

BENEFIT CHANGE CHECKLIST

Because Texas A&M University allows premiums to be “pre-taxed”, we are required to follow strict guidelines set forth by the IRS.

- There is a **31-day deadline** to make your changes.
- There are specific reasons that allow you to make a change to your coverage in the middle of the plan year.

1) Below is the specific list of events that qualify.

Is your reason on the list?

- A) Birth or adoption of a child
- B) Marriage
- C) Divorce
- D) Loss of other coverage (so you need to **add** coverage or dependents)
- E) Gain of other coverage (so you need to **drop** coverage or dependents)
- F) Change due to spouse’s open enrollment period
- G) Change in residence that affects employee / dependent eligibility
- H) Change in Day Care costs

2) Did the change happen within the last 30 days?

If the answer to **both questions** is YES, you can proceed to the steps.

(If the reason for change is due to a divorce, contact the benefits office at agrilifebenefits@ag.tamu.edu for assistance.)

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NOTE:

For the change to be effective on the first day of the following month, you must complete **all the steps** in Workday before the first day of the month.

If not, the effective date is pushed forward to the next month.

STEP 1

Upload PROOF of your change in status to your
HR Connect Legacy file. [Document Upload \(tamus.edu\)](https://tamus.edu)

This will notify the benefits department that you are requesting a change. They will contact you about your change request.

Specific documents are required by the auditors to show proof of status change.

Birth or Adoption	Birth certificate or Verification of Birth Facts if less than month old Court document for Adoption in progress
Marriage	Official marriage license
Divorce	Divorce decree after it is signed by the judge (all pages)
Loss of other coverage	Letter or document with company letterhead showing all names with date that coverage(s) ended
Gain of other coverage	Letter or document with company letterhead showing all names with date that coverage(s) began
Change due to spouse's open enrollment period	Confirmation of spouse's change in their open enrollment period – including changes to covered dependents
Change in residence	Proof of change / flight itinerary for dependent(s)
Change in Day Care costs	Proof from Day care showing cost change

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IF DROPPING DEPENDENTS OR COVERAGE - GO TO STEP 4

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STEP 2*

TO ADD NEW DEPENDENTS

If your benefit change request pertains to adding new dependents to your coverage, you must first add their information in Workday.

***Note – if they are already on your list, you can proceed to step 4.**

- ✓ Log in to Workday
- ✓ In the SEARCH box, type “dependents”
- ✓ Select “Dependents Report”

This will show your dependent list.

- ✓ Select **ADD** to add the required dependent information:
 - Current date
 - Reason: ____ (select best answer)
 - Legal Name
 - Gender
 - Date of birth
 - Relationship
 - National ID (SSN)
 - Click **Submit**

***Note – this does not automatically add them to coverage. You must complete steps 3 & 4.**

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STEP 3

Go to your Workday inbox for the [link to upload documentation](#) required for your dependents.

Review list below (if this step is not completed, your dependent will not have coverage):

SEE PAGE 4

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STEP 4

Go to your Workday inbox to the [Benefit Change task](#)

- ✓ Follow the steps to the Main page.
- ✓ Select **Manage** or **Enroll** under the coverage
- ✓ Watch for Instructions on the right side of the page
- ✓ Add or Drop coverage pertaining to your benefit change
- ✓ Add or Drop any dependents pertaining to your benefit change
- ✓ **Review** your final page before you **click Submit**.
- ✓ Make sure all other tasks in your inbox are submitted.

Documentation needed to qualify your dependents for coverage:

Legal Marriage Documents

If you are legally married, even if physically separated, you will need:

- Your most recent filed tax Federal Tax Return with **signature page or e-file confirmation** (financial information can be redacted), **OR**
- Marriage certificate **AND** proof of joint ownership dated less than six months old. Recommended documents for proof of joint ownership include:
A mortgage or bank statement, residential leasing agreement, property tax bill, or joint credit card statement. Documents must include both the employee's name and the spouse's name. If within two years of marriage, then only the marriage certificate is required.

Common Law Marriage Documents

If you are legally married by a Common Law Marriage you will need:

- Your most recent Federal Tax Return(s) showing that you are married filing jointly or separately, **OR**
- Texas Declaration of Informal/Common Law Marriage from the County where the marriage was recognized or recorded **AND** proof of joint ownership dated less than six months old. Recommended documents for proof of joint ownership include:
A mortgage or bank statement, residential leasing agreement, property tax bill, or joint credit card statement. Documents must include both the employee's name and the spouse's name.

Biological Child Documents

Birth certificate of the biological child listing the employee as either the mother or father. If the child is under 6 months old, documentation on hospital letterhead indicating the birth date of the child or children will be accepted as temporary enrollment but must be followed by the birth certificate when received.

Step Child Documents

Child's birth certificate showing the child's parent is the employee's spouse, **AND** marriage certificate showing legal marriage between the employee and the child's parent.

Adopted Child Documents

The documents will depend on the current stage of the adoption. Official court/agency placement papers for a child placed with you for adoption (initial stage), **OR** Official Court Adoption Agreement for an Adopted Child (mid-stage), **OR** birth certificate (final stage).

Disabled/Incapacitated Child age 26 or older

A doctor's statement regarding the physical or mental condition of the dependent, whether the dependent is able to maintain self-sustaining employment and whether the condition occurred before the child reached age 26. In order for the medically incapacitated dependent to be enrolled in coverage when he/she is age 26 or older, the following documentation must be submitted either before the child/grandchild reaches age 26 if currently enrolled or at the time of enrollment:

1. For medical coverage including optional coverages (if applicable) submit the [BCBSTX Dependent Child's Statement of Disability form](#).
2. For optional coverage only excluding medical, submit the [TAMUS Dependent Child's Statement of Disability](#) to System Benefits Administration for review.

Grandchild Documentation

Most recent filed tax return, including the signature or confirmation of e-file, showing the grandchild as a claimed dependent (financial information can be redacted).

Foster Child Documentation

Official Court or Agency Placement papers.

Legal Guardianship Documentation

Court order establishing guardianship of a child. Eligible up to age 18 unless court order defines otherwise.

Managing Conservatorship Documentation

Court order establishing managing conservatorship of a child. Eligible up to age 18 unless court order defines otherwise.