Blue Cross PPO 281636 [✕ CANCEL CHANGE](#)

Dental

 Delta Dental PPO 19301 [View or Change](#)

You are changing from: Delta Dental PPO 19301 [✕ CANCEL CHANGE](#)

Vision

 VSP Vision Plan 30081855 [View or Change](#)

You must select or decline all coverages before moving on [Review and Checkout](#)

Review and Check Out

Review and Check Out

This section will show who is enrolled in which benefits.

1. Review the information to ensure your dependents have the coverages you intended.

If the information is correct, select **Checkout**.

This is your last opportunity to review your changes.

Confirm your Benefit Elections

Review Profile Shop Benefits Checkout

Each benefit election you have made is listed below.
Your enrollment will be complete when you click **Checkout** at the bottom of the page.

Current Benefits

Plan Year Effective from 07/01/2022 to 06/30/2023

Review Changes

Medical

Anthem Health. Join In. **Anthem Blue Cross PPO 281636** [View or Change](#)

Start Date: 08/19/2021 **Coverage Level:** Employee + 2 or more Dependents

Family Covered: Roncal Appleseed, Elena Appleseed, Julia Appleseed **Employer Contribution:** \$2,681.38

Dental

DELTA DENTAL **Delta Dental PPO 19301** [View or Change](#)

Start Date: 08/19/2021 **Coverage Level:** Employee + 2 or more Dependents

Roncal Appleseed, Elena Appleseed.

[← BACK](#) [Checkout](#)

Review and Check Out

2. Email the required documentation necessary to process the qualifying life event to your GME office or HR at UCSF.

A final review of your request will be made before approving the pending changes.

You can email, print or download a copy of the benefits confirmation statement.

If you need to make corrections, select **View or Change**.

Current Benefit Elections

Life Event Changes Complete!
You have completed the life event changes to your benefits.

Need a copy of your benefits confirmation statement? [Send by Email](#)

Review Profile Shop Benefits Checkout

Current Benefits Plan Year Effective from 07/01/2022 to 06/30/2023 [DOWNLOAD](#) [EMAIL](#) [PRINT](#)

Below are your new elections. Benefit elections may be changed during your company's Open Enrollment or if you've had a Qualifying Life Event.

Medical

Anthem Blue Cross PPO 281636 [View or Change](#)

Pending Life Event Approval

You are changing from: Anthem Blue Cross PPO 281636

Dental

Delta Dental PPO 19301 [View or Change](#)

Pending Life Event Approval

Questions?

Visit [PlanSource](#) or contact your GME office or [HR at UCSF](#).