# Manage Your Benefits

Within Workday, you can manage your benefits by reporting coverage change events, 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

From the Workday Menu, **click: Benefits and Pay** application
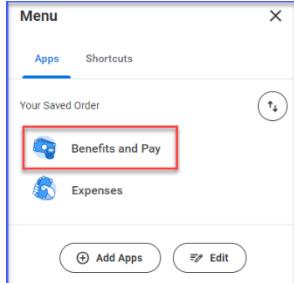
Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, or similar life event, you can update your benefits to better fit your needs. For changes due to divorce, email hrcompbenefitsteam@tidelandshealth.org to request changes.

1. From the **Benefits and Pay** application:
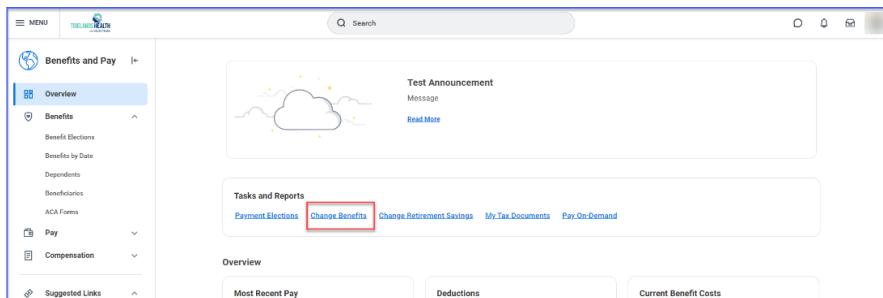
2. In the center of the page, under Tasks and Reports

   a. **Click:** The **Change Benefits** link which moves to the Change Benefits page.

Manage Your Benefits

3. **Click:** the appropriate Change Reason, click the circle next to it.

4. Once a change reason is selected, a calendar appears, **click** the calendar to enter the benefit event. **Note:** If adding beneficiaries because none exist (not due to marriage, adoption, birth, etc.) Select today's date.

5. Once a date is entered, an Attachment option appears. Attach appropriate documentation.

6. Enter comments if desired.

7. **Click:** Submit.

a. From the "You have Submitted" pop-up, **click: Open** to start the Benefits Change task.

b. Alternatively, navigate to **My Tasks**.

Note: If you navigate to your task box instead of clicking **Open as** demonstrated in step **8a** above, you will see a **Get Started** button. Follow the steps accordingly.
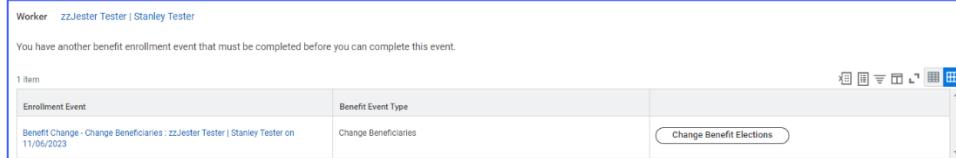
Manage Your Benefits

8. **Click: Benefit Change** task, then **Let's Get Started**.

9. Complete and continue through all required screens.

10. When complete, **click: Review and Sign** to provide an electronic signature, confirming your changes.

11. Click: **Submit**.

12. **Click: Done** to complete the task **or** **click: View Benefits Statement** to review and print a summary of your benefits.
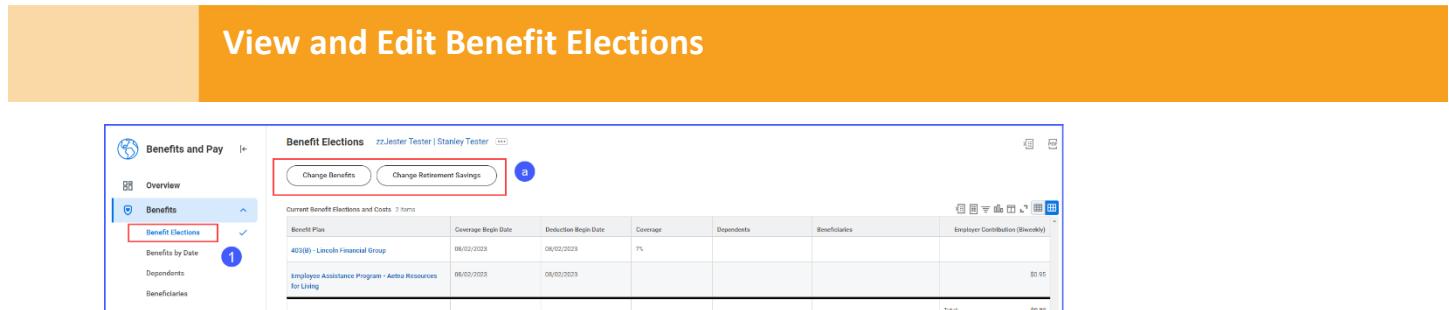
View and Edit Benefit Elections

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 and Pay application:

1. Under Tasks and Reports, **click:** the **Benefit Elections** button.

2. Review your benefit elections and costs.

3. **Click:** the **Change Benefits** button.

4. Enter all required information, denoted by asterisks, and make any permitted changes.

5. **Click: Submit**.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan.

From the Benefits and Pay application:

1. Under Change, **click** the **Dependents** button.

2. **Click:** The **Edit** button to edit an existing dependent.

3. **Click:** The **Add** button to add a new dependent.

4. **Click:** The **Edit** icon [pencil icon] or **click** the field to modify. Asterisks denote required fields.

5. **Click:** The **Add** button to add new information.

6. **Click: 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 and Pay application:

1. Under Change, **click** 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 and Pay application:

1. Under Change, choose the **Beneficiaries** button.

2. View existing beneficiaries for enrollment benefit plans or modify information by **Clicking: Edit**.

3. **Click:** The **Add** (plus sign) button to add a new beneficiary. The Add My Beneficiary row displays.
   Choose either: Existing Beneficiary, Existing Trust, Add New Beneficiary or Trust
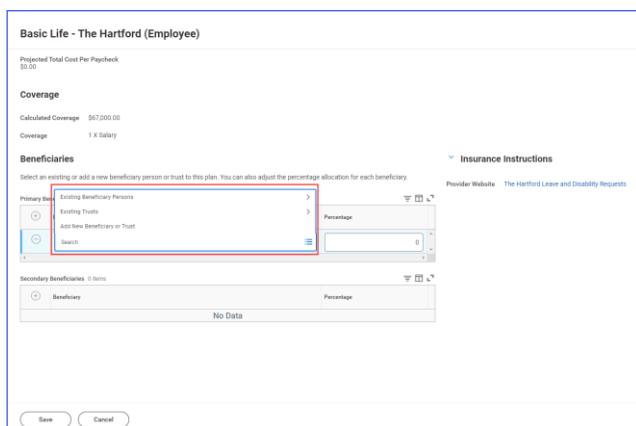
4. **Click: Existing Dependent or Emergency Contact**, **Create a New Beneficiary**, or **Create a New Trust as Beneficiary**.

Manage Your Benefits

Basic Life - The Hartford (Employee)

Projected Total Cost Per Paycheck
$0.00

Coverage

Calculated Coverage $67,000.00

Coverage   1 X Salary

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 Ben...   ← Existing Beneficiary Persons

● ☁ Susie Smith   Percentage

⊖   Search   0

Secondary Beneficiaries 0 Items

⊕   Beneficiary   Percentage

                                    No Data

∨ Insurance Instructions

Provider Website   The Hartford Leave and Disability Requests

Save   Cancel

      a.   If a person's name appears, **click the radio button next to the name** to select it.

5. **Fill in the Percentage** the person will receive.

6. **Click: Save**

7. Enter all required information, denoted by an asterisk. To add a beneficiary's social security number (SSN) or National ID, see below for instructions.

8. **Click: Submit**.

PRINT BENEFITS STATEMENT

From the Home page:

1. **Click: Profile** photo > **View Profile**.

2. **Click:** the **Actions** button.

3. Click: **Benefits** > **View My Benefit Statement**.

4. Click: the **Benefit Event** prompt.

5. Click: the desired benefit event you would like to view and print.

6. Click: **OK**

7. Click: the **Print** button. The Click: ed Benefit Event will open as a PDF document that you can save and print.

View and Edit Beneficiaries SSN/National ID

The purpose of this section of this job aid is to demonstrate how to add the SSN to an existing beneficiary's information.

From the Workday Home page, **navigate** to your profile:

1. **Click: Benefits**

Manage Your Benefits
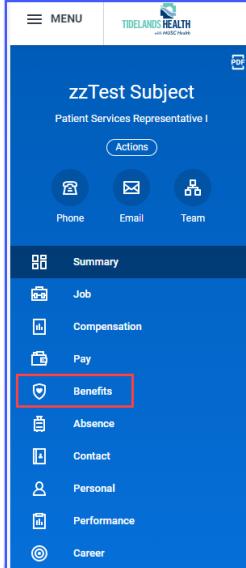
2. Click: **My Beneficiaries**

   a. **Click: Edit**
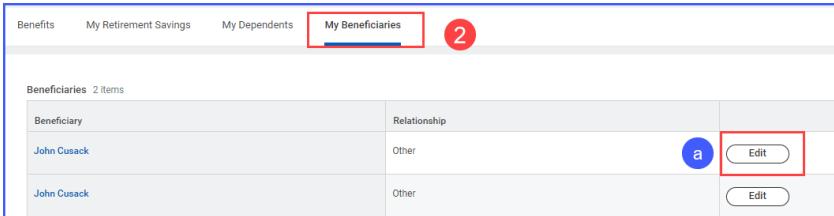

3. The **Edit My Beneficiary** page appears.

   a. **Scroll** down the page
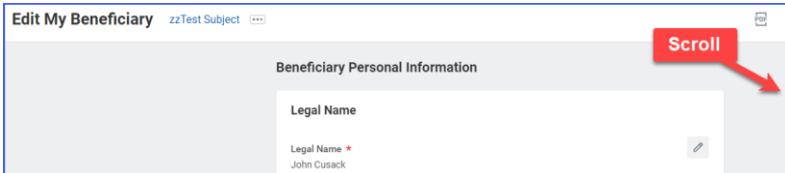
4. **Stop at Identifier Information**

   a. **Click: Add**
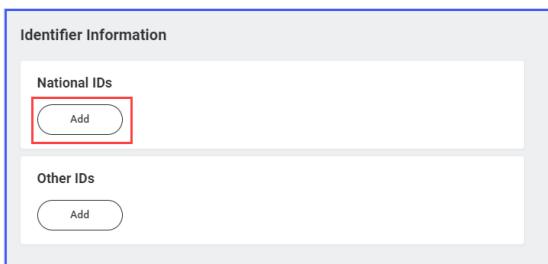
5. The **National IDs** window opens.

   a. **Click: Country**

i. The country selected will then change the choices for **National ID Type and Add/Edit ID** fields. In this example, the USA is the country selected.

You can search by:

Frequently Used or By Country Alphabetically

Or **Type: USA**

6. **Click: SSN or TIN**

7. **Type** in the **SSN.**

8. When complete. **Click the checkmark**

9. **Click: Submit**

Done!