MAJOR LIFE EVENT CHECKLIST

Outside of the annual open enrollment period, an employee may change an enrollment election (i.e. add or delete dependents, change level of coverage) only if there has been a Major Life Event. The following are considered major life events:

✓ Marriage or divorce of the employee
✓ Death of the employee’s spouse or dependent
✓ Birth or adoption of a child by the employee
✓ Termination of employment (or commencement of employment) of the employee’s spouse
✓ Switching from a part-time to a full-time employment status by the employee or employee’s spouse’s employment
✓ Gain or involuntary loss of health care coverage by your dependent

All changes due to a major life event must be consistent with that major life event. Enrollment changes are subject to the other terms and limitations of this program.

If you have experienced a Major Life Event; you may want to add or delete dependents, or change your level of coverage for supplement benefit elections. You may also need to change your marital status, address, beneficiaries, etc. The list of forms below may assist you in making these decision(s). Please be advised that changes which alter your level(s) of coverage (i.e. health insurance, life insurance, AD & D, flexible spending accounts, etc.) must be received by Human Resources within 30 days of the major life event. The only exception to this rule is the addition of a child which must be done within 60 days of the birth/adoption.

ALL FORMS MAY BE FOUND AT: http://www.alaska.edu/hr/forms/

Personnel Forms

✓ Change Form (update address, marital status, or name)
✓ W4 Form (change withholding, marital status, etc.)
✓ Automatic Deposit (if there has been a change in bank accounts, etc.)

Pension/ORP/Tax Deferred Annuity (TDA)

✓ Contact Pension or ORP plan sponsor to update beneficiary information
✓ Contact TDA plan sponsor to update beneficiary information

PERS or TRS

✓ TRS/PERS Beneficiary Form to update beneficiary information

Health Insurance

✓ UA Choice Health Care Enrollment Form (add, remove, or change dependents, update relationship codes, etc.)
✓ Change your UA Choice level of coverage

Optional/Supplemental Benefits

✓ Beneficiary Designation (change UA beneficiary information)
✓ Optional – UA Choice Supplemental Benefit Election form
  o Supplemental Life Insurance: Increase/decrease level of coverage
  o Accidental Death & Dismemberment (AD&D): Elect or change AD&D coverage amount
  o Flexible Spending Accounts (FSA): Add or change amounts for dependent and/or medical FSA