

Human Resources

Benefits Life Events Reference Guide

A qualifying life event is a specific life event that allows a City employee to request their benefit elections be changed outside of the annual Open Enrollment period. IRS regulations state that you may not change your pre-tax benefit options unless you experience a qualifying event. Qualifying events include but are not limited to the events below.

The “Life Events” option guides City employees through the process of submitting a request for one of the qualifying life events listed below.



Will your Life Event result in other changes to your personal information, tax withholdings, and/or beneficiary information? Please refer to the [Life Event Checklist](#) to ensure all areas that may be impacted by a life event are reviewed and updated as applicable.

Birth of a Child	Adoption of a Child	Marriage
<ul style="list-style-type: none"> ▪ Enter and submit date of Birth ▪ Upload county issued birth certificate, attestation form or Birth Verification Letter ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event ▪ If you completed the attestation form, upload and submit the county issued birth certificate and SSN within 60-days of the birth 	<ul style="list-style-type: none"> ▪ Enter and submit date of Adoption ▪ Upload adoption court order documents or attestation form ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event ▪ If you completed the attestation form, upload and submit the county issued birth certificate and SSN within 60-days of the birth 	<ul style="list-style-type: none"> ▪ Enter and submit date of Marriage ▪ Upload county issued marriage certificate or attestation form ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent(s) and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event ▪ If you completed the attestation form, upload and submit the county issued birth certificate and SSN within 60-days of the birth

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Add Domestic Partner	Dissolution of Domestic Partner	Divorce/Legal Separation*
<ul style="list-style-type: none"> ▪ Enter and submit date of Domestic Partnership establishment ▪ Upload City affidavit form, state issued domestic partnership certificate, or attestation form. Take note of taxable/non-taxable status of your domestic partner ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event 	<ul style="list-style-type: none"> ▪ Enter of dissolution of Domestic Partnership ▪ Upload City affidavit of termination of Domestic Partnership form ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event 	<ul style="list-style-type: none"> ▪ Enter date of Divorce/Legal Separation ▪ Upload final divorce court separation documents* ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event
Gain of Coverage Elsewhere*	Loss of Coverage Elsewhere*	All Other Events
<ul style="list-style-type: none"> ▪ Enter and submit date of gain of coverage ▪ Upload proof of alternative group coverage gain (such as employee portal print out/employer verification letter) ▪ Review/Update Dependent/Beneficiary Information ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event 	<ul style="list-style-type: none"> ▪ Enter and submit date of loss of coverage ▪ Upload proof of alternative group coverage loss (such as employee portal print out/employer verification letter) ▪ Update Benefits Elections <ul style="list-style-type: none"> ○ Add new dependent and indicate desired coverage within each benefit ▪ Review Benefits Elections and Submit Enrollment ▪ Save and Print a Copy of Submitted Benefit Statement ▪ Complete Life Event 	<ul style="list-style-type: none"> ▪ Email HRBenefits@sanjoseca.gov with reason and date of event <p style="text-align: center;"><i>A team member will respond to assist in understanding what changes may be made based on your Life Event and guide you through additional steps.</i></p>
<p>* You must upload required documentation PRIOR to your benefit changes being approved for Gain/Loss of Coverage and Divorce/Separation events.</p>		