Change Benefits for Life Event

Workday Job Aid for Employees

Overview

This business process is used to initiate a benefit change for a life event. You have 30 days from the date of your life event to make changes within Workday. Only fields marked with an asterisk (*) are required.

Before You Begin

Certain life event reasons require documentation to be attached in Workday. Use the tables below to determine if it's required for the life event.

Change Reason	Documentation Required
Judgement/Decree/Order	Proof by Judgement/Decree/Order.
Marriage	Government issued marriage license.
Mass Transit Contribution Change	No documentation required.
Retirement Savings Contributions	No documentation required.
Significant Cost Increases in Healthcare	Documentation required as proof.
Spouse/Dependent Gains Coverage from another Employer Plan or Other Source	Documentation from former/future sponsor detailing dates of gain of coverage and names of impacted individuals.
Spouse/Dependent Loses Coverage from another Employer Plan or Other Source	Documentation from former/future sponsor detailing dates of loss of coverage and names of impacted individuals.
Loss of Dependent	Death certificate.

Change Reason	Documentation Required
Birth / Adoption of Child / Legal Guardianship	Adoption paperwork or Government issued Birth Certificate (Hospital copy acceptable for newborns, but birth certificate should be provided when received).
Change Beneficiary	No documentation required.
Change in Residence – Move by Employee	Proof of residential address and identification card showing current address.
Change in Residence – Move by Spouse/Dependent Child	Proof of residential address change.
Divorce	Divorce decree.
Employee Moves out of HMO Service Area	Proof of residential address and ID Card showing current address.
HSA Contribution Change	No documentation required.

Process Flow: Change Benefits for Life Event

Employee initiates Change Benefits for Life Event → Employee receives a My Tasks notification to continue the benefit change → Process automatically routes to the Benefits Partner or Retiree Partner for approval → If COBRA records exist and the employee is US-based, the Benefits or Retiree Partner will review COBRA eligibility

View Benefits Information

Benefits information is available to you before or after your life event.

1. From the Workday home page, click **MENU** and select the **Benefits and Pay** application.

   Note: From the Suggested Links column, you can click the available links to read more information as needed.

2. On the left pane, click **Benefits** and select one of the following options, as applicable:
   - **Benefit Elections**: View all current benefit elections.
   - **Benefit by Date**: View benefit elections as of a specific date.
   - **Dependents**: View all listed Dependents.
   - **Beneficiaries:** View all listed Beneficiaries.
   - **ACA Forms:** View Applicable ACA (Affordable Care Act) Forms.

Change Benefits for Life Event

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.

Note: If you need to add or change dependents of beneficiaries ad hoc, please refer to the *Add or Change Dependents or Beneficiaries* job aid.

1. From the Workday home page, click **MENU** and select the **Benefits and Pay** application.
2. On the Overview page, click **Change Benefits**.
3. Select a **Change Reason**.
4. Enter the **Benefit Event Date**.
5. Review when to **Submit Elections By**.
6. Review the **Benefits Offered**.
7. If applicable, attach required documentation. Scroll to the **Attachments** section. Drag and drop or click **Select files** to upload the required supporting documentation.
8. Click **Submit**.

   Note: Upon submission, you receive a Change Benefit Elections Workday My Tasks notification. Continue with the **Change Benefit Elections** section immediately.

Change Benefit Elections

1. From your Workday My Tasks, locate and select the **Benefit Change** task.
2. Click **Let's Get Started**.
3. The page displays with the following sections and related options:
   - Health Care and Accounts
   - Insurance
   - Additional Benefits
4. Select one of the following actions for the benefit option(s) that requires modification:
   - To enroll in a plan, click **Enroll**.
   - To edit an existing plan, click **Manage**.
5. Read the **Important Information** and **General Instructions**.
6. Under the Plans Available section, view the plan details.
7. Select one of the following actions:
   - To enroll in a plan, click **Select**.
   - To waive a plan, click **Waive**.
8. Click **Confirm and Continue**.

9. Use the following table to determine your next step:

If…	Then…
You are not adding Dependents to a plan	• Click **Save**. • You automatically return to the Open Enrollment screen to continue elections
You are adding an existing Dependent to a plan	• A list of dependents displays • Select the applicable dependent(s) from the list
You are adding a new Dependent to a plan	• Click **Add New Dependent** • Click **OK** • Enter Dependent information

10. Click **Save.**
11. You automatically return to the Open Enrollment screen to continue making elections.

Review and Sign

Important: Changes to elections are saved, but not submitted until you Review and Sign.

1. Click **Review and Sign**.
2. Review the instructions at the top of the screen.
3. Carefully review your benefits.
4. Under the Electronic Signature section, carefully read the Legal Notice.
5. Select the **I Accept** checkbox.

   Note: This acknowledgement is equivalent to a formal signature.
6. Click **Submit**.
7. Click **Print** to print a copy of your enrollment for your records as proof of what you changed in your benefit elections.

   Note: Changes to your benefits route to the Benefits Partner or Retiree Partner for review, then to relevant benefits providers to update coverage.