



The Benefits Management tip sheet is for Benefits Administrators and HR Partners.

Benefits Reports

Below is a list of helpful Benefits reports. For a full list, in the Workday Search bar, type “**Workday Standard Reports**” and select the report.

| Report Name | Description |
|---|---|
| Benefit Elections Audit - CR 1097 CHES | Use to validate employee’s enrolled benefits. |
| Benefit Changes | View a list of benefit changes for one or more employees within a specific benefit group. |
| Benefit Census | View workers who meet the criteria defined by the eligibility rule associated with a specific benefit group. |
| Benefit Eligibility by Benefit Group | View workers within a specific benefit group and the benefit plans for which they are eligible within a specific benefit plan year. |
| Benefit Eligible by Worker | View a list of the benefits plans in which a worker is eligible to enroll. |
| COBRA Report with Dependents CR - 1098 CHES | Returns benefit elections for COBRA participants and their dependents. |
| Dependents and Workers With Matching National IDs | Advanced report lists dependents who have the same National ID (such as Social Security number) as a worker. |
| Enrollment Count | View the number of enrolled and waived elections for health, spending accounts, and insurance benefit plans for a specific benefit group. |
| Open Enrollment Status Report | View detailed information about active and closed open enrollment events. |

| Report Name | Description |
|-----------------------------------|--|
| Separated Employees with Benefits | View workers who have been separated but are enrolled in their current benefit elections. Enables you to evaluate whether their benefits need to be extended so you can begin the COBRA process, or should be separated. |

Benefit Events Status Report

To look up enrollment status of a benefits **event you can utilize the Benefit Events Status Report**. This report will enable you to manually take action to cancel or change benefit elections. Additionally, this report shows when an employee may have submitted benefits elections.

1. In the Workday Search bar, type “**Benefit Events Status Report**” and select the report.
2. Select **Enrollment Statuses**.
3. Optional: Select **Benefits Groups** or **Benefit Types** to narrow the report results.
4. Select **OK**. The report displays the Event, Benefit Event Type, Event Date, Status, and action you may be able to take such as Cancel Enrollment and Change Benefit Elections.
5. You may take action manually from this view

An accompanying task is **Finalize Open Benefit Events**. This task can be automatically run every day to help close and finalize events. For example, you may want to close out New Hire Enrollment on day 31 when they only have 30 days to make selections.

Admin Changes

Benefits partners have access to manually change benefit elections for employees.

1. In the Workday Search bar, type the employee name and select the profile.
2. Select **Actions > Benefits > Change Benefits**. Workday displays previous benefit selections.
3. Select a **Change Reason**.

NOTE: **Administrative Correction** should be used sparingly.

4. Select **Benefit Event Date**.
5. Select **Submit Elections By**.

NOTE: This process does not take any rules into account, such as waiting periods. Changes made will be as of the selected effective date.

6. Select **Submit**.
7. Within the table, Benefit Election History, locate the benefit event you would like to alter. Hover your cursor near the magnifying glass and select **Related Actions**  > **Benefits > Correct Benefits**.
8. Workday will ask you to confirm you would like to correct benefits for the employee prior to launching the specific benefits enrollment.
9. Once changes are complete, select **Submit**.

Management of Evidence of Insurability

Evidence of Insurability is documented proof of good health, to be medically qualified for specific levels of insurance coverage. When an employee selects a coverage plan above the guaranteed amount, Evidence of Insurability is required.

1. In the Workday Search bar, type “**Manage Evidence of Insurability Status**” and select the task.
2. **Status** defaults to **Pending**. This option shows any employees with pending approval by the insurance company.
3. To view one employee’s status, type a name to search for the person.
4. Select the **Benefit Group(s)** to filter by college.
5. All other fields may remain blank.
6. Select **OK**. The grid displays what each employee requested and the current status.

NOTE: Workday determines coverage level and automatically applies the enrollment rules at the appropriate level of coverage.

Questions? Contact us.

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