Shawnee State UNIVERSITY

Reporting a Life Event Using Bear Trax

All Employees

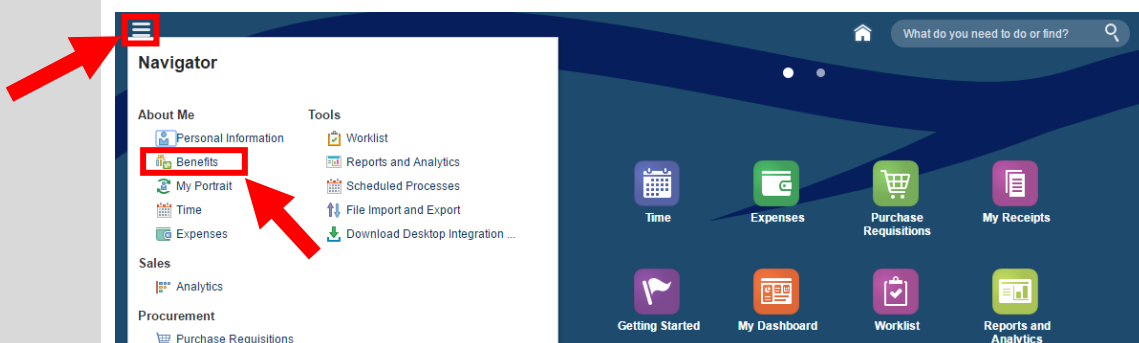### Intro

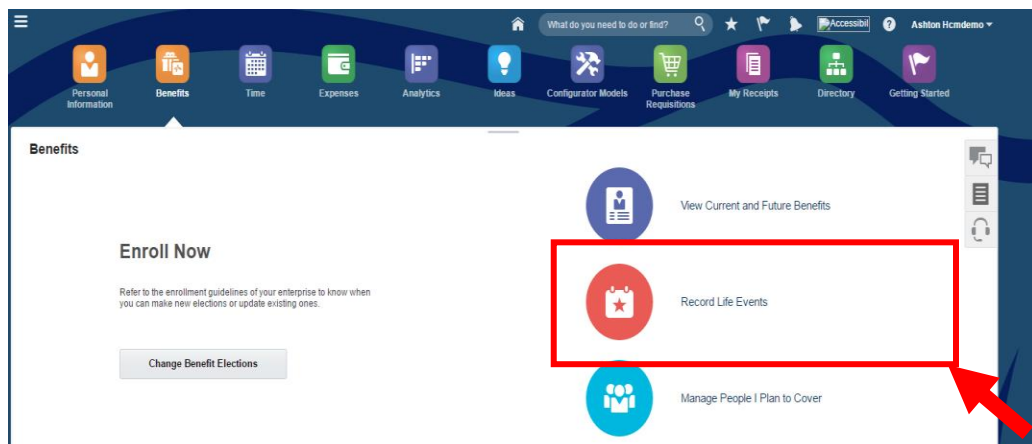|	
Purpose:	To report a new life event in Bear Trax or make changes to your Benefits information during open enrollment.
How to Access:	Go to the Home Screen by clicking the [home] icon.
	Click the [menu] Icon.

Under "About Me," click "Benefits." This will take you to the Benefits screen.

Helpful Hints:	Be sure to keep in mind that…

1. You can report a variety of different life events through this screen that affect your current enrollments.
2. You can meet at any time with a Human Resources Coordinator to discuss the effects of life events on your benefits.
3. You can report a life event at any time of the year. Changes must be reported within 30 days of the event.
4. Any life events being reported will be effective as of the date of the life event.
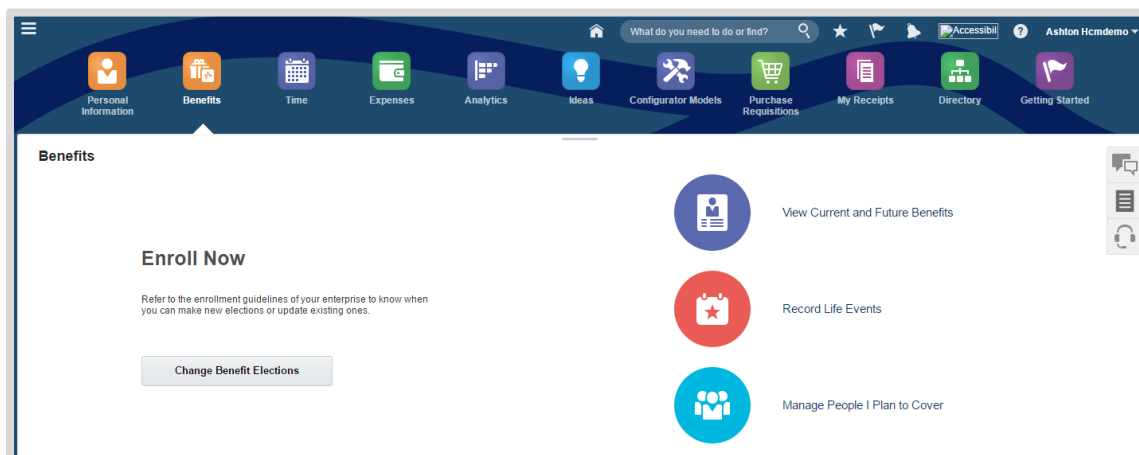
5. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.
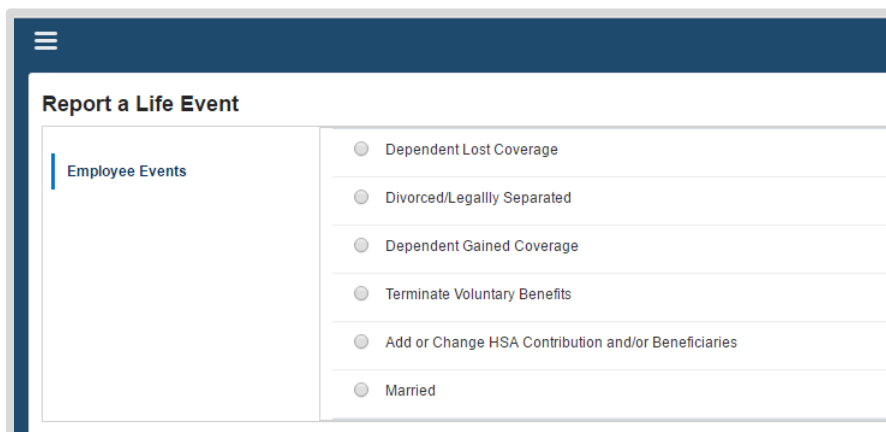
Procedure: Complete the following steps to report new life events:

Report a Life Event
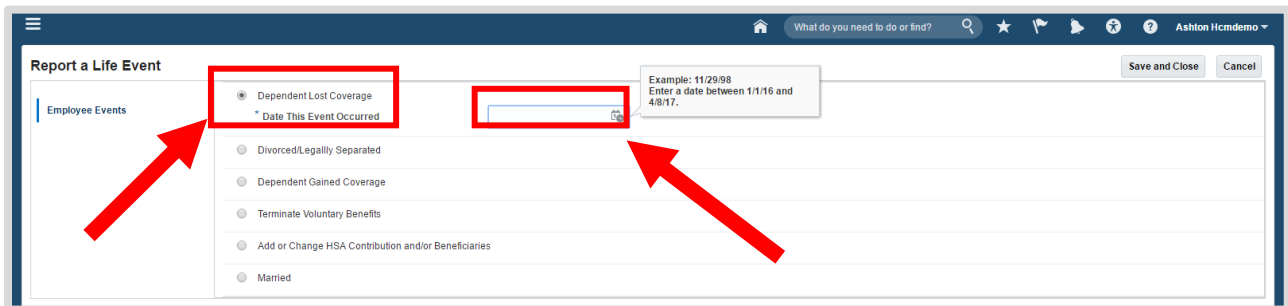
1. Click Record Life Events from the Benefits page.

2. Select the appropriate Life Event you want to report.

If you want to…	Then…	Go To
Report a Dependent Losing Coverage	Select the option to do so, and type in the date.	Section 1
Report a Divorce or Legal Separation	Select the option to do so, and type in the date	Section 2
Report a Dependent Gaining Coverage	Select the option to do so, and type in the date	Section 3
Terminate your Voluntary Benefits	Select the option to do so, and type in the date	Section 4
Add or Change your HSA Contribution and/or Beneficiaries	Select the option to do so, and type in the date	Section 5
Report a New Marriage	Select the option to do so, and type in the date	Section 6

Section 1: Report Dependent Losing Coverage

Use this option if one of your dependents will no longer need or receive coverage. (For example, if you had a child that recently accepted a job and got their own insurance, he or she can no longer be covered by your insurance.)
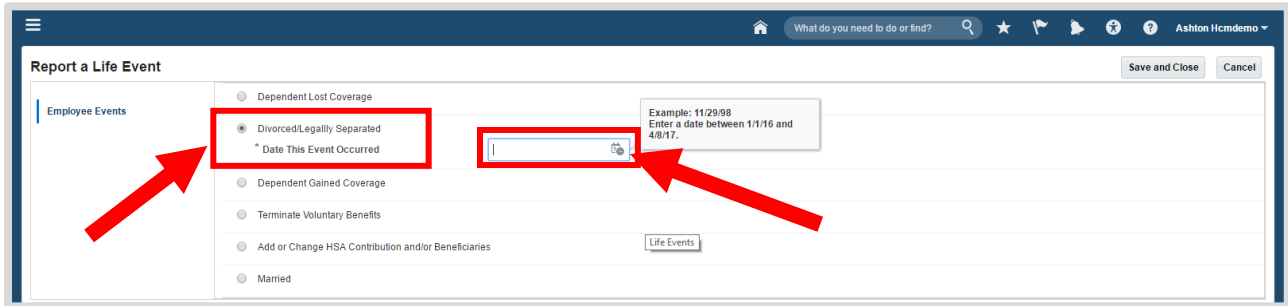

1. Click the choice that states "Dependent Lost Coverage."

2. Type the date that this event occurred in the text box to the right in the appropriate format MM/DD/YY.

3. Click "Save and Close."

4. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office.

5. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.

![Shawnee State University]

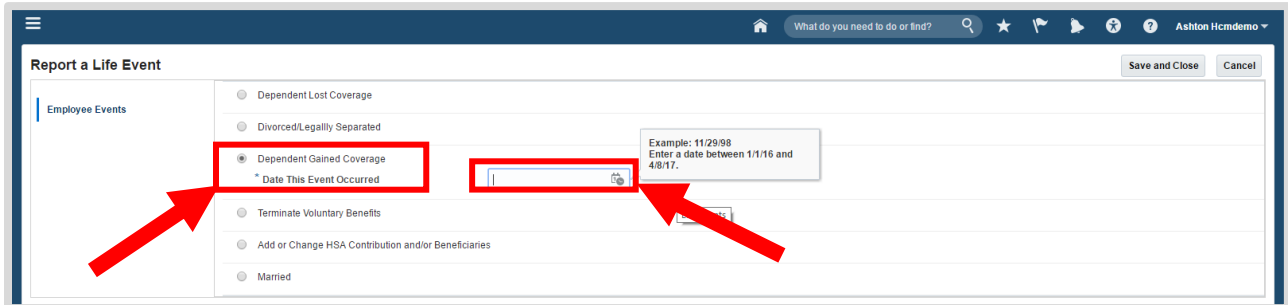### Section 2: Report a Divorce or Legal Separation

Use this option if you have recently divorced or legally separated from a spouse.

1. Click the choice that states "Divorced/Legally Separated."

2. Type the date that this event occurred in the text box to the right in the appropriate format MM/DD/YY.

3. Click "Save and Close."

4. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office.

5. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.

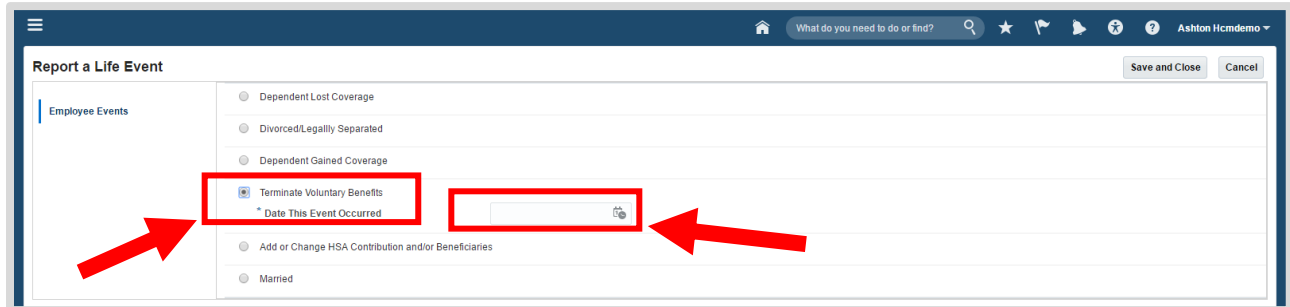## Section 3: Report Dependent Gaining Coverage

Use this option if you are adding coverage for a new dependent. (I.e.: birth of a child, adoption)

1. Click the choice that states "Dependent Gained Coverage."

2. Type the date that this event occurred in the text box to the right in the appropriate format MM/DD/YY.

3. Click "Save and Close."

4. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office.

5. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.
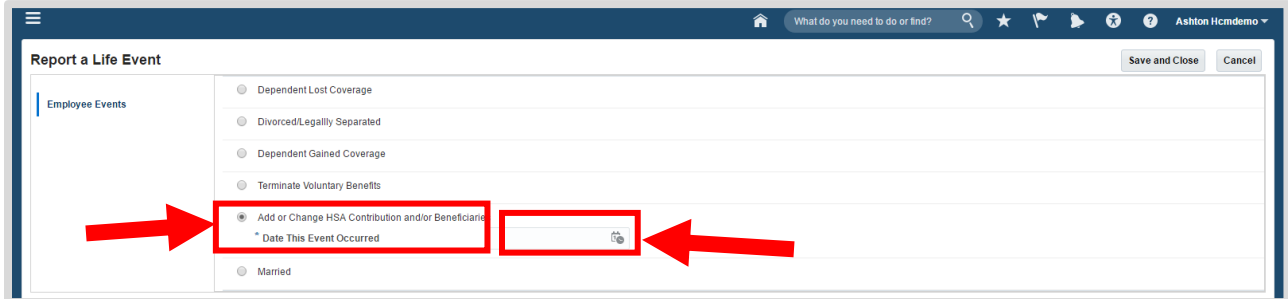
Section 4: Terminate Voluntary Benefits

Use this option if you intend to terminate your voluntary benefits.

1. Click the choice that states "Terminate Voluntary Benefits."

2. Type the date that this event occurred in the text box to the right in the appropriate format MM/DD/YY.

3. Click "Save and Close."

4. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office.

5. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.

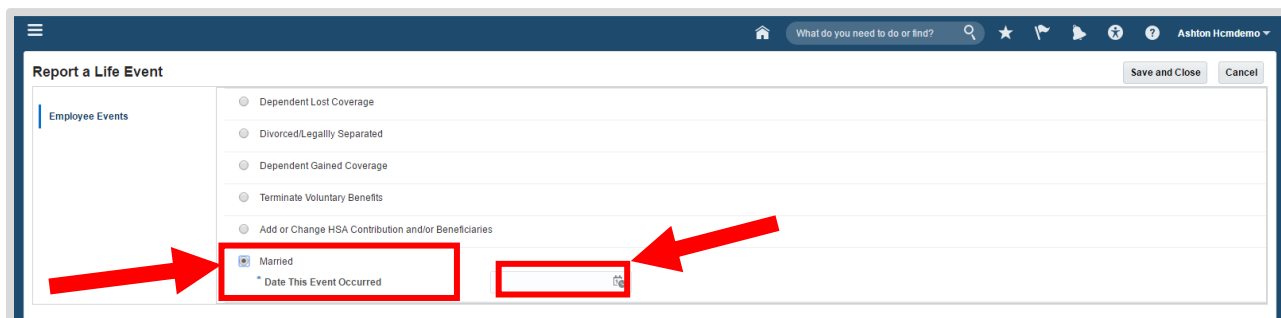## Section 5: Add or Change HSA Contribution and/or Beneficiaries

Use this option if you intend to add or change your HSA contribution and/or beneficiaries.

1. Click the choice that states "Add or Change HSA Contribution and/or Beneficiaries."

2. Type the date that this event occurred in the text box to the right in the appropriate format MM/DD/YY.

3. Click "Save and Close."

4. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office.

5. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.

Shawnee State
UNIVERSITY

Section 6: Report a New Marriage

Use this option if you recently got married or will be married soon.

1. Click the choice that states "Report a New Marriage."

2. Type the date that this event occurred in the text box to the right in the appropriate format MM/DD/YY.

3. Click "Save and Close."

4. After recording a new life event, upload the certificate (or other required documentation) or submit it to the Human Resources office.

5. Once that has been completed, you need to refer to the Make Benefit Elections job aid to make updates to your benefit elections. The system will not automatically change enrollments based on the life event recorded.

Final Notes

By following these steps, you have successfully reported any new life events which would affect your current enrollments and future enrollments.