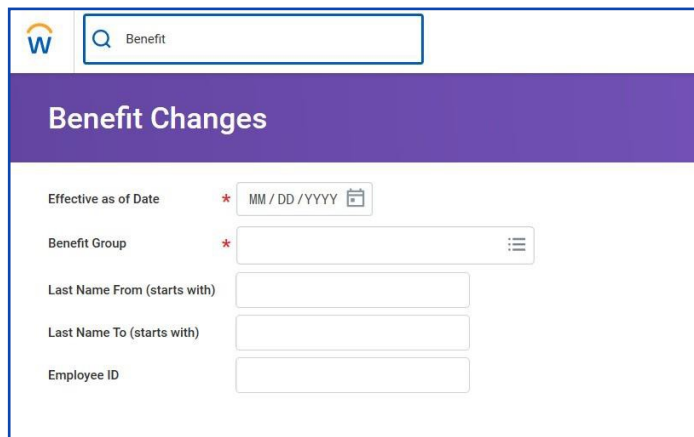


Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. Your organization defines the steps to accomplish these objectives. This job aid covers generic events, so please contact your HR or benefits representative if you have further questions.

REPORT A COVERAGE CHANGE EVENT

Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, divorce, or similar life event, you can update your benefits to better fit your needs.

From the Benefits application icon: or by typing Benefits in the search bar



The screenshot shows the Workday interface for reporting a coverage change event. At the top left is the Workday logo. A search bar contains the text "Benefit". Below this is a purple header with the text "Benefit Changes". The main form area contains several fields: "Effective as of Date" with a date picker (MM/DD/YYYY), "Benefit Group" with a dropdown menu, "Last Name From (starts with)", "Last Name To (starts with)", and "Employee ID".

1. Click the **Benefits** icon from your home page. It looks like this:



2. In the Change box, select BENEFITS



3. Select the **Benefit Event Type** from the pull-down.

- Change Reason * Birth / Adoption of Child
- Change in Dependent Care Cost
 - Court Ordered Coverage
 - Death of Spouse or Child
 - Gains / Loses Coverage from Another Source
 - Marriage - Legal Spouse
 - Marriage of Dependent Child
 - Named Legal Guardian
 - Newly Eligible for Government Assistance

Benefit Event Date *

Submit Elections By (empty)

Instructions

Prior to submitting you must attach the following documentation for these life events:

- Birth / Adoption of Child - Official State Birth Certificate
- Court Ordered Coverage - Official Medical Child Support Order
- Death of Spouse or Child - Death Certificate
- Divorce - Divorce Decree
- Gaining Eligibility for Medicare (for retirees) - Letter from Employer or Medical Plan
- Gains / Loses Coverage from Another Source - Letter from Employer or Medical Plan
- Marriage - Legal Spouse - Official State Marriage Certificate
- Marriage of Dependent Child - Official State Marriage Certificate

If you wish to drop your spouse due to a divorce, you must go to the dependent tab on your benefit profile page and click on edit to change your spouse to an ex-spouse. This action will trigger a benefit event that will allow you to drop your spouse from your coverage.

If you are retired and have gained eligibility for Medicare, you must click on Medicare Information from your home page under the benefits worklet. Adding your Medicare information will trigger a benefit event that will allow you to make your benefit elections.

- Click the **calendar** icon to enter the date of the benefit event. Attach required documents, then click **Done**.

Change Benefits
Brian Kaplan [Actions](#)

Instructional Text
Any dependent/marital status change event requires proof of the change in family status, prior to making mid-year benefit election changes. You will be required to [attach supporting documentation](#) to your request for such a benefit event. Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval. **Reminder:** The [Benefits Policy Document](#) includes specifics on all of the requirements.

Benefit Event Type * Beneficiary Change

Benefit Event Date * 02 / 03 / 2020

Submit Elections By 03/03/2020

Enrollment Offering Types
401(k)
Basic Group Life
Voluntary AD&D
Voluntary Supplemental Life

Attachments

Drop files here

or

Select files

- Click Submit, then click done. A task will route to your Inbox, if applicable.
- Navigate to your **Inbox**.
- Click the **Benefit Event** task.
- Complete and continue through all required screens. If required, select the **I Agree** checkbox to provide an electronic signature, confirming your changes.
- Click **Submit**.
- Click **Done** to complete the task or **Print** to launch a printable version of the summary for your records. Keep in mind, that this Change of Benefits will be stored in your employee profile and history. Thus, you will always have access to it when you need it.

VIEW AND EDIT BENEFIT ELECTIONS

Employees can change benefit elections when a qualifying event occurs, such as a change in marital status, the birth or adoption of a child, or a beneficiary change.

From the Benefits application:

11. Click the **Benefit Elections** button under View.

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - Aetna HMO Open Access	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<ul style="list-style-type: none"> Collin Brooks Griffin Brooks Lindsey Brooks 	Employee + Family
Medical - BlueChoice Advantage PPO High Option	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - BlueChoice Advantage PPO Standard Option	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - Kaiser Permanente HMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Prescription Drug - CareFirst CVS CareMark High Option	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<ul style="list-style-type: none"> Collin Brooks Griffin Brooks Lindsey Brooks 	Employee + Family
Prescription Drug - CareFirst CVS CareMark Standard Option	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Dental - United Concordia DHMO	<input type="radio"/> Elect		

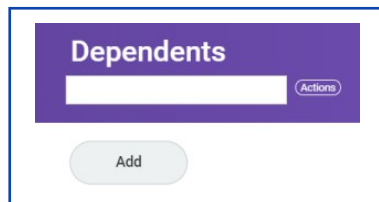
12. Review your benefit elections and costs.
13. Click the **Actions** Actions button.
14. Select **Benefits** > **Change Benefits**
15. Enter all required information, denoted by asterisks, and make any emitted changes.
16. Click **Submit**.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan.

From the Benefits application:

Click the **Dependents** button under Change.



17. Click the **Add** button to add a new dependent-

18. Click the **Edit**  icon or click in the field to modify. Asterisks denote required fields.

19. Click the **Add** button to add new information.

20. Click **Submit**.



Note: If you add an additional dependent, you may need to update your Federal Tax elections, as well as your Benefit elections. If you add an additional beneficiary, you may need to update your Benefit elections.

VIEW DEPENDENTS' BENEFIT ELECTIONS

From the Benefits application:

Click the **Dependents** button under Change.

21. Review your existing dependents and their benefit plan coverage.

MANAGE BENEFICIARIES

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can change, edit, and add beneficiaries from the Benefits application.

From the Benefits application:

22. Click the **Beneficiaries** button under **Change**.
23. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking **Edit**.
24. Click the **Add** button to add a new beneficiary. The Add My Beneficiary page displays.
25. Select **Existing Dependent or Emergency Contact**, **create a New Beneficiary**, or **Create a New Trust as Beneficiary**.
26. Click **OK**.
27. Enter all required information, denoted by an asterisk.
28. Click **Submit**.

PRINT BENEFITS STATEMENT

From the Home page:

Click the **Profile** image > **View Profile**.

29. Click the **Actions** button.
30. Select **Benefits** > **View My Benefit Statement**.
31. Click the **prompt** in the Benefit Event field.
32. Select the desired Benefit Event you would like to view and print.
33. Click **OK**.
34. Click the **Print** button. The selected Benefit Event will open as a PDF document, which can be saved and printed.

STILL HAVE QUESTIONS ABOUT WORKDAY

For additional support and questions about Workday please contact your agency HR Practitioner.