



## Submitting a Qualifying Life Event

*Have you recently experienced a life event and need to make changes to your benefits?*

*Here are some examples of QLE's:*

*Marriage*

*Divorce*

*Birth of a Child*

*Loss of Coverage*

*Gaining other Coverage*

If you meet one of the QLE's above, you are qualified to make changes to your benefits. **You have 30 days from the date of the qualifying event to make changes. If you do not make changes (i.e. enroll or cancel) within the 30-day window, you will lose the opportunity to do so. Important: You will be required to submit documentation as evidence of the QLE, please see further instructions below.**

Outside of a qualifying event, the next opportunity to make changes will be during open enrollment which takes place in August for a September 1st effective date of the upcoming plan year. Additionally, you must have actively enrolled or declined coverage initially to be eligible to make changes to your benefits due to a qualifying event.

Follow these steps to submit a Qualifying Life Event in PlanSource

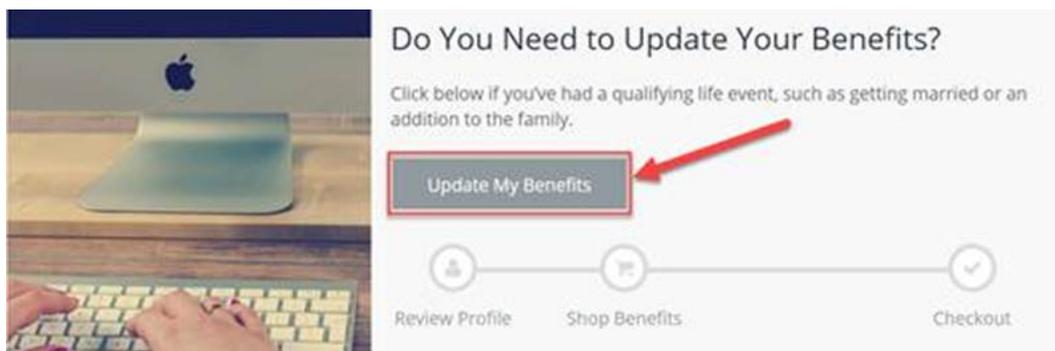
Log on to [PlanSource](#)

Username: First Name.Last Name, ie. Jose.Altuve

Password: When you first registered and enrolled/declined you were prompted to change your password. If you need a password reset, please click on Forgot Password or email

[Bac.yesprepbenefits@ajg.com](mailto:Bac.yesprepbenefits@ajg.com)

Once you are logged on, go to Update my Benefits in the main screen



This will take you to the "Report Life Event" Page



Select the Qualifying Life Event (QLE) that applies to you

Enter the start date of the QLE, and provide detailed notes as to why/what the life event is  
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.

All supporting documentation should be sent to this email address : Bac.yesprepbenefits@ajg.com in order for your life event to be approved.

Select Life Event \*

- Adoption
- Birth
- Dependent Student Status Change
- Gain Custody of Dependent
- Loss of Dependent Status
- Marriage

Click submit.

You will be taken to a "Manage your Profile" page

Please make sure your demographic information is accurate

Next is the "My Family" page

If you are adding a dependent due to birth or loss of coverage (you want to add them to your insurance) please make sure they are added under Current Family Members.

Manage your family members

View, add, edit or remove dependents here. If you add a new family member, the family member won't be added to your benefits automatically. You still need to add the family member to any applicable benefits.

Current Family Members

+ Add Family Member

< Back

Next: Shop for Benefits

Next is "Shop for Benefits"



This is where you will elect the changes to your benefits. Under each type of benefit there will be a “Change Plan” button

Ex: If you had a baby and want to add them to your medical coverage, you would change your plan to “Employee and Family” (if you and your spouse were already covered) or “Employee and Children” (if a spouse does not need to be covered).

### Your Benefits

Review Profile      Shop Benefits      Checkout

To make a change, click on the benefit name. To complete your enrollment, click Continue at the bottom of the page.

### Current Benefits Coverage effective from 09/01/2017 to 08/31/2018

#### Smoker / Non Smoker

|                                   |  |                              |
|-----------------------------------|--|------------------------------|
| <b>+</b> <b>Status:</b> Completed | <b>Dates:</b><br>Last Updated 01/12/2018 | <a href="#">View Summary</a> |
|-----------------------------------|--|------------------------------|

#### Medical

|  |                             |
|--|-----------------------------|
| <b>+</b> TRS-ActiveCare    ActiveCare 1 HD | <a href="#">Change Plan</a> |
|--|-----------------------------|

Once you have made all of your desired changes, scroll to the bottom and click “Review and Checkout”

Confirm your benefit elections and click “Checkout”

### Confirm your Benefit Elections

Review Profile      Shop Benefits      Checkout

Last Step! Take a few moments and check things over. If it looks good, then click Confirm at the bottom and you'll be all set. If not, click on Your Benefits to make changes. If we have an e-mail address on file for you, we will email you a confirmation statement.

Additional Content (1):  
[Information](#)

By the way, if you get married, unmarried or have a baby, come back and let us know! We want to make sure you have the right benefits for your family – no matter what size. Watch the video below to learn more and making a change to your benefits.

[+ View More](#)

### Current Benefits Coverage effective from 09/01/2017 to 08/31/2018

Send an email copy of your confirmation statement to yourself once you completed your life event changes.



## 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](#)



The coverage details listed below are the current active elections on file for you and your dependents.

- If you believe there is an error in your statement, please contact your Benefits Administrator.
- If you need to make changes due to a qualify life event, please click on the Life Event link to the left.

Click on the icons below to print your confirmation statement or generate a pdf file.

### Important Follow-Up Actions Required

Once you submit the qualifying live event in PlanSource, you are required to provide supporting documentation for approval of the life event. This will need to be submitted to [Bac.yesprepbenefits@ajg.com](mailto:Bac.yesprepbenefits@ajg.com). Below are some examples of supporting documentation you can submit:

**Certificate of Credible Coverage** – This is a document your previous insurance provider can generate which details the last or first day you or your dependent were covered with their insurance. This document is required for a “Gaining other coverage” or “Loss of coverage” life event.

**Birth Certificate, Vital Record, Report of Birth, Birth Facts** – For the “Birth” life event, any one of these documents is acceptable. The birth certificate may not be available within 30 days from the date of birth but any hospital document that shows the name of the child and birthdate should suffice.

**Marriage Certificate or Divorce Decree** – These documents are required for adding or removing the dependent from your coverage.

Once your life event is approved, you will receive confirmation of your changes. If you need support with any of this documentation please reach out to [Bac.yesprepbenefits@ajg.com](mailto:Bac.yesprepbenefits@ajg.com).