Benefits: Manage Your Benefits

Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. Your organization will define 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

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 similar life event, you can change your benefits to better fit your needs.

From the Benefits application:

1. Click the Benefits button under Change.
2. Select the Benefit Event Type.
3. Click the Calendar icon to enter the date of the Benefit event.
4. Attach required documents, if applicable.

5. Click Submit, then click Done. A task will route to your Inbox, if applicable.
6. Navigate to your Inbox.
7. Click the Benefit Event task.
8. Complete and continue through all required screens. Check the I Agree checkbox, if required, to provide an electronic signature, confirming your changes.
9. Click Submit.
10. Click Done to complete the task or Print to launch a printable version of the summary for your records.
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**VIEW AND EDIT BENEFIT ELECTIONS**

From the Benefits application:

1. Click the **Benefit Elections** button under View.
2. Review your benefit elections and costs.

3. Click your **Related Actions** button.

4. Select **Benefits > Change Benefits**.

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

6. Click **Submit**.

**ADD DEPENDENTS**

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

From the Benefits application:

1. Click the **Dependents** button under Change.
2. Click **Add**.
3. Click the **Edit** icon or click in the field to modify. Asterisks denote required fields.
4. Click the **Add** button to add new information.
5. Click **Submit**.

**VIEW DEPENDENTS’ BENEFIT ELECTIONS**

From the Benefits application:

1. Click the **Dependents** button under Change.
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 application:

1. Click the **Beneficiaries** button under **Change**.
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2. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking Edit.

3. Click Add to add a new beneficiary. The Add Beneficiary page displays.

4. Select Existing Dependent or Emergency Contact, New Person as Beneficiary, or New Trust as Beneficiary.

5. Click OK.

6. Enter all required information, denoted by an asterisk.

7. Click Submit.

PRINT BENEFITS STATEMENT

From the Home page:

1. Click the Profile icon > View Profile.

2. Click the Actions button.


4. Click the prompt in the Benefit Event field.

5. Select the desired Benefit Event you would like to view and print.

6. Click OK.

7. Click the Print icon. The selected Benefit Event will open as a PDF document, which can be saved and printed.