



STATEWIDE PERSONNEL
— S Y S T E M —

**Complete Open Enrollment Elections
as an Agency Benefits Coordinator
for an Employee**



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Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Complete Open Enrollment Elections for an Employee

Use this procedure to complete open enrollment on behalf of an employee if necessary.

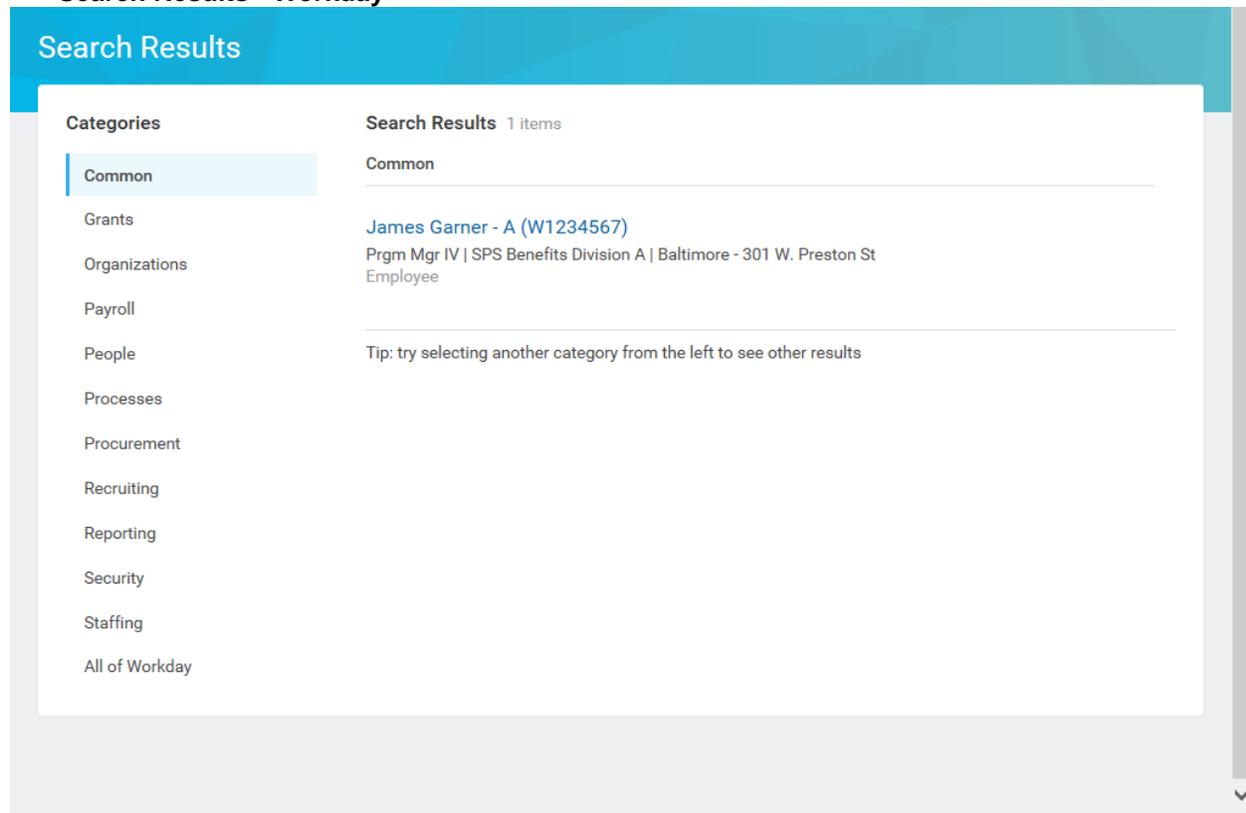
Note that if an employee does not complete open enrollment, the employee's benefit elections from the prior year will carry over to the current year (except flexible spending accounts).

Agency Benefit Coordinators will have access to enroll their employees.

Procedure:

1. Enter the employee's name or W number in the **Search** field.
2. Click the **search**  icon.

Search Results - Workday



The screenshot shows the 'Search Results' page in Workday. On the left, there is a 'Categories' sidebar with 'Common' selected. The main content area shows 'Search Results 1 items' under the 'Common' category. The result is for 'James Garner - A (W1234567)', a 'Prgm Mgr IV | SPS Benefits Division A | Baltimore - 301 W. Preston St Employee'. A tip at the bottom suggests selecting another category to see other results.

3. Click the employee name hyperlink.



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Worker - Workday

4. On the Job tab, click the **Worker History** sub-tab.



Note: You may have to click the More options.



drop down arrow to find a complete list of



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Change Benefits - Workday

James Garner - A
(W1234567)
Prgm Mgr IV

Actions

Team

- Summary
- Job**
- Contact
- Personal
- Benefits
- Pay
- Performance

Organizations | **Worker History** | Additional Data | More

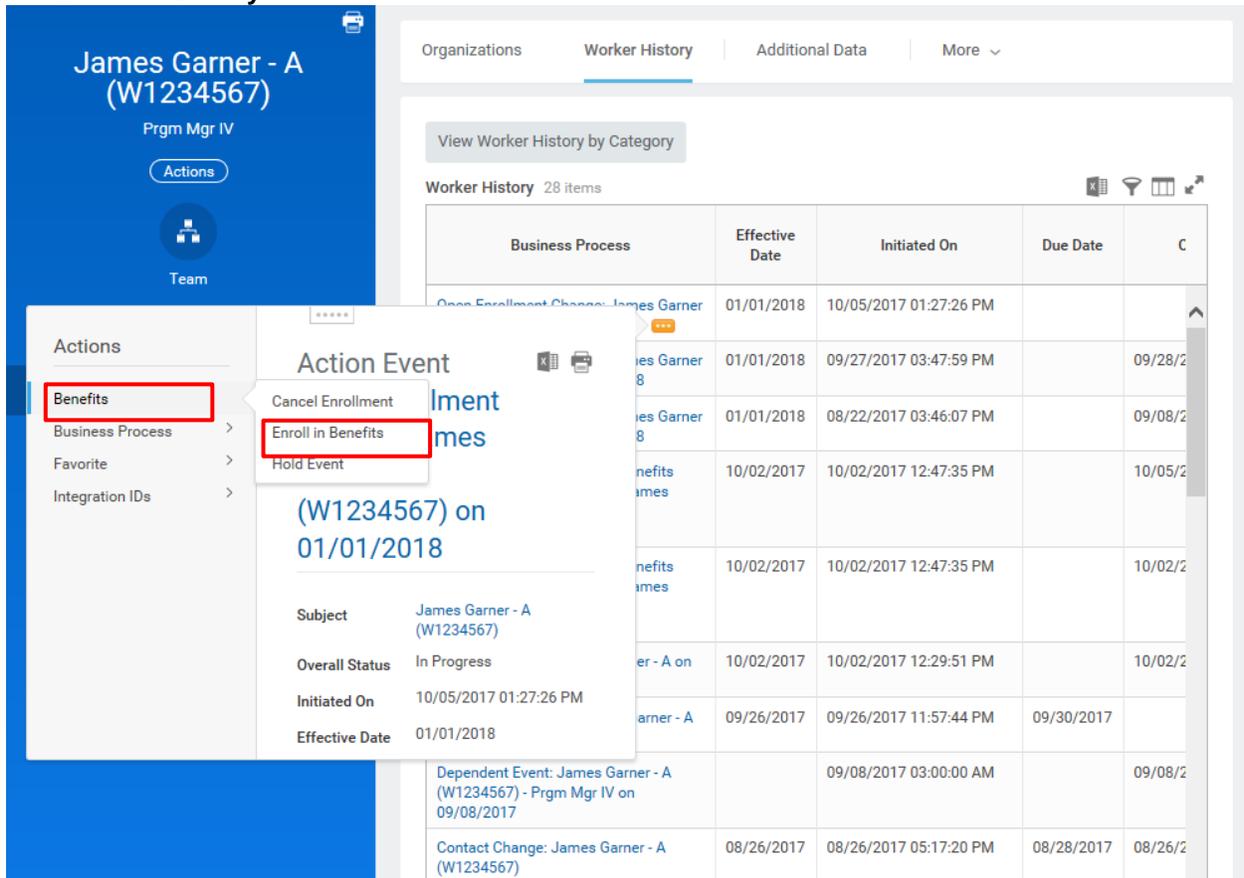
View Worker History by Category

Worker History 28 items

Business Process	Effective Date	Initiated On	Due Date	C
Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018	01/01/2018	10/05/2017 01:27:26 PM		
Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018	01/01/2018	09/27/2017 03:47:59 PM		09/28/2017
Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018	01/01/2018	08/22/2017 03:46:07 PM		09/08/2017
Benefit Change - Employee Benefits Enrollment (EBD Use Only) : James Garner - A (W1234567) on 10/02/2017	10/02/2017	10/02/2017 12:47:35 PM		10/05/2017
Benefit Change - Employee Benefits Enrollment (EBD Use Only) : James Garner - A (W1234567) on 10/02/2017	10/02/2017	10/02/2017 12:47:35 PM		10/02/2017
Dependent Event: Selena Garner - A on 10/02/2017	10/02/2017	10/02/2017 12:29:51 PM		10/02/2017
Legal Name Change: James Garner - A (W1234567)	09/26/2017	09/26/2017 11:57:44 PM	09/30/2017	
Dependent Event: James Garner - A (W1234567) - Prgm Mgr IV on 09/08/2017		09/08/2017 03:00:00 AM		09/08/2017
Contact Change: James Garner - A (W1234567)	08/26/2017	08/26/2017 05:17:20 PM	08/28/2017	08/26/2017

5. Click the Related Action and Preview icon next to the Open Enrollment Change for the employee.

Event - Workday



The screenshot shows the Workday interface for James Garner - A (W1234567), a Program Manager IV. The 'Action Event' menu is open, with 'Enroll in Benefits' highlighted. The background shows a table of worker history items.

Business Process	Effective Date	Initiated On	Due Date	C
Open Enrollment Change: James Garner - A (W1234567)	01/01/2018	10/05/2017 01:27:26 PM		
James Garner - A (W1234567)	01/01/2018	09/27/2017 03:47:59 PM		09/28/2017
James Garner - A (W1234567)	01/01/2018	08/22/2017 03:46:07 PM		09/08/2017
Benefits James	10/02/2017	10/02/2017 12:47:35 PM		10/05/2017
Benefits James	10/02/2017	10/02/2017 12:47:35 PM		10/02/2017
er - A on	10/02/2017	10/02/2017 12:29:51 PM		10/02/2017
Garner - A	09/26/2017	09/26/2017 11:57:44 PM	09/30/2017	
Dependent Event: James Garner - A (W1234567) - Prgm Mgr IV on 09/08/2017		09/08/2017 03:00:00 AM		09/08/2017
Contact Change: James Garner - A (W1234567)	08/26/2017	08/26/2017 05:17:20 PM	08/28/2017	08/26/2017

6. In the menu, hover over Benefits and then click the Enroll in Benefits hyperlink.



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Change Benefits for Open Enrollment - Workday

← 1 of 1

Change Benefits for Open Enrollment

Open Enrollment 2018 for James Garner (W1234567) - Step 1 of 4 Actions

Event Date: 01/01/2018 Total Employee Net Cost/Credit: \$0.00 Monthly Cost

Initiated On: 07/19/2017

Submit Elections By: 01/10/2017

You may enroll in a new plan, drop current coverage, or add/drop a dependent(s).

Once you have added a dependent, he/she can be selected for any other benefits in which you enroll.

Health Care Elections 6 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - CareFirst BCBS PPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue Save for Later Cancel Elect

7. You are now on Step 1 of 4 of Open Enrollment. Scroll down if necessary to view all items.

Submit Elections By
01/10/2017

8 day(s) ago - Effective 01/01/2018

Health Care Elections 6 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - CareFirst BCBS PPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - Kaiser IHM	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - UnitedHealthcare EPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - UnitedHealthcare PPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue Save for Later Cancel

8. Make elections on this screen. Note that benefits plans are automatically waived if the employee is not currently enrolled in the plan.

- Select **Elect** to enroll the employee in Medical.



Note that the system will only allow you to elect one of the medical coverage plans.

- Select **Elect** to enroll the employee in Prescription drug coverage.
- Select **Elect** to enroll the employee in Dental coverage.



Note: Leave election set to Waive for coverage in which the employee does not wish to enroll.

- If applicable, enroll dependents in medical, prescription, and dental coverage by selecting each dependent that should be covered in the **Enroll Dependents** field. For instructions on how to enroll a new dependent, or one who is not available to be selected from the list, refer to the [Add a Dependent During an Enrollment Event](#) section of this job aid.



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators



The coverage level will update based on the dependents selected.

Continue

9. Click the **Continue** button to go to the next screen.

Change Benefits for Open Enrollment - Workday

← 1 of 1

Change Benefits for Open Enrollment

Open Enrollment 2018 for James Garner (W1234567) - Step 2 of 4 Actions

Event Date: 01/01/2018 Total Employee Net Cost/Credit: \$68.08 Monthly Cost

Initiated On: 07/19/2017

Submit Elections By: 01/10/2017

You must re-enroll in FSA each year to continue participating in these plans. You may enter an amount per pay or for the whole year. The annual minimum and maximums you may elect show on the right side of your screen.

Remaining Payroll Deductions: 24

Remaining Deductions Override:

Spending Account Elections: 2 items

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Healthcare FSA - P&A Group FSA-Health	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year: 1 How much do you want to contribute for the total year?: 0.00 How much do you want to contribute per paycheck (Bi-weekly)?	Minimum Contribution (Annual): \$120.00 Maximum Contribution (Annual): \$2,600.00 Provider Website: P&A

Continue Save for Later Go Back Cancel

Your contribution (Monthly)

10. You are now on Step 2 of 4 of Open Enrollment. Scroll down if necessary to view all items.

Submit Elections By
01/10/2017

8 day(s) ago - Effective 01/01/2018

Spending Account Elections 2 items

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Healthcare FSA - P&A Group FSA-Health	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 1 How much do you want to contribute for the total year? 0.00 How much do you want to contribute per paycheck (Bi-weekly)? 0.00 Your contribution (Monthly) \$0.00	Minimum Contribution (Annual) \$120.00 Maximum Contribution (Annual) \$2,600.00 Provider Website P&A Plan Description P&A
Dependent Care FSA - P&A Group FSA-Dependent	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 1 How much do you want to contribute for the total year? 0.00 How much do you want to contribute per paycheck (Bi-weekly)? 0.00	Minimum Contribution (Annual) \$120.00 Maximum Contribution (Annual) \$5,000.00 Provider Website P&A

11. On this screen:

- Select **Elect** to enroll the employee in Healthcare FSA.



Note that you will have to enter the amount that you want to contribute for the whole year or per paycheck. The system will calculate the monthly deduction amount.

- Select **Elect** to enroll the employee in Dependent FSA.



You will have to enter the amount that you want to contribute for the whole year or per paycheck. The system will calculate the monthly deduction amount.

12. Click the **Continue**  button to go to the next screen.



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Change Benefits for Open Enrollment - Workday

← 1 of 1
↑ ↓

Change Benefits for Open Enrollment ↗
 Open Enrollment 2018 for James Garner (W1234567) - Step 3 of 4 Actions

<p>Event Date 01/01/2018</p> <p>Initiated On 07/19/2017</p> <p>Submit Elections By 01/10/2017</p> <ul style="list-style-type: none"> You may enroll in up to \$50,000 of Employee Life without submitting evidence of insurability. <u>You must have elected the guaranteed amount of \$50,000 before you can enroll in supplemental life insurance.</u> You may enroll in additional supplemental life up to \$250,000 (for a combined total maximum of \$300,000) You may enroll in up to \$25,000 of Spouse Life without submitting evidence of insurability. <u>You must have elected the guaranteed amount of \$50,000 before you can enroll in supplemental spouse life insurance.</u> Spouse Life cannot exceed half of your life amount. You may enroll in up to \$25,000 of Child Life without submitting evidence of insurability. <u>You must have elected the guaranteed amount of \$50,000 before you can enroll in supplemental Child Life insurance.</u> Child Life cannot exceed half of your life amount. <p><u>Please note that supplemental life amounts are not in effect until approval is received from the insurance carrier. Your premium will not reflect the supplemental benefit until such approval is received.</u></p> <p>➤ Insurance Plan Dependencies and Coverage Limitations</p>	<p>Total Employee Net Cost/Credit \$176.41 Monthly Cost</p>
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➤ Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 6 items ☰ ↗

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents
Life Ins - Guaranteed - Securian (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		↑

Continue
Save for Later
Go Back
Cancel

13. You are now on Step 3 of 4 of Open Enrollment. Scroll down if necessary to view all items.



Submit Elections By
01/10/2017

8 day(s) ago - Effective 01/01/2018

Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 6 items

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents
Life Ins - Guaranteed - Securian (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Life Ins - Supplemental - Securian (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Spouse Life - Securian (Spouse)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Child Life - Securian (Dependent)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
AD&D - Securian (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue

Save for Later

Go Back

Cancel

14. On this screen:

- Select **Elect** to enroll the employee in Term Life Insurance.



You can select up to \$50,000 of term life insurance on behalf of the employee which will be a pre-tax deduction from his or her paycheck under the Life Insurance – Securian guaranteed issue amount for an employee. This means that the employee does not pay taxes on the amount deducted. No evidence of insurability is required for amounts elected up to \$50,000.

- If the employee wants to enroll in more than \$50,000 of term life insurance, select **Elect Supplemental Life Insurance**.



You CAN NOT enter an amount in this field unless you have entered \$50,000 in the term life insurance election. Any life insurance above \$50,000 will be a post-tax deduction from the employee's paycheck which means he or she WILL have to pay taxes on the amount deducted. Evidence of insurability is required for amounts over \$50,000.



Title: Complete Open Enrollment for an Employee
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- Select **Elect** if the employee wants to enroll in Spouse Term Life Insurance.



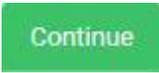
In order to be eligible for Spouse Term Life insurance, the employee must be enrolled in Term Life insurance. The amount for Spouse Term life insurance cannot be more than half of the amount that the employee has selected for Term Life insurance.

- Select **Elect** if the employee wants to enroll in Child Term Life Insurance.



In order to be eligible for Child Term Life insurance, the employee must be enrolled in Term Life insurance. The amount for Child Term life insurance cannot be more than half of the amount that the employee has selected for Term Life insurance.

- Select **Elect** to enroll the employee in AD&D Insurance and enter the amount.



15. Click the **Continue** button to go to the next screen.

← 1 of 1

Change Benefits for Open Enrollment ↗

Benefit Elections Review for Open Enrollment 2018 - Step 4 of 4 (Actions)

Total Employee Net Cost/Credit
\$179.11 Monthly Cost

Your Benefit Elections will not take effect unless you check the "I Agree" box below and click the "SUBMIT" button.

Elected Coverages 3 items 🔍 📄 ↗

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - CareFirst BCBS EPO (Employee)	01/01/2018	01/01/2018	Employee				\$68.08	\$38.50
Healthcare FSA - P&A Group FSA-Health	01/01/2018	01/01/2018	\$50.00 Annual				\$108.33	
Life Ins - Guaranteed - Securian (Employee)	01/01/2018	01/01/2018	\$50,000	\$50,000.00			\$2.70	
Total:							\$179.11	\$38.50

Waived Coverages 0 items 🔍 📄 ↗

Attachments 0 items 🔍 📄 ↗

Attachment	Comment	File
+		

Submit
Go Back
Cancel

16. On Step 4 of 4, review the benefit elections and the total monthly cost for the benefit elections.

17. Attach any documents for new dependents if all are available. If not, wait until the Dependent



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Verification Audit process following the start of the new plan year.

18. Scroll down if necessary to view all items.

ELECTRONIC SIGNATURE/LEGAL NOTICE/DEPENDENT ATTESTATION:

Your Name and Password are considered to be your "Electronic Signature" to this submission, with all the legal effect of any other signature by you. The electronic signature will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

1. You understand that your benefit elections are legal and binding transactions and you authorize payroll deductions from your paycheck or pension allowance, if applicable, for the cost of your benefit elections.
2. For those waiving health insurance coverage: You understand that you have been provided with the opportunity to enroll in group health coverage, but you are declining enrollment for yourself and any eligible dependents at this time.
3. You are making the following attestation:
 - I understand that I cannot cancel or change my enrollment elections except during an Open Enrollment period or as the result of a qualifying change in status permitted by COMAR 17.04.13.04 and IRS Section 125 (26 U.S.C. §125);
 - I certify that I am not covered under another State of Maryland employee's or retiree's membership for any coverage for which I am enrolling during this Open Enrollment period;
 - For those enrolling dependents: I certify that my covered dependents are not covered under another State of Maryland employee's or retiree's membership for any coverage for which they are being enrolled during this Open Enrollment period.

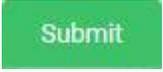
I understand that if I willfully misrepresent my eligibility or the eligibility of my dependents during this enrollment, or fail to take the necessary action to remove ineligible dependents timely, or in any way obtain benefits to which I am not entitled, my benefits will be canceled, I will be required to repay the full value of the lesser of any claims or insurance premiums, and I may face criminal investigation and prosecution.

You are entitled to request a paper form for submission of your enrollment elections. By filing this form electronically you are consenting to submission by electronic means and agree that electronic filing does not invalidate your submission in any way. Pursuant to Maryland Commercial Law Article § 21-106, where a law requires a signature, an electronic signature satisfies that law, and a record or signature cannot be denied legal effect merely because it is in electronic form.

I Agree

 enter your comment

19. Check the "I Agree" checkbox to certify the benefit elections chosen by the employee.

20. Click the **Submit**  button to submit the benefit elections.



Title: Complete Open Enrollment for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

← 1 of 1 ⏪ ⏩

Submit Elections Confirmation Open Enrollment 2018 for James Garner (W1234567) Actions  

Total Employee Cost/Credit
\$179.11 Monthly Cost

Initiated On
 07/19/2017

Submit Elections By
 01/10/2017

Event Date
 01/01/2018

8 day(s) ago - Effective 01/01/2018

You have successfully submitted your benefits enrollment. Select Print to launch a printable version of this summary for your records.

Elected Coverages 3 items     

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - CareFirst BCBS EPO (Employee)	01/01/2018	01/01/2018	Employee				\$68.08	\$38.00
Healthcare FSA - P&A Group FSA-Health	01/01/2018	01/01/2018	\$50.00 Annual				\$108.33	
Life Ins - Guaranteed - Securian (Employee)	01/01/2018	01/01/2018	\$50,000	\$50,000.00			\$2.70	

Print Done Total: \$179.11 \$38.00

21. The benefit elections have been submitted. Select the **Print**  button from this screen if you need to print the Confirmation Summary Statement, otherwise you will not be able to go back and print. Click the **Done**  button to finish.

 You can still make changes to the employee's open enrollment elections even after you have submitted the elections until the last day of open enrollment. Note that when viewing the employee's benefits, these benefits will not show as active until the plan year begins (January 1st of the upcoming year).

For instructions on how to view open enrollment benefits, refer to the [View Benefit Election History for an Employee](#) section of this job aid).

22. The System Task is complete.



Edit Open Enrollment Elections for an Employee

Use this procedure to edit Open Enrollment elections on behalf of an employee.

Benefit elections can be modified until the last day of Open Enrollment.

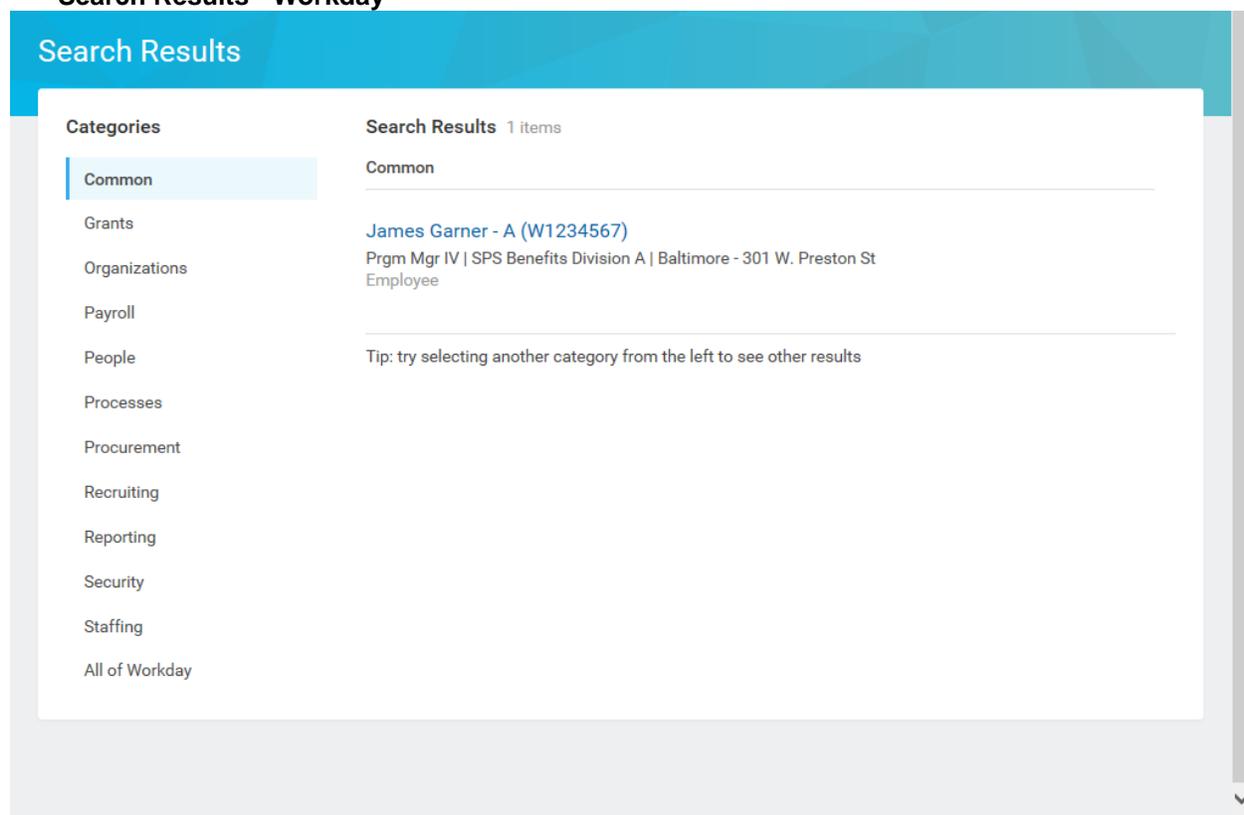
Note that SPMS Agency Benefits Coordinators will edit open enrollment elections for an employee when necessary.

Procedure:

1. Enter the employee's name or W number in the **Search** field.

2. Click the **search**  icon.

Search Results - Workday



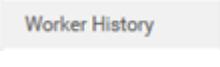
The screenshot shows the Workday search interface. On the left is a 'Categories' sidebar with 'Common' selected. The main area shows 'Search Results 1 items' under the 'Common' category. The result is for 'James Garner - A (W1234567)', a Program Manager IV in the SPS Benefits Division A at Baltimore, with the address 301 W. Preston St. A tip at the bottom suggests selecting another category for more results.

3. Click the employee name hyperlink.



Title: Edit Open Enrollment Elections for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Worker - Workday

4. On the Job tab, click the **Worker History**  sub-tab.



Note: You may have to click the More options.



drop down arrow to find a complete list of



Title: Edit Open Enrollment Elections for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

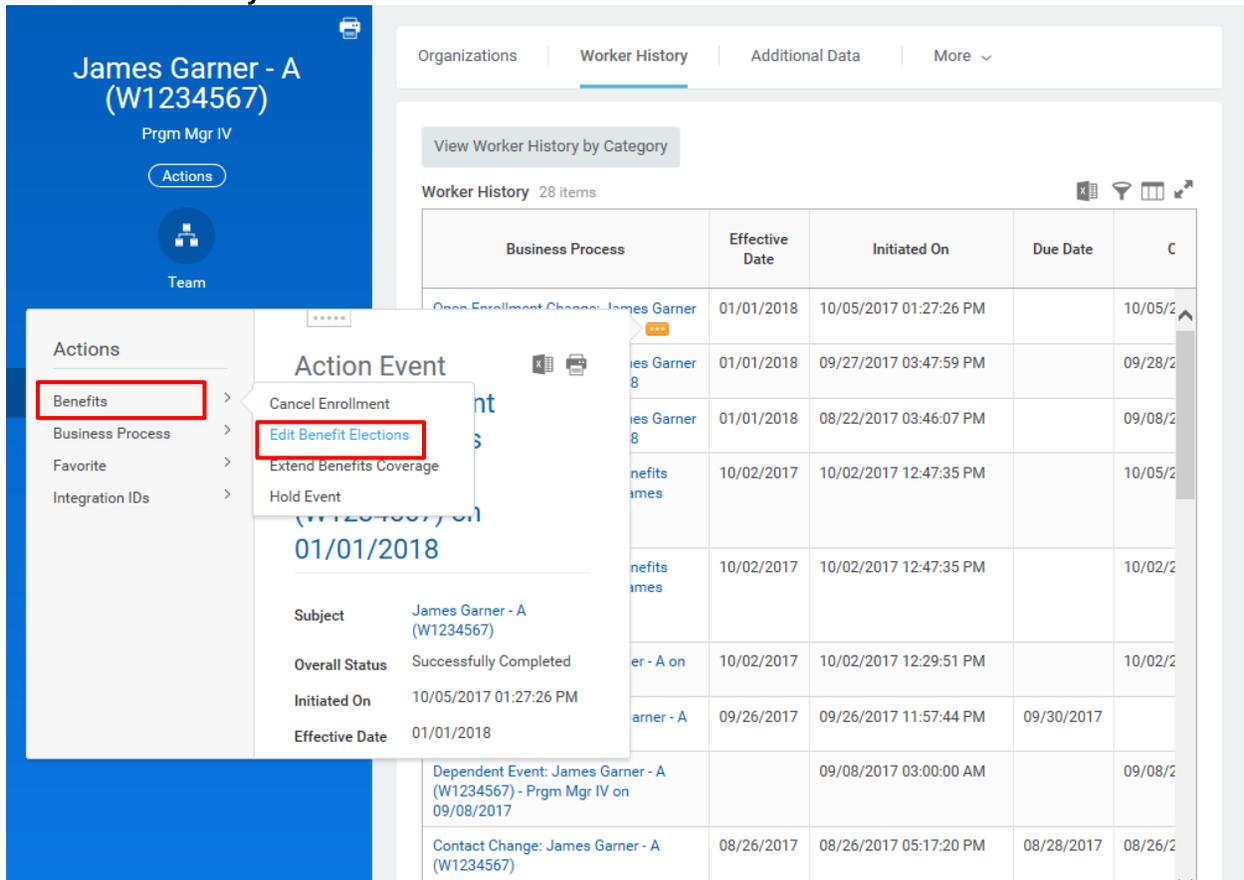
Change Benefits - Workday

The screenshot shows the Workday interface for an employee profile. On the left is a blue navigation sidebar with options: Summary, Job, Contact, Personal, Benefits, Pay, and Performance. The main content area is titled 'James Garner - A (W1234567)' with the role 'Prgm Mgr IV'. Below the name is an 'Actions' button and a 'Team' icon. The 'Worker History' tab is selected, showing a table of 21 items. The table has columns for Business Process, Effective Date, and Initiated On. The first row is highlighted, corresponding to the instruction in step 5.

Business Process	Effective Date	Initiated On
Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018	01/01/2018	08/22/2017 03:46:07 PM
Legal Name Change: James Garner - A (W1234567)	09/26/2017	09/26/2017 11:57:44 PM
Dependent Event: James Garner - A (W1234567) - Prgm Mgr IV on 09/08/2017		09/08/2017 03:00:00 AM
Contact Change: James Garner - A (W1234567)	08/26/2017	08/26/2017 05:17:20 PM
Personal Information Change: James Garner - A (W1234567)		08/26/2017 05:18:11 PM
ID Change: James Garner - A (W1234567)		08/21/2017 05:54:29 PM
Personal Information Change: James Garner - A (W1234567)		08/21/2017 05:43:31 PM
Assign Organizations: James Garner - A	08/18/2017	08/26/2017 05:16:03 PM

5. Click the Related Action and Preview  icon next to the Open Enrollment Change for the employee.

Event - Workday



The screenshot displays the 'Event - Workday' interface for James Garner - A (W1234567), a Program Manager IV. The 'Actions' menu is open, with 'Benefits' and 'Edit Benefit Elections' highlighted. The background shows a 'Worker History' table with 28 items.

Business Process	Effective Date	Initiated On	Due Date	C
Open Enrollment Change: James Garner - A (W1234567)	01/01/2018	10/05/2017 01:27:26 PM		10/05/2017
James Garner - A (W1234567)	01/01/2018	09/27/2017 03:47:59 PM		09/28/2017
James Garner - A (W1234567)	01/01/2018	08/22/2017 03:46:07 PM		09/08/2017
Benefits James	10/02/2017	10/02/2017 12:47:35 PM		10/05/2017
Benefits James	10/02/2017	10/02/2017 12:47:35 PM		10/02/2017
er - A on	10/02/2017	10/02/2017 12:29:51 PM		10/02/2017
Garner - A	09/26/2017	09/26/2017 11:57:44 PM	09/30/2017	
Dependent Event: James Garner - A (W1234567) - Prgm Mgr IV on 09/08/2017		09/08/2017 03:00:00 AM		09/08/2017
Contact Change: James Garner - A (W1234567)	08/26/2017	08/26/2017 05:17:20 PM	08/28/2017	08/26/2017

6. In the menu, hover over Benefits and then click the Edit Benefit Elections hyperlink.



Edit Benefit Elections - Workday

Edit Benefit Elections Event Previously Submitted Notification Actions

Initiated On	07/19/2017
Submit Elections By	01/10/2017
Event Date	01/01/2018

Important Information!

Please note that this enrollment event was previously submitted and/or closed. Any changes you make now to your benefit elections will have to be submitted again. If you do not resubmit, the changes will be disregarded and the previous submission will remain in effect.

7. Click the **OK**  button.



Note the message that any changes you make to the benefit elections will need to be submitted again or the changes will be disregarded and the previous submission will remain in effect.



Title: Edit Open Enrollment Elections for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Edit Benefit Elections - Workday

Edit Benefit Elections Open Enrollment 2018 for James Garner (W1234567) - Step 1 of 4 Actions

Total Employee Net Cost/Credit
\$120.26 Monthly Cost

Event Date 01/01/2018
Initiated On 07/19/2017
Submit Elections By 01/10/2017

Health Care Elections 6 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>	Employee
Medical - CareFirst BCBS PPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - Kaiser IHM	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - UnitedHealthcare EPO (Employee)	<input type="radio"/> Elect <input type="radio"/> Waive		

Continue Save for Later Cancel

8. Edit the benefit elections as necessary.



Refer to the [Complete Open Enrollment for an Employee](#) section of this job aid for specific instructions on completing open enrollment elections. Be sure to click Done Done when changes are complete.

9. The System Task is complete.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Add a Dependent During an Enrollment Event

Use this procedure to add a dependent for benefits. Dependents can only be added to benefits when an enrollment event (i.e., New Hire Enrollment, Open Enrollment, Life Event Change) is being completed.

Procedure:

1 of 1 - Workday

← 1 of 2

Change Benefits for Open Enrollment
Open Enrollment 2018 for Darryl Jackson (W1234567) - Step 1 of 4 Actions

Total Employee Net Cost/Credit
\$0.00 Monthly Cost

Event Date
01/01/2018

Initiated On
06/29/2017

Submit Elections By
11/15/2017

19 day(s) ago - Effective 01/01/2018

Health Care Elections 4 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO SLEOLA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - CareFirst BCBS POS SLEOLA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue Save for Later Cancel Elect

1. On the Change Benefits Elections (Step 1 of 4) screen, select the item(s) to elect under health care elections.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

1 of 1 - Workday

Event Date
01/01/2018

Initiated On
06/29/2017

Submit Elections By
11/15/2017

11 day(s) ago - Effective 01/01/2018

Health Care Elections 4 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO SLEOLA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text" value=""/>	Employee
Medical - CareFirst BCBS POS SLEOLA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - CareFirst BCBS PPO SLEOLA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Prescription - : RX SLEOLA Employee	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue Save for Later Cancel

2. Use the prompt  in the **Enroll Dependents** field to enroll dependents for benefits.

1 of 1 - Workday

Event Date
01/01/2018

Initiated On
06/29/2017

Submit Elections By
11/15/2017

11 day(s) ago - Effective 01/01/2018

Health Care Elections 4 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO SLEOLA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Existing Dependents</p> <p>Add My Dependent From Enrollment</p> </div>	Employee
Medical - CareFirst BCBS POS SLEOLA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - CareFirst BCBS PPO SLEOLA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Prescription - : RX SLEOLA Employee	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue Save for Later Cancel

- To add a new dependent, select the **Add My Dependent From Enrollment** menu item.



If you already have an existing dependent, the dependent can be selected using the **Existing Dependents** menu item.



Add My Dependent From Enrollment - Workday

Add Dependent Darryl Jackson (W1234567) Actions

Existing Beneficiary or Emergency Contact

New Dependent

Use as Beneficiary

OK Cancel

4. Select the **Existing Beneficiary or Emergency Contact** Existing Beneficiary or Emergency Contact radio button and check to see if the dependent you are adding is already listed as an Emergency Contact. If so, choose from the list. If the new dependent is not an emergency contact, then select the **New Dependent** New Dependent radio button.
5. DO NOT check the **Use as Beneficiary** checkbox.



Information: Life insurance beneficiaries will not be managed in SPS. Beneficiaries will still be managed directly by the life insurance vendor. See the Beneficiary Designation form on the DBM Health Benefits website under Term Life and AD&D.

6. Click the **OK** OK button.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Add My Dependent From Enrollment - Workday

Add Dependent

Relationship	*	<input type="text"/>
Use as Dependent	<input checked="" type="checkbox"/>	
Use as Beneficiary	<input type="checkbox"/>	
Inactive Date		(empty)
Date of Birth	*	<input type="text" value="MM / DD / YYYY"/>
Age		(empty)
Gender	*	<input type="text" value="select one"/>
Additional Nationalities		<input type="text"/>
Citizenship Status		<input type="text"/>
Full-time Student	<input type="checkbox"/>	
Student Status Start Date		
Student Status End Date		
Disabled	<input type="checkbox"/>	
Allow Duplicate Name	<input type="checkbox"/>	

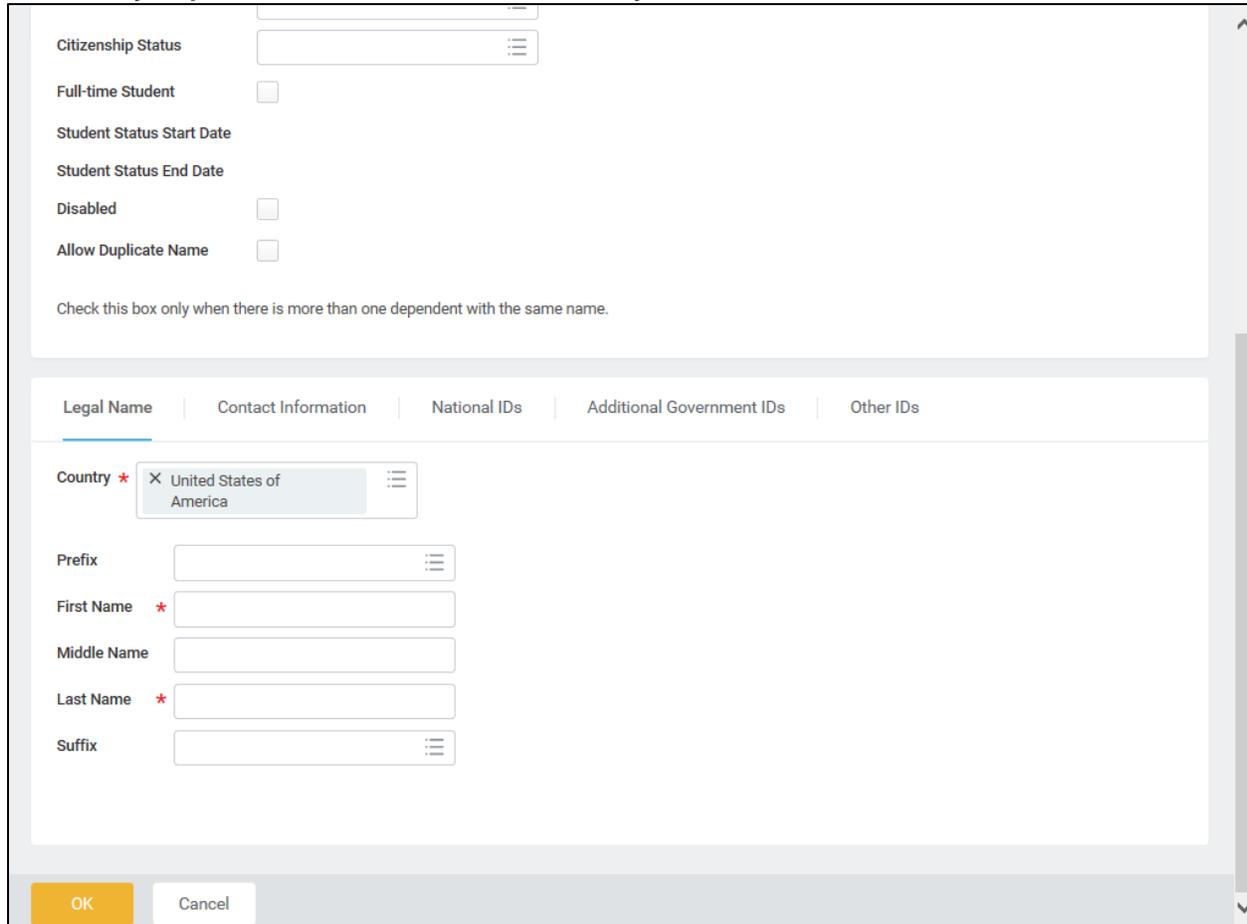
Check this box only when there is more than one dependent with the same name.

7. On this screen, complete the following fields:

- Use the **Relationship** prompt to select the relationship of the dependent.
- Enter the date of birth for the dependent you are adding in the **Date of Birth** field.
- Use the **Gender** drop down to select the gender of the dependent.

8. Scroll down to continue.

Add My Dependent From Enrollment - Workday



9. Ensure the **Legal Name** **Legal Name** tab is selected and complete the following fields:

- Enter the first name of the dependent you are adding in the **First Name** field.
- Enter the middle name of the dependent you are adding in the **Middle Name** field



It is recommended to enter the middle name even though it is not a required field.

- Enter the last name of the dependent you are adding in the **Last Name** field.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Allow Duplicate Name

Check this box only when there is more than one dependent with the same name.

Legal Name | **Contact Information** | National IDs | Additional Government IDs | Other IDs

Phone
Add

Address
Add

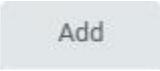
Email
Add

Instant Messenger
Add

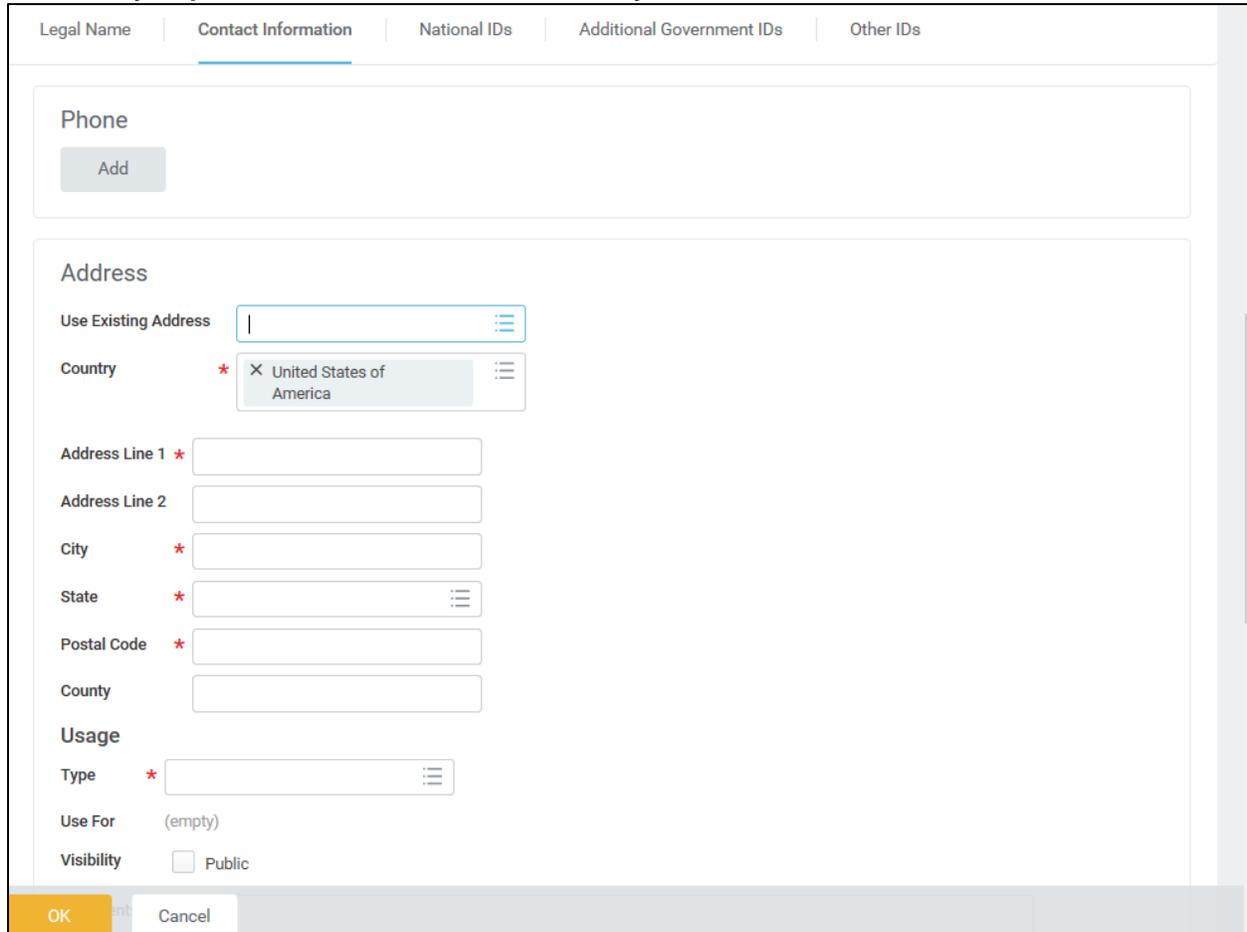
W L A H

OK Cancel

10. Select the Contact Information **Contact Information** tab:

11. In the **Address** section, click the **Add**  button to enter the address for the dependent.

Add My Dependent From Enrollment - Workday



12. On this screen, complete the following fields:

- Use the prompt to select the **Country**.
- Enter the street address in the **Address Line 1** field.
- Enter the city in the **City** field.
- Enter the state in the **State** field.
- Enter the zip code in the **Postal Code** field.
- Use the **Type** prompt to type of address (Work or Home).



The **Use Existing Address** prompt can be used to select the address associate with the employee.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Inactive Date (empty)

Date of Birth * 08 / 09 / 2017

Age 0 years, 0 months, 13 days

Gender * Female

Additional Nationalities

Citizenship Status

Full-time Student

Student Status Start Date

Student Status End Date

Disabled

Allow Duplicate Name

Check this box only when there is more than one dependent with the same name.

Legal Name | Contact Information | **National IDs** | Additional Government IDs | Other IDs

National IDs 0 items

	*Country	*National ID Type	Identification #	Issued Date
No Data				

OK Cancel

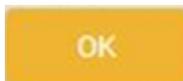
13. Select the **National IDs** **National IDs** tab.

14. Click the **Add** button to complete the following fields:

- Use the prompt to select the **Country**.
- Select the **National ID Type**.
- Enter the social security number for the dependent in the **Identification #** field OR enter the tax identification number for foreign nationals.



Note that if you do not enter the social security number at this point, you will be prompted later to enter a reason for not entering it (e.g., birth of a child who does not yet have a social security number).



15. Click the **OK** button.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators



You have successfully added the dependent. When you complete subsequent elections, you will not have to add the dependent again. The dependent will be listed in the Existing Dependents menu item of the **Enroll Dependents** field.

16. The System Task is complete.



View Benefit Election History for an Employee

Use this procedure to view the benefit election history for an employee.

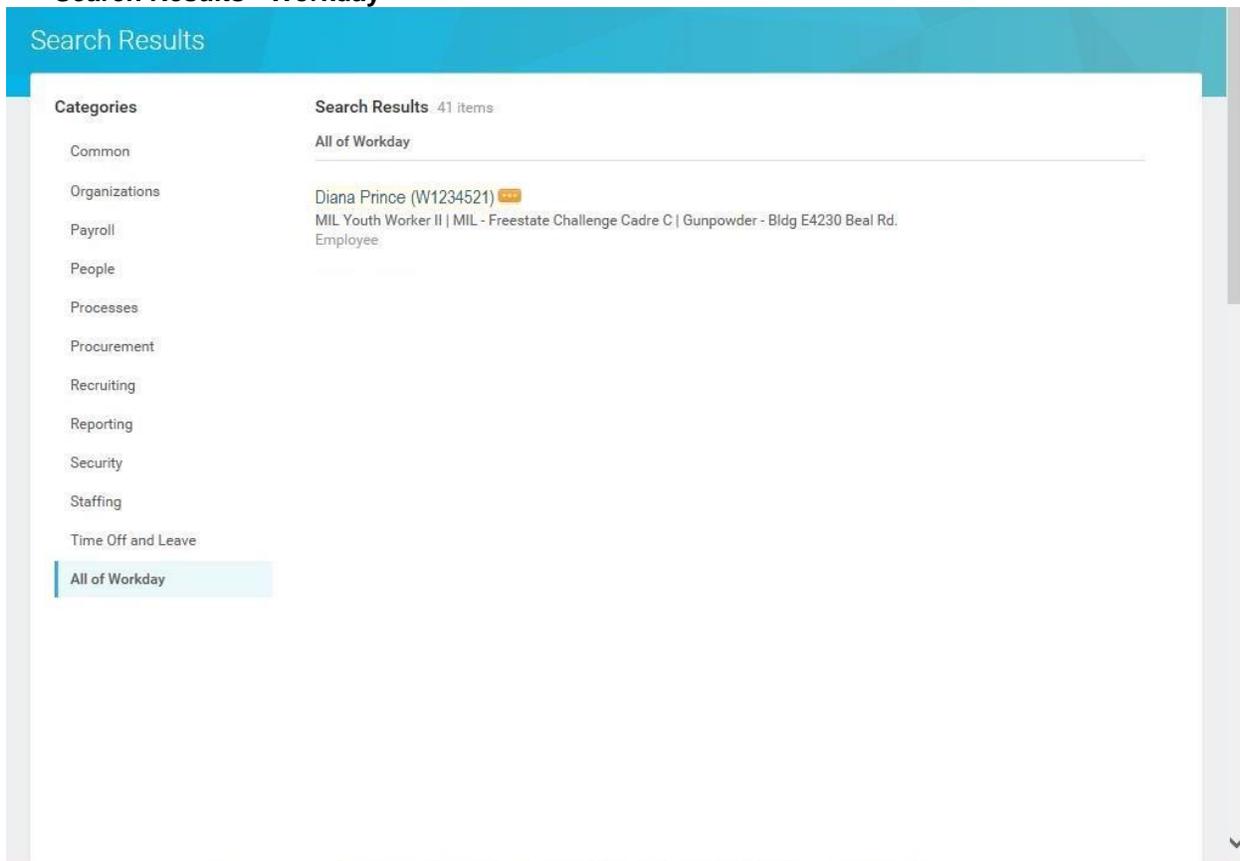
Note that SPMS Agency Benefits Coordinators can view benefit election history for their employees. The Employee Benefits Division can view benefit election history for all employees.

Procedure:

1. Enter the employee name or W number in the **Search** field.

2. Click the **search**  icon.

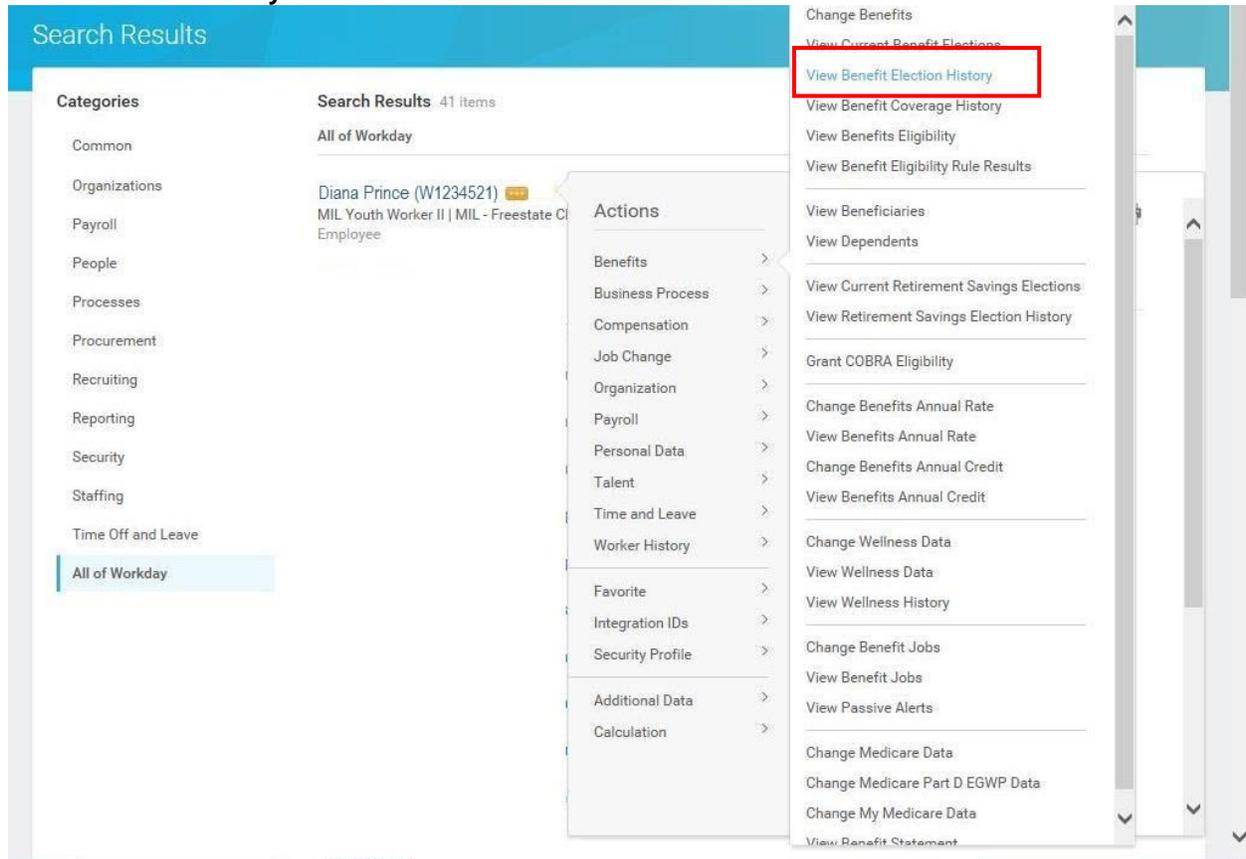
Search Results - Workday



The screenshot shows the Workday search interface. On the left is a sidebar with 'Categories' including Common, Organizations, Payroll, People, Processes, Procurement, Recruiting, Reporting, Security, Staffing, and Time Off and Leave. The 'All of Workday' category is selected. The main content area shows 'Search Results 41 items' and 'All of Workday'. A search result for 'Diana Prince (W1234521)' is displayed with a 'Related Actions and Preview' icon (three yellow dots) next to her name. Below her name, the text reads: 'MIL Youth Worker II | MIL - Freestate Challenge Cadre C | Gunpowder - Bldg E4230 Beal Rd. Employee'.

3. Click the **Related Actions and Preview**  icon next to the employee's name.

Worker - Workday



The screenshot displays the Workday interface for a worker. On the left, a 'Categories' sidebar lists various organizational areas, with 'All of Workday' selected. The main area shows 'Search Results' for 41 items, with the first result being 'Diana Prince (W1234521) MIL Youth Worker II | MIL - Freestate Cl Employee'. A dropdown menu is open over this result, listing various actions such as 'Benefits', 'Business Process', 'Compensation', etc. The 'View Benefit Election History' option is highlighted with a red box. To the right of the dropdown, a vertical list of actions is visible, including 'Change Benefits', 'View Current Benefit Elections', 'View Benefit Election History', 'View Benefit Coverage History', 'View Benefits Eligibility', 'View Benefit Eligibility Rule Results', 'View Beneficiaries', 'View Dependents', 'View Current Retirement Savings Elections', 'View Retirement Savings Election History', 'Grant COBRA Eligibility', 'Change Benefits Annual Rate', 'View Benefits Annual Rate', 'Change Benefits Annual Credit', 'View Benefits Annual Credit', 'Change Wellness Data', 'View Wellness Data', 'View Wellness History', 'Change Benefit Jobs', 'View Benefit Jobs', 'View Passive Alerts', 'Change Medicare Data', 'Change Medicare Part D EGWP Data', 'Change My Medicare Data', and 'View Benefit Statement'.

4. Hover over Benefits and then click the View Benefit Election History hyperlink.

Benefit Election History - Workday

Benefit Election History Diana Prince (W1234521) Actions

1 item

Event	Current	Benefits Details	Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed
Q		Diana Prince (W1234521) Benefit Elections Active on 01/01/2018	Open Enrollment 2018	01/01/2018	07/19/2017	01/10/2017	07/29/2017 01:06:22.963

5. View the benefit election history.



Information: Note that while the benefit elections have been submitted, they are not yet active. In this example, the Event Date is 01/01/2018, which is the date that the elections will be in effect.

6. The System Task is complete.