

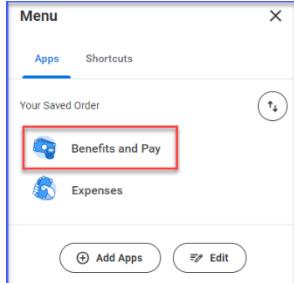


## Manage Your Benefits

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.

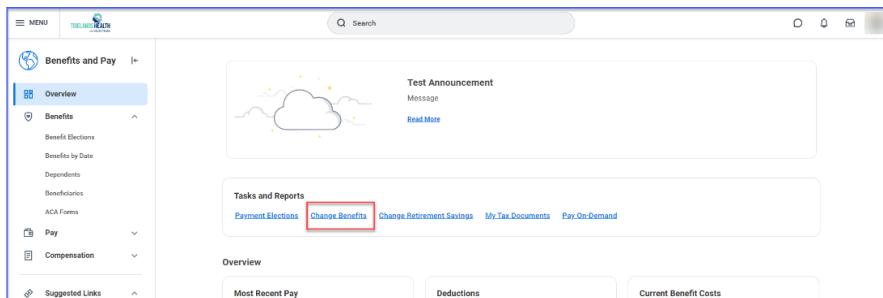
### Report a Coverage Change Event

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

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

## Manage Your Benefits

Change Reason:  Birth/Adoption of a Child  
 Change Beneficiaries  
 Employee or Dependent Gains/Loses Other Coverage  
 ID Theft Enrollment Changes  
 Marriage  
 MASA 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, 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/Loses Other Coverage - Proof of New Coverage or Loss of Coverage

write your comment:

Submit  Save for Later  Cancel

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

Change Reason:  Birth/Adoption of a Child  
 Change Beneficiaries  
 Employee or Dependent Gains/Loses Other Coverage  
 ID Theft Enrollment Changes  
 Marriage  
 MASA Enrollment Changes

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

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/Loses Other Coverage - Proof of New Coverage or Loss of Coverage

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](#)

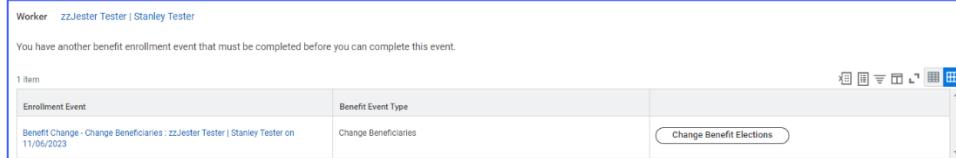
a. From the "You have Submitted" pop-up, click: Open to start the Benefits Change task.



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

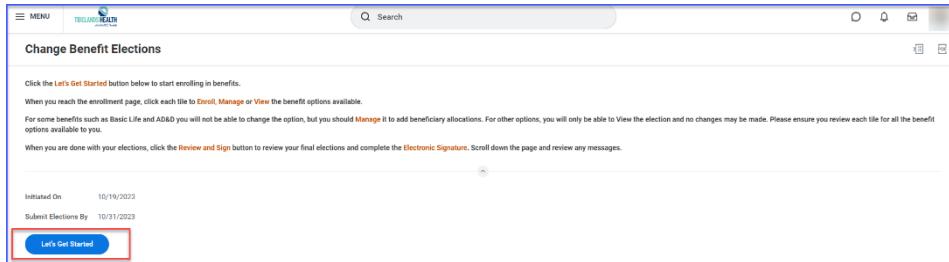


Worker zzJester Tester | Stanley Tester

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

1 item	Enrollment Event	Benefit Event Type	Change Benefit Elections
	Benefit Change - Change Beneficiaries : zzJester Tester   Stanley Tester on 11/06/2023	Change Beneficiaries	

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.

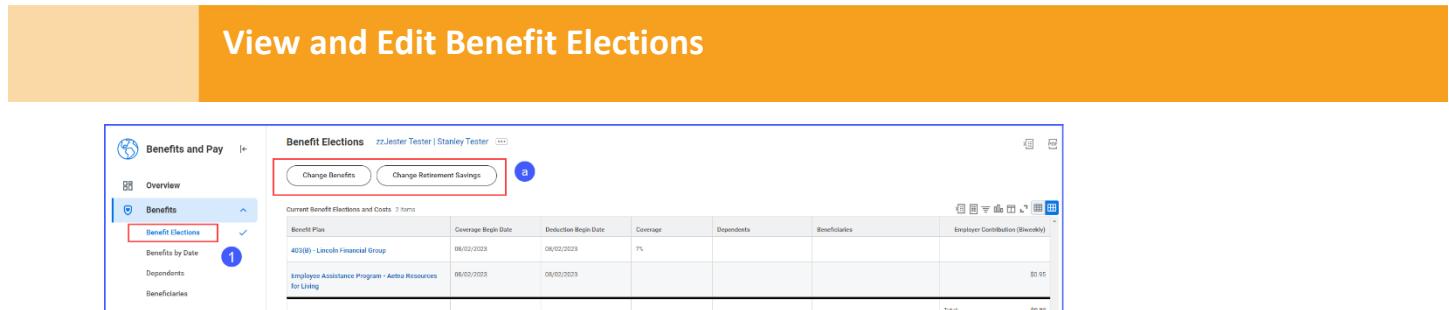
When you are done with your elections, click the **Review and Sign** button to review your final elections and complete the **Electronic Signature**. Scroll down the page and review any messages.

Initiated On 10/19/2023

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

Benefit Elections zzJester Tester | Stanley Tester

Change Benefits Change Retirement Savings

Current Benefit Elections and Costs: 2 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employer Contribution (if needed)
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				\$0.95

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:

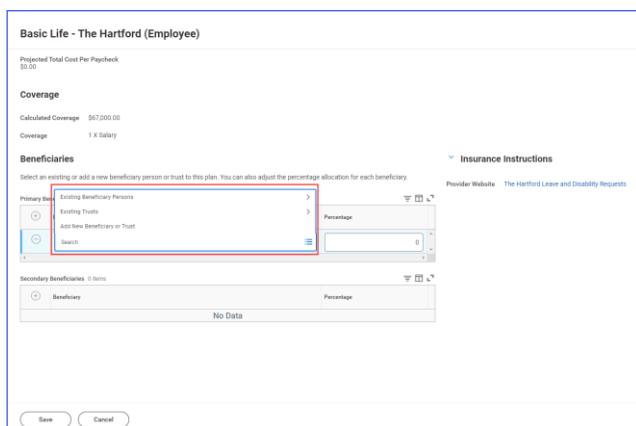
1. Under Change, **click** the **Dependents** button.
2. Review your existing dependents and their benefit plan coverage.

## 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



4. **Click:** Existing Dependent or Emergency Contact, Create a New Beneficiary, or Create a New Trust as Beneficiary.

## Manage Your Benefits

The screenshot shows the 'Basic Life - The Hartford (Employee)' section of the 'Manage Your Benefits' page. It includes a 'Projected Total Cost Per Paycheck' of '\$0.00', 'Calculated Coverage' of '\$67,000.00', and 'Coverage' of '1 X Salary'. The 'Beneficiaries' section allows selecting primary and secondary beneficiaries. A red box highlights the 'Existing Beneficiary Persons' list, which shows 'Susie Smith' selected with a radio button. The 'Percentage' field for Susie Smith is set to '0'. The 'Secondary Beneficiaries' section shows 'No Data'. The 'Insurance Instructions' section provides a 'Provider Website' link to 'The Hartford Leave and Disability Requests'. At the bottom are 'Save' and 'Cancel' buttons.

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.

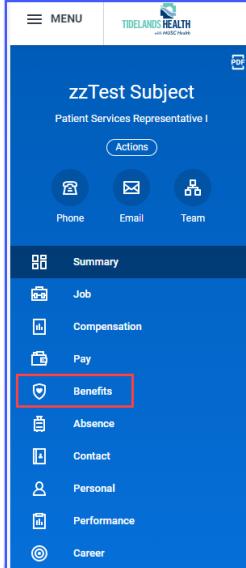
### View and Edit Beneficiaries SSN/National ID

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:

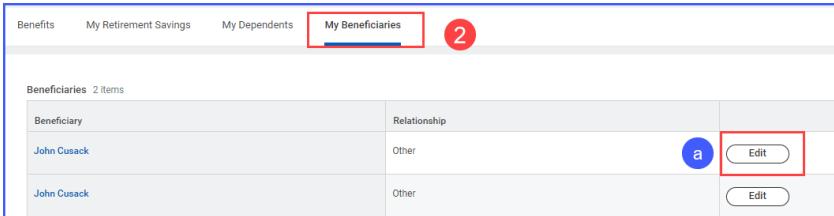
1. **Click: Benefits**

## Manage Your Benefits



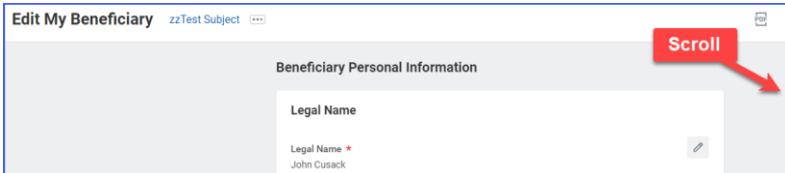
### 2. Click: My Beneficiaries

#### a. Click: Edit



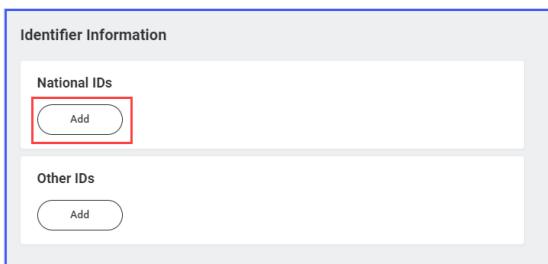
### 3. The Edit My Beneficiary page appears.

#### 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.

Identifier Information

National IDs

Country \*   

National ID Type \*  

Add/Edit ID \*

 Details

You can search by:

Frequently Used or By Country Alphabetically

Or Type: USA

Frequently Used 

By Country Alphabetically 

Search 

## 6. Click: SSN or TIN

Social Security Number (SSN)

U.S. Individual Taxpayer Identification Number (ITIN)

Search 

## 7. Type in the SSN.

Identifier Information

National IDs

Country \*   

National ID Type \*  

Add/Edit ID \*

 Details

## 8. When complete. Click the checkmark

Identifier Information

National IDs

Country \*   

National ID Type \*  

Add/Edit ID \*

 Details

Manage Your Benefits

9. Click: Submit



Done!