## **Benefits:** Manage Your Benefits

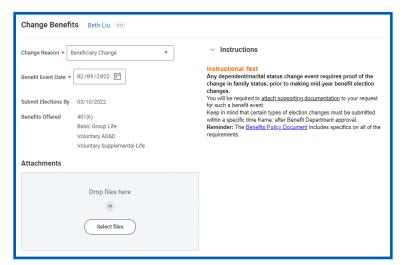
Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. Your organization defines the steps to accomplish these objectives. This job aid covers generic events, so please contact your HR or benefits representative if you have further 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.



- 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.
- 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

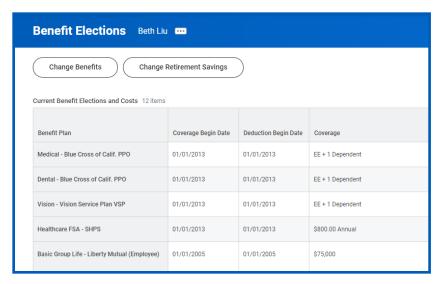
Employees can change benefit elections when a qualifying event occurs, such as a change in marital status, the birth or adoption of a child, or a beneficiary change.

From the Benefits application:

- 1. Under View, choose the **Benefit Elections** button.
- 2. Review your benefit elections and costs.



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- 3. Select the **Related Actions** icon .....
- 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.
- 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.

