## OBJECTIVE

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

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.

1. Log into Workday, click the **Menu** icon located at the top left corner of your homepage and then click on the Benefits icon 🛡 .
2. Select the **Benefits** option located under the **Change** section. Result: The **Change Benefits** page opens.
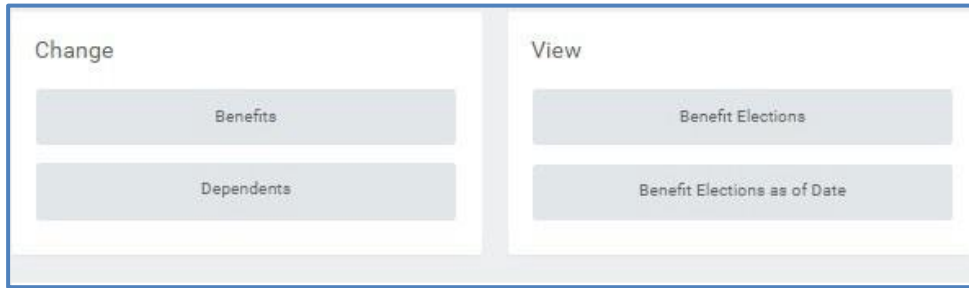
3. Select the **Change Reason** and **Benefit Event Date**. Note: Review the instructions provided prior to submitting a change.

Your screenshots may vary in color from this document; however, processes are correct as of revision date.

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4. Attach required documents, then click **Submit.** <u>Result</u>: A task will route to your **My Tasks**, if applicable.
5. Navigate to your **My Tasks** icon 🖃 located at the upper right corner of the homepage.
6. Click the **Benefit Event** task.
7. Complete and continue through all required screens. If required, select the **I Agree** checkbox to provide an electronic signature, confirming your changes.

8. Click **Submit**.
9. (Optional) Click **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.

1. Navigate to the **Benefits** application.
2. Click the **Benefit Elections** button located under the **View** section.
3. Review your benefit elections and costs.
4. Click the **Actions** ⚏ button next to your name.
5. Select **Benefits** > **Change Benefits**
6. Enter all required information, denoted by asterisks, and make any emitted changes.
7. Click **Submit**.

ADD DEPENDENTS

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

From the **Benefits** application:

1. Click the **Dependents** button under the **Change** section.
2. Click the **Add** button to add a new dependent.
3. Click the **Edit** ✎ icon or click in the field to modify. Mandatory fields will be marked with a red asterisk*.
4. Click the **Add** button to add new information.
5. Click **Submit**.

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> 📒 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.

PRINT BENEFITS STATEMENT

1. Click the **Profile** 👤 icon located at the top right corner of your homepage and select the **View Profile** button below your name.

2. Click the **Actions** [Actions] button located below your name.

3. Select **Benefits** > **View My Benefit Statement** from the drop-down menu.

4. Click the **Benefit Event** field, select the desired benefit event you would like to view and print and click **Ok**.
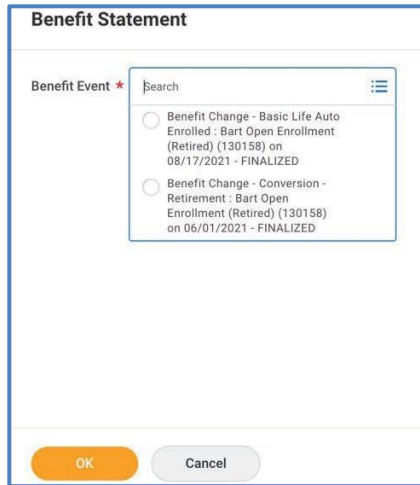
5. Click the **Print** button. Result: The selected benefit event will open as a PDF document, which can be saved and printed.

STILL HAVE QUESTIONS ABOUT WORKDAY

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