



PlanSource Life Event Instructions - Removing Dependents

PlanSource Call Center: 855.436.3849

SJC Benefits Fax: 904.209.2414 | Email: bccbenefits@sjcfl.us

How to remove dependent(s) 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 the PlanSource Call Center 855.436.3849.

Life event video: <https://youtu.be/w7lnz-MsN9A>

How to enroll video: <https://plansource.com/resources/videos/demovideos/lifeevents/>

Benefits Guide: [EC Benefits Home](#)

Log In to Plan Source

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

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)

- **Divorce**
- **Dependent/Self Gains Coverage (Remove Coverage)**
- **Gain Eligibility Medicare/Medicaid**
- **Remove Spousal Surcharge (Spouse Loses Coverage)**
- **Death of Dependent**

Enter the life event date with 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.

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: Your Dependents

In this step you will verify and/or update your dependents

Event due to Divorce or Death of Dependent: Select "Remove Dependent" for all dependents no longer eligible for coverage (i.e. ex-spouse, stepchildren). **This will terminate the family member(s) and all active coverages.** Coverage tiers will be adjusted where possible. If there is no tier that supports the remaining family members, the coverage will be terminated.

All other events: **Only use the "Remove" button if you wish to cancel ALL coverage.** If you wish to only cancel certain coverages you will need to individually select the coverage you want to make changes to.

Next to move to Step 3.

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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". Under "Family Covered" remove check mark (✓) next to name of dependent you wish to remove coverage. 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.

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:

Removing Spouse and stepchildren if applicable (due to divorce)

- First page and Judge's signature page of divorce decree

Removing Spouse and or children/stepchildren (due to gaining other coverage)

- verification from current employer, such as a letter on corporate letterhead stating date coverage went into effect, **or**;
- Online Enrollment – Employee Benefit Confirmation Statement, showing effective date of coverage, **or**;
- Verification of coverage under Medicaid/Medicare showing effective date of coverage

Removing dependent (due to death)

- Copy of state issued death certificate (long form)

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!