

Manage Your Benefits

Guidelines to view your benefits, add beneficiaries, report coverage change events and more.

Within Workday, you can manage your benefits by reporting coverage change events, viewing benefits, and editing your benefit elections. Follow the steps below to accomplish these objectives. This job aid covers generic events, 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 other qualifying life event, you can update your benefits to better fit your needs.

From the Benefits application on your home page or menu:



1. Under Change, select the **Benefits** button.
2. 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**.

Manage Your Benefits

Guidelines to view your benefits, add beneficiaries, report coverage change events and more.

11. Select **Done** to complete the task or select **View Benefits Statement** to review and print a summary of your benefits.

View and Edit Benefit Elections

From the Benefits application on your home page or menu:



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

Benefit Elections Beth Liu ...				
Current Benefit Elections and Costs 4 items				
Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage
Basic Group Life - Liberty Mutual (Employee)	01/01/2005	01/01/2005	\$75,000	\$75,000.00
Voluntary Supplemental Life - Liberty Mutual (Employee)	01/01/2009	01/01/2009	\$300,000	\$300,000.00
Commuter Spending - SHPS Parking Account	02/01/2010	02/01/2010	\$50	
Commuter Spending - SHPS Transit Account	02/01/2010	02/01/2010	\$25	

3. Select the **Related Actions** icon
4. Select **Benefits > Change Benefits**.
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 spouse, who receives benefits under your plan.


From the Benefits application on your home page or menu:



1. Under Change, choose the **Dependents** button.
2. Select the **Add** button to add a new dependent.

Manage Your Benefits

Guidelines to view your benefits, add beneficiaries, report coverage change events and more.

3. Select the **Edit** button.
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.

View Dependents' Benefit Elections

From the Benefits application on your home page or menu:



1. Under Change, choose the **Dependents** button.
2. Review your existing dependents and their benefit plan coverage.

Manage Beneficiaries – Edit or Delete Beneficiaries

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can edit and delete beneficiaries from the Benefits application.

From the Benefits application on your home page or menu:



1. Under Change, choose the **Beneficiaries** button.
2. View existing beneficiaries and their benefit elections. Select **Edit** or **Delete**.
3. Fill in the corresponding information.
4. Select **Submit**.

Manage Beneficiaries – Add Beneficiaries

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can add beneficiaries from the Benefits application.

From the Benefits application on your home page or menu:



Manage Your Benefits

Guidelines to view your benefits, add beneficiaries, report coverage change events and more.

1. Under Change, choose the **Benefits** button.
2. For the change reason, select **Change Beneficiaries**.
3. Click the Calendar icon to add the benefit event date.

Change Reason * Birth/Adoption of a Child
 Change Beneficiaries
 Change HSA
 Death of Child/Spouse
 Employee or Dependent Gains/Loses Other Coverage
 Gain of Medicare
 Marriage / Domestic Partnership
 Parking/Commuter Election

Benefit Event Date * 03/06/2023 

Submit Elections By 04/04/2023

Benefits Offered Basic AD&D

Submit

Save for Later

Cancel

4. Select **Submit**.
5. A window message will pop up that says you have submitted. Select **Open**.
6. Select **Let's Get Started**.

Change Benefit Elections



Click the **Let's Get Started** button below to start enrolling in benefits.

When you reach the enrollment page, click each tile to **Enroll**, **Manage** or **View** the benefit options available.

For some benefits such as Basic Life and AD&D you will not be able to change the option, but you should **Manage** it to add beneficiary allocations. For other options, you will only be able to **View** the election and no changes may be made. Please ensure you review each tile for all the benefit options available to you.

When you are done with your elections, click the **Review and Sign** button to review your final elections and complete the **Electronic Signature**. Scroll down the page and review any messages.

Initiated On 03/23/2023

Submit Elections By 04/04/2023

Let's Get Started

7. Select **Enroll** or **Manage** on the benefit you would like to add your new beneficiary to.

Manage Your Benefits

Guidelines to view your benefits, add beneficiaries, report coverage change events and more.

Review and Sign

Save for Later

8. Select **Confirm and Continue**.
9. Click the **+** button by beneficiary for either the primary beneficiary or secondary beneficiaries depending on your needs. Note that if you have more than one beneficiary for primary, the percentage must equal 100%.

Coverage

Calculated Coverage \$121,000.00

Coverage 2 X Salary

Plan cost (Semimonthly) 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 1 item



+	Beneficiary	Percentage

10. Select **Save**.
11. After you have added your beneficiary to all desired benefits, select **Review and Sign**.
12. Review your summary, check the **I Accept** box, and click **Submit**.

Print Benefits Statement

From the Home page:

Manage Your Benefits

Guidelines to view your benefits, add beneficiaries, report coverage change events and more.

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.