Benefits: Manage Your Benefits

People, not applications, make businesses successful. Our belief drives Workday’s mission—to help customers get the most out of their人力资本. We’re dedicated to providing great resources, tools, and support.

This job aid covers generic events. Your company will define the steps you take to accomplish some of these objectives. Contact your HR or Benefits Representative if you have any questions.

Report a Coverage Change Event

From the Benefits worklet:

1. Click **Benefits**.
2. Select the Benefit Event Type.
3. Click the **Calendar** icon to enter the date for the life event change.
4. Attach required documents, if applicable.

Any dependent event status change event requires proof of the change in family status, prior to making mid-year benefit election changes. You will be required to attach supporting documentation to your request for such a benefit event. Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval.

Reminder: The **Benefits Policy Document** includes specifics on all of the requirements.
5. Click **Submit**. A task appears in your Inbox.

6. Click your **Profile Icon > Inbox**.

7. Click the Benefit Event task. The Revise Benefit Changes page displays.

8. Complete any necessary changes and click **Submit**.

9. Complete and continue through all required screens and check the **I Agree** box to provide an electronic signature confirming your changes.

10. Click **Submit**.

**View Existing Benefit Elections**
From the Benefits worklet:

1. Click **Benefit Elections**.

2. Review your benefit elections and costs.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Coverage Begin Date</th>
<th>Deduction Begin Date</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - Aetna PPO</td>
<td>11/16/2009</td>
<td>11/16/2009</td>
<td>EOE - Employee Only</td>
</tr>
<tr>
<td>Dental - Aetna PPO</td>
<td>11/16/2009</td>
<td>11/16/2009</td>
<td>EOE - Employee Only</td>
</tr>
<tr>
<td>Healthcare FSA - SHPS</td>
<td>01/01/2013</td>
<td>01/01/2013</td>
<td>$1,000.00 Annual</td>
</tr>
<tr>
<td>Basic Group Life - Liberty Mutual (Employee)</td>
<td>11/16/2009</td>
<td>11/16/2009</td>
<td>$75,000</td>
</tr>
<tr>
<td>Short Term Disability - Liberty Mutual (Employee)</td>
<td>11/16/2009</td>
<td>11/16/2009</td>
<td>70% of Salary</td>
</tr>
<tr>
<td>Long Term Disability - Liberty Mutual Enhanced (Employee)</td>
<td>11/16/2009</td>
<td>11/16/2009</td>
<td>60% of Salary</td>
</tr>
<tr>
<td>Employee Assistance Program - Liberty Mutual (Employee)</td>
<td>01/01/2010</td>
<td>01/01/2010</td>
<td></td>
</tr>
</tbody>
</table>

**View Dependents’ Benefit Elections**
From the Benefits worklet:

1. Click **Dependents**.

2. Review your existing dependents and their benefit plan coverage.

3. Click the **Related Actions** icon ⌁ next to your name to make changes.

4. Select **Benefits > Change Benefits**.

5. Make any permitted changes and click **Submit**.

**Manage Dependents**
From the Benefits worklet:

1. Click **Dependents**.

2. Click **Add**.

3. Click the **Edit** icon 🌡️ or click in the field to modify. Required fields are denoted by red asterisks.

4. Click the **Plus** icon + to add new information.

5. Click **Submit**.

Once you add an additional dependent, you may need to update your Federal Tax elections, as well as your Benefit elections. Click the **Skip** button if you want to do this later.
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Manage Beneficiaries
From the Benefits worklet:

1. Click **Beneficiaries**.

2. View existing beneficiaries for enrollment benefit plans, or modify the existing information by clicking **Edit**.

3. Click **Add** to add a new beneficiary. The Add Beneficiary page displays.

4. Click the button for Existing Dependent or Emergency Contact, New Person as Beneficiary, or New Trust as Beneficiary.

5. Click **OK**

6. Enter all required information denoted by an asterisk.

7. Click **OK**.

8. Click **Done**.

Once you add an additional beneficiary, you may need to update your Benefit elections.