Manage Your Benefits: View & Change Your Benefits

Topics covered in this guide:

- View Existing Benefit Elections (formerly Benefits Summary)
- Report a Benefit Event (formerly Qualifying Life Event)
- View Benefit Changes in Progress
- Submit Your Benefit Event (Benefit Elections Review)
- Cancel a Benefit Event Change
- Add Dependents or Add Beneficiaries
- Edit a Dependent’s Demographic Information or Edit a Beneficiary’s Demographic Information

For all other qualifying events, see the instructions outlined below. If you need more information, visit the HR Benefits website for more detail on cost, or contact the Employee Service Center.

### Qualifying Life Events* vs. Workday Benefit Event Type

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*You must finish making benefits changes for one life event before making any other changes.
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**Note:** Benefit Events must be entered in Workday within 30 days of the date of the benefit event. If it has been more than 30 days since the event, call or email the Employee Service Center for assistance.

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**View Existing Benefit Elections** (formerly Benefits Summary)

1. On the Workday Homepage, click the **Benefits worklet**:  
   ![Benefits](image1.png)

2. Click **Benefit Elections** in the View box.
   
   **Note:** See **External Links** in the Benefits worklet for additional information and links to manage flex spending accounts, commuter transit options, pension resources, and more.

3. Review your benefit elections and costs.
   
   **Note:** This view includes both retirement plans you are enrolled in and plans in which you are eligible to participate.

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**Report a Benefit Event** (formerly Qualifying Life Event)

1. On the Workday Homepage, click the **Benefits worklet**:  
   ![Benefits](image2.png)

2. Click **Benefits** in the Change box.

3. Select the appropriate Benefit Event Type.
   
   **Note:** See list of **Workday Benefit Events**.

4. Click the **Calendar** icon to enter the date that the benefit event change happened.
   
   **Note:** Benefit Event changes must be entered within 30 days of the benefit event. If it has been more than 30 days since the event, call or email the Employee Service Center for assistance.

5. Skip the field labeled **enter your comments**.
   
   **Note:** Any comments entered are part of a permanent record and cannot be deleted or changed.

6. Click **Submit**.

7. Click **Open** to view the information you just submitted.

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**View Benefit Changes in Progress**

If you have moved on to another Workday page or closed your browser, here’s how you can view your submission:

1. Click your name (upper right corner), then select: **Inbox**.

2. Select the appropriate **Action** in your **Inbox**.
   
   **Note:** If you find an error that needs to be corrected, contact the Employee Service Center for assistance.

Follow the instructions outlined below based on the Workday Benefit Event Type you selected. Not all steps may be applicable or editable based on your eligibility.

- **Health Care Elections**
- **Health Savings Election**
- **Spending Account Elections**
- **Life Insurance Elections**
Health Care Elections

1. Make your Health Care Elections, choosing Elect or Waive.
2. For each Health Care Election, your current Coverage is displayed. To change Coverage, click on the Coverage field, click the prompt ☐☐ and select the appropriate Coverage.
3. Click the Enroll Dependents field to add your dependent(s). Click the prompt ☐☐ then click Dependents to select your dependent. If your dependents have not yet been entered in Workday, select Create, click on Add My Dependent from Enrollment, and follow the subsequent steps.
4. Indicate if your new dependent is already a beneficiary or emergency contact. Indicate if you’d like your new dependent to be available to be selected as a beneficiary.
5. Click OK.
6. Type in your new dependent’s Name, Address, Personal and Contact Information.
   Note: Fields marked * are required.
7. Skip National IDs (do not click Add) – you will be prompted to enter a Social Security Number later. If the Social Security Number is not yet available, such as for a newborn, you will be given the chance to indicate this.
8. Click OK to return to the Health Care Elections screen. If applicable, repeat steps 1-7 for other dependents and for other plans, including health, dental and vision.
9. Click Continue.
   Note: If you encounter an error that you cannot resolve, contact the Employee Services Center.
Clicking Cancel will not cancel the process as a whole, but rather exit out of the current screen.
10. If you have enrolled a new dependent, you will be prompted to enter a Social Security Number (SSN). If you do not have the SSN (such as for a newborn), select Reason ID is Not Available, and enter a supporting comment.
   NOTE: You must supply an SSN for your dependent within six months of entering that dependent in Workday. To add it later, see the instructions for how to Edit a Dependent’s Demographic Information.
11. Click Continue (or click Go Back to make changes).

Health Savings Election

1. If eligible, elect (or waive) the Health Savings Account and complete the appropriate fields under Contribution Range (Annual).
   Note: See Benefits Eligibility Requirements to see if you are eligible.
2. Click Continue (or click Go Back to make changes).

Spending Account Elections

1. If eligible, elect (or waive) Flexible Spending Accounts (Healthcare and/or Dependent Care) and complete the appropriate fields under Contributions.
   Note: See Benefits Eligibility Requirements to see if you are eligible.
2. Click Continue (or click Go Back to make changes).

Life Insurance Elections

1. If eligible, elect (or waive) the Life Insurance Benefit Plans that appear and complete the appropriate fields under Coverage Level.
   Note: See Benefits Eligibility Requirements to see if you are eligible.
The Coverage Level may be pre-populated based on the Benefit Plan you elect.
2. Click Continue (or click Go Back to make changes).
3. If applicable, add or remove a Beneficiary using the Plus (+) or Minus (−) icons.
4. If you are adding a Beneficiary, click the prompt ☐☐ then select the appropriate person. If your beneficiary has not yet been entered in Workday, click Create and enter all of the appropriate information.
   Note: Fields marked * are required.
5. Click OK.
6. Select Primary or Contingent along with the percentage distribution.
7. Click Continue (or click Go Back to make changes).
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Submit Your Benefit Event (Benefit Elections Review)

1. Review the summary of your benefit elections.

   **Note:** To make changes to your benefits elections, click **Go Back**.

2. The **Waived Coverage** section is collapsed. Click the **Pull Down** icon to see what you are waiving.

3. If your benefit elections are correct, check the **I Agree** check box to provide an electronic signature confirming your changes.

4. Click **Submit**.

5. Click **Print** located at the bottom of the screen to print a copy of your elections.

6. Click **Done** to finish and return to the Homepage.

Cancel a Benefit Event Change

If you wish to cancel a coverage change event before or after you have submitted changes, contact the Employee Service Center.

Add Dependents

Dependents can be added during the Enrollment process. Once a **Benefit Event** has been selected, refer to the **Health Care Elections** instructions listed above.

Add Beneficiaries

If you wish to add a beneficiary outside of another life event, select the **Benefit Event** Type **Insurance/LTD/Beneficiary Change** and follow the instructions for **Life Insurance Elections** listed above.

   **Note:** Selecting the Benefit Event Type **Insurance/LTD/Beneficiary Change** does not require you to change your coverage. This Benefit Event Type can be selected if you wish to add or edit beneficiaries and/or the percent allocation.

Edit a Dependent’s Demographic Information

   **Note:** To update the status for full-time student/disabled dependent, contact the Employee Service Center.

1. If you wish to edit the demographic information for one of your dependents, click your name (upper right corner), then select: **View Profile**.

2. Click the **Benefits** tab.

3. Click the **My Dependents** sub-tab.

4. Click **Edit** for the dependent whose information you wish to update.

5. To add a Social Security Number, click **Add** in the National IDs field.

Edit a Beneficiary’s Demographic Information

1. If you wish to edit the demographic information for one of your dependents, click your name (upper right corner), then select: **View Profile**.

2. Click the **Benefits** tab.

3. Click the **My Beneficiaries** sub-tab.

4. Click **Edit** for the beneficiary whose information you wish to update.

5. To add a Social Security Number, click **Add** in the National IDs field.