



PlanSource Life Event Instructions - Enrolling Dependents

SJC Benefits Fax: 904.209.2414 | Direct 904.209.0635, #4 | Email: bccbenefits@sjcfl.us

How to enroll eligible dependents due to a life changing event (a.k.a. qualified life event, change in status).

If you have questions about the process or need assistance with enrollment contact your Benefits Team.

Benefits Guide: [EC Benefits Home](#)

Log In to Plan Source

WEBSITE = <https://benefits.plansource.com/?sjc>

USER NAME = First initial of your first name, first six letters of your last name and last four of your social security number. (Ex. jsmith0000)

PASSWORD = Password you created

*If you have forgotten your password, you can click on "forgot password" or request the Benefits Team to change it to the default which will be your date of birth in following format: YYYYMMDD.

From the Plan Source home page: Click on "Update My Benefits". You will then be asked for the type of life event: (select one of the following)

- Birth*
- Adoption
- Gain Custody of Dependent
- Marriage
- Self/Spouse/Dependent Loses Coverage (Add Coverage)
- Lose Eligibility Medicare/Medicaid
- Add Spousal Surcharge (Spouse Gains Coverage)

Enter the date of the event or the **date your benefits will change**. It is required that you submit your qualifying life event and all supporting documents to your HR department within 30 calendar days of any change in status.

*For birth – don't wait to receive the child's social security #, leave blank, once received call HR to input the #.

Step 1: Your Info

In this step you will review, verify, and if necessary, update your personal information. You will only be allowed to update the information allowed by your administrator. Save and/or Next to move to Step 2.

Step 2: Review My Family

In this step you will add and/or update your current dependents. All eligible dependents that you plan to include in your benefit elections need to be added in this step. To add a dependent select "Add Family Member", complete all fields, save and continue for each family member you wish to add. Next to move to Step 3.

Step 3: Shop for Benefits

In this step you will make all of your benefit elections. To change a benefit election, click directly on one of the following: View or Change Plan, View Summary or Shop Plans. Available option(s) will be shown under each Plan. Make your plan selection by clicking on "View Plan". If you elect coverage with family members, make sure under "Family Covered" all members (eligible for coverage) have a check mark (✓) next to their name. Once selection has been made click "Update Cart". Proceed through all eligible benefits.

Note: Notices and Agreements are just that, no election is required but you are required to acknowledge receipt of all notices and agreements with your electronic signature.

PlanSource Life Event Instructions - Enrolling Dependents (cont.)

Review and update Beneficiaries if necessary.

Review and Checkout: Review your updated elections.

Check out / Send by Email / Review: Your To-Do List

Step 4: Documents

In this step you will upload any supporting documents. If you are unable to upload your document(s), you can fax to 904.209.2414 or email them to BCCBenefits@sjcfl.us

Required Documentation:

Adding Spouse (due to recent marriage)

- copy of state issued marriage certificate

Adding Spouse (due to loss of other coverage)

- verification from previous employer, such as a letter on corporate letterhead stating date coverage terminated or COBRA notice, **and**;
- copy of state issued marriage certificate, **and**;
- proof of current, joint residency (First class mail dated within last 6 months with either both of your names or two separate pieces of mail)

Adding Child(ren) (due to loss of other coverage)

- Adding children due to loss of other coverage – official document showing date coverage terminated, **and**
- Copy of state issued birth certificate indicating names of baby and parents, **or**;
- Copy of the footprint certificate from the hospital/medical center indicating baby and parent's name, **or**;
- Verification of the birth document from the hospital/medical center indicating the names of the baby and parent

Adding Child(ren) (due to birth/adoption)

- Copy of state issued birth certificate indicating names of baby and parents, **or**;
- Copy of the footprint certificate from the hospital/medical center indicating baby and parent's name, **or**;
- Verification of the birth document from the hospital/medical center indicating the names of the baby and parent

Congratulations! You have finished the enrollment process, once your HR department has all the required documentation, your life event should be approved. Note: It may take up to two (2) weeks for life events to be processed.

Please let us know if you have any questions or refer to your [Benefits Guide](#). Thank you!