

Benefits: Manage Your Benefits

Employee

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 and Pay application:

1. From the Tasks and Reports section, select the **Change Benefits** button. The Change Benefits page displays, as shown in the image below.
2. From the **Change Reason** field, select a change reason.
3. Select the **Calendar** icon to enter the date of the benefit event.
4. Attach required documents, if applicable.

Change Benefits

Beth Liu

Change Reason * Beneficiary Change

Benefit Event Date * 08/02/2024

Submit Elections By 08/31/2024

Benefits Offered

- 401(k)
- Basic Group Life
- Voluntary AD&D
- Voluntary Supplemental Life

Attachments

Drop files here

or

Select files

Submit Save for Later Cancel

Instructions

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.

5. Select **Submit**.
6. From the pop-up, select **Open** to start the Benefits Change task.
7. Alternatively, navigate to My Tasks.
8. Select the **Benefit Change** task, then **Let's Get Started**.
9. Complete and continue through all required screens. If required, select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
10. Select **Submit**.
11. Select **Done** to complete the task or select **View 2024 Benefits Statement** to review and print a summary of your benefits.

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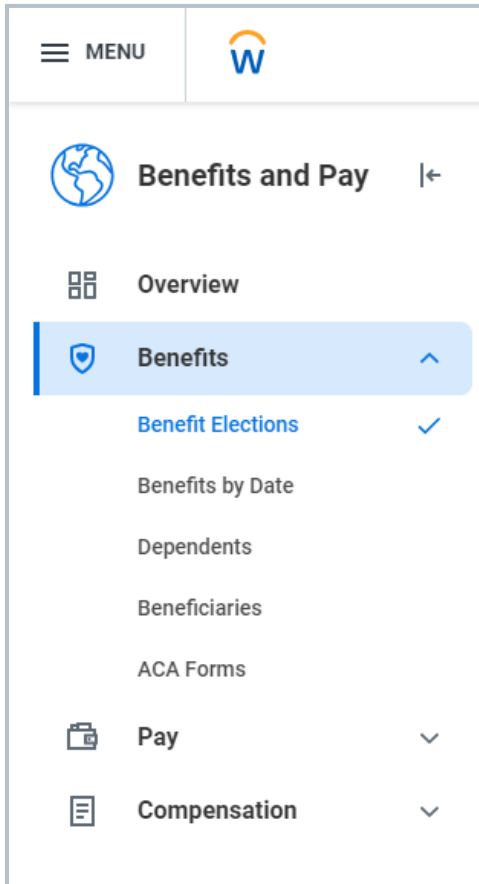
Employee

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 and Pay application:

1. Select **Benefits** from the Navigation Pane, as shown in the image below, then choose **Benefit Elections**.



2. Review your benefit elections and costs.

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Benefit Elections

My Monthly Totals

My Cost \$233.34 Employer Cost \$361.90 Credits Used \$110.00 Remaining Credits \$185.00

[Change Benefits](#) [Change Retirement Savings](#) [View as Grid](#)

Health Care and Accounts

Plan Name	Provider	Cost (Monthly)	Coverage
Medical	Aetna PPO	\$90.00	EE - Employee Only
Dental	Aetna PPO	\$20.00	EE - Employee Only
Vision	Vision Service Plan VSP	\$13.00	EE - Employee Only

Insurance

Plan Name	Provider
Basic Group Life	Liberty Mutual (Employee)
Voluntary Supplemental Life	Liberty Mutual (Employee)
Short Term Disability	Liberty Mutual (Employee)

3. Select the **Change Benefits** button, as highlighted in the image above.
4. Enter all required information, denoted by asterisks, and make any permitted changes.
5. Select **Submit**.

Add Dependents

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

From the Benefits and Pay application:

1. Select **Benefits** from the Navigation Pane, then choose **Dependents**.
2. Select **Edit** from the Actions button to edit an existing dependent.
3. Select the **Add** button to add a new dependent.
4. Select the **Edit** icon or select the field to modify. Asterisks denote required fields.
5. Select the **Add** button to add new information.
6. Select **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 another beneficiary, you may need to update your benefit elections.

View Dependents' Benefit Elections

From the Benefits and Pay application:

1. Select **Benefits** in the Navigation Pane, then choose **Dependents**.

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

Manage Beneficiaries

A beneficiary is a designated individual who would receive your benefits in the event of your death. You can change, edit, and add beneficiaries from the Benefits application.

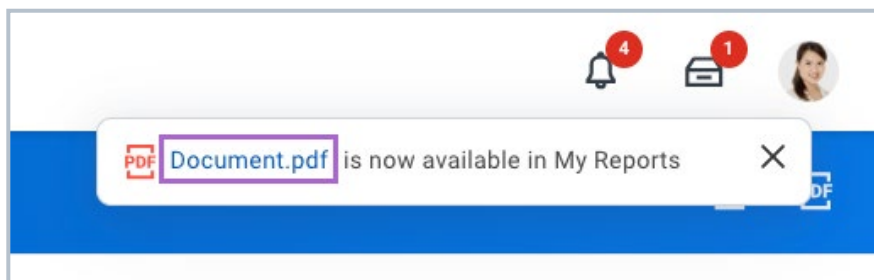
From the Benefits and Pay application:

1. Select **Benefits** in the Navigation Pane, then choose **Beneficiaries**.
2. View existing beneficiaries for enrollment benefit plans or modify information by selecting **Edit**.
3. Select the **Add** button to add a new beneficiary. The Add My Beneficiary page displays.
4. Select **Create a New Beneficiary** or **Create a New Trust as Beneficiary**.
5. Select **OK**.
6. Enter all required information, denoted by an asterisk.
7. Select **Submit**.

Print Benefits Statement

From the Home page:

1. Select the **Profile photo > View Profile**.
2. Select the **Actions** button.
3. Select **Benefits > View My Benefit Statement**.
4. Select the **Benefit Event** prompt.
5. Select the desired benefit event you would like to view and print.
6. Select **OK**.
7. Select the **Print** button.
8. From the Export Document pop-up, select **Download**. The selected benefit event saves to your device as a PDF document that you can open and print.
9. Alternatively, select the document name from the notification on the right side of your screen, as shown in the image below.



10. The selected benefit event will open as a PDF document that you can save and print.