

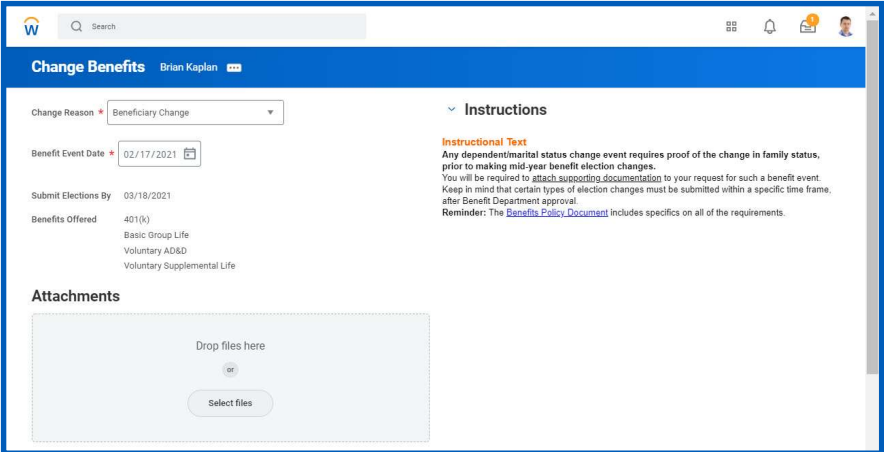
Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. Your organization defines the steps to accomplish these objectives. This job aid covers generic events, so please contact your HR or benefits representative if you have further 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. Click the **Change benefits** button.
2. From the pull-down, select the **Change Reason**.
3. Click the **calendar** icon to enter the date of the benefit event.
4. Attach required documents, if applicable.



5. Click **Submit**.
6. On the pop-up, click **View Details** to view the business process.
7. Click **Done**. A task will route to your Inbox, if applicable.
8. Navigate to your **Inbox**.
9. Click the **Benefit Change** task, and click **Let's Get Started**.
10. Complete and continue through all required screens. If required, select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
11. Click **Submit**.
12. Click **Done** to complete the task, or click **View 2025 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 and Pay application:

1. Under Benefits, click the **Benefit Elections** button.
2. Review your benefit elections and costs.


Benefit Elections Brian Kaplan						
Current Benefit Elections and Costs 9 items						
Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries
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		B Kaplan Personal Trust
Voluntary Supplemental Life - Liberty Mutual (Employee)	01/01/2013	01/01/2013	\$300,000	\$300,000.00		B Kaplan Personal Trust
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 **Related Actions**  icon.
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. Under Change, click the **Dependents** button.
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. Under Change, click the **Dependents** button.
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. Under Change, click the **Beneficiaries** button.

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. In the Benefit Event field, click the **prompt** icon.
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.