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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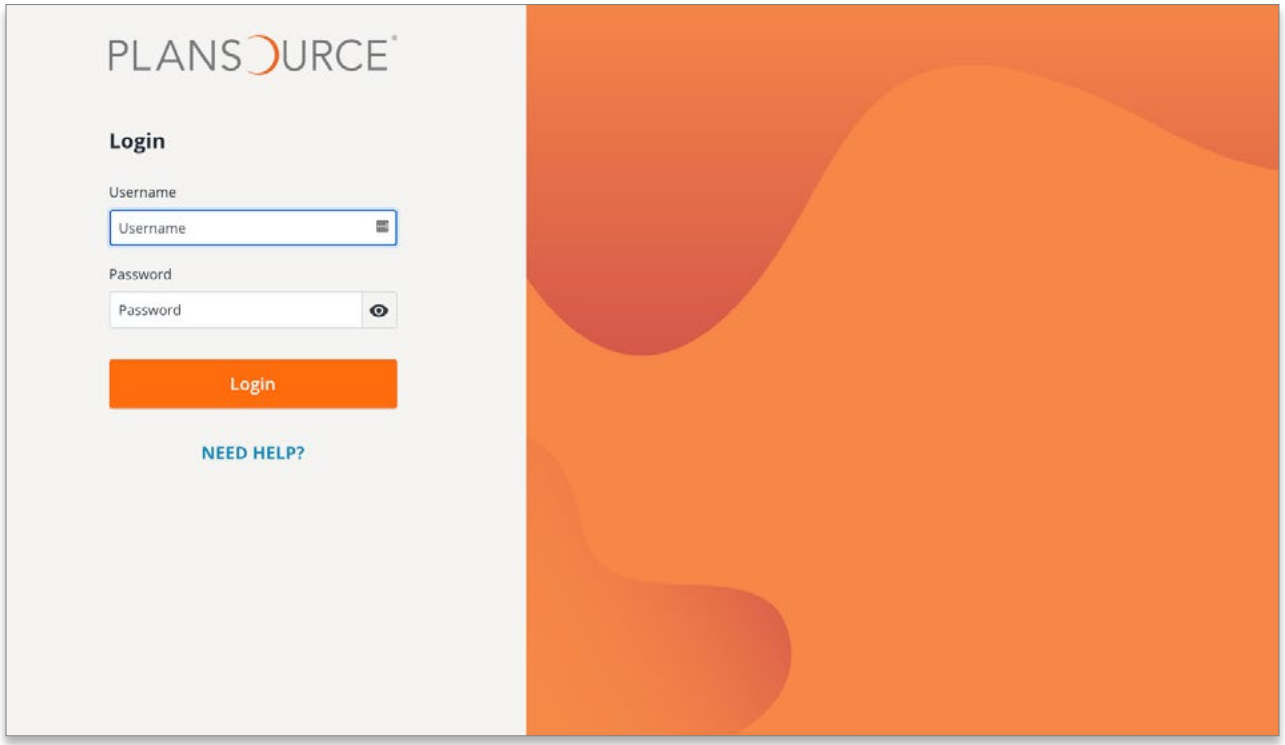
Create a Life Event

Create a Life Event

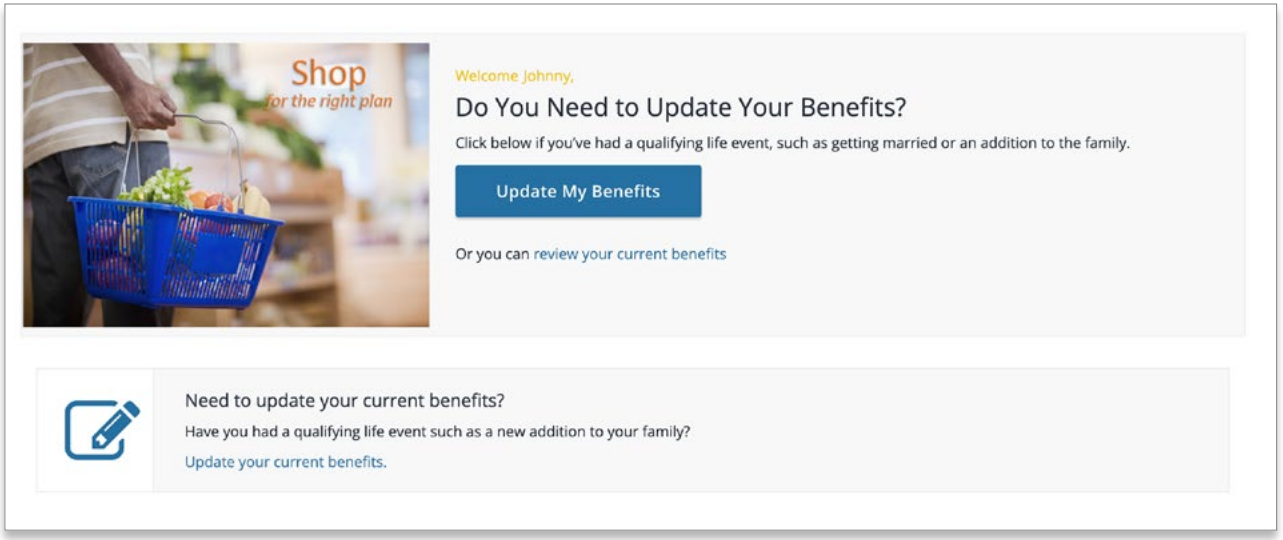
1. **Log in to PlanSource at benefits.plansource.com.**

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



Create a Life Event

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



KEEP IN MIND:

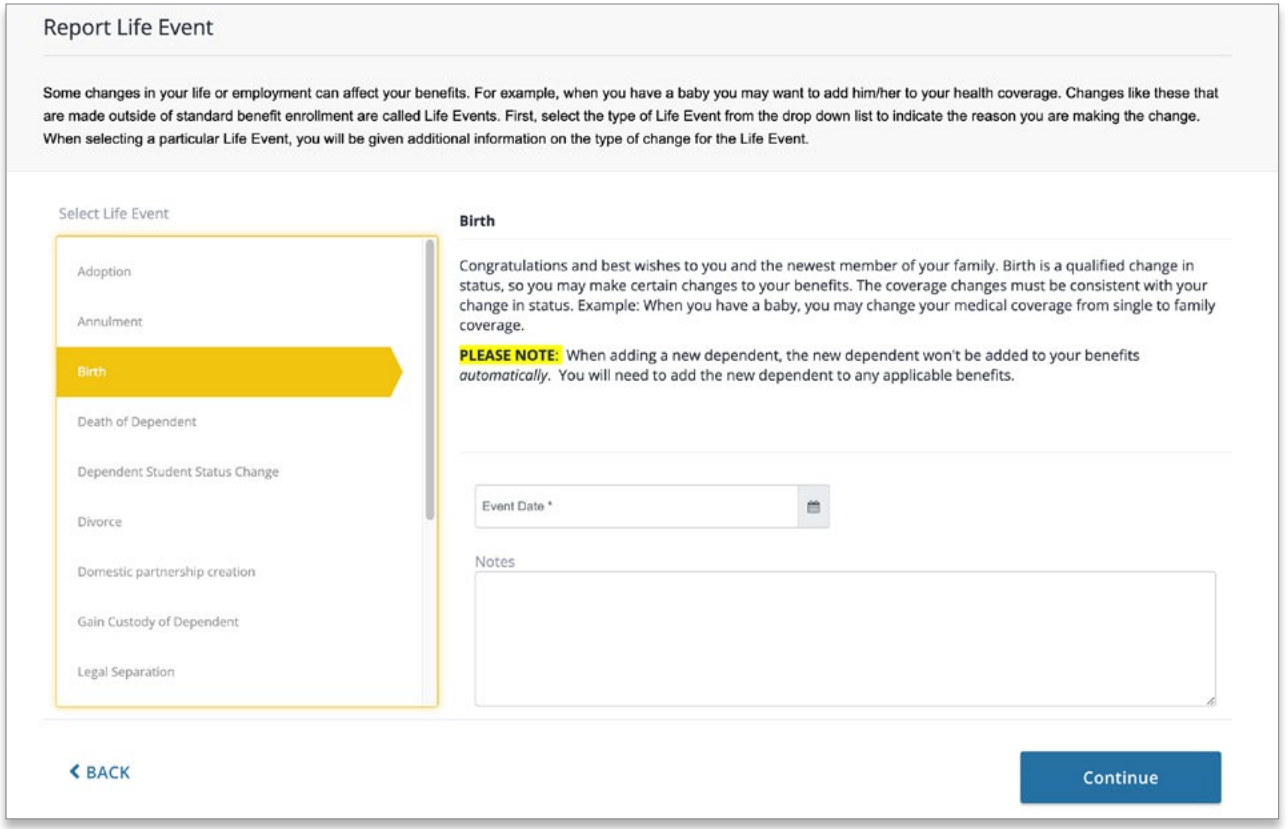
- To change your benefits, you must report life events within 30 days of the event.
- If both you and your spouse/domestic partner are in a UC training program, you cannot cover each other as dependents. You must each enroll in your own coverage.
- The premium that UC pays to cover your domestic partner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

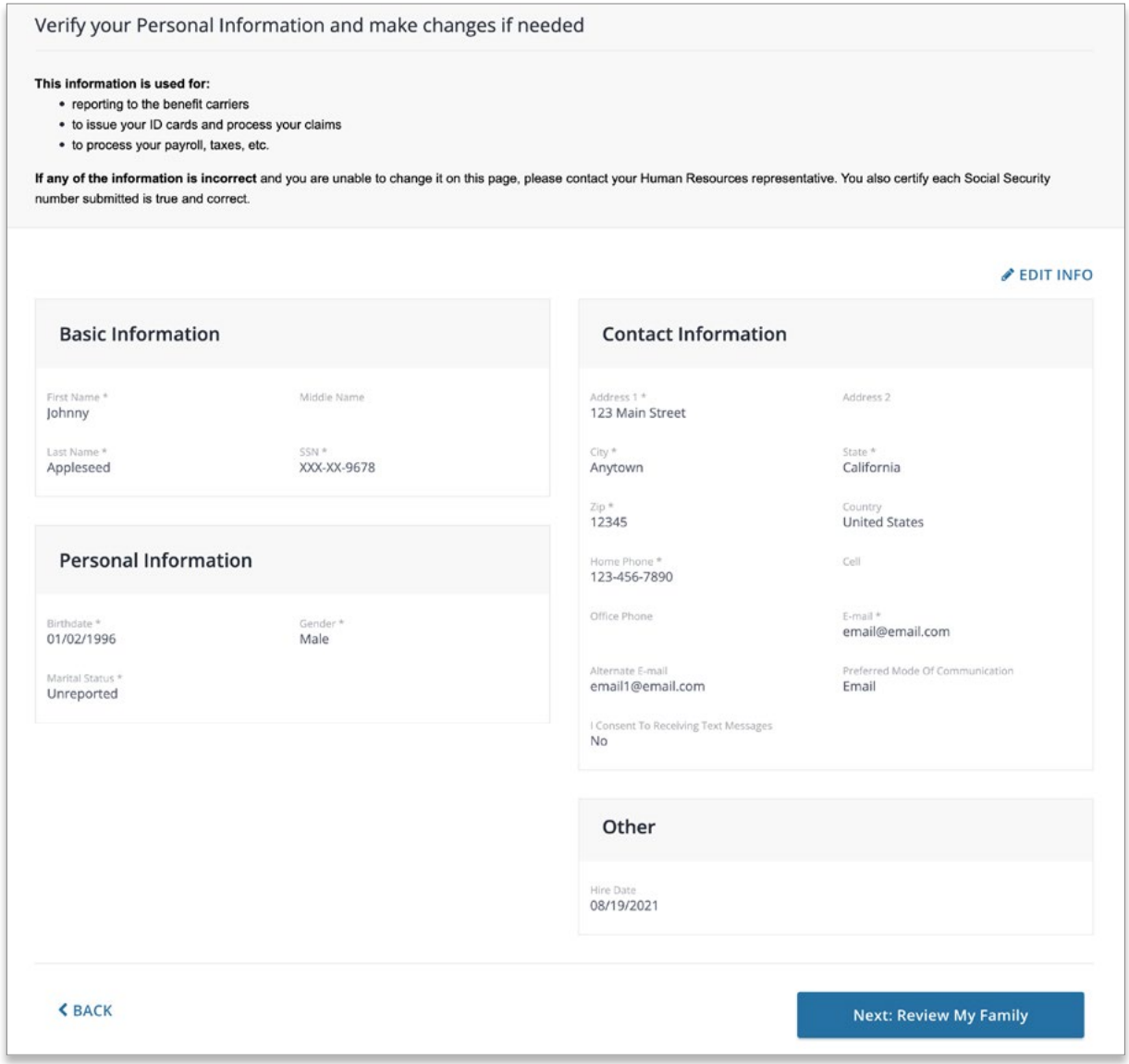
You'll need to provide your GME office with supporting documentation in order to add or remove a family member from coverage.



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**.



Add Dependents

Add Dependents

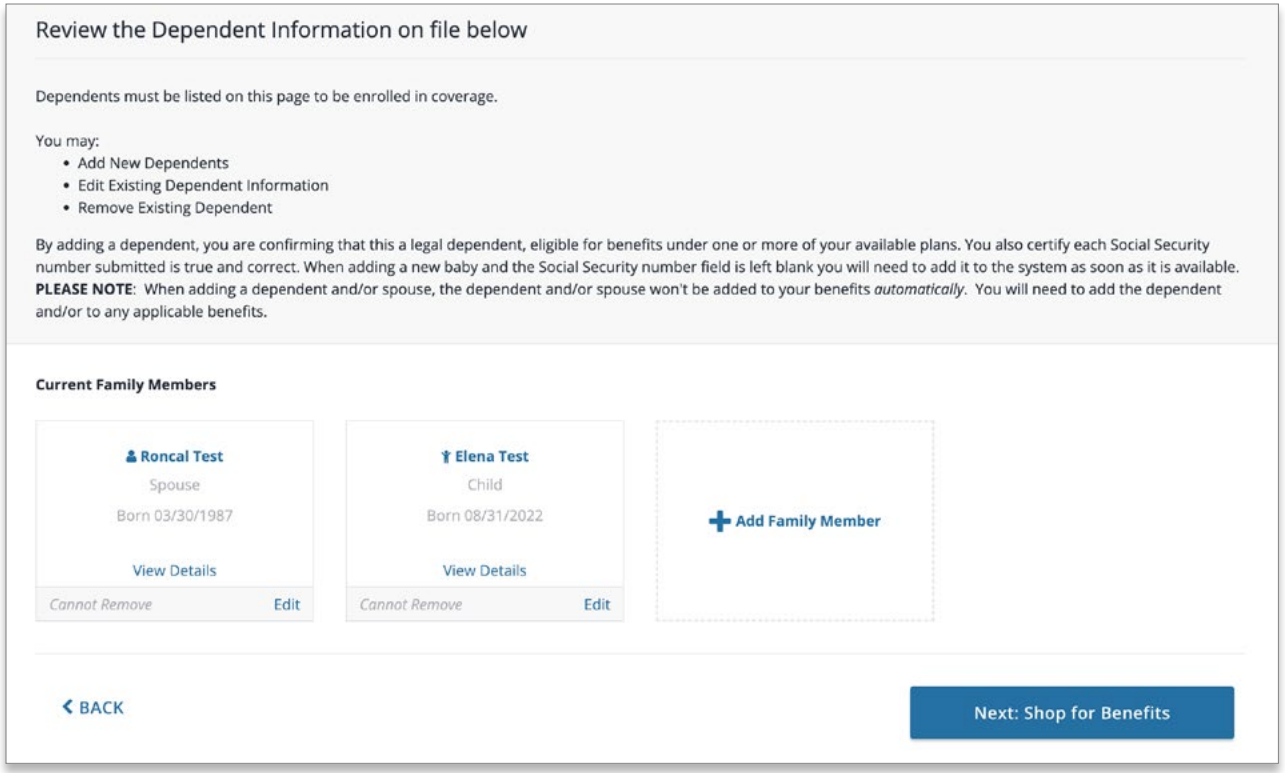
1. **Review your current dependents' information.**

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

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

2. **Add a new dependent.**

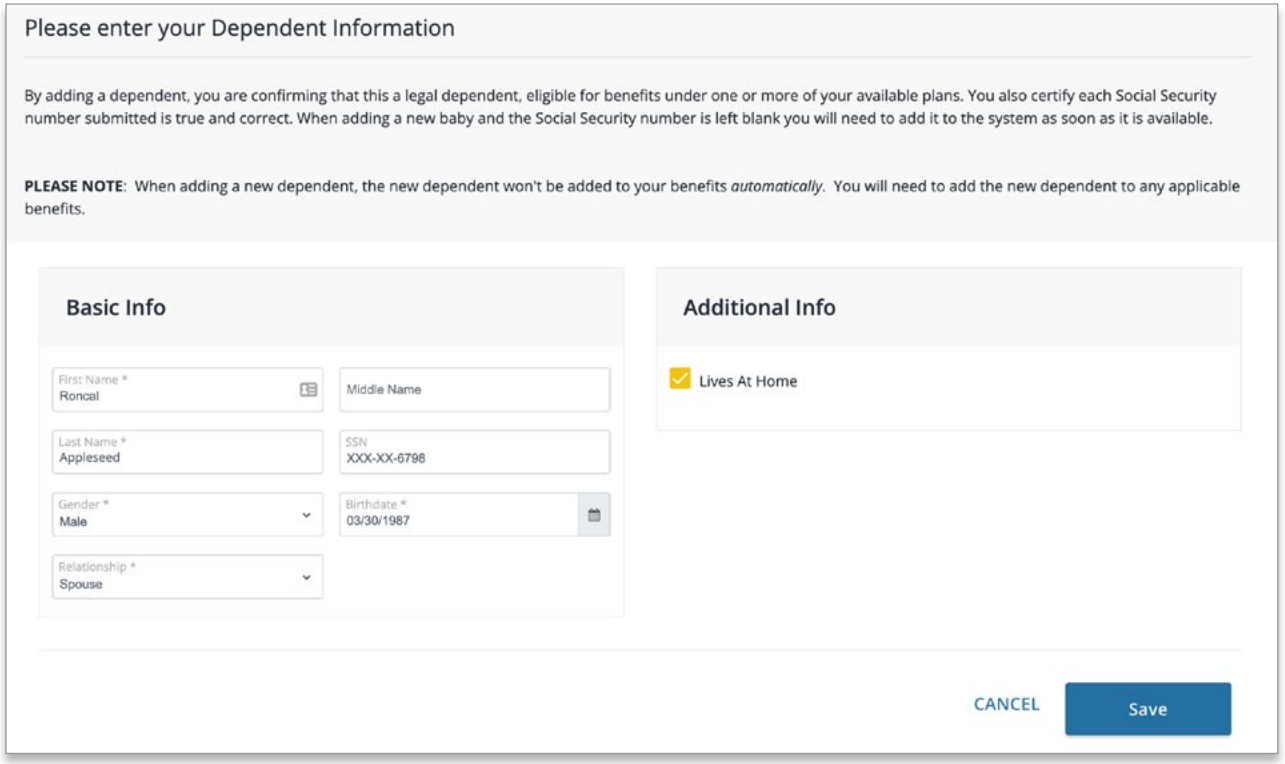
   To add a dependent, select **+ Add Family Member**.



Add Dependents

3. Enter your new dependent's information.

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



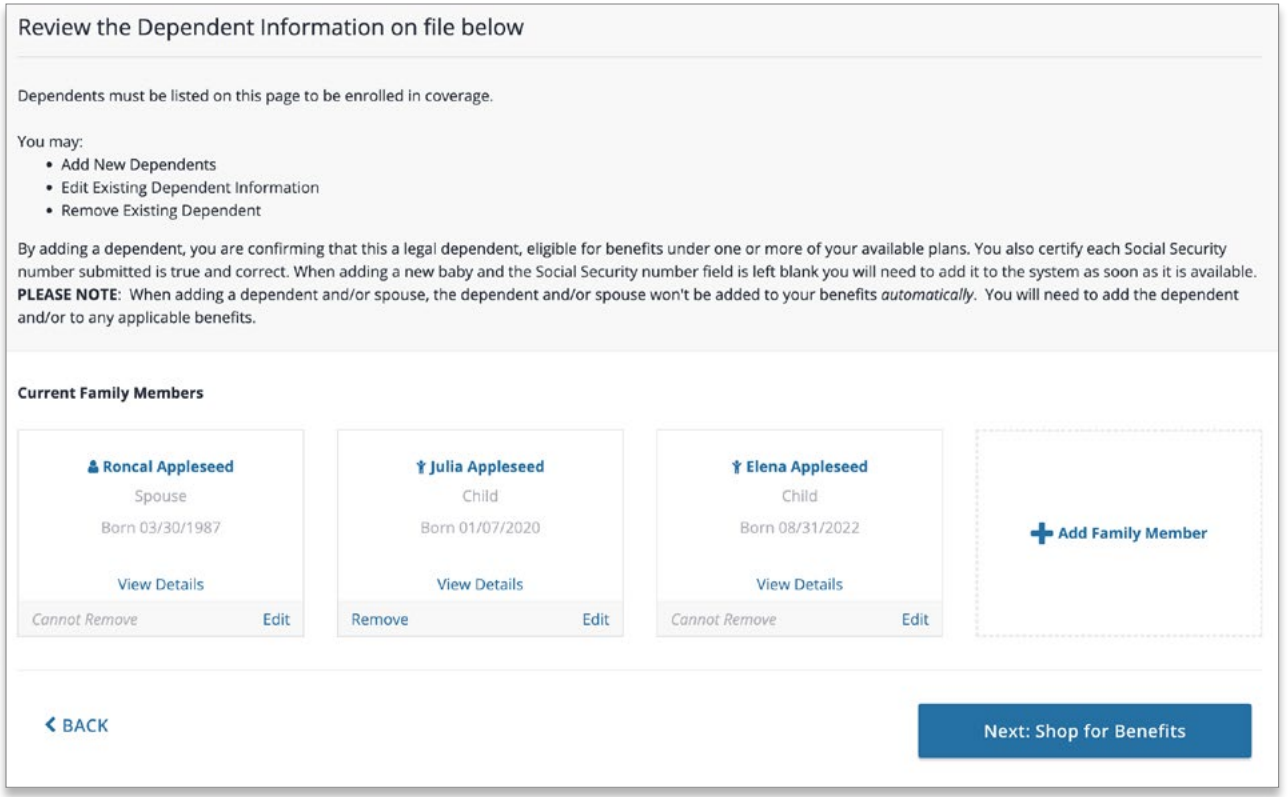
KEEP IN MIND

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.

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**.



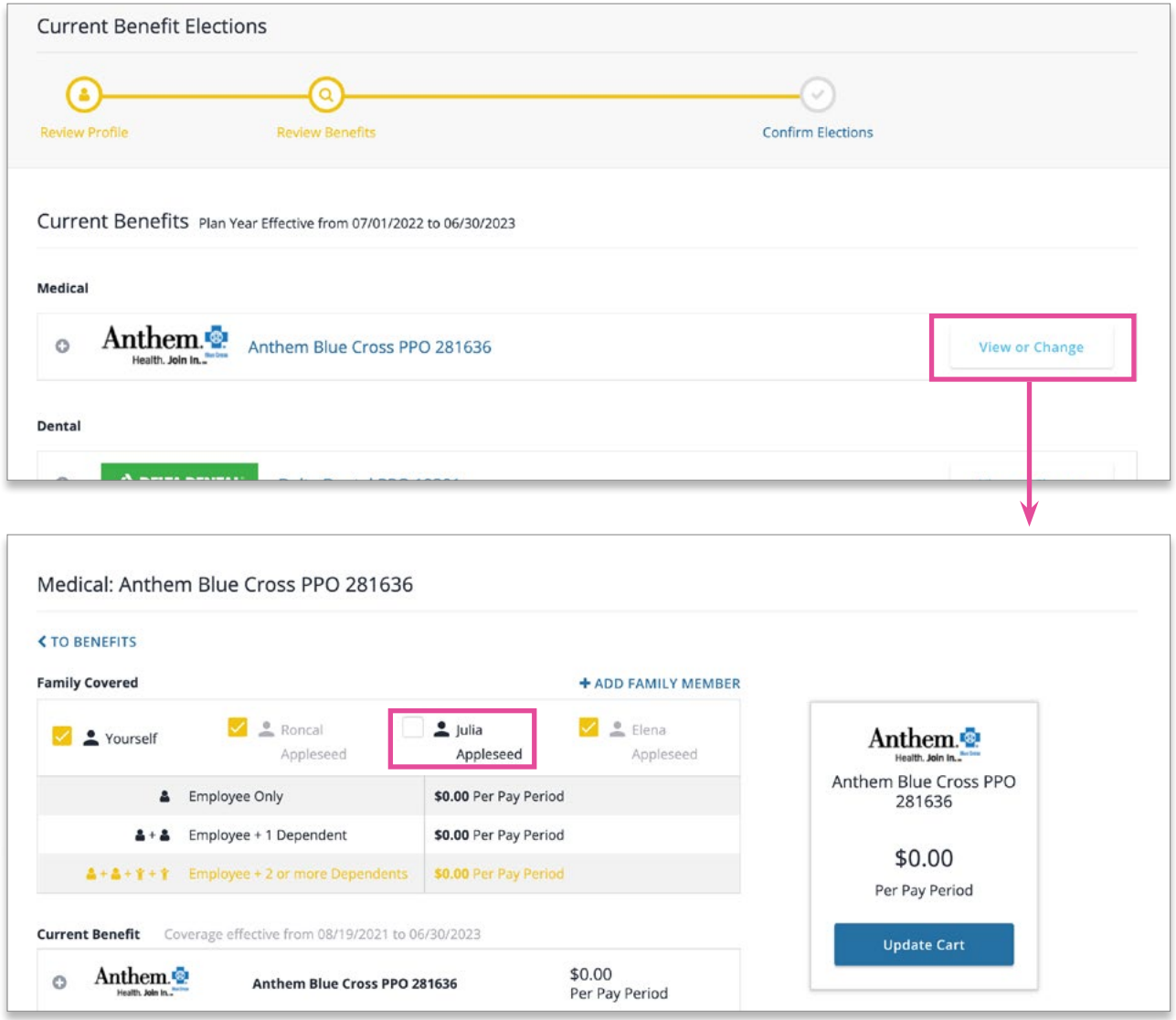
Choose Benefits

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**.

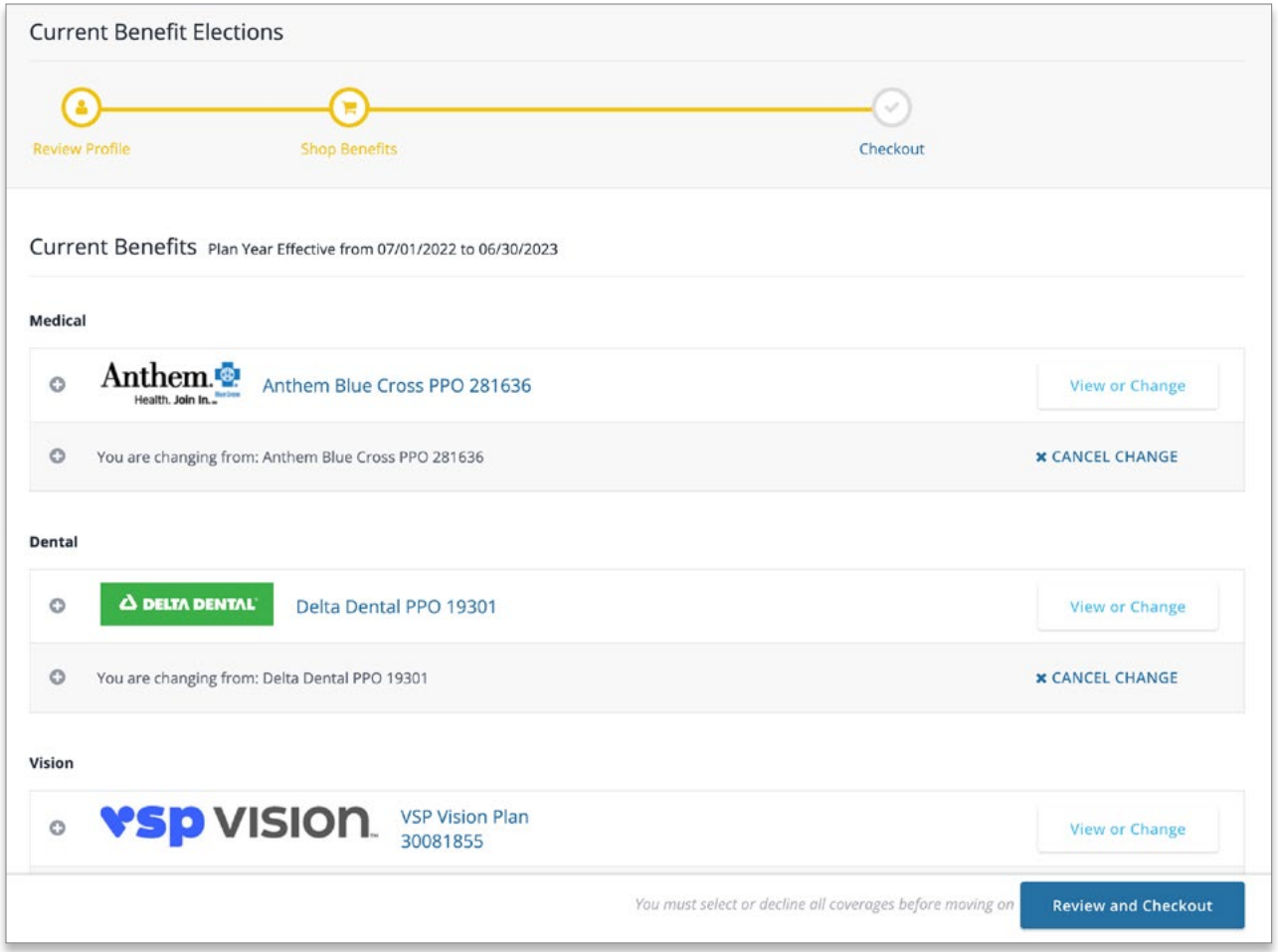
   Repeat this for all coverage you want to enroll this dependent in.



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**.



Review and Check Out

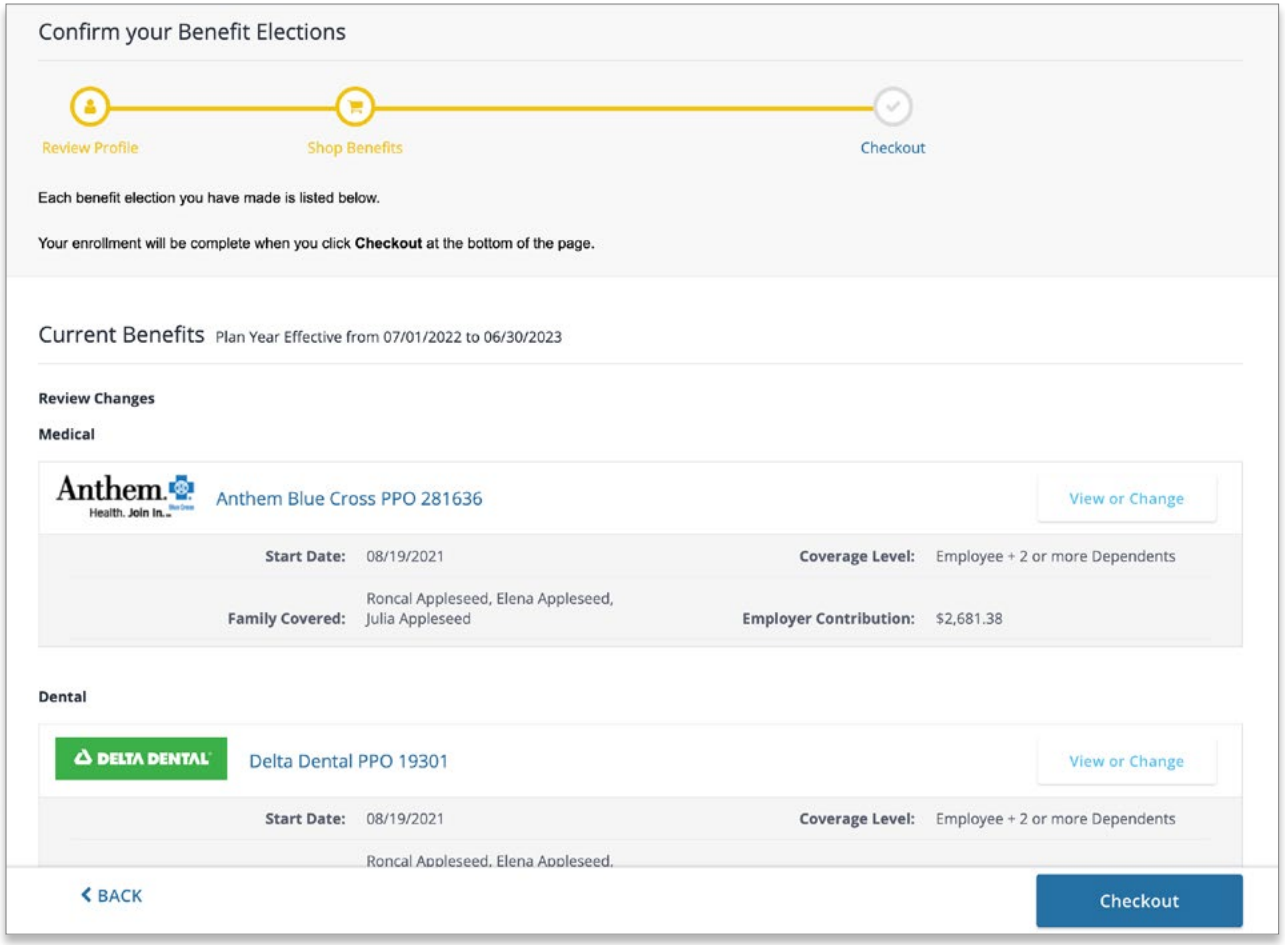
Review and Check Out

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.



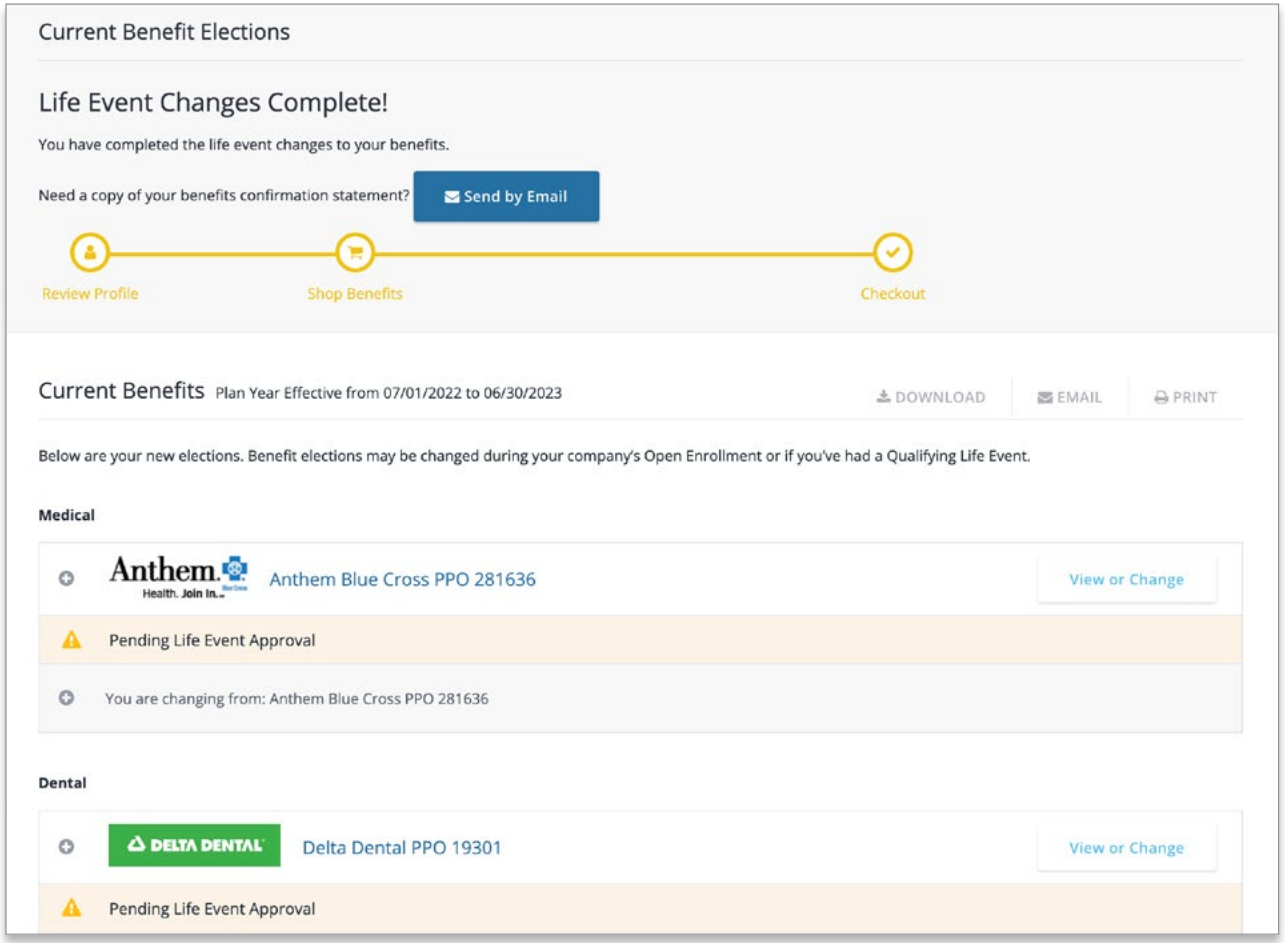
Review and Check Out

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**.



Questions?

Visit PlanSource or contact your GME office or HR at UCSF.