

Manage Your Benefits

Audience: Employees



Overview:

Employees who are eligible for benefits will use Workday to review and select their benefits such as medical, dental, vision coverage, life insurance, and pre-tax benefits.

- Current Employees will be prompted to make benefit elections for the coming year during the annual Open Enrollment period via a Workday Inbox task.
- New Employees must make their benefit elections within 60 days of joining the County. The new hire enrollment task will be delivered via a Workday Inbox task.

Employees will have 30 days to report a qualifying life event outside of the Open Enrollment period. Qualifying life events include *marriage, divorce, birth, adoption, foster care placement, dependent death, loss of legal guardianship or foster care, spouse, or dependent gain/loss of coverage*. This job aid will address updating benefits with a qualifying life event.

This job aid covers the following:

- [View Benefit Elections](#)
- [Change Benefits](#)
- [Add/Change Beneficiaries](#)
- [Add/Change Dependents](#)
- [Print Benefits Statement](#)

View Benefit Elections

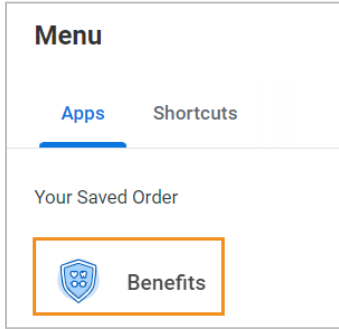
1. From the Workday homepage, click the **Global Navigation Menu** icon.



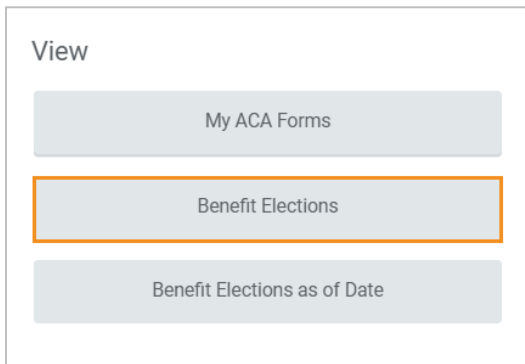
2. Click the **Benefits** application.

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3. From the **View** column, click **Benefit Elections**.



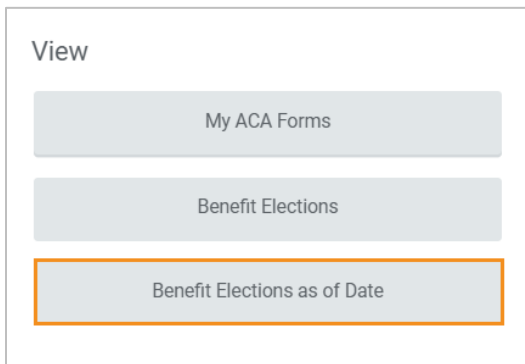
4. A summary of benefits displays.

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Semimonthly)	Employer Contribution (Semimonthly)
Medical/Dental - LGHIP (BCBS) PPO Wellness	01/01/2023	01/01/2023	Family				\$134.50	\$582.00
Employee Group Term Life/AD&D - Prudential (Employee)	01/01/2023	01/01/2023	\$50,000	\$50,000.00				\$8.25
Spouse Group Term Life - Prudential (Spouse)	01/01/2023	01/01/2023	\$5,000	\$5,000.00				\$0.73
401(a) - Nationwide	02/18/2023	02/18/2023	1%					
Pension - Retirement Systems of Alabama Tier 2	09/18/2021	09/18/2021	7.5%					
Total:							\$134.50	\$590.98

5. Repeat steps 1-3 and click **Benefit Elections as of Date** to see a set of selections for a specific period.

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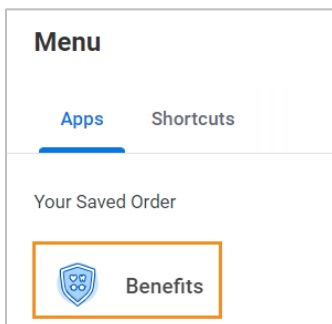


Change Benefits

1. From the Workday homepage, click the **Global Navigation Menu** icon.



2. Click the **Benefits** application.



3. Locate the **Change** column and click **Benefits**.

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Change

- Benefits
- Beneficiaries
- Dependents
- Retirement Savings
- 1095-C Printing Election

4. Select a **Change Reason** from the drop-down selection.

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select one

- Birth / Adoption of Child / Legal Guardianship
- Cancel Long Term Disability
- Cancel Short Term Disability
- Cancel Voluntary Child Life
- Cancel Voluntary Employee Life/AD&D
- Cancel Voluntary Spouse Life
- Change Beneficiary
- Death of dependent, loss of legal guardianship or foster child
- Divorce
- Employee Gains Coverage From Another Source
- Employee Loses Coverage From Another Source
- Marriage
- Retirement Elections Change
- Spouse or Dependent Gains/Loses Coverage from Another Source

5. Depending on the Change Reason selected, enter the **Benefit Event Date**.

Change Benefits Alaina SAT-A ...

Change Reason * Birth / Adoption of Child / Legal Guar... ▼

Date of Birth or Adoption or Legal Guardianship * MM/DD/YYYY 📅

Submit Elections By (empty)

enter your comment

Submit Save for Later Cancel

6. Once the Benefit Event Date is selected, items will default in such as *Submit Elections By date* and *Benefits Offered*. Certain qualifying life events will require documentation to be

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uploaded to Workday as proof of change and will be requested through a Workday Inbox task. Click **Submit**.

A screenshot of a Workday form for managing benefits. The form includes a dropdown menu for "Change Reason" with the selected option "Birth / Adoption of Child / Legal Guar...". Below this is a date field for "Date of Birth or Adoption or Legal Guardianship" with the value "03/11/2023". A "Submit Elections By" field shows "04/09/2023". A list of "Benefits Offered" includes "Child(ren) Group Term Life", "Employee Group Term Life/AD&D", "Medical/Dental", "Spouse Group Term Life", "Voluntary Dental", and "Voluntary Vision". An "Attachments" section contains a "Drop files here" area with a "Select files" button. At the bottom, there are three buttons: "Submit" (highlighted with an orange border), "Save for Later", and "Cancel".

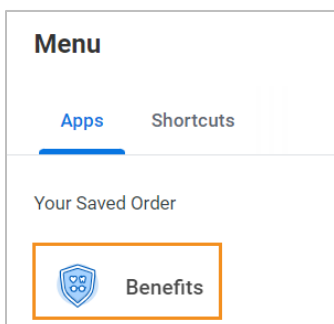
Add/Change Beneficiaries

Add additional beneficiaries in Workday so they can be added to benefit elections outside of the Open Enrollment period.

1. From the Workday homepage, click the **Global Navigation Menu** icon.



2. Click the **Benefits** application.



3. Locate the **Change** column and click **Beneficiaries**.

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Change

- Benefits
- Beneficiaries**
- Dependents
- Retirement Savings
- 1095-C Printing Election

4. If there are already Beneficiaries entered, the Beneficiary dashboard will open. You can click on the beneficiary's name to see the details, select Edit or Delete. Select **Add** and skip to step #6.

Beneficiaries Molli Manager ⋮

Add

Beneficiaries 1 item ✕ ☰

Beneficiary	Relationship	
Steven Manager	Child	Edit Delete

5. Select **Add** if no Beneficiaries have been entered.

Beneficiaries

Add

none entered

6. Select the type of Beneficiary to create and

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Add My Beneficiary

Create a New Beneficiary

Create a New Trust as Beneficiary

7. Click **OK**.

8. Enter required information by selecting the **pencil icon** or the **Add** button.

Beneficiary Personal Information

Legal Name

Legal Name *
(empty)

Relationship

Relationship *
(empty)

Date of Birth

Date of Birth
(empty)

Gender

Gender
(empty)

Contact Information

Primary Address

Additional Address

Primary Phone

Primary Email

Identifier Information

National IDs

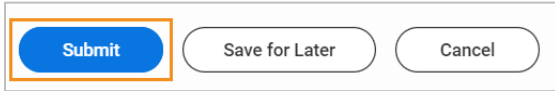
Other IDs

Note: Creating a new beneficiary does not automatically add the new beneficiary or remove any existing beneficiaries from your benefit elections.

9. Click **Submit** to save your change.

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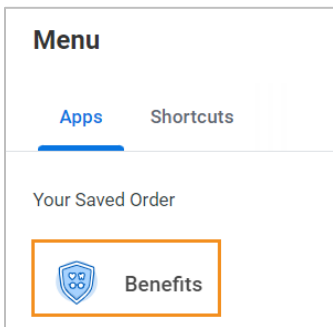


Add/Change Dependents

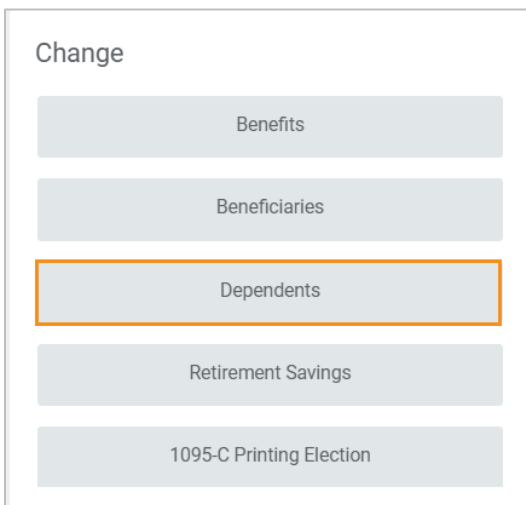
1. From the Workday homepage, click the **Global Navigation Menu** icon.



2. Click the **Benefits** application.



3. Locate the **Change** column and select **Dependents**.



4. Select **Add** to add Dependents outside of the Open Enrollment period.

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Dependents

Add

none entered

- If there are dependents entered, the **Dependents** dashboard opens.
 - Click the dependent name hyperlink to view the information.
 - Click **Edit** to update the dependent's information.
 - Use **Add** to create a new dependent.

Dependents

 Mollie Manager ⋮

Add

Dependents 1 item 🔍 📄 🗑️ 📄 📄

Dependent	Relationship	Age	
Steven Manager	Child	0 years, 1 months, 18 days	Delete Edit

- After selecting **Add**, click the pencil icon to open and update the Dependent Options section.

Dependent Options

Is your new dependent already a beneficiary or emergency contact?

If yes, which one? ✎

Effective Date & Reason

Effective Date * ✎

03/29/2023

Reason

Use your new dependent as a beneficiary?

Use as Beneficiary ✎

No

- The **Effective Date** will default to the current date.
A **Reason** must be selected for the change before any edits can be saved.

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Click the **check mark** to save and close this section.

A form titled "Effective Date & Reason". It has two main sections. The first section is "Effective Date *", which contains a date input field with "03/29/2023" and a calendar icon. To the right of this field are two icons: a pencil and a checkmark. The second section is "Reason", which contains a dropdown menu with a list icon.

8. Use the **Pencil** icon to make any additional changes. Be sure to click the check mark to save and close sections.

Note: Once Dependents have been added or updated, elections can be modified to include them in different coverage areas.

A form titled "Dependent Personal Information". It contains three sections, each with a label and a pencil icon for editing. The first section is "Legal Name", with a label "Legal Name *" and "(empty)". The second section is "Gender", with a label "Gender *" and "(empty)". The third section is "Date of Birth", with a label "Date of Birth *" and "(empty)".

9. Click **Submit** to complete the change.

A row of three buttons: "Submit" (blue with white text), "Save for Later" (white with grey text), and "Cancel" (white with grey text).

10. You receive a confirmation any changes have been submitted and there is a To Do item that will need to be completed before the task can move to the approval step. Select **To Do**. The To Do step will only appear for Birth, Marriage, or Divorce reasons.

A confirmation dialog box with a close button (X) in the top right corner. The text inside reads: "You have submitted", "Up Next: Mollie Manager | Change Benefits", and a link "View Details". At the bottom, there is a blue button with white text that says "To Do".

11. To complete the **To Do**, follow the listed Instructions to **Change Benefits** or select **Submit**.

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Complete To Do [Change Benefits](#) ⋮

For [Molli Manager](#)


Overall Process [Dependent Event: Molli Manager - Manager on 02/11/2023](#)

Overall Status Successfully Completed

Due Date 03/30/2023

Instructions You have successfully updated your Dependent record. Based on your selected reason for this change, you may also wish to update your Benefits to add or remove dependent(s) from coverage.
If you wish to do so, please click the link below to update your elections. Note that this inbox task will not disappear automatically once you have done so; you will need to return to your inbox and click "Submit" below.
If you do not need to update your elections, please select "Submit" below to remove this task from your inbox.

[Change Benefits](#)

 enter your comment

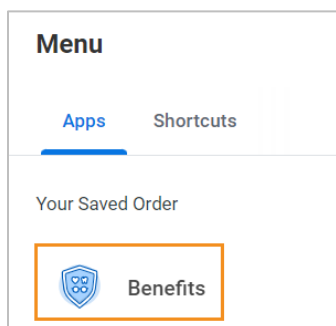
[Submit](#) [Save for Later](#) [Close](#)

Print Benefits Statement

1. From the Workday homepage, click the **Global Navigation Menu** icon.



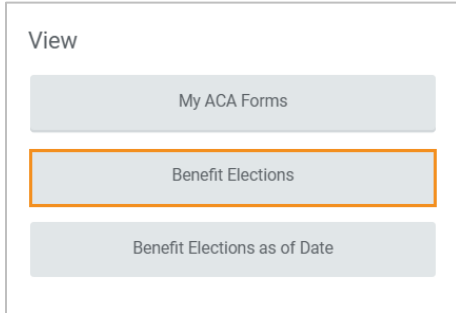
2. Click the **Benefits** application.



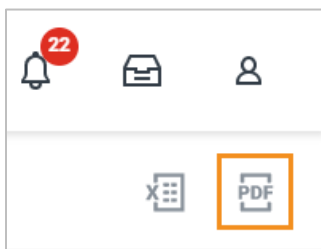
3. From the **View** column, click **Benefit Elections**.

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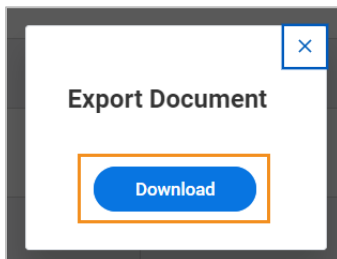
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4. Select the PDF icon in the upper right-hand corner of the screen, just below your Profile icon.



5. Select **Download**.



6. Review document and save/print.

Benefit Elections: EXAMPLE

10:14 AM
03/30/2023
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Current Benefit Elections and Costs

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Semimonthly)	Employer Contribution (Semimonthly)
	01/01/2023	01/01/2023	Family				\$134.50	\$582.00
	01/01/2023	01/01/2023	\$50,000	\$50,000.00				\$8.25
	01/01/2023	01/01/2023	\$5,000	\$5,000.00				\$0.73
	02/18/2023	02/18/2023	1%					
	09/18/2021	09/18/2021	7.5%					
Total:							\$134.50	\$590.98