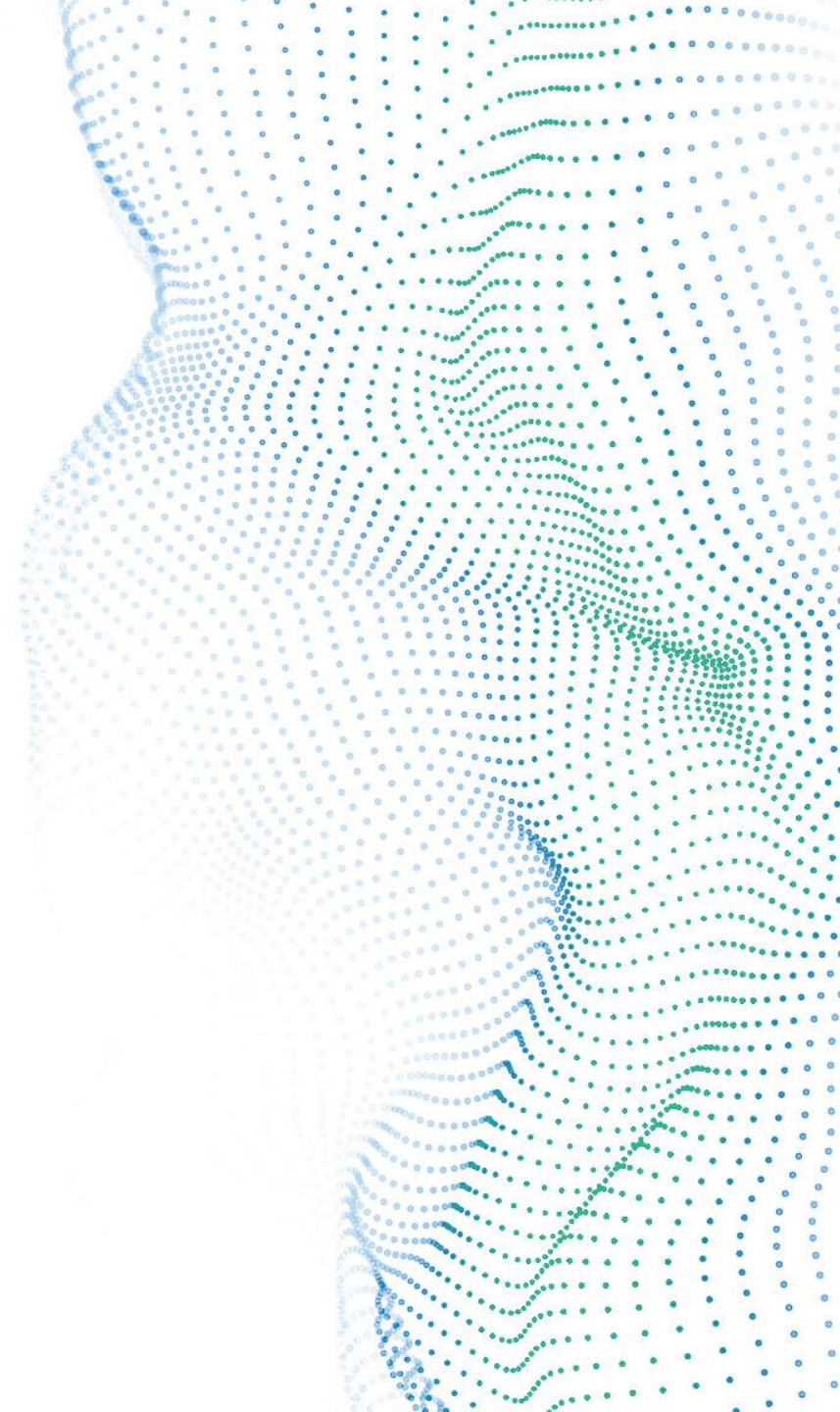




alteryx

Life Event

Quick Reference Guide



How to Submit a Life Event

Quick Reference Guide

Please Note, submitting a Life Event is a 2 step process:

1. Submit the life event in Workday with supporting documentation
2. Enroll in new benefits and then submit

You must complete both steps in order to be enrolled in benefits.

**Announcements**
6 items



WELCOME TO THIS YEAR'S OPEN ENROLLMENT EVENT
Please continue through the Open Enrollment task if any...

[Benefits Open Enrollment](#)



Logging Vacation Time
Employees should plan vacation time well in advance whenever possible.



Welcome Alteryx Team Member!
Welcome to our HR Information System, Workday! On behalf of the entire team, we are excited to provide this tool to be...

[Onboarding](#)

[View More](#)

**Applications**
10 items

**Requests**

**Directory**

**Personal Information**

**Absence**

**Time**

**Benefits**

**Pay**

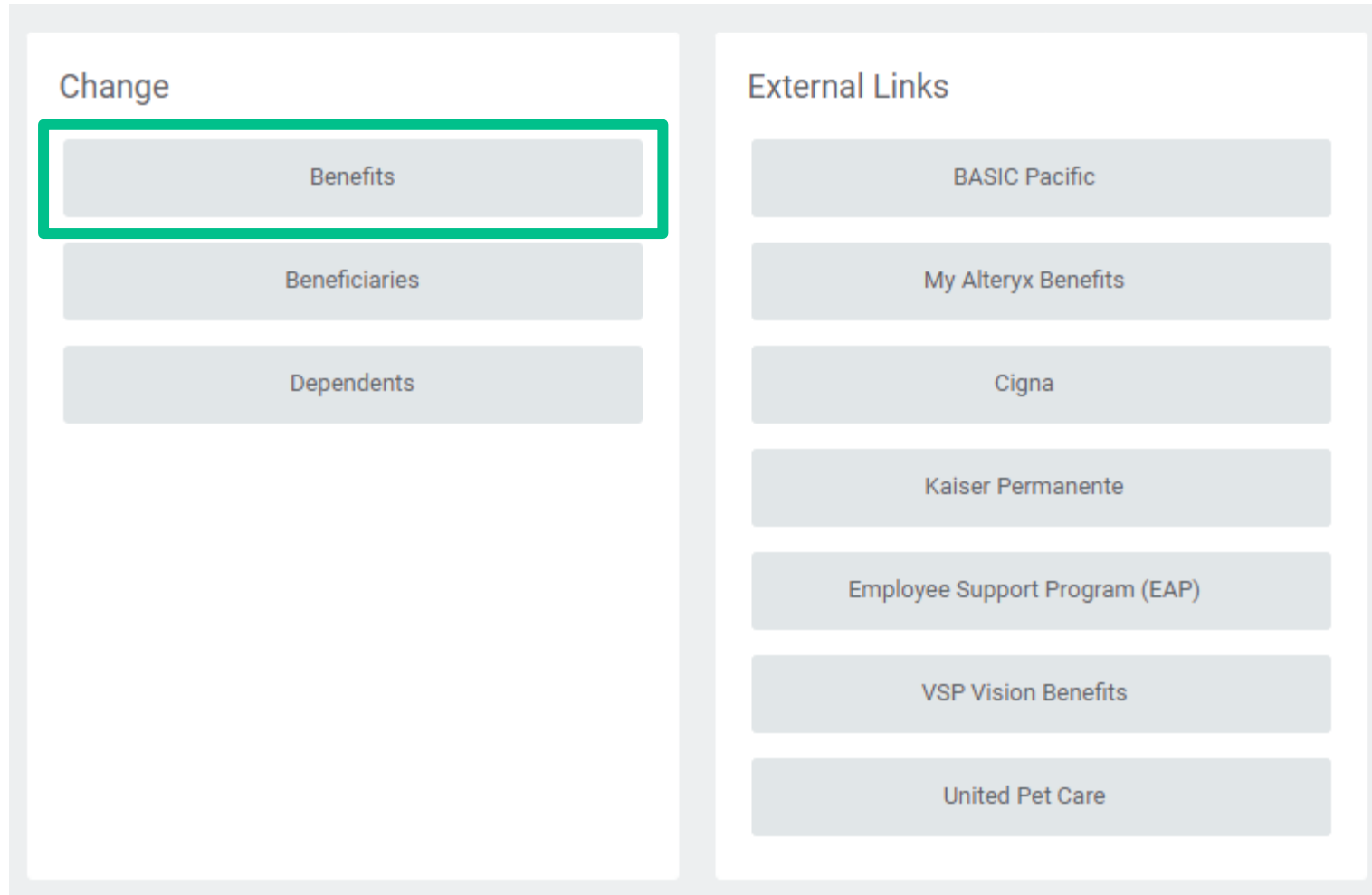
**Career**

**Favorites**

**Performance**

How to Submit a Life Event

Quick Reference Guide



Change	External Links
Benefits	BASIC Pacific
Beneficiaries	My Alteryx Benefits
Dependents	Cigna
	Kaiser Permanente
	Employee Support Program (EAP)
	VSP Vision Benefits
	United Pet Care

How to Submit a Life Event

Quick Reference Guide

Select a change reason that matches your life event.

Change Benefits Mollie Duner 

- Change Reason *
- ☐ Beneficiary Change
 - ☐ Birth/Adoption of a Child
 - ☐ Commuter Contribution Change
 - ☐ Death of Spouse/Child
 - ☐ Dependent Gains Coverage
 - ☐ Dependent Loses Coverage
 - ☐ Employee Gains/Loses Coverage
 - ☐ HSA Contribution Change
 - ☐ Marital Status - Marriage

How to Submit a Life Event

Quick Reference Guide

Change Benefits Mollie Duner

Change Reason *

- ☐ Beneficiary Change
- ☐ Birth/Adoption of a Child
- ☐ Commuter Contribution Change
- ☐ Death of Spouse/Child
- ☐ Dependent Gains Coverage
- ☒ Dependent Loses Coverage
- ☐ Employee Gains/Loses Coverage
- ☐ HSA Contribution Change
- ☐ Marital Status - Marriage

Benefit Event Date * 09/30/2021

Submit Elections By 10/30/2021

Benefits Offered

- Basic Life & AD&D
- Dental
- Dependent Care FSA
- Healthcare FSA
- Health Savings Account
- + More (6)

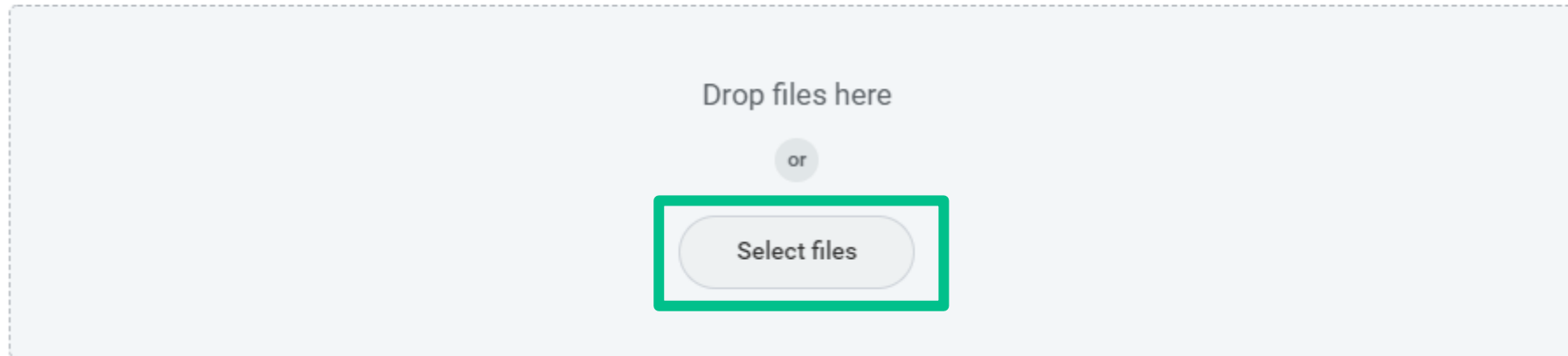
- Once you have chosen a change reason you will need to enter a benefit event date.
- If the event is dependent losses or gains coverage, the benefit event date will be the last day of coverage with Alteryx or with the existing employer.
- If the event is marriage or the birth/adoption of a child, the benefit event date is the date of marriage or date of birth.

How to Submit a Life Event

Quick Reference Guide

Add supporting documents in the attachments section. This may include a birth certificate, marriage certificate, or a termination of benefits letter.

Attachments



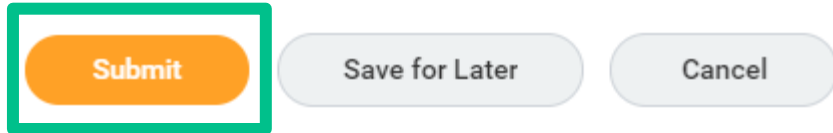
Drop files here

or

Select files

How to Submit a Life Event

Quick Reference Guide



Once you have filled in all of the required information you can click submit.

How to Submit a Life Event

Quick Reference Guide

Once you have submitted the life event with the supporting documentation, you must then enroll in new benefits or add/drop your dependents.

You have submitted

Up Next: Mollie Duner, Change Benefit Elections

[View Details](#)



Change Benefit Elections

Initiated On 10/01/2021

Submit Elections By 10/31/2021



How to Submit a Life Event

Quick Reference Guide

Click “Manage” to start the update process for each Health Care Account.

Health Care and Accounts

Medical Kaiser Permanente HMO Kaiser Medical HMO Southern CA Cost per paycheck Included Coverage Employee Manage	Dental Cigna DPO Cigna Dental PPO - CA Cost per paycheck Included Coverage Employee Manage	Vision VSP VIS - CA Cost per paycheck Included Coverage Employee Manage
Health Savings Account Waived Enroll	Healthcare FSA Basic Contribution per paycheck \$100.00 Manage	Dependent Care FSA Waived Enroll

How to Submit a Life Event

Quick Reference Guide

Select or waive each plan option.

Plans Available

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for Employee.

3 items

*Selection	Benefit Plan	You Pay (Biweekly)	Company Contribution (Biweekly)
☐ Select ☒ Waive	Cigna HDHP Cigna Medical HSA - CA	Included	\$278.10
☐ Select ☒ Waive	Cigna PPO Cigna Medical PPO - CA	Included	\$296.00
☒ Select ☐ Waive	Kaiser Permanente HMO Kaiser Medical HMO Southern CA	Included	\$209.63

The next slide will review adding a dependent to you

How to Submit a Life Event

Quick Reference Guide

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage

* Employee

Plan cost per paycheck

Add New Dependent

To add Dependents, click, **Add New Dependent**. You will have the option to use the Dependent as a Beneficiary by selecting **Use as Beneficiary**. You will also be presented with instructions outlining documentation requirements.



Complete the pages that follow: Click the **radio** buttons or **check boxes** next to items that apply; click the **Calendar** icon to select dates or enter the dates manually; **required** fields are indicated by a red asterisk. You will be required to submit documentation for each **new** dependent. You also will be prompted to provide a Social Security Number or Taxpayer Identification Number for each dependent.

How to Submit a Life Event

Quick Reference Guide

Review and Sign

Save for Later

Once you have gone through all of the health care and account options, you can click Review and Sign.

How to Submit a Life Event

Quick Reference Guide

On the **View Summary** page, read the instructions at the top of the page. Review your selections. If adjustments are needed, use the **Cancel** button to return to any page. Scroll to the bottom, read the **Electronic Signature** information and click the **I Accept** check box. (You will receive an error if you do not click the "I Accept" box.) When finished, click the **Submit** button.

I Accept ☐ **Submit** **Save for Later** **Cancel**

On the following page, click the **View 2021 Benefit Statement** button to print a copy of this information for your files. Save your statement for future reference. When finished, click the **Done** button.

Done **View 2021 Benefits Statement**

How to Submit a Life Event

Quick Reference Guide

Your selections will be reviewed by the Benefits team before being submitted to the claims administrators. You may be contacted to submit missing required documentation.

Benefit elections will be effective the first of the month following your benefit change. If the Benefit change is marriage or birth/adoption of a child, the benefits will be effective on the benefit change date.