

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. Under Change, select the **Benefits** button.
2. From the pull-down, select the **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 \* 02/09/2022

Submit Elections By 03/10/2022

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

**Attachments**

Drop files here

or

Select files

**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 your **Inbox**.
8. Choose 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 2022 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. Under View, choose the **Benefit Elections** button.
2. Review your benefit elections and costs.

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage
Medical - Blue Cross of Calif. PPO	01/01/2013	01/01/2013	EE + 1 Dependent
Dental - Blue Cross of Calif. PPO	01/01/2013	01/01/2013	EE + 1 Dependent
Vision - Vision Service Plan VSP	01/01/2013	01/01/2013	EE + 1 Dependent
Healthcare FSA - SHPS	01/01/2013	01/01/2013	\$800.00 Annual
Basic Group Life - Liberty Mutual (Employee)	01/01/2005	01/01/2005	\$75,000

3. Select the **Related Actions** icon
4. Select **Benefits > Change Benefits**, or select the **Change Benefits** button.
5. Enter all required information, denoted by asterisks, and make any permitted changes.
6. Select **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, choose the **Dependents** button.
2. Select the **Edit** 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 application:

1. Under Change, choose 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, choose the **Beneficiaries** button.
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 **Existing Dependent or Emergency Contact**, **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. The selected Benefit Event will open as a PDF document that you can save and print.