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)]

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):

Specific dependent documentation is required

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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.