

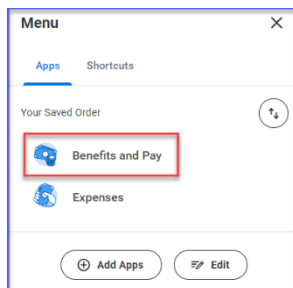


## Manage Your Benefits

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.

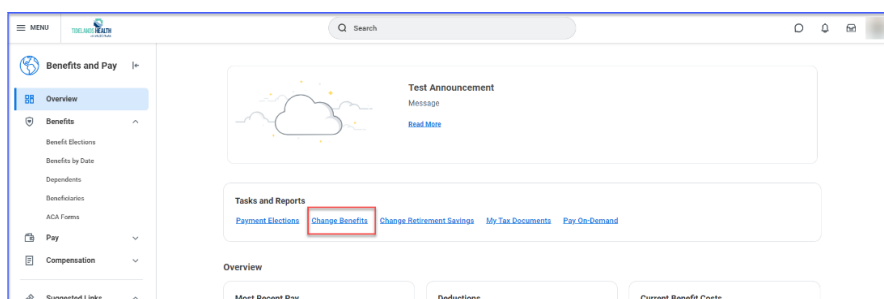
### Report a Coverage Change Event

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](mailto: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

**Change Benefits**

**Change Reason**

- ☐ Birth/Adoption of a Child
- ☐ Change Beneficiaries
- ☐ Employee or Dependent Gains/Losses Other Coverage
- ☐ ID Theft Enrollment Changes
- ☐ Marriage
- ☐ MADA Enrollment Changes

**Instructions**

**SAMPLE INSTRUCTIONS**

Select the appropriate benefit event in the **Change Reason** field and enter the **date** the change occurred. Some changes may not be backdated and others must be entered within 30 days of the event.

Most qualifying life events require supporting documentation. You will be asked for the document after submitting your event. If you do not have documentation at this time, you may proceed but you will need to submit that documentation within 30 days. See below for a list of acceptable documents. If you have questions about the benefit plans or acceptable documentation or do not have documentation, please contact the Benefits Department.

**Note:** Before initiating a **Divorce/Dissolution of Domestic Partnership**, update your dependent's relationship to Ex-Spouse or Ex-Domestic Partner. Return to your Benefits application on your home page and under the Change section, select Dependents and then edit the appropriate dependent.

- Marriage/Domestic Partnership – Marriage Certificate or License, Domestic Partner Affidavit
- Birth/Adoption of Child – Birth Certificate, Hospital Records, Certificate of Live Birth, Adoption Records
- Death of Child/Spouse – Death Certificate
- Divorce/Dissolution of Domestic Partnership – Divorce Decree, Legal Separation Documentation
- Employee or Dependent Gains/Losses Other Coverage – Proof of New Coverage or Loss of Coverage

Submit Save for Later Cancel

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

**Change Benefits**

**Change Reason**

- ☒ Birth/Adoption of a Child
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**Date of Birth or Adoption** 12/18/2023

**Submit Elections By** 01/16/2024

**Benefits Offered**

- Accident Insurance
- Critical Illness Insurance - Employee
- Dental
- Dependent Care FSA
- Healthcare FSA
- More (8)

**Attachments**

Drop Files here

Select Files

Submit Save for Later Cancel

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.

**You have submitted**

Up Next: Change Benefit Elections

[View Details](#)

Open

- 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

Worker: zz.Jester Tester | Stanley Tester

You have another benefit enrollment event that must be completed before you can complete this event.

1 item

Enrollment Event	Benefit Event Type
Benefit Change - Change Beneficiaries - zz.Jester Tester   Stanley Tester on 11/06/2023	Change Beneficiaries

Change Benefit Elections

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**.

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: 10/16/2023  
Submit Elections By: 10/31/2023

**Let's Get Started**

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

Benefits and Pay | Overview

Benefit Elections - zz.Jester Tester | Stanley Tester

Change Benefits | Change Retirement Savings

Current Benefit Elections and Costs: 3 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employer Contribution (Biweekly)
401(k) - Lincoln Financial Group	08/01/2023	08/01/2023	7%			
Employee Assistance Program - Aetna Resources for Living	08/01/2023	08/01/2023				\$0.00
Total						\$0.00

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.

## Manage Your Benefits

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  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:

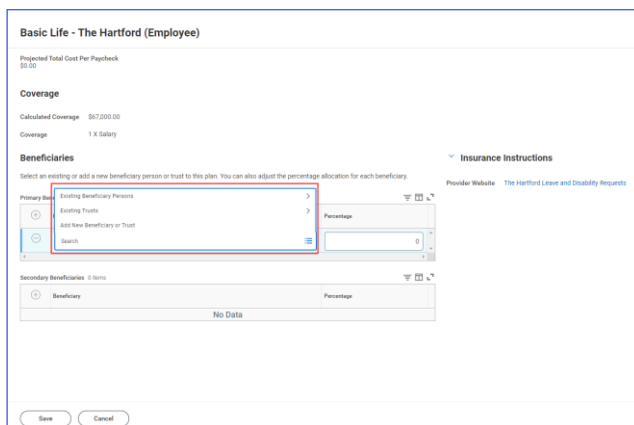
1. Under Change, **click** the **Dependents** button.
2. Review your existing dependents and their benefit plan coverage.

## 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



The screenshot shows the 'Basic Life - The Hartford (Employee)' application. The 'Beneficiaries' section is active, displaying a table for 'Primary Beneficiary' with columns for 'Beneficiary' and 'Percentage'. The 'Add New Beneficiary or Trust' row is highlighted. Below this, the 'Secondary Beneficiaries' section is visible, also with a table for 'Beneficiary' and 'Percentage'. The 'Add New Beneficiary or Trust' row is highlighted in the secondary section as well. The 'Save' and 'Cancel' buttons are at the bottom.

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 Beneficiaries** Existing Beneficiary Persons

Beneficiary	Percentage
<input checked="" type="radio"/> Susie Smith	0

**Secondary Beneficiaries** 0 Items

Beneficiary	Percentage
No Data	

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.

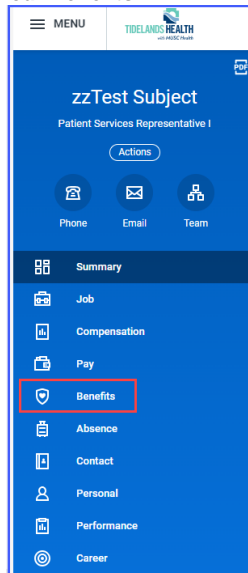
## View and Edit Beneficiaries SSN/National ID

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:

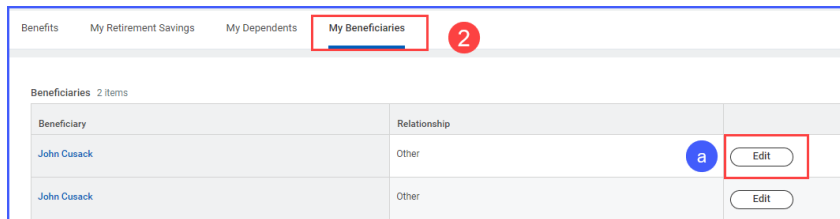
1. **Click: Benefits**

## Manage Your Benefits



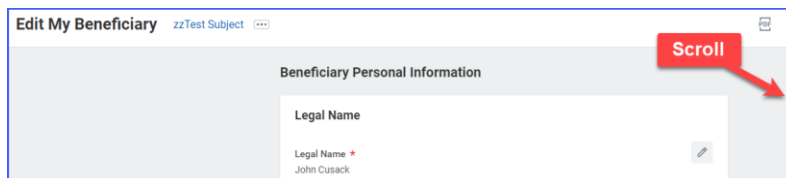
### 2. Click: **My Beneficiaries**

#### a. Click: **Edit**



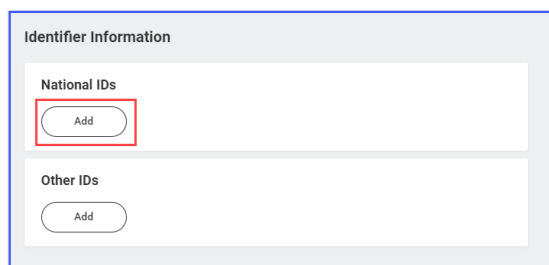
### 3. The **Edit My Beneficiary** page appears.

#### a. Scroll down the page



### 4. Stop at **Identifier Information**

#### a. Click: **Add**



### 5. The **National IDs** window opens.

#### a. Click: **Country**

## Manage Your Benefits

- 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.

The screenshot shows the 'Identifier Information' form. The 'Country' field is highlighted with a red box. Below it, the 'National ID Type' and 'Add/Edit ID' fields are visible. A 'Details' link is at the bottom left.

You can search by:

Frequently Used or By Country Alphabetically

Or **Type: USA**

The screenshot shows a search dropdown menu with three options: 'Frequently Used', 'By Country Alphabetically', and 'Search'. The 'Search' option is highlighted with a red box.

### 6. Click: SSN or TIN

The screenshot shows two radio button options: 'Social Security Number (SSN)' and 'U.S. Individual Taxpayer Identification Number (ITIN)'. The 'SSN' option is selected. A 'Search' button is at the bottom right.

### 7. Type in the SSN.

The screenshot shows the 'Identifier Information' form. The 'Country' field is set to 'United States of America' and the 'National ID Type' is set to 'Social Security Number (SSN)'. The 'Add/Edit ID' field is highlighted with a red box.

### 8. When complete. Click the checkmark

The screenshot shows the 'Identifier Information' form. The 'Country' field is set to 'United States of America' and the 'National ID Type' is set to 'Social Security Number (SSN)'. The 'Add/Edit ID' field contains the SSN '555-12-1212'. The checkmark button is highlighted with a red box.

**Manage Your Benefits**

9. **Click: Submit**



The image shows a horizontal row of three buttons. The first button on the left is blue with the word 'Submit' in white text. It is highlighted with a red rectangular border. The second button is white with a gray border and the text 'Save for Later'. The third button is white with a gray border and the text 'Cancel'. All three buttons are contained within a larger blue rectangular border.

**Done!**