

Benefits: Benefits Election

Workday User Guide



Intended Audience: All Benefit Eligible Workday Users

Once a year, a task will be pushed to your inbox to review and update your benefit elections during the Open Enrollment period. However, you can also complete benefit election changes for life events throughout the year with submission of the required documentation.

Required Documents

You will need to include the following documents based on your change request:

- **Marriage/ Domestic Partnership:** Marriage Certificate or License, Domestic Partner Affidavit
- **Birth/ Adoption of Child:** Birth Certificate, Hospital Records, Certificate of Live Birth, Adoption Records
- **Death of Child/Spouse:** Death Certificate
- **Divorce/ Dissolution of Domestic Partnership:** Divorce Decree, Legal Separation Documentation
- **Employee or Dependent Gains/Losses Other Coverage:** Proof of New Coverage or Loss of Coverage

Task: Change Benefits for Life Event

1. On the **Navigation sidebar**, under the **Personal** section, select **Benefits and Pay**
2. Expand **Benefits** on the left and select **Benefit Elections**.
3. Select **Change Benefits**.
4. Review the instructions on the right. Next to **Change Reason**, select the appropriate Benefit Event Type.
NOTE: Additional information will display based on the selected reason.
5. Enter the **Event Date** for which you want this to take effect.
6. Select **Submit**.

Task: Selecting Your Coverage

After submitting, you will have a new task in your inbox to start the benefit Change.

When you reach the enrollment page, click each tile to Enroll, Manage or View the benefit options available.

For some benefits you will not be able to change the option, but you should **Manage** it to add beneficiary allocations. For other options, you will only be able to **View** the election and no changes may be made. Please ensure you review each tile for all the benefit options available to you.

1. Use the **Select or Waive** radio buttons to indicate the desired coverage and select **Confirm and Continue** at the bottom of the change to review additional available benefits.
2. If you need to add a **Dependent** to a specific coverage type, select the field in the Enroll Dependent column and select one of the following:
 - a. **Existing Dependents**
 - b. **Add My Dependent from Enrollment:** Use this to add a new individual to Workday who does not currently have coverage (e.g., Birth)
 - i. Select **OK**, enter details, and select **OK** again

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- ii. This individual can now be added to this and other coverage types
 - c. If you need to add a **Beneficiary** to a specific coverage type, select the Add icon and select the field Beneficiary column and select one of the following:
 - i. **Beneficiary Persons (Existing)**
 - ii. **Trusts (Existing)**
 - iii. **Create > Add Beneficiary or Add Trust**
 1. Enter details and select **OK**.
3. On the final page, review the **Legal Notice** and select **OK**.

NEXT STEPS: The process will go to the Benefits Partner in HR to review required documents, and the elections selected. You may also receive an additional inbox item to provide Evidence of Insurability.

Task: Updating Information for Existing Dependents & Beneficiaries

1. Select **Benefits and Pay**, accessing from the **Navigation sidebar** under **Personal**.
2. Expand **Benefits** at the left and select **Dependents**.
3. Select the **Add** button to add new or the **Edit** button to update an existing dependent or beneficiary.
4. Fill out the information on the Dependent Options screen. All questions with a red asterisk are required.
5. Select **Submit**.

Support: Still have questions?

For technical assistance, please contact the HelpDesk at 717-245-1000 or email helpdesk@dickinson.edu

If you have additional questions, please contact HR Services via email at hrrservices@dickinson.edu