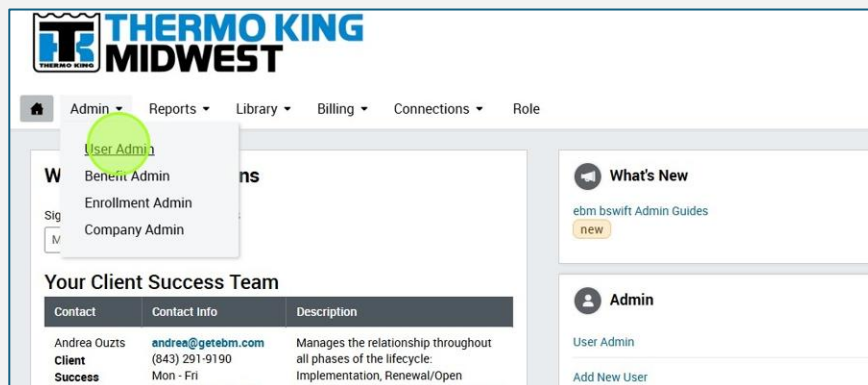
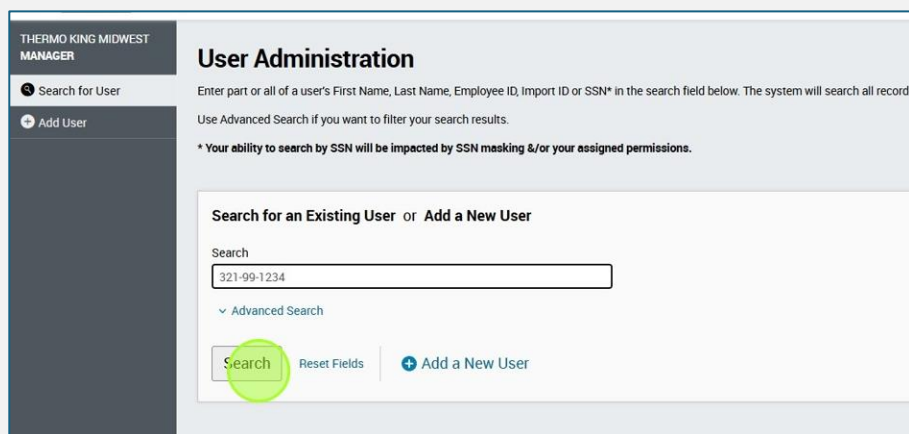


Adding a Life Event in Bswift

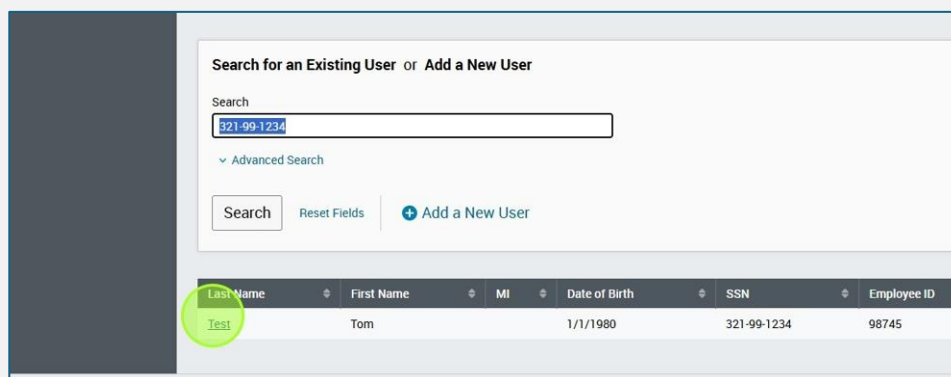
1. From the Bswift manager dashboard, select **User Admin** from the **Admin** dropdown.



2. Enter the employee's first name, last name, or social security number and click **Search** to access the employee's record.



3. Select the employee you want to edit.



4. From the employee's record, click the **Life Events** option on the left side of the screen.

The screenshot shows the THERMO KING MIDWEST MANAGER interface. The left sidebar contains the following options: Search for User, Add User, Impersonate User, View/Edit, Life Events (highlighted with a green circle), Notes, Employee File, Personalized Forms, Family Information, and Assign Roles. The main content area displays the Demographic Information for Tom Test (Employee ID: 98745). The Demographic Information table includes the following fields: First Name (Tom), Middle Initial, Last Name (Test), Social Security Number (321-99-1234), Date of Birth (1/1/1980), Age (45), Gender (Male), and Marital Status. The Life Events option in the sidebar is highlighted with a green circle.

5. Select the type of Life Event you wish to enter. In this example, we will add a new child.

The screenshot shows the THERMO KING MIDWEST MANAGER interface. The left sidebar contains the following options: Search for User, Add User, Impersonate User, View/Edit, Life Events (highlighted with a green circle), Notes, Employee File, Personalized Forms, Family Information, Assign Roles, Clone User, and Benefit Coverages. The main content area displays the Life Events selection screen for Tom Test (Employee ID: 98745). The screen includes a message: "If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections. Please fill out the form below to update your information." The screen is divided into two steps: STEP 1: Please select your life event. The options are: Marriage, Birth/Adoption/Legal Guardianship (highlighted with a green circle), and Other life events... The Life Events option in the sidebar is highlighted with a green circle.

6. Enter the **date** the Life Event occurred.

The screenshot shows the THERMO KING MIDWEST MANAGER interface. The left sidebar contains the following options: Search for User, Add User, Impersonate User, View/Edit, Life Events (highlighted with a green circle), Notes, Employee File, Personalized Forms, Family Information, and Assign Roles. The main content area displays the Life Events information entry screen for Tom Test (Employee ID: 98745). The screen includes a message: "If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections. Please fill out the form below to update your information." The screen is divided into two steps: STEP 2: Enter your life event information. The options are: Birth/Adoption/Legal Guardianship (highlighted with a green circle) and Other life events... The Life Events option in the sidebar is highlighted with a green circle. The screen also includes a date entry field: "When did your life event take place? Enter a date (mm/dd/yyyy)".

7. If you select a life event that is adding a spouse or dependent, you must enter those details at this time. Click **+Add Dependents** to proceed.

THERMO KING MIDWEST
MANAGER

Search for User

Add User

Impersonate User

View/Edit

Life Events

Notes

Employee File

Personalized Forms

Family Information

Assign Roles

Clone User

Benefit Coverages

Billing History

Connection Log

Special Enrollment

Life Events

Tom Test (Employee ID: 98745) (Import User ID: 321-99-1234)

If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections. Please fill out all information requested to complete your enrollment in coverage.

STEP 2 Enter your life event information

Birth/Adoption/Legal Guardianship [Change life event](#)

When did your life event take place?

Enter a date

Enter your new dependent's information:

Name	Relationship	Date of Birth	Age	Gender
Add at least one dependent to continue				
<div>+ Add Dependent</div>				
<div>Continue Cancel</div>				

8. Enter new **Dependent Demographic Information**.

Add Family Member

> Edit Demographic Information

Dependent Demographic

* Fields are required

* First Name

Middle Initial

* Last Name

Last Name Effective Date

* Date of Birth

* Social Security Number

* Gender ☒ Male ☐ Female

Disabled ☐ Yes ☒ No

9. Continue scrolling to complete **Dependent Demographic Information**.

*Import User ID is social security number. In the case of a newborn, if SSN isn't available, use employee's SSN and add "-1".

A screenshot of a web form titled "Dependent Demographic Information". It contains the following fields: "Import User ID" (text input), "Relationship" (dropdown menu), "Member Status" (dropdown menu with "Active" selected), and "GDPR Applicable" (checkbox). A green circle highlights the "Save" button at the bottom left of the form.

10. Confirm Address information. Click Save to move to the next step.

A screenshot of a web form titled "Confirm Address information". On the left is a sidebar menu with options: "Impersonate User", "View/Edit", "Life Events", "Notes", "Employee File", "Personalized Forms", "Family Information", "Assign Roles", "Clone User", "Benefit Coverages", "Billing History", "Connection Log", and "Special Enrollment". The main form area contains fields for "Address 1" (123 Main Street), "Address 2", "City" (Indianapolis), "State" (IN - Indiana), "Zip" (46235), "Home Phone", "Cell Phone", and "Home Email". A green circle highlights the "Save" button at the bottom left of the form.

11. Confirm Life Event details are correct. If you need to add more dependents as part of this life event, click **+Add Dependent** again and follow the steps. If not, click **Continue**.

A screenshot of a web form titled "Confirm Life Event details". At the top, it says "Tom Test (Employee ID: 98745) (Import User ID: 321-99-1234)". Below this is a message: "If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections. Please fill out all information requested to complete your life event." The form is titled "STEP 2 Enter your life event information". It has a section for "Birth/Adoption/Legal Guardianship" with a "When did your life event take place?" field containing the date "08/10/2025". Below this is a table for "Enter your new dependent's information:" with columns: Name, Relationship, Date of Birth, Age, and Gender. The table has one row: "Baby Test", "Child", "8/10/2025", "0", "M". At the bottom, there is a "+ Add Dependent" button and a "Continue" button (highlighted with a green circle) and a "Cancel" button.

12. Tick the box to confirm all details are correct.

13. Click **Save and Start Life Event Enrollment**.

Tom Test (Employee ID: 98745) (Import User ID: 321-99-1234)

If you had a recent life event such as a birth of a child, or a marriage, you may be eligible to change your benefit elections in coverage.

STEP 3 Confirm your information

Birth/Adoption/Legal Guardianship

Life Event: **Birth/Adoption/Legal Guardianship**
Date of Event: **08/10/2025**
Added to Family: **Baby Test**

☒ I verify that all of the above Life Event information is correct

☐ Hide Event from Employee

Save and Start Life Event Enrollment Cancel

14. You may now make changes to the employee's benefits. Follow the prompts for each line of coverage. Click **Continue** when finished.

15. If you prefer the employee completes the benefit changes themselves, click **Save and Finish Later**. The employee can now login and complete their own benefit updates.

321-99-1234)

rollment. If you have trouble using the platform, please call **ebm** at 855.400.0792 for assistance between the hours of 8:30am and 5pm EST. If you may leave a voice message and someone will get back to you during normal business hours. Any benefit related questions should be herb@benefiti.com.

NO PLAN SELECTED **View Plan Options**

NO PLAN SELECTED **I don't want this benefit (waive)** **View Plan Options**

NO PLAN SELECTED **I don't want this benefit (waive)** **View Plan Options**

1 Your Benefits
2 Enroll
3 Complete

Your Cost per pay period \$0.00

Finished selecting benefits? Click the button below to continue.

Continue

Not ready to complete your benefits enrollment? No problem, you can click the button below to save your progress and return later.

Save and Finish Later