

OVERVIEW

Title: Report a Benefits Coverage Change Event

Introduction: In this document, you will learn how to **Report a Benefits Coverage Change Event** in Workday.

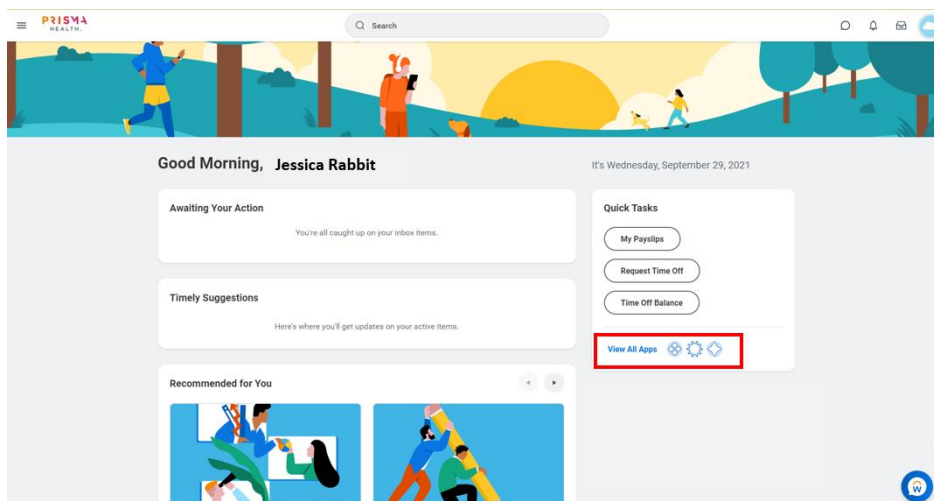
Within Workday, you can manage your benefits by reporting coverage change events as well as viewing and editing your benefit elections. Coverage change events, also known as qualifying life events, include events such as a change in marital status, the birth or adoption of a child, or a beneficiary change. Depending on the event, you may be eligible to add a dependent(s) and/or beneficiaries during this process.

A dependent is someone, like a child or a spouse, who receives benefits under your plan. A beneficiary is a designated individual who would receive your benefits if something were to happen to you.

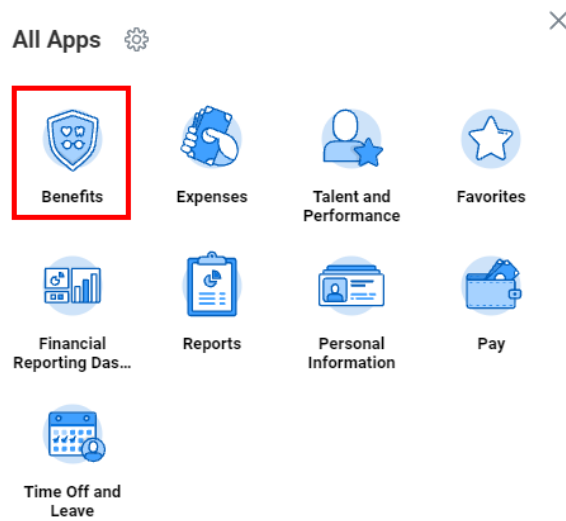
Please contact the People Portal at 833.PPL.PORT or <https://thepeopleportal.prismahealth.org> if you have further questions.

STEPS:

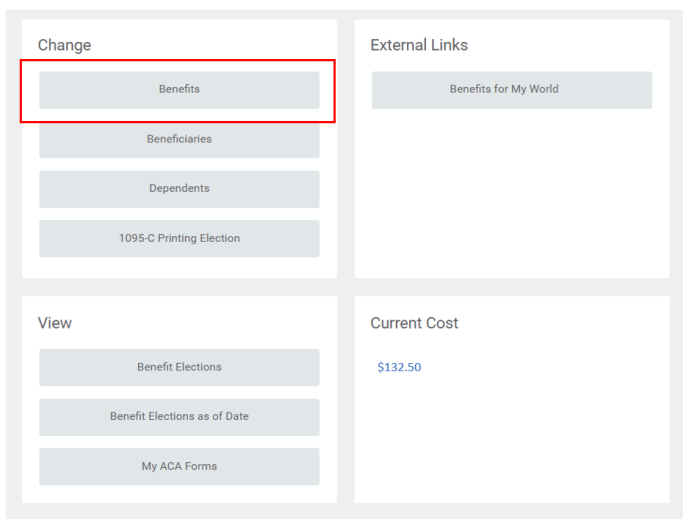
1. From the Home Page, select the blue **View All Apps** link in the Quick Tasks section.



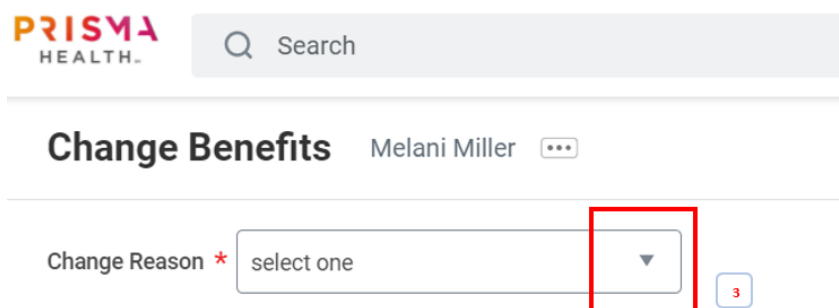
2. Select the **Benefits** app in the pop-up window.



3. Select the **Benefits** button under the **Change** section.



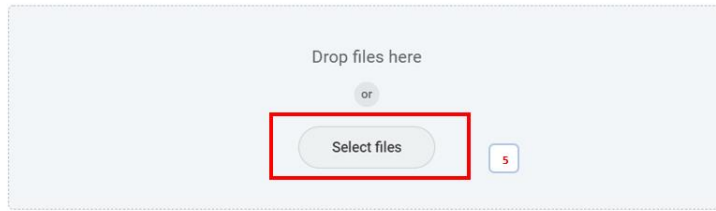
4. From the **drop-down**, select the Change Reason.



5. Click the **calendar** icon to enter the date of the benefit event.

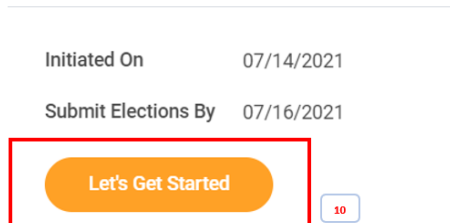
6. Click the **Select files** button to attach required documents, if applicable.

Attachments



7. Enter **comments** in the box if needed.
8. Click **OK**.
9. Click **Submit**.
10. Click the **Open** button to view the task.
11. Click the **Let's Get Started** button.

Change Benefit Elections



12. Click on the **tile(s)** to view and update the appropriate information.



Note: Depending on the event, you may be eligible to add a dependent(s) during this step.

To Add New Dependent

- a. If applicable, click the **Add New Dependent** button, then click **OK** to Create Dependent.

b. Enter the required fields for the Name and Personal Information sections and click **Save**.

c. Click **Add** under National IDs.

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

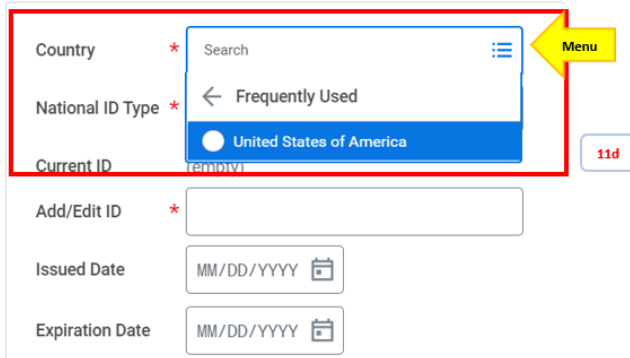


The screenshot shows the 'National IDs' section. A red rectangular box highlights the 'Add' button, which is a light gray oval with the text 'Add' inside. To the right of the 'Add' button is a small blue box containing the text '11c'.

d. In the Country field, select the **menu** then click on **Frequently Used** to select United States of America.

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.



The screenshot shows the 'National IDs' form. A red rectangular box highlights the 'Country' field, which has a dropdown menu open. The dropdown menu shows 'Frequently Used' and 'United States of America'. A yellow arrow points to the 'Menu' icon in the dropdown. Below the 'Country' field is the 'National ID Type' field, which has a dropdown menu open showing 'Social Security Number'. Below the 'National ID Type' field is the 'Current ID' field, which has a text input field. Below the 'Current ID' field is the 'Add/Edit ID' field, which has a text input field. Below the 'Add/Edit ID' field is the 'Issued Date' field, which has a date picker. Below the 'Issued Date' field is the 'Expiration Date' field, which has a date picker. A small blue box containing the text '11d' is located to the right of the 'Current ID' field.

e. In the National ID Type field, select **Social Security Number**. Enter the SSN and Issued Date (if known).

f. Click **Save**.

g. The Address, Phone, and Email sections will default to the information on file for the employee. To change, click on the "x" for the information box shown in the Use Existing...fields for address and/or phone and then update the required fields.

h. Once all the dependent information has been entered, click

Save.



Note: Depending on the event, you may be eligible to add beneficiaries during this step.

To Add Beneficiaries

i. Under Primary Beneficiaries, click the **plus** sign.

PRISMA HEALTH Search

Basic Life - The Standard (Team Member)

Projected Total Cost Per Paycheck

Coverage

Calculated Coverage

Coverage 1 X Salary

Plan cost per paycheck Included

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

j. In the Beneficiary field, click the **menu** icon and select **Add New Beneficiary or Trust**.

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries

Beneficiary	Percentage
No Data	

k. On the pop-up window, select **Add New Beneficiary** or **Add New Trust** and click the **Continue**.

l. Complete the required fields and click **OK**.

- m. Update the percentage field with a **number** (1 to 100).
 - n. Add an additional beneficiaries until the total percentage is 100, if applicable.
 - o. Click **Save**.
13. Repeat the process of reviewing/ updating elections for each available **tile** if applicable.



Note: If adding a dependent, ensure the newly added dependent is selected if desired.

14. Click on the **Review and Sign** button once complete.
15. Review benefit elections on **View Summary**, read the **Electronic Signature statement**, and click **I accept** to provide an electronic signature confirming changes.
16. Click **Submit**.
17. Click **Done** to complete the task, or click **View 2021 Benefits Statement** to review and/or print a summary of your benefits.



Congratulations, you have just learned how to **Report a Benefits Coverage Change Event** in Workday!