

Standard Operating Procedure: Workterra Initiating a Qualifying Life Event



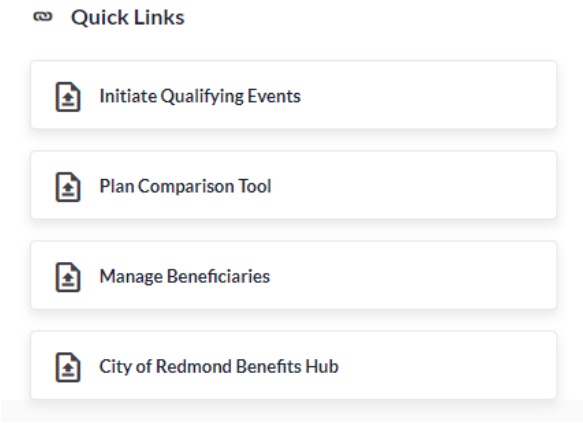
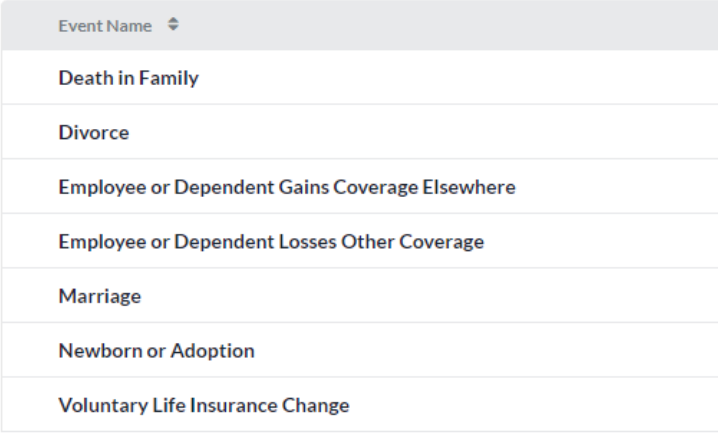
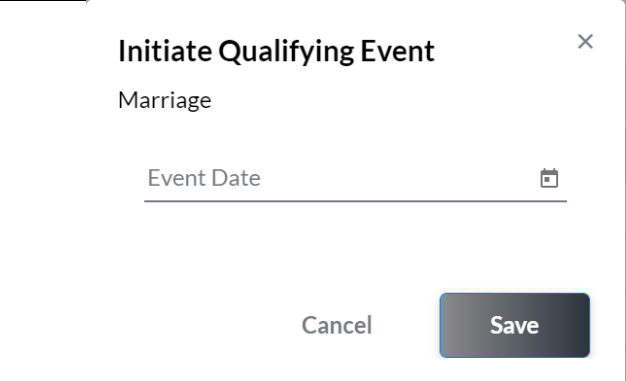
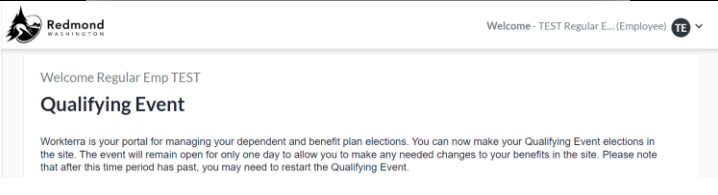
Purpose: A qualifying life event (QLE) is an event deemed acceptable by the IRS that may allow participants in cafeteria plans to change their benefit elections.

Audience: Benefits eligible employees

Step	What to do	Visual Aid
1.	Access the Workterra Benefits site: https://workterra.net/workterra	
2.	From the homepage, there are multiple options to initiate a Qualifying Life Event : <ul style="list-style-type: none"> • <i>My Benefits</i> dropdown • <i>Favorite Actions</i> • <i>Quick Links</i> 	
2a.	My Benefits dropdown: <ul style="list-style-type: none"> • From the Home page Top Menu, select My Benefits • Select Initiate Qualifying Events 	
2b.	Favorite Actions: <ul style="list-style-type: none"> • Navigate to the Left Menu, Favorite Actions • Click Initiate Qualifying Event 	

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2c.	<p>Quick Links (varies by user):</p> <ul style="list-style-type: none"> Navigate to the Right Menu, Quick Links Click Initiate Qualifying Event 	
3.	<p>On the Qualifying Event page, select the appropriate event:</p> <ul style="list-style-type: none"> Death in Family Divorce Employee or Dependent Gains coverage Elsewhere Employee or Dependent Loses Other Coverage Marriage Newborn or Adoption Voluntary Life Insurance Change 	
4.	<p>Type in the Qualifying Event date</p> <ul style="list-style-type: none"> Click Save 	
5.	<p>You will be directed to the Qualifying Event workflow.</p>	

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6.	<p>The Qualifying Event workflow remains open for one day to complete your benefit elections; however, you have 30 days to upload documents.</p> <ul style="list-style-type: none"> • If you do not complete the elections during the same day, you will have to re-start the Qualifying Event. • If you wish to cancel the request after the Qualifying Event workflow closes, please contact RedmondBenefits@redmond.gov 	
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Revision History		
Revision Date	Summary of revision	Revision Author
11/22/2022	SME Review	N Bruce
12/12/2022	Add language on QE period	C Miller