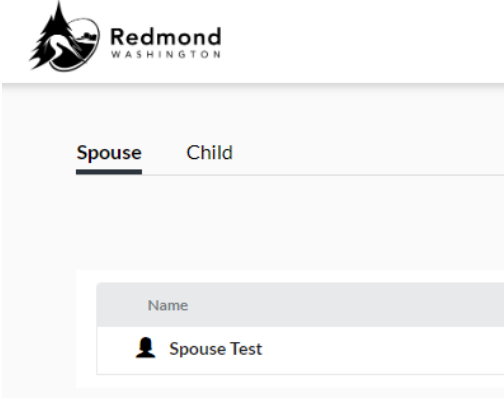
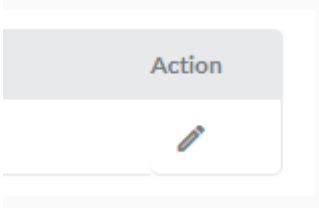
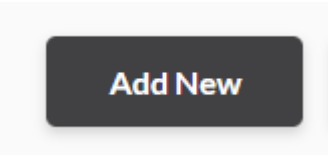


Standard Operating Procedure: Workterra Adding a Spouse or Domestic Partner



Purpose: A spouse/domestic partner can be added to Workterra Benefits in the enrollment workflow as part of new hire enrollment, open enrollment, or a qualified live event. A spouse/domestic partner can also be added from the Home Page.

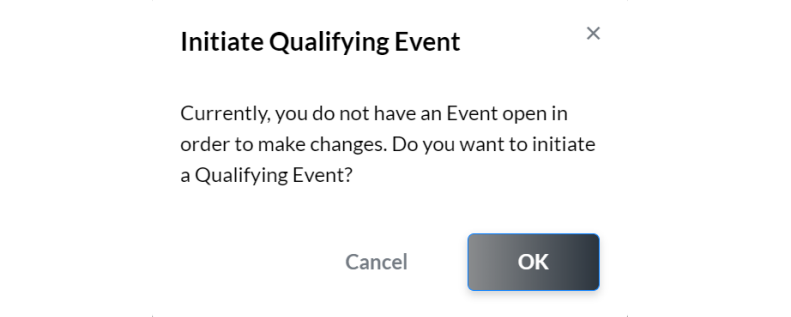
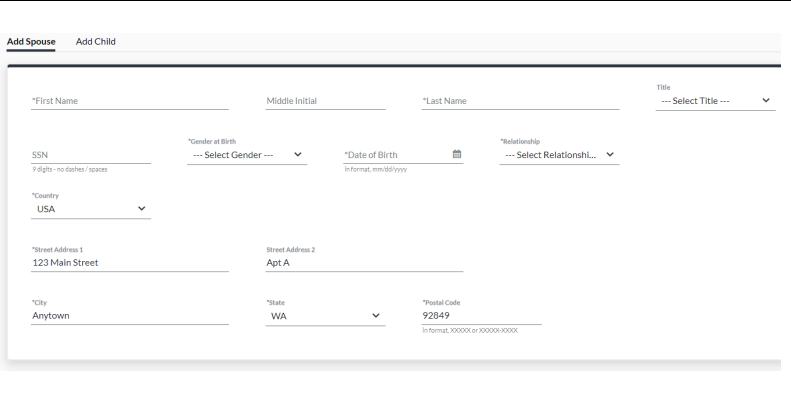
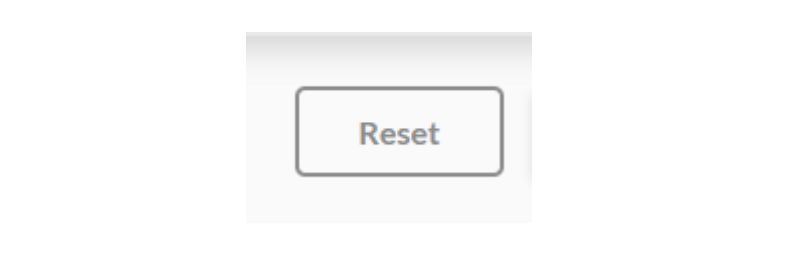
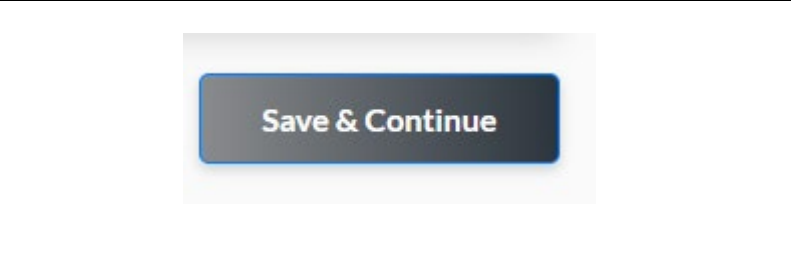
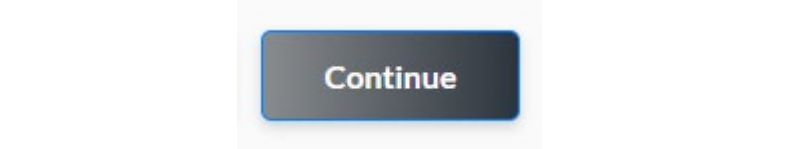
Audience: Benefits eligible employees

Step	What to do	Visual Aid
1.	Access Spouse/Domestic Partner information via an Enrollment workflow, the 'My Profile' dropdown, or via a quick link on the home page.	
2.	To review or edit existing Spouse/Domestic Partner information, select the pencil icon	
3.	To add a Spouse/Domestic Partner, select Add New <ul style="list-style-type: none"> If there is not a Spouse/Domestic Partner on your profile, the system will default to Add Spouse <p>*Note: If you newly enroll a spouse or domestic partner, you will need to upload proof of relationship if adding them to health plans.</p>	

Standard Operating Procedure: Workterra

Adding a Spouse or Domestic Partner



4.	<p>When reviewing your Spouse/Domestic Partner info outside of the Enrollment workflow, a popup message displays asking if you want to open a Qualifying Event. If a Qualifying Event does not need to be initiated, select Cancel</p>	 <p>Initiate Qualifying Event</p> <p>Currently, you do not have an Event open in order to make changes. Do you want to initiate a Qualifying Event?</p> <p>Cancel OK</p>
5.	<p>Complete all fields preceded by an asterisk (*)</p> <p>Note: In the Relationship dropdown menu the following option is not benefits eligible: Ex-Spouse. This options are available to use to capture the dependent information if choosing to designate as a beneficiary.</p>	 <p>Add Spouse Add Child</p> <p>*First Name Middle Initial *Last Name Title --- Select Title ---</p> <p>SSN --- Select Gender --- *Date of Birth *Relationship --- Select RelationshipL...</p> <p>*Country USA</p> <p>*Street Address 1 123 Main Street *Street Address 2 Apt A</p> <p>*City Anytown *State WA *Postal Code 92849</p>
6.	<p>The Reset button at the bottom of the page will clear data entered on screen.</p>	 <p>Reset</p>
7.	<p>Click Save or Save & Continue once you review, add, or edit the Spouse fields</p>	 <p>Save & Continue</p>
8.	<p>Select Continue to move forward if in the enrollment workflow</p>	 <p>Continue</p>

Revision History		
Revision Date	Summary of revision	Revision Author
11/22/2022	SME Review	N Bruce

Standard Operating Procedure: Workterra Adding a Spouse or Domestic Partner



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