Managing Benefits
Smart Guide

Employees

This job aid focuses on how to manage benefits in Workday. All the below benefits processes can be completed during open enrollment or completed afterwards if there is a qualifying life event. Some life events allow you to change your benefits, dependents, and/or beneficiaries. This job aid addresses the topics below covering generic events. Please contact your HR Partner if you have questions about specific life events.

Audience: Employees

Sections:

- Adding a Qualifying Life Event
- Change Benefit Elections
- Add or Edit Dependents
- Add or Change Beneficiary Information
- View or Print Benefits Statement

Adding a Qualifying Life Event to Workday

1. On the **Workday Home Page**, select the **Benefits** Worklet
2. Under the **Change** section, click **Benefits**.
3. Select the box next to **Change Reason** and click which benefit event applies.
4. Indicate a **Benefit Event Date** by entering a date or clicking the calendar icon.
5. New details will appear indicating when you need to **Submit Elections By** and what are the **Benefits Offered** as it pertains to the life event.

Note: click the **More** button to show a full list.

6. Attach additional documentation via the **Select files** button under the **Attachments** section. This section will not show until you make a life event selection.

Note: Some life events will require documentation to be approved. See the DAS Life Events page to determine what documentation is required for specific life events. For example, if you were married, you would attach a copy of your marriage certificate. For a divorce, you would attach a copy of a divorce decree.

7. Click **Submit**.
8. The **Up Next** window will display automatically with an option to click **Open** or **Done**.
    a. **Open** will bring you to a page that allows you to change your benefit elections.
    b. **Close** will close the page you are on and no benefit changes will be made.

Note: If you do not make your benefit elections at this point, you will have a task to complete in your **Workday Inbox**, which allows you to complete the enrollment later.

Change Benefit Elections

1. After completing the steps for reporting/adding the life event (e.g. marriage), click **Open** to start choosing benefits.
2. Click **Let's Get Started**.
    a. You will see Benefit "Cards" indicating various types of benefits (e.g. Dental, Medical, Dependent Care FSA).
3. One by one, click through **Enroll** in each "card" to view and/or change election types and/or dependents.

Note: Some options may be grayed out if you are not eligible to select that option.

4. Choose which coverage you want by selecting **Select** or **Waive**. Workday will not allow you to select two items.
5. Click **Confirm and Continue**.
6. For applicable benefit types, you will be taken to a **Dependents** page where you can add or remove

coverage to previously added dependents or add new dependents for the first time.

   a. Follow the instructions in the **Add a New Dependent** section of this guide if needed.

7. Under the **Select** column, click the checkbox to either add or remove a previously listed dependent to coverage.
8. Click **Save**.
9. Continue these steps with each Benefits "card."
10. Click **Review and Sign**.
    a. You can also select **Save for Later** if you need more time.

Add or Edit Dependents

1. After completing the steps for reporting/adding the life event (e.g. marriage), click **Open** to start choosing benefits.
2. Click **Let's Get Started**.
3. Click **Manage** on one of the Benefit Cards to which you would like to add or within which you would like to edit a dependent (e.g. **Medical**)
4. Select your plan and click **Confirm and Continue.**
5. Click the **Add New Dependent** button.
6. Read the prompt and click **OK**.
7. Enter the new dependent's information in the **Name, Personal Info, National IDs, Address,** and **Phone & Email** sections**.**

Note: for birth, employees have 60 days to add information like a social security number (SSN).

8. Review dependents covered via the check boxes next to their names. Uncheck the box if you need to remove a dependent from coverage.

Note: at the end of the calendar year in which a dependent turns 26 years old, they are automatically removed from medical and dental insurance.

Note: you may need to add your dependents **Social Securit**y Number if you haven't done so previously.

9. Click **Review and Sign.**
10. Review your **Beneficiary Designations** for accuracy.
11. Scroll to the bottom of the page to review the Electronic Signature.
12. Click the **I Agree** box.
13. Click **Submit**.

Add or Edit Beneficiaries

Note: You can add beneficiaries at any time; it does not require a qualifying life event. The beneficiaries listed in Workday only apply to life insurance.

1. From the **Workday Home page**, select the **Benefits** Worklet.
2. Under the **Change** section, click **Benefits** (do not select Beneficiaries or Dependents.)
3. Select **Change Beneficiaries** from the **Change Reason** dropdown.
4. Click the **calendar** icon in the **Benefit Event Date** field to enter the date of the beneficiary change.

Note: **Submit Elections By** and **Benefits Offered** will display with the associated required date by which you must submit elections and which benefits are associated with the change reason.

   a. Attach required documents, if applicable.

5. Click **Submit**.
6. A **You have submitted** window will display. Click **Open**.

7. The **Change Benefits Elections** page will display.
8. Click **Let's Get Started**.
9. Select **Manage** under **Basic Life.**

Note: Beneficiaries listed under Basic Life will apply to Supplemental as well. You cannot choose different beneficiaries for Basic and Supplemental.

10. Click **Select** or **Waive** for the plan of interest.
11. Click the **+** icon in the **Primary Beneficiary** and **Secondary Beneficiary** and choose Existing Beneficiary, Existing Trusts, or Add New Beneficiary or Trust.

Note: Follow the relevant steps below depending on your selection in step 9; then proceed to step 10.

a. **Add beneficiary**
   i. Click on the prompt icon to select the Relationship type. **Use as Beneficiary** will automatically be selected.
   ii. Enter **Date of Birth and Gender**.
   iii. Enter the **First Name** and **Last Name** of the beneficiary.
   iv. Click the **+** icon to enter the address information of the beneficiary.

b. **Add beneficiary using existing contact**
   i. Click on the prompt icon for **Existing Contacts**.
   ii. Click on the person's name to select them.
   iii. Click **OK**.
   iv. Verify the **Relationship** listed is accurate.
   v. Leave **Use as Beneficiary** checked.
   vi. Enter **Date of Birth** and **Gender**.
   vii. Review the **Legal Name** and **Contact Information**.
   viii. Review your selections. Click **OK**.

c. **Add trust:** Enter the **Trust Name**.
   i. Enter the **First Name** and **Last Name** of the **Trustee**. If there is more than one Trustee, click on the **+** icon to input additional names.
   ii. Click on the + icon under Address to enter the address information.

12. Choose your Beneficiary by clicking the drop-down menu and selecting **Beneficiary Persons**. If you do not wish to use an existing person or if you want to

add an additional beneficiary, you can do so by clicking **Create**.

13. Enter the **Percentages** (if applicable) for each beneficiary or trust. You can have multiple primary beneficiaries, but the total percentage of all beneficiaries should equal 100. This also applies to contingent beneficiaries.
14. Click **Continue**.
15. A pop-up that says **Your Basic Life changes have been updated, but not submitted** will appear. Click **X**.
16. Click **Review and Sign**.
17. Review your **Beneficiary Designations** for accuracy.
18. Scroll to the bottom of the page to review the Electronic Signature.
19. Click the **I Agree** check box.
20. Click **Submit**.

View and Print Your Benefits Information

1. From the **Workday Home page**, select the **Cloud/Profile photo** icon.
2. Click **View Profile**.
3. Click the **Actions** button.
4. Hover over **Benefits**.
5. Click **View My Current Benefit Elections**.
6. Click the **PDF** icon on the top right.
7. Wait until the **Export Document** pop-up appears.
8. Click **Download**.
9. Open the download that appears at the bottom of your screen.
10. From here, you have a PDF you can view or print.