



The Managing Your Benefits tip sheet is for all employees.

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

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 update your benefits to better fit your needs.

If you are adding or removing a dependent from coverage, you must attach the appropriate documentation such as a birth certificate, marriage certificate, or proof of loss of coverage.

1. Navigate to the Workday Menu and select **Apps > Benefits**.

Note: If the Benefits app is missing from the Menu, select **Add Apps**, search for the app by typing its name, and select the **plus sign** to add it.

2. Within Benefits, under the **Change** header, select **Benefits**.

NOTE: You may also access the **Change Benefits** task via the Workday Search bar. Type "**Change Benefits**" and select the task.

3. Select the radio button to select the appropriate **Benefit Change Reason**. Available reasons for change are listed below:
 - Birth/Adoption/Guardianship of a Child
 - Death of a Child / Spouse
 - Employee or Dependent Gains / Losses Outside Coverage
 - Marriage / Domestic Partnership

Note: Each college may have additional options based on status changes.

4. Follow the outlined steps to select new or alter coverages. Please note any special enrollment instructions at the top or right side of each new screen.
5. Select **Submit**.
OR
Select **Save for Later** to save changes and return to this process later.
OR
Select **Cancel** to exit the process and not save changes.

Report a Coverage Change Event


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1. In Workday, select the **Menu > Benefits**.
2. Under the Change header, select **Benefits**.
3. From the pull-down, select the **Change Reason**.
4. Select the **Calendar** icon to enter the date of the benefit event.
5. Attach required documents, if applicable.
6. Select **Submit**.
7. From the pop-up, select **Open** to start the Benefits Change task.
OR
Navigate to **My Tasks**.
8. Choose the Benefit Change task, then **Let's Get Started**.
9. Complete and continue through all required screens.
10. Once edits are complete, select **Review and Sign**.
11. If required, select the **I Accept** checkbox to provide an electronic signature and confirm your changes.
12. Select **Submit**.
13. Select **Done** to complete the task or select View 2023 Benefits Statement to review and print a summary of your benefits.

View and Edit Benefit Elections

Employees can change benefit elections when a qualifying event occurs, such as a change in marital status, the birth or adoption of a child, or a beneficiary change.

From the Benefits application:

1. Under View, choose **Benefit Elections**.
2. Review your benefit elections and costs.
3. To edit your Benefit Elections, select the **Related Actions** icon () > **Benefits > Change Benefits**.
OR
4. Select the **Change Benefits** button.
5. Enter all required information, denoted by asterisks, and make any permitted changes.

6. Select **Submit**.

Add Dependents

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

From the **Benefits** application:

1. Under **Change**, select **Dependents**.
2. Select the **Add** button to add a new dependent.
3. Select the **Edit** button to edit an existing dependent. **The Edit My Dependent** page displays.
4. Within **Edit My Dependent**, select the **Edit** icon (pencil) or select the field to modify. Asterisks denote required fields.
5. Select the **Add** button to add new information.
6. Select **Submit**.

Note: If you add an additional dependent, you may need to update your federal tax elections as well as your benefit elections. If you add another beneficiary, you may need to update your benefit elections.

View Dependents' Benefit Elections

From the Benefits application:

1. Under **Change**, select **Dependents**.
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. Under **Change**, select **Beneficiaries**.
2. View existing beneficiaries for enrollment benefit plans or modify information by selecting **Edit**.
3. Select the **Add** button to add a new beneficiary. The **Add My Beneficiary** page displays.
4. Select **Create a New Beneficiary** or **Create a New Trust as Beneficiary**.
5. Select **OK**.
6. Enter all required information, denoted by an asterisk.

7. Select **Submit**.

Print Benefits Statement

From the Home page:

1. Select the Profile photo > **View Profile**.
2. Select the **Actions** button.
3. Hover over **Benefits** and select **View My Benefit Statement**.
4. Select the **Benefit Event** prompt.
5. Select the desired benefit event you would like to view and print.
6. Select **OK**.
7. Select the **Print** button.
8. From the **Export Document** pop-up, select **Download**. The selected benefit event saves to your device as a PDF document that you can open and print.