HUMAN RESOURCES

# Manage Your Benefits

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Make and manage your benefit selections in Workday. At any time, you'll be able to view your current benefit selections from the **Benefits** tab in your worker profile.

You also have a **Benefits worklet**, which contains your current elections as well as other associated tasks and resources.

## Benefits You Can Change Anytime vs. Annual Elections

Some benefits, such as your retirement savings, contributions to an HSA (Health Savings Account), or contributions towards parking/commuter benefits, may be updated at any time without documentation.

All voluntary benefit plans, with the exception of MetLaw, may be dropped (or coverage may be lowered) at any time without documentation.

Other benefits changes, such as healthcare, dental and vision, may only be changed on an annual basis or following a qualifying event.

## Annual Benefits Election Inbox Tasks

Upon first being hired, you'll receive an inbox task prompting you to select your benefits. You'll receive a similar task annually during the open enrollment period, during which you can change your benefit selections for the upcoming year.

# Qualifying Events

Outside of the annual open enrollment period, you can only alter benefits selections following a qualifying event, such as a change in marital status or the birth or adoption of a child.

# Request a Benefit Change

You can change benefit elections for yourself or for any of your dependents or beneficiaries right from Workday.

**1)** Run the **Change Benefits** task.

- Read any information/instructions at the top of the page.

**2)** Select the benefit you'd like to adjust from the **Benefit Event Type** dropdown menu.

**3)** Enter the date of the life/qualifying event in the **Benefit Event Date** field.

**4)** Click the **Select files** button to attach required documents (if applicable).

- You can find a list of events requiring documentation at the top of the page.
- You will see an error message if you submit without required documentation attached.

**5)** Click **Submit**, then click **Done**.

- A task will route to your inbox, if applicable. **Follow the steps below as necessary**.

**6)** Click the **tray icon** to open your inbox.

**7)** Click the **Benefit Change** task.

**8)** Complete the task, continuing through all required screens.

**9)** Check the **I Agree** box to provide an electronic signature.

**10)** Click **Submit**.

# View Existing Benefit Elections

**1)** Run the **Benefit Elections** report.

- You can also find this report in the **Benefits** worklet or from Workday search.

**2)** Review your benefit elections and costs in the table displayed.

**3)** To initiate changes to your benefits from here:

- Click the **Actions** button next to your name in the teal header.
- Hover over the **Benefits** tab, then click **Change Benefits** from the mini-menu.

**4)** Follow the steps in the **Request a Benefit Change** section above.

# View, Add, and Edit Dependents

Members of your household, such as your spouse, domestic partner, or children, may be eligible to receive benefits such as healthcare, dental, or vision. Add these individuals as **dependents** in Workday to get started.

Note that while your **dependents** may often also be your **beneficiaries**, these are separate designations in Workday.

**1)** Run the **Dependents** report.

- You can also find this report in the **Benefits** worklet or from Workday search.

**2)** In the table displayed, view your existing dependents and their benefit plan coverage.

- Follow the **Request a Benefit Change** steps above to change dependents' benefit elections.

**3)** Click the **Add** button to create a new dependent or click the **Edit** button to update an existing dependent.

**4)** Fill out the form:

- Click the **pencil icon** to modify a field and the **checkmark icon** to save changes to a field.
- You must designate a **Reason** for either adding or changing a dependent.

**5)** Click **Submit**.

Once you add or update a dependent, you may also need to update your **Federal Tax elections**, as well as your benefit elections (see **Request a Benefit Change** for steps).

# View, Add, and Edit Beneficiaries

Designate your beneficiaries in Workday, who are eligible to receive life insurance payouts in the event of your death.

**1)** Run the **Beneficiaries** report.

- You can also find this report in the **Benefits** worklet or from Workday search.

**2)** In the table displayed, view your existing beneficiaries and their coverage.

**3)** Click the **Edit** button to update an existing beneficiary (**skip to step 7**).

**4)** Alternatively, click the **Add** button to create a new beneficiary.

**5)** Choose to add a beneficiary from your existing dependents or emergency contacts, create a new beneficiary, or designate a trust as a beneficiary.

**6)** Click **OK** to proceed.

**7)** Fill out the form:

- Click the **pencil icon** to modify a field and the **checkmark icon** to save changes to a field.

**8)** Click **Submit**.

Follow the **Request a Benefit Change** steps if you need to change benefit elections for your beneficiaries.