



Changing Benefits Mid-Year

MATRIX has a June 1st benefit plan year, and our annual Benefits Open Enrollment is held in May for a June 1st effective date. Benefit elections must be made within the first 30 days of employment, and your pre-tax (Medical, Dental, Vision, Basic Life, Dependent Care FSA) benefit elections are locked-in until our annual Open Enrollment. The [IRS](#) will allow changes to your pre-tax benefits outside of the Open Enrollment window if you are within 30 days of an IRS “qualifying event” (Marriage, Divorce, Birth, Death, Eligibility Change under another employer/group plan, Open Enrollment in another employer/group plan, Significant Cost Change).

If you are within 30 days of an IRS “qualifying event” and would like to change your Medical, Dental, Vision, Basic Life or Dependent Care FSA, you may make the change in [Workday](#).

To drop Medical, Dental, Vision or Basic Life coverage for yourself or a Dependent:

1. Go to the Benefits section in [Workday](#)
2. Click “Change Benefits”
3. Select “Gains/Losses coverage from another source”
4. Enter your Benefit Event Date
 - a. If dropping coverage, enter the last date of coverage
5. In the “Comments” section, please specify the reason for the change (i.e. “Spouse started new job and will be on new employer’s coverage”, etc.)
6. SUBMIT the change
7. On the next page, click the box that says “Open”
8. Add/Drop coverage as needed (you may only add/drop coverage that you have gained/lost)

To add Medical, Dental, Vision or Basic Life coverage:

1. Go to the Benefits section in [Workday](#)
2. Click “Change Benefits”
3. Select “Gains/Losses coverage from another source”
4. Attach your Certificate of Coverage or initial COBRA election invitation paperwork from your prior insurer here (REQUIRED) (These documents are typically produced from the insurer only after the coverage has ended. The IRS gives you 30 days to provide this documentation to us). Please attach document for each line of coverage that you are adding (i.e. if adding Dental, we require the Dental document, if adding Vision, we require the Vision document, etc.)
5. Enter your Benefit Event Date
 - a. If adding coverage, enter your effective date (the day after your last day of coverage)
6. In the “Comments” section, please specify the reason for the change (i.e. “Lost coverage on 03/01/19 when my spouse’s employment ended”, etc.)
7. SUBMIT the change
8. On the next page, click the box that says “Open”
9. Add/Drop coverage as needed (you may only add/drop coverage that you have gained/lost, and you must provide the Certificate of Coverage or COBRA election invitation paperwork for each line of coverage that you are adding)
10. You may review the plan summaries & pricing on our benefits website at www.MatrixRes.com/Benefits



To add a dependent to coverage (within 30 days of a birth, marriage, loss of coverage):

1. Go to the Benefits section in [Workday](#)
2. Go to "Change" then "Dependents"
3. Add the Dependent's info (name, SSN, etc.). The effective date for a new baby should be the birthdate. For a marriage the effective date is the marriage date. If the dependent lost other coverage, the effective date should be the date that coverage ended (and please attach the Certificate of Coverage or the COBRA election invitation paperwork from the prior insurer - REQUIRED).
4. Once you have added the Dependent's info, click "Submit"
5. On the next page, click the box that says "Open". Workday will allow you to add your Dependent to your Medical, Dental and Vision plans.