

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 application:

1. Click the **Benefits** button under Change.
2. Select the **Change Reason** from the pull-down.
3. Click the **calendar** icon to enter the date of the benefit event.
4. Attach required documents, if applicable.

Change Benefits
John Simmons (Actions)

Change Reason * Update Beneficiary

Benefit Event Date * 10/01/2020

Submit Elections By 10/07/2020

Benefits Offered
Group AD&D
Group Term Life
Voluntary Life and AD&D

Attachments

Drop files here

or

Select files

5. Click **Submit**, then click **Done**. A task will route to your Inbox, if applicable.
6. Navigate to your **Inbox**.
7. Click the **Benefit Change** task.
8. Complete and continue through all required screens. If required, select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
9. Click **Submit**.
10. Click **Done** to complete the task or click **View Benefits Statement** to review and print a summary of your benefits.


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 application:

1. Click the **Benefit Elections** button under View.
2. Review your benefit elections and costs.


Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage
Medical - Aetna PPO	11/16/2009	11/16/2009	EE - Employee Only	
Dental - Aetna PPO	11/16/2009	11/16/2009	EE - Employee Only	
Vision - Vision Service Plan VSP	01/01/2013	01/01/2013	EE - Employee Only	
Healthcare FSA - SHPS	01/01/2012	01/01/2012	\$1,000.00 Annual	
Basic Group Life - Liberty Mutual (Employee)	11/16/2009	11/16/2009	\$75,000	\$75,000.00
Voluntary Supplemental Life - Liberty Mutual (Employee)	01/01/2013	01/01/2013	\$300,000	\$300,000.00
Short Term Disability - Liberty Mutual (Employee)	11/16/2009	11/16/2009	75% of Salary	\$57,750.00
Long Term Disability - Liberty Mutual Enhanced (Employee)	11/16/2009	11/16/2009	60% of Salary	\$46,200.00
Employee Assistance Program - Liberty Mutual MyLibertyAssist®	01/01/2010	01/01/2010		

3. Click the **Actions**  button.
4. Select **Benefits > Change Benefits**.
5. Enter all required information, denoted by asterisks, and make any permitted changes.
6. 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 Change.
2. Click the **Add** button to add a new dependent.
3. Click the **Edit**  icon or click in the field to modify. Asterisks denote required fields.
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.

VIEW DEPENDENTS' BENEFIT ELECTIONS

From the Benefits application:

1. Click the **Dependents** button under Change.
2. Review your existing dependents and their benefit plan coverage.

MANAGE BENEFICIARIES

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can change, edit, and add beneficiaries from the Benefits application.

From the Benefits application:

1. Click the **Beneficiaries** button under **Change**.

2. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking **Edit**.
3. Click the **Add** button to add a new beneficiary. The Add My Beneficiary page displays.
4. Select **Existing Dependent or Emergency Contact, Create a New Beneficiary**, or **Create a New Trust as Beneficiary**.
5. Click **OK**.
6. Enter all required information, denoted by an asterisk.
7. Click **Submit**.

PRINT BENEFITS STATEMENT

From the Home page:

1. Click the **Profile** photo > **View Profile**.
2. Click the **Actions** button.
3. Select **Benefits** > **View My Benefit Statement**.
4. Click the **prompt** in the Benefit Event field.
5. Select the desired Benefit Event you would like to view and print.
6. Click **OK**.
7. Click the **Print** button. The selected Benefit Event will open as a PDF document, which you can save and print.