

QUALIFYING LIFE EVENTS

Major life events – such as birth or adoption of a child, marriage, divorce, or loss of other coverage – enable you to make changes to your health care plans and add or drop eligible dependents from coverage.

When you experience a life event, also known as a qualifying status change, you have 60 days from the date of the event or within 60 days from the date that eligibility under other coverage ended to make changes to your benefits. If you miss the 60-day deadline, your next chance to request a change is open enrollment.

Explore the topics below to learn more about each life event and the benefit changes that might apply to your situation.

➤ Health Insurance Faculty, Managers, Nurses, Coaches and Police

If you would like to add a child or a spouse to your health insurance, you will want to ensure that you complete the [PASSHE Enrollment/Change form](#) and return the completed form to benefit-services@iup.edu for processing along with a copy of the child's original birth certificate. If adding a spouse, in addition to the PASSHE enrollment change form, a [Spouse Attestation](#) and possibly a [Spouse -Employer Form](#) is needed, along with a copy of your original marriage license. The form(s) should include a wet ink signature. You will have 60 days from the qualifying life event to make this change. You can review more about qualifying life events here: [sshe-summary.pdf \(passhe.edu\)](#) and [Birth or Adoption | PA State System of Higher Education \(passhe.edu\)](#) or if adding a spouse: [Health Care for APSCUF Faculty](#)

If you need to remove a dependent, please submit a completed [PASSHE Enrollment/Change form](#) along with documentation stating the date the dependent lost other coverage or date of divorce with a page of the divorce degree showing the date. You will have 60 days from the qualifying life event to make this change. Please submit the completed form and documentation to benefit-services@iup.edu for processing.

➤ **APSCUF Faculty Only**

Please contact your health and welfare specialist or the Faculty Health and Welfare Fund at [Forms & Benefits | APSCUF](#) for your vision and dental changes.

➤ **Health Insurance**
AFSCME AND SCUPA

If you would like to add a child or a spouse to your health insurance, you will want to ensure that you complete the [PEBTF2 Enrollment/change form](#) and return the completed form to benefit-services@iup.edu for processing along with a copy of the child's original birth certificate and if a spouse, along with the PEBTF2 form, a copy of the marriage license along with a [Declaration of Spouse Health Coverage](#) form and possibly an [Employer Verification Form](#) is needed. The form should include a wet ink signature. You will have 60 days from the qualifying life event to make this change. You can review more about qualifying life events here: [pebtf-summary.pdf](#). Please submit forms, birth certificate(s) and documentation to benefit-services@iup.edu

If you need to remove a dependent, please submit a completed [PEBTF2 Enrollment/change form](#) and return the completed form to benefit-services@iup.edu for processing along with documentation stating the date the dependent lost other coverage or date of divorce with a page of the divorce decree showing the date. You will have 60 days from the qualifying life event to make this change. Please submit the completed form and documentation to benefit-services@iup.edu for processing.

➤ **Basic Group Life Insurance**

To update your beneficiary and manage your account, sign onto the [MetLife website](#). Choose "Commonwealth of Pennsylvania" under company name, then register or log in to your account. If you have questions, you can contact Metlife by telephone at 1-855-972-5433.

➤ **Voluntary Life Insurance**

To add a beneficiary to your voluntary life insurance, you must complete a Beneficiary Designation Form. You can list your beneficiaries on the form and then return this form to benefit-services@iup.edu for processing or you can log on to [Employee Self-Service \(ESS\) - Office of Human Resources - IUP](#) and [follow these instructions](#).

If you are considering enrolling in voluntary life insurance, you will need to complete the Voluntary Group Life Insurance form found at [Voluntary Group Life \(VGLIP\) | PA State System of Higher Education \(passhe.edu\)](#), under Forms, then select Indiana. Please submit the completed enrollment form to benefit-services@iup.edu for processing. If the Statement of Health is necessary, you will submit it directly to Metlife.

If you want to end coverage for you or a dependent on your Voluntary Life Insurance, we need something in writing or by email to benefit-services@iup.edu stating that you would like to end coverage on a certain date.

➤ **Accidental Death & Dismemberment Insurance (AD&D)**

If you are considering enrolling in AD&D insurance, you will need to complete the AD&D enrollment form found at [Accidental Death Dismemberment \(AD\) | PA State System of Higher Education \(passhe.edu\)](#) under Enrollment Forms, then select Indiana. Please submit the completed enrollment form to benefit-services@iup.edu for processing.

If you want to end your coverage in the Accidental Death & Dismemberment Insurance, we need something in writing or by email to benefit-services@iup.edu stating that you would like to end coverage on a certain date.

➤ **Flex Spending Account / Health Care or Day Care**

Within 60 days of a [qualifying life event](#), you must submit a [Change in Status/Election](#) to add or change your Flex Spending Status. Supporting documentation is required. Upon the approval of your election change request, your existing elections will be stopped or modified (as appropriate). Other events, such as a change in childcare expenses, may qualify to change your election amount.

➤ **Retirement/Voluntary Retirement Plan**

The **SERS** representative for IUP is Heidi Barnett. You can reach her by phone, at 1-800-633-5461, ext. 3205, or by email at hbarnett@pa.gov , and she can assist you in updating beneficiaries with SERS.

The **PSERS** representative for IUP is Brian Farester. You can reach him by phone, at 1-888-773-7748, or by email at bfarester@pa.gov , and he can assist you in updating beneficiaries with PSERS.

If you participate in the **Alternative Retirement Plan** or a **Voluntary Retirement plan** (403b) through **Fidelity**, you will need to contact the Fidelity representative for IUP, who is George Maccarelli. He is available to assist you with updating beneficiaries and answer any questions by phone at 1-800-642-7131, or email at george.maccarelli@fmr.com.

If you participate in the **Alternative Retirement Plan** or a **Voluntary Retirement plan** (403b) through **TIAA**, you will need to contact the TIAA representative for IUP, who is Chad Firmstone. He is available to assist you with updating beneficiaries and answer any questions by contacting the TIAA scheduling center at 877-209-3136 or at 412-365-3012, or he can be reached by email at CFirmstone@tiaa.org.

If you participate in the **457 Deferred Compensation Plan** through Empower Retirement, you will need to contact the Deferred Compensation Plan Specialist, Michael McMahon. He is available to assist you with updating beneficiaries and answer any questions by phone at 1-412-992-8655, or email at Michael.mcmahon@empower.com.

➤ **Lactation Space**

A Lactation Space room is available upon the birth of a child, if you would like to utilize it, it's in Room 335 of Sutton Hall. The room does include a chair, table, and a refrigerator to store related items. If you would like to use the room, you must communicate with Human Resources- Benefit Services at benefit-services@iup.edu and arrangements will be made to allow access.

In addition to the Lactation Space available in Sutton Hall, there are also Lactation Space rooms available in Kopchick Hall, Stabley Library, and the Center for Health and Well-Being.

The Lactation Space in Kopchick Hall is in Room 412P, and is equipped with a chair, ottoman, refrigerator, sink, and power supply.

To utilize the Lactation Space in Stabley Library, you must go to the front desk and request a key. It is available if the library is open. It is equipped with a refrigerator, footstool, and a bathroom.

The Lactation Space in the Center for Health and Well-Being is in Room G65E. You will report to the reception area to obtain the key to the room. It is equipped with a couch, refrigerator, and a changing table.

➤ **Employee Assistance Program (SEAP)**

The Pennsylvania State System of Higher Education participates in the Commonwealth of Pennsylvania's employee assistance program, known as [SEAP](#). State System employees and their family members are eligible to receive up to six free confidential counseling sessions to evaluate concerns and determine the best referral. The benefit renews each year. Services are available 24 hours a day, 7 days per week by calling 1-800-692-7459. The services provided by SEAP are strictly confidential. PASSHE will not be notified unless you provide written consent. Review the privacy notice and other SEAP information on the SEAP website.

➤ **Finalize Leave of Absence**

You will need to submit medical documentation confirming the date of birth and/or hospitalization. This will allow us to make a revision to your Designation Notice. The Designation Notice will indicate when your leave of absence will begin and end, which is typically based on how long your health care provider indicates you will need to be off work.

➤ **Death**

Faculty, Manager, OPEIU, Coaches or POA/SPFPA

In the event your covered spouse or dependent dies, please notify benefit-services@iup.edu as soon as possible. Complete a [PASSHE Enrollment/Change form](#) to remove the dependent from your health benefits within 60 days of the life event. Please submit a completed form and copy of original death certificate to benefit-services@iup.edu.

➤ **Death**

AFSCME, SCUPA

In the event your covered spouse or dependent dies, please notify benefit-services@iup.edu as soon as possible. Complete a [PEBTF2 Enrollment/change form](#) to remove the dependent from your health benefits within 60 days of the life event. Please submit a completed form and copy of original death certificate to benefit-services@iup.edu.

➤ **Payroll**

You may need to adjust your withholding for federal income taxes. This can be done any time by logging into [PA State System of Higher Education](#) and follow the instructions at [PASSHE Fiori Help Documentation](#).