


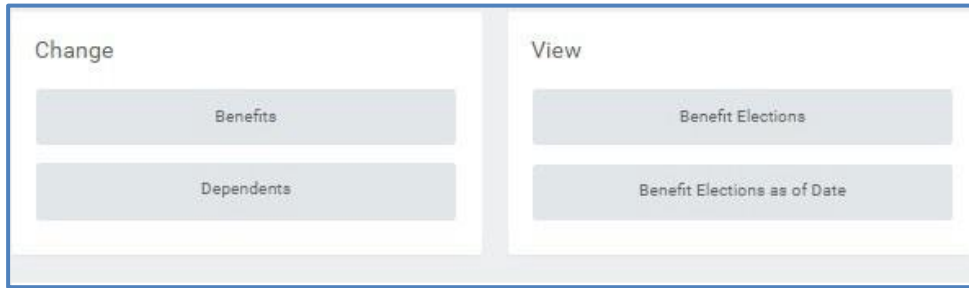
OBJECTIVE

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.

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 * MM/DD/YYYY 

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 Degree
- 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.

Submit **Save for Later** **Cancel**

4. Attach required documents, then click **Submit**. Result: 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.

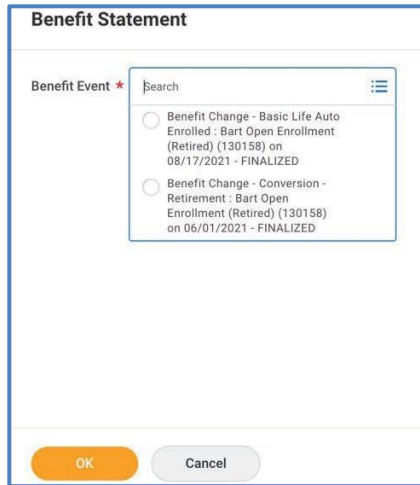
From the **Benefits** application:

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**.

 **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**  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.

