

Change Benefit Elections

Workday Reference Guide for Employees

Overview

This reference guide provides you with an overview of how to change your benefit elections. Healthcare benefits are managed in Workday (medical, dental, vision, etc.). If you need to manage retirement elections, then you will use the Transamerica website. A link to the Transamerica website is available from the Benefits application in Workday.

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Initiating a Benefit Change

To change your benefits in Workday, you must first initiate the change by selecting a reason for the change and, when applicable, attaching required documentation. Use the guidance below to get started.

1. Towards the top left of the screen, click **Menu** and select the **Benefits** application.
2. From the Benefits application, you can view and change your benefit elections, as well as follow links to external benefit sites (e.g., Anthem, Transamerica, Delta Dental, etc.).
3. Click **Benefits** in the Change section to initiate a benefit change.
4. Select a **Change Reason** (e.g., change beneficiaries, HSA contribution change, marriage, etc.). You are required to attach documentation for all events except HSA Contribution Change, HSA Eligibility Change, and Change Beneficiaries.
 - Below are examples of the documentation that may be required to complete the change. Proof of coverage and coverage start/end date.
 - Dependent Confirmation Documentation Remittance form and applicable documents for child (Birth Certificate) or spouse (Marriage License or Joint Tax Return and Working Spouse Form, as applicable).
 - Questionnaire for Health and Dental coverage of a Spouse (Working Spouse Rule).
 - Judgement Decree or Court Order

5. Enter the applicable **Date** (e.g., Date of Marital Status Change, Date of Birth/Adoption/Custody, Today's Date for HSA Contribution Changes, etc.). **Please note, you have 31 days from the applicable date to make changes and include supporting documentation.**
6. If applicable, attach required documentation by clicking **Select Files** and selecting from your device.
7. Click **Submit**.

Next: You have now initiated the change and receive a second task in your Workday **My Tasks** box to complete called "**Change Benefit Elections.**" Continue to the next section of this document for guidance on completing the Change Benefits Elections task.

Change Benefit Elections

1. From your Workday **My Tasks** box, locate the task titled **Benefit Change**. When you click the title, the task on the right side of the screen will display with the title of "Change Benefit Elections."
2. Click **Let's Get Started**.
3. The next screen displays benefits you can change based on the reason you selected when initiating (e.g., change beneficiaries, HSA contribution change, marriage, etc.). Each applicable type displays as a tile that includes an option to **Manage** or **Enroll**. The image below is an example only and does not reflect all possible options or real costs.
4. For each applicable benefit type, click **Manage** or **Enroll**.
5. On the next screen, read the **General Instructions**.
6. For each benefit option, click **Select** or **Waive**. The image below is an example only and does not reflect all plan options.
7. Click **Confirm and Continue**.
8. If you are changing or adding dependents or beneficiaries, you can do so from this screen. Use the table below for reference:

Change Type	Directions
Add Dependent	<p>Click Add New Dependent or Add New Beneficiary.</p> <p>Read the notification.</p> <p>Click OK.</p> <p>Enter required details for the dependent or beneficiary.</p> <p>Click Save.</p>
Remove Dependent	<p>Unselect the checkbox next to the applicable person's name.</p>
Add Beneficiary	<p>Click the Plus Icon to add a row on the Beneficiaries chart.</p>

	<p>Click the Beneficiary field and select an existing beneficiary or add a new beneficiary.</p> <p>If adding a new beneficiary, enter the applicable details and click Save.</p> <p>Click Save.</p>
Remove Beneficiary	Click the Minus Icon next to the applicable name on the Beneficiaries chart.

9. Click **Save**.
10. Ensure that you have made the applicable changes for each Benefit type.
11. Click **Review and Sign**.
12. Review all changes.
13. Read the **Electronic Signature Legal Notice**.
14. Click the **I Accept** checkbox.
15. Click **Submit**.