



STATEWIDE PERSONNEL
— S Y S T E M —

Process for Double Keying

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Change Spouse to Ex-Spouse

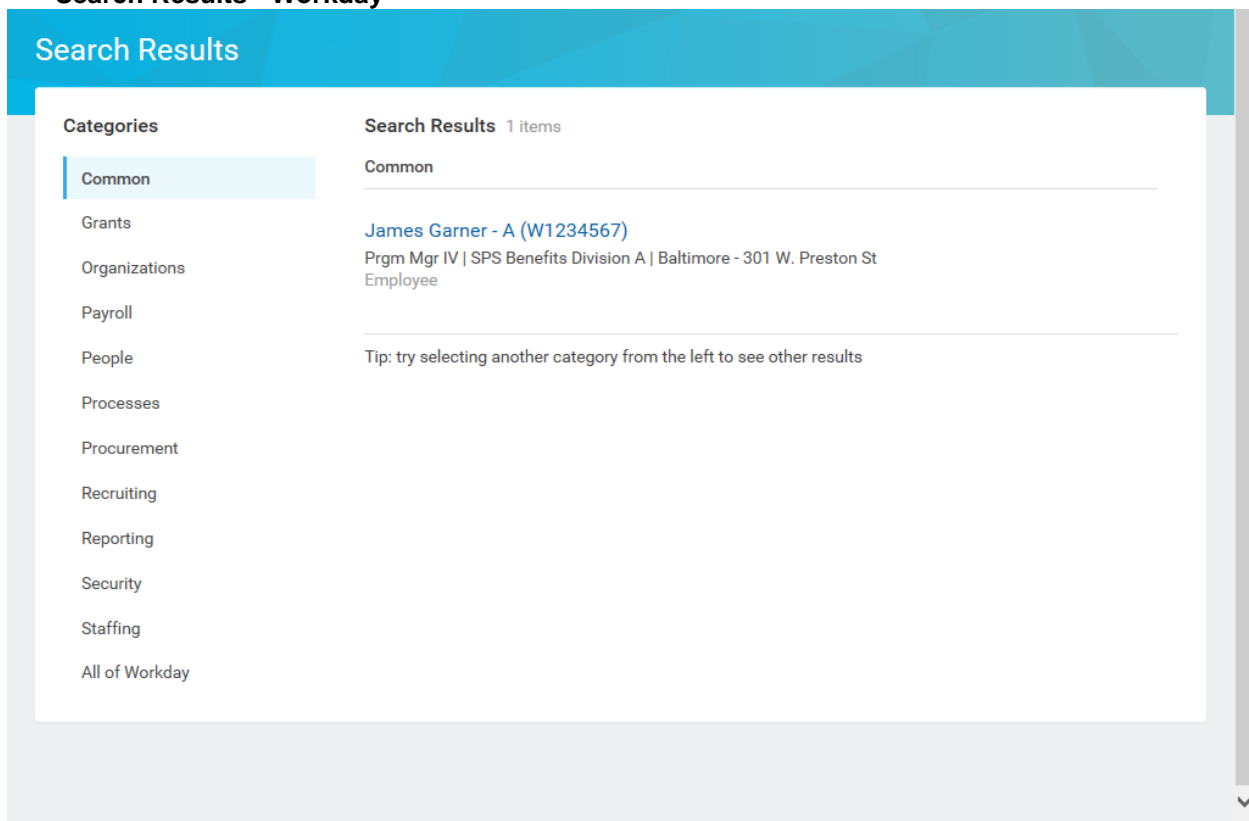
IMPORTANT: Use this procedure **BEFORE** processing a Change Benefits for Life Event (Divorce) for an employee. Otherwise begin with the **Change Benefits** section.

In this procedure you will change the relationship of the Spouse to make them an Ex-Spouse on behalf of an employee or retiree.

Procedure:

1. Enter the name or W number of the employee 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 a list of categories: Common, Grants, Organizations, Payroll, People, Processes, Procurement, Recruiting, Reporting, Security, Staffing, and All of Workday. The 'Common' category is selected. The main area displays 'Search Results 1 items' under the 'Common' filter. The result is for 'James Garner - A (W1234567)', with details: 'Prgm Mgr IV | SPS Benefits Division A | Baltimore - 301 W. Preston St Employee'. A tip at the bottom of the results area says: 'Tip: try selecting another category from the left to see other results'.

3. Click the employee name hyperlink.



Title: Change Spouse to Ex-Spouse
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

View Worker - Workday

James Garner - A
(W1234567)
Prgm Mgr IV

Actions

Team

Location
Baltimore - 301 W. Preston St

Manager
David Hayden (W1231234)

Summary

Job

Contact

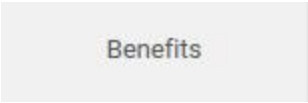
Personal

Compensation

Benefits

Pay

More (3)



4. Click the **Benefits** tab.



Title: Change Spouse to Ex-Spouse
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

View Worker - Workday

| Benefit Plan | Coverage Begin Date | Deduction Begin Date | Coverage | Dependents |
|---|---------------------|----------------------|-------------------|-------------------|
| Medical - CareFirst BCBS EPO (Employee) | 01/01/2017 | 01/01/2017 | Employee + Spouse | Selena Garner - A |
| Prescription - Drug RX (Employee) | 01/01/2017 | 01/01/2017 | Employee + Spouse | Selena Garner - A |
| Dental - United Concordia DPPO (Employee) | 01/01/2017 | 01/01/2017 | Employee + Spouse | Selena Garner - A |

Dependents

5. Click the **Dependents** sub-tab.



Title: Change Spouse to Ex-Spouse
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

James Garner - A (W1234567)
Prgm Mgr IV
Actions

Team

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

Benefits | Dependents

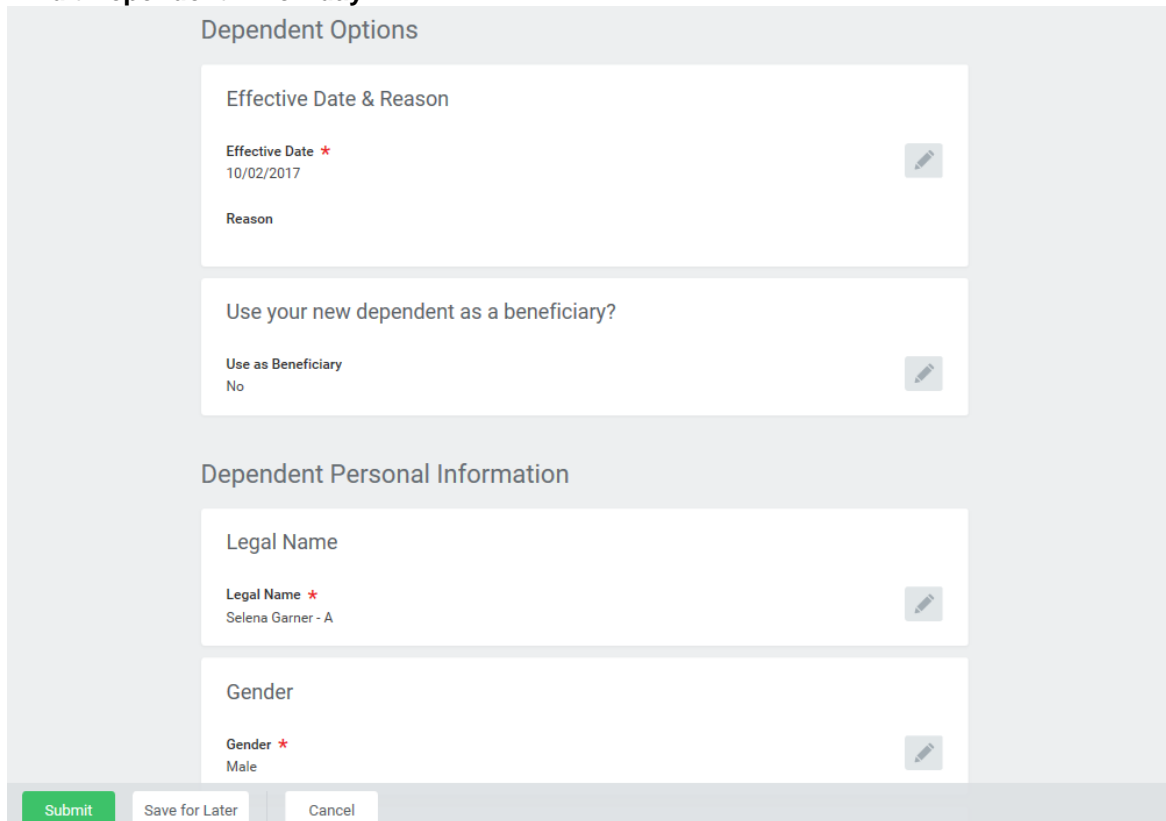
Add

Dependents 5 items


| Dependent | Relationship | Age | Benefit Elections | |
|--------------------|--------------|-----------------------------|--|--------|
| Cody Garner | Child | 0 years, 2 months, 0 days | | Delete |
| Jay Garner - A | Child | 22 years, 3 months, 29 days | | Delete |
| Kay Garner - A | Child | 21 years, 3 months, 28 days | | Delete |
| Richard Garner - A | Child | 20 years, 4 months, 0 days | | Delete |
| Selena Garner - A | Spouse | 49 years, 4 months, 15 days | James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Dental - United Concordia DPPO (Employee)) (Elect) James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Medical - CareFirst BCBS EPO (Employee)) (Elect) James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Prescription - Drug RX (Employee)) (Elect) | Edit |

6. Click the **Edit** button in the row for the Spouse.

Edit Dependent - Workday



7. On the Dependent Options page:

- Click the **Edit**  icon in the Effective Date & Reason section.
- Change the **Effective Date** to the effective date of divorce.



DO NOT enter today's date in the **Effective Date** field.

- Select the **Update Dependent > Divorce** reason.
- Click the Edit  icon in the **Relationship** section.
- Change the **Relationship** from Spouse to Ex-Spouse.





Note: You may also have to change a stepchild to an ex-stepchild. Follow this same procedure to make the change.




Title: Change Spouse to Ex-Spouse
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

8. Click the **Submit**  button.

You have submitted - Workday


You have submitted Dependent Event: Selena Garner - A on 10/02/2017 Actions  



Process Successfully Completed

[Details and Process](#)

Done

9. Click the **Done**  button.
10. The System Task is complete.




Title: Enter Death of Dependent
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

Enter Death of Dependent

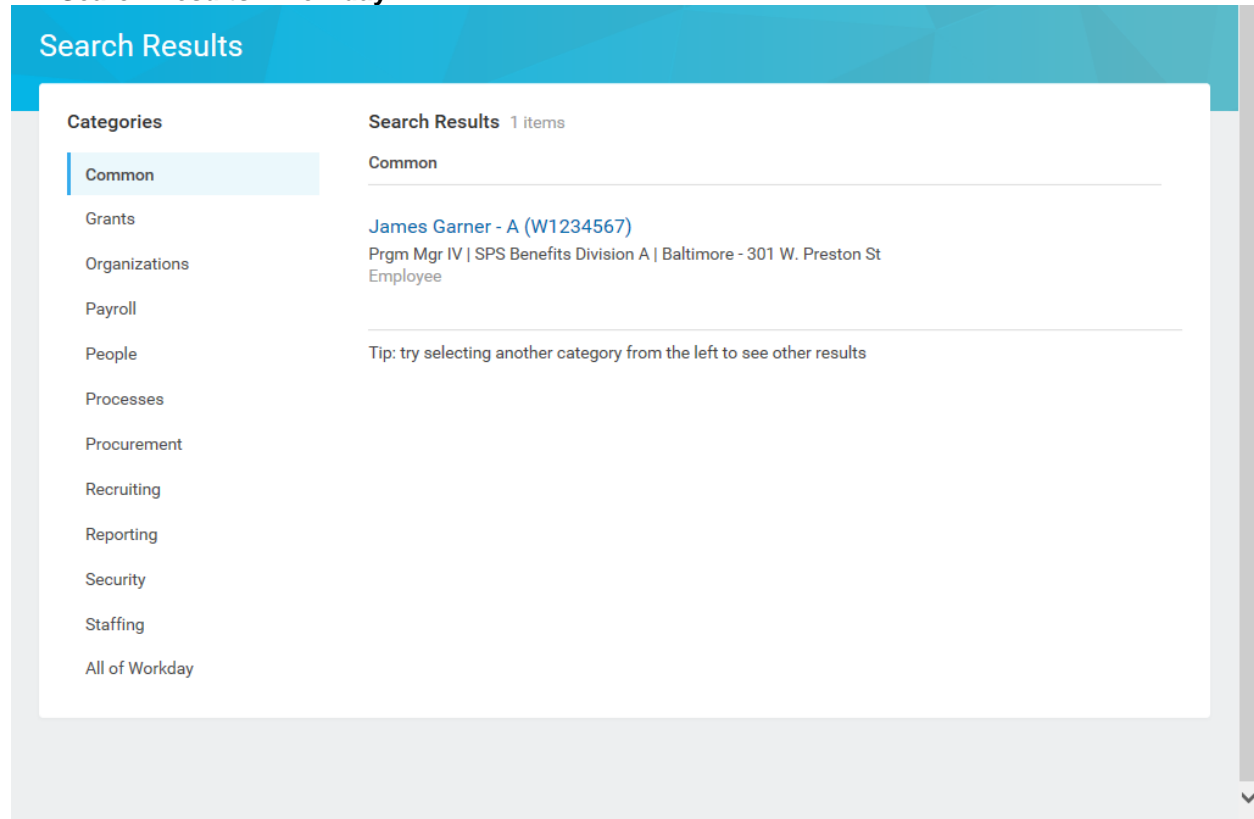
IMPORTANT: Use this procedure **BEFORE** processing a Change Benefits for Life Event (Death of a Dependent) for an employee. Otherwise begin with the **Change Benefits** section.

In this procedure you will mark the dependent as deceased and enter the date of death.

Procedure:

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

Search Results - Workday



The screenshot shows the Workday search interface. On the left, there is a 'Categories' list with 'Common' selected. The main area displays '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 for more results.

3. Click the employee name hyperlink.



Title: Enter Death of Dependent
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

View Worker - Workday

James Garner - A
(W1234567)
Prgm Mgr IV

Actions

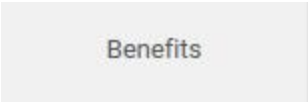
Team

Location
Baltimore - 301 W. Preston St

Manager
David Hayden (W1231234)

Summary
Job
Contact
Personal
Compensation
Benefits
Pay

More (3)



4. Click the **Benefits** tab.



Title: Enter Death of Dependent
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

View Worker - Workday

| Benefit Plan | Coverage Begin Date | Deduction Begin Date | Coverage | Dependents | |
|---|---------------------|----------------------|-------------------|-------------------|---|
| Medical - CareFirst BCBS EPO (Employee) | 01/01/2017 | 01/01/2017 | Employee + Spouse | Selena Garner - A | ↑ |
| Prescription - Drug RX (Employee) | 01/01/2017 | 01/01/2017 | Employee + Spouse | Selena Garner - A | |
| Dental - United Concordia DPPO (Employee) | 01/01/2017 | 01/01/2017 | Employee + Spouse | Selena Garner - A | ↓ |

Dependents

5. Click the **Dependents** sub-tab.



Title: Enter Death of Dependent
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

James Garner - A
(W1234567)
Prgm Mgr IV
Actions

Team


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

Benefits | Dependents

Add

Dependents 5 items


| Dependent | Relationship | Age | Benefit Elections | |
|--------------------|--------------|-----------------------------|--|--------|
| Cody Garner | Child | 0 years, 2 months, 0 days | | Delete |
| Jay Garner - A | Child | 22 years, 3 months, 29 days | | Delete |
| Kay Garner - A | Child | 21 years, 3 months, 28 days | | Delete |
| Richard Garner - A | Child | 20 years, 4 months, 0 days | | Delete |
| Selena Garner - A | Spouse | 49 years, 4 months, 15 days | James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Dental - United Concordia DPPO (Employee)) (Elect) James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Medical - CareFirst BCBS EPO (Employee)) (Elect) James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Prescription - Drug RX (Employee)) (Elect) | Edit |

6. Click the **Edit**  button in the row for the applicable dependent.

Edit Dependent - Workday


Dependent Options

Effective Date & Reason

Effective Date *
10/02/2017 


Reason

Use your new dependent as a beneficiary?


Use as Beneficiary
No 

Dependent Personal Information


Legal Name

Legal Name *
Selena Garner - A 

Gender


Gender *
Male 

7. On the Dependent Options page:

- Click the **Edit**  icon in the Effective Date & Reason section.
- Change the **Effective Date** to the actual date of death for the dependent.



DO NOT enter today's date in the **Effective Date** field.

- Select the **Update Dependent > Death of Dependent** reason.
- Click the **Edit**  icon in the Date of Death section and enter the date of death for the dependent.


8. Click the **Submit**  button.



Title: Enter Death of Dependent
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

You have submitted - Workday

You have submitted Dependent Event: Selena Garner - A on 10/02/2017 Actions

 Process Successfully Completed

[Details and Process](#)

Done

9. Click the **Done**  button.

10. The System Task is complete.




Title: Change Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

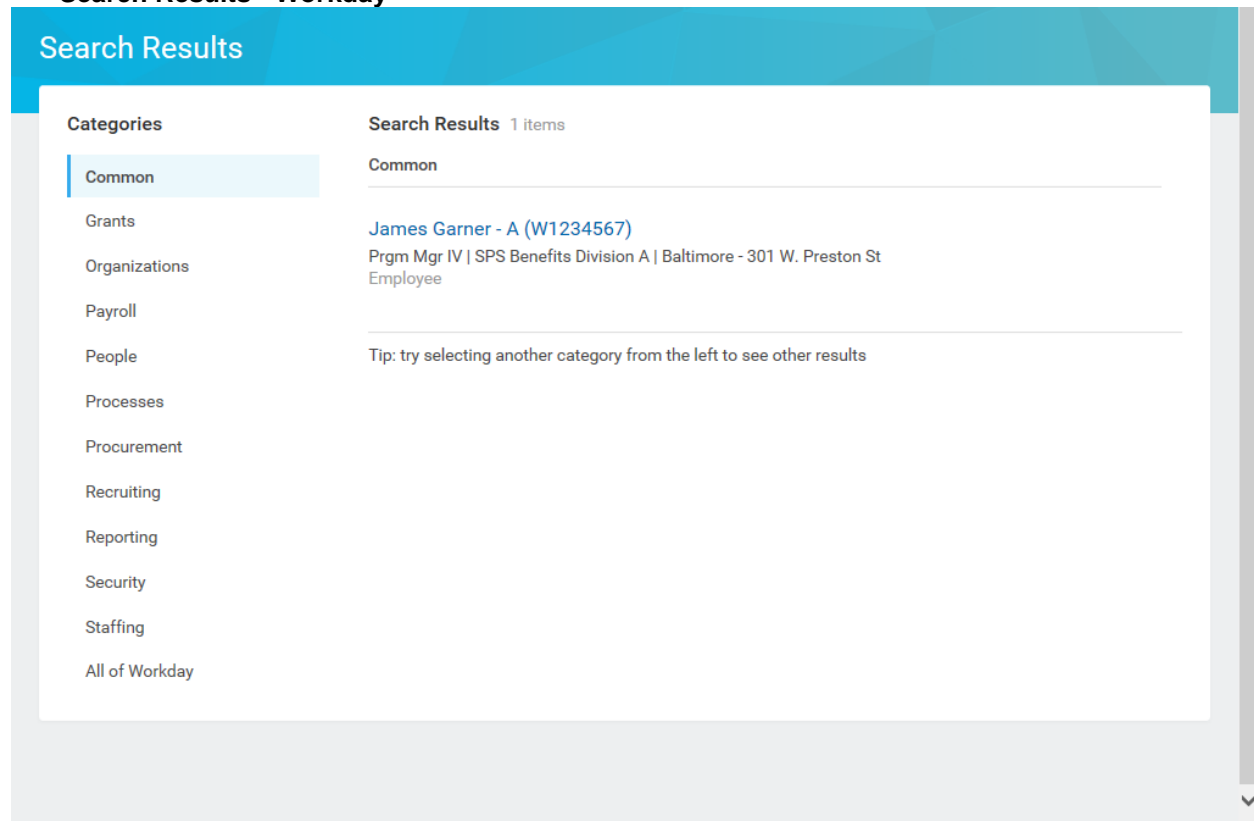
Change Benefits

Use this procedure to double key events. During the period of September 11, 2017 through December 31, 2017, the Employee Benefits Division (EBD) will perform this task for DBM and DoIT employees. Employees will continue to use the current process of submitting a form to EBD and this form will be used to key the information for the employee in SPS Benefits.

Procedure:

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

Search Results - Workday



The screenshot shows the Workday search results interface. On the left is a vertical list of categories: Common, Grants, Organizations, Payroll, People, Processes, Procurement, Recruiting, Reporting, Security, Staffing, and All of Workday. The 'Common' category is selected. The main content area shows 'Search Results 1 items' under the 'Common' filter. The result is for 'James Garner - A (W1234567)', with details: 'Prgm Mgr IV | SPS Benefits Division A | Baltimore - 301 W. Preston St Employee'. Below the result is a tip: 'Tip: try selecting another category from the left to see other results'. A scroll bar is visible on the right side of the results area.

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



Title: Change Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

Worker - Workday

The screenshot shows the Workday interface for a worker. On the left, there is a 'Categories' sidebar with 'All of Workday' selected. The main area displays search results for 'James Garner - A (W1234567)', identified as a 'Prgm Mgr IV | SPS Benefits Division Employee'. A dropdown menu is open over the worker's name, showing a list of actions. The 'Benefits' section is expanded, and the 'Change Benefits' option is highlighted with a red box. Other options in the dropdown include '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. In the menu, hover over **Benefits** and then click the **Change Benefits** hyperlink.

Change Benefits - Workday

Change Benefits James Garner - A (W1234567) Actions

Benefit Event Type *

Benefit Event Date *

Submit Elections By *

Open Elections for (empty)

Attachments 0 items

| + | Attachment | Comment | File |
|---------|------------|---------|------|
| No Data | | | |

Benefit Election History 7 items

| Event | Current | Benefits Details | Enrollment Event Type | Event Date | Initiated On | Submit Elections By | Li |
|-------|--------------------------|--|---|------------|--------------|---------------------|------------|
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 01/01/2018 | Open Enrollment 2018 | 01/01/2018 | 09/27/2017 | 11/15/2017 | 09/28/2017 |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 01/01/2018 | Open Enrollment 2018 | 01/01/2018 | 08/22/2017 | 11/30/2017 | 09/08/2017 |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 08/15/2017 | Employee Benefits Enrollment (EBD Use Only) | 08/15/2017 | 08/28/2017 | 10/13/2017 | |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 08/15/2017 | Employee Benefits Enrollment (EBD Use Only) | 08/15/2017 | 08/28/2017 | 10/13/2017 | |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 07/10/2017 | Employee Benefits Enrollment (EBD Use Only) | 07/10/2017 | 08/24/2017 | 09/07/2017 | |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 07/10/2017 | Employee Benefits Enrollment (EBD Use Only) | 07/10/2017 | 08/24/2017 | 09/07/2017 | 08/28/2017 |

Submit Save for Later Cancel

- Select the **Employee Benefits Enrollment (EBD Use Only)** Benefit Event Type from the drop down box.
- Enter or select the **Benefit Event Date**.



Note that this is the effective date of the event (e.g., the actual date of the divorce is 7/20, but enter 7/31 in the Benefit Event Date field. This is the date the benefits change will go into effect).

The **Submit Elections By** date will automatically populate based on the date entered for **Benefit Event Date**. It will populate to the day 60 days after the Benefit Event Date.



Change Benefits - Workday

Change Benefits James Garner - A (W1234567) Actions

Benefit Event Type * Employee Benefits Enrollment (...)

Benefit Event Date * 07/31/2017

Submit Elections By * 09/28/2017

Open Elections for
 Spouse Life
 Prescription
 Medical
 Life Ins - Supplemental
 Life Ins - Guaranteed
 + More (5)

Attachments 0 items

| Attachment | Comment | File |
|------------|---------|------|
| No Data | | |

Benefit Election History 7 items

| Event | Current | Benefits Details | Enrollment Event Type | Event Date | Initiated On | Submit Elections By | Li |
|-------|--------------------------|--|---|------------|--------------|---------------------|------------|
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 01/01/2018 | Open Enrollment 2018 | 01/01/2018 | 09/27/2017 | 11/15/2017 | 09/28/2017 |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 01/01/2018 | Open Enrollment 2018 | 01/01/2018 | 08/22/2017 | 11/30/2017 | 09/08/2017 |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 08/15/2017 | Employee Benefits Enrollment (EBD Use Only) | 08/15/2017 | 08/28/2017 | 10/13/2017 | |

Submit Save for Later Cancel

7. Attach the applicable document for the event.



Examples of documents you may attach include a marriage certificate, divorce decree, birth certificate, etc. (depending on the **Benefit Event Type** chosen).



Title: Change Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

8. Enter the reason for processing this dual entry event and the actual day of the event in the **Comment** field (e.g. Employee divorce event. Date of divorce – 7/20).

Change Benefits - Workday

Change Benefits James Garner - A (W1234567) Actions

Benefit Event Type * Employee Benefits Enrollment (...)

Benefit Event Date * 07/31/2017

Submit Elections By * 09/28/2017

Open Elections for
Spouse Life
Prescription
Medical
Life Ins - Supplemental
Life Ins - Guaranteed
+ More (5)

Attachments 1 item

| Attachment | Comment | File |
|------------|---|--------------------|
| | Employee divorce event. Date of divorce - 7/20. | Divorce decree.pdf |

Benefit Election History 7 items

| Event | Current | Benefits Details | Enrollment Event Type | Event Date | Initiated On | Submit Elections By | Li |
|-------|--------------------------|--|-----------------------|------------|--------------|---------------------|------------|
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit Elections Active on 01/01/2018 | Open Enrollment 2018 | 01/01/2018 | 09/27/2017 | 11/15/2017 | 09/28/2017 |
| Q | <input type="checkbox"/> | James Garner - A (W1234567) Benefit | Open Enrollment 2018 | 01/01/2018 | 08/22/2017 | 11/30/2017 | 09/08/2017 |

Submit Save for Later Cancel

9. Click the **Submit**  button.



Tip: If you do not want to submit the request at this point, you can also click one of the following buttons:

- Click **Save for Later** to save your changes but not submit. Access the saved task later from your Inbox.
- Click **Cancel** to cancel the process and start at another time.



Title: Change Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

You have submitted - Workday

The screenshot shows a notification banner at the top with the text "You have submitted Benefit Event: James Garner - A (W1234567) on 07/31/2017" and an "Actions" button. Below the banner is a white card with two columns: "Up Next" containing "Change Benefit Elections" with an "Open" button, and "Do Another" containing "Change Benefits". Below these is a "Details and Process" link with a right-pointing arrow. At the bottom left of the card is a "Done" button.

10. Click the **Open**  button.

11. The System Task is complete.



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

Change Benefit Elections

Use this procedure to change benefit elections on behalf of an employee. The task will be routed to the Central Benefits Coordinator and can be accessed via the Workday Inbox.

Procedure:

Change Benefits for Life Event - Workday

← 1 of 1

Change Benefit Elections
Employee Benefits Enrollment (EBD Use Only) for James Garner (W1234567) - Step 1 of 4 Actions

Total Employee Net Cost/Credit
\$0.00 Monthly Cost

Event Date
07/31/2017

Initiated On
08/10/2017

Submit Elections By
09/28/2017



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

1. You are now on Step 1 of 4 of Change Benefit Elections. Scroll down, if necessary, to view all items.

Submit Elections By
09/28/2017

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 | | |

2. 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.



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



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

to the [Add a Dependent During an Enrollment Event](#) job aid.



The coverage level will update based on the dependents selected.



3. Click the Continue button to go to the next screen.

Change Benefits for Life Event - Workday

← 1 of 1

Change Benefit Elections

Employee Benefits Enrollment (EBD Use Only) for James Garner (W1234567) - Step 2 of 4 Actions

Total Employee Net Cost/Credit
\$68.08 Monthly Cost

Event Date
07/31/2017

Initiated On
08/10/2017

Submit Elections By
09/28/2017

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 | Minimum Contribution (Annual) \$5.00 Maximum Contribution (Annual) \$2,550.00 Provider Website P&A Plan Description P&A |

Continue Save for Later Go Back Cancel

Your contribution (Monthly)

4. You are now on Step 2 of 4 of Change Benefit Elections. Scroll down, if necessary, to view all items.



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

Submit Elections By
09/28/2017

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) \$5.00 Maximum Contribution (Annual) \$2,550.00 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 |

5. On this screen:

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



Note 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.

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



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

← 1 of 1

Change Benefit Elections

Employee Benefits Enrollment (EBD Use Only) for James Garner (W1234567) - Step 3 of 4 Actions

Total Employee Net Cost/Credit
\$176.41 Monthly Cost

Event Date
07/31/2017

Initiated On
08/10/2017

Submit Elections By
09/28/2017

[Guarantee Life Insurance is Pre-Tax, Supplemental Life Insurance is Post-Tax.](#)
[Please note that you must elect the Guarantee Life Max of \\$50,000 prior to electing Supplemental.](#)

> 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 | | |

Continue Save for Later Go Back Cancel

7. You are now on Step 3 of 4 of Change Benefit Elections. Scroll down, if necessary, to view all items.



Submit Elections Bv
09/28/2017

> 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

8. On this screen:

- Select **Elect** to enroll the employee in Guaranteed 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 – Guaranteed - Securian guaranteed issue amount for an employee. No evidence of insurability is required for amounts elected up to \$50,000. The deduction for this coverage amounts up to and including \$50,000 is taken on a pre-tax basis.

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



Do 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 the deduction is taken after all applicable federal and state taxes have been applied. Evidence of insurability is required for amounts over \$50,000.

- 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 select the amount.



Spouse Life, Child Life and AD&D premiums are all post-tax deductions.

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



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

← 1 of 1

Change Benefit Elections

Employee Benefits Review for Employee Benefits Enrollment (EBD Use Only) - Step 4 of 4 Actions

Total Employee Net Cost/Credit
\$179.11 Monthly Cost

> Details

Your Benefit Elections will not become active unless you hit 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) | 07/31/2017 | 07/31/2017 | Employee | | | | \$68.08 | \$38.00 |
| Healthcare FSA - P&A Group FSA-Health | 07/31/2017 | 07/31/2017 | \$50.00 Annual | | | | \$108.33 | |
| Life Ins - Guaranteed - Securian (Employee) | 07/31/2017 | 07/31/2017 | \$50,000 | \$50,000.00 | | | \$2.70 | |
| Total: | | | | | | | \$179.11 | \$38.00 |

> Waived Coverages

Attachments 0 items

| Attachment | Comment | File |
|----------------|---------|------|
| No Attachments | | |

Submit Go Back Cancel

10. On Step 4 of 4, review the benefit elections and the total monthly cost for the benefit elections.
11. Attach any documents for new dependents if all are available. If not, wait until the Dependent Verification process following the start of the new plan year to submit the documentation.
12. Scroll down, if necessary, to view all items.



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

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

Submit

Go Back

Cancel

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

14. Click the **Submit**  button to submit the employee's benefit elections.



Title: Change Benefit Elections
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

← 1 of 1

Submit Benefit Elections

Employee Benefits Enrollment (EBD Use Only) for James Garner (W1234567) Actions

Initiated On
08/10/2017

Submit Elections By
09/28/2017

Event Date
07/31/2017


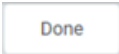
Total Employee Cost/Credit
\$179.11 Monthly Cost

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

15. The benefit elections have been submitted. Select the **Print**  button from this screen if you need to print the Confirmation Summary Statement at this time; you will not be able to go back and print the statement later. Click the **Done**  button to finish.



The event will be routed to the Central Benefits Partner for approval.

Note that when viewing the employee's benefits, these benefits will not show as active until the effective date of the benefit change (e.g. the last day of the month for a divorce).

For instructions on how to view benefits that are not yet active, refer to the [View Benefit Election History](#) for an Employee section of this job aid.

16. The System Task is complete.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

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
07/31/2017

Initiated On
08/10/2017

Submit Elections By
09/28/2017

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](#) [Event](#)

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: Employee Benefits Division (Central Benefits Coordinator)

1 of 1 - Workday

Event Date
07/31/2017

Initiated On
08/10/2017

Submit Elections By
09/28/2017

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 | | |

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

1 of 1 - Workday

Event Date
07/31/2017

Initiated On
08/10/2017

Submit Elections By
09/28/2017

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;"> Existing Dependents > Add My Dependent From Enrollment </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

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



If the dependent is already listed, the dependent can be selected using the **Existing Dependents** menu item.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

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 **New Dependent** **New Dependent** radio button.



The **New Dependent** radio button allows you to add a new dependent to the employee's benefits plan, such as a new spouse or child.

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. Employees are referred to the Beneficiary Designation form on the DBM Health Benefits website under Term Life and AD&D.

6. Click the **OK**  button.



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"/> | |

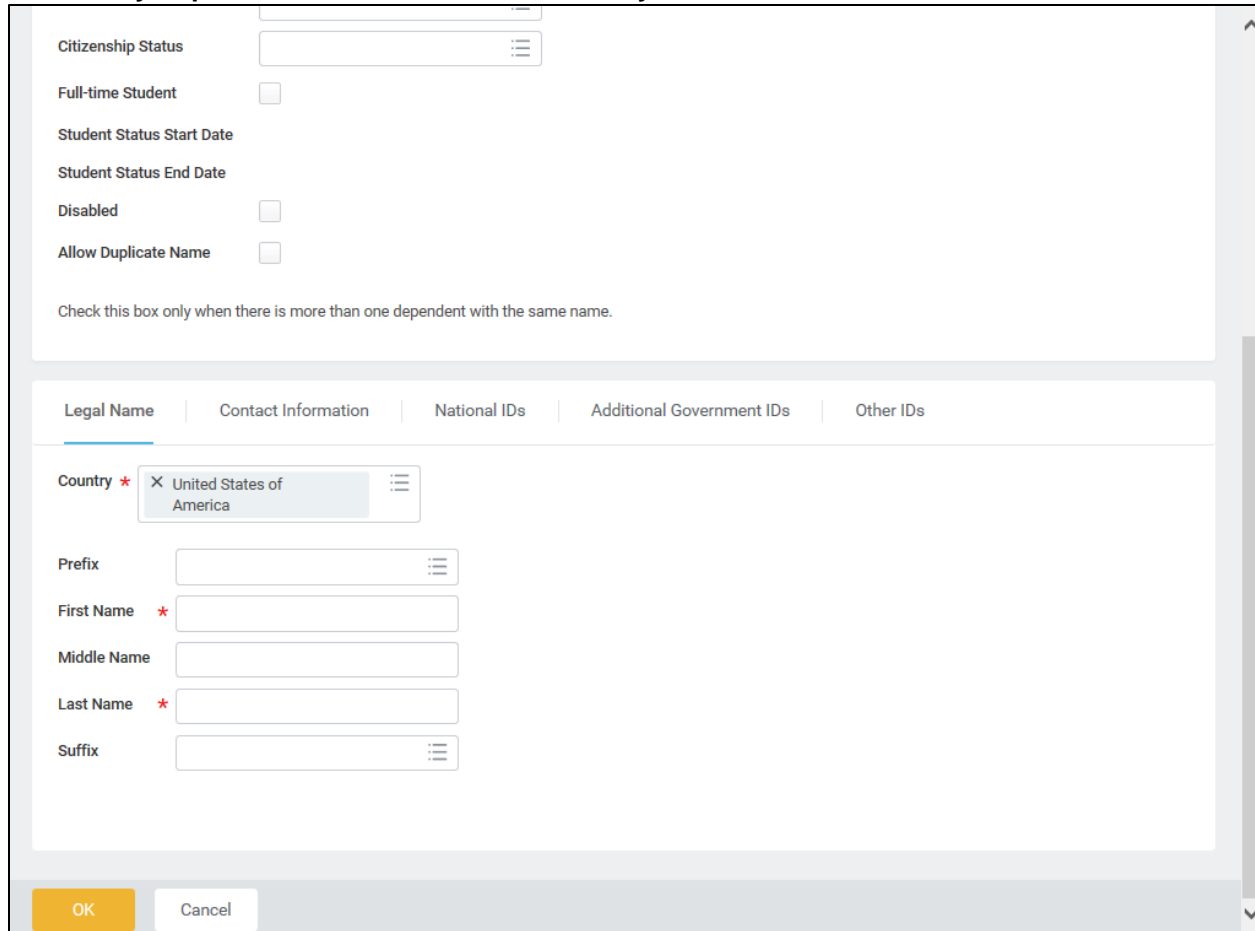
Check this box only when there is more than one dependent with the same name.

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: Employee Benefits Division (Central Benefits Coordinator)

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

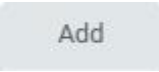
Email
Add

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.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

Add My Dependent From Enrollment - Workday

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

Phone
Add

Address

Use Existing Address

Country *

Address Line 1 *

Address Line 2

City *

State *

Postal Code *

County

Usage

Type *

Use For (empty)

Visibility Public

OK Cancel

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 associated with the employee.



Title: Add a Dependent During an Enrollment Event
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

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: Employee Benefits Division (Central Benefits Coordinator)




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.

Review Benefits Changes

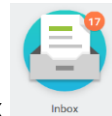
Use this procedure to access your Inbox and review benefits changes that have been routed to you for approval. When an employee initiates a Change Benefits for Life Event, it will be routed to the Central Benefits Partner to review the information and approve if accurate.

Procedure:

1. Click the **My Account**  icon.
2. Click the **Inbox** hyperlink.

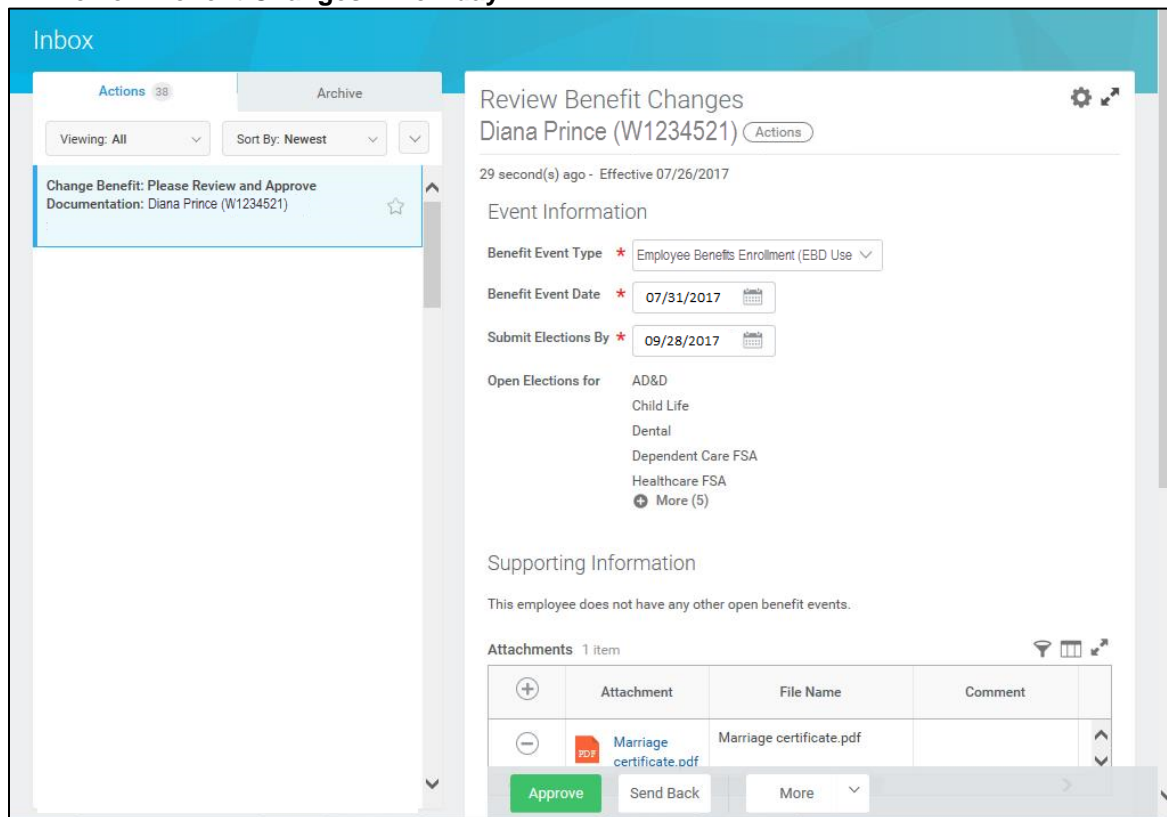


Note that you can also click the Inbox



worklet from your homepage to access the Inbox.

Review Benefit Changes - Workday



Inbox

Actions 38 Archive

Viewing: All Sort By: Newest

Change Benefit: Please Review and Approve Documentation: Diana Prince (W1234521)

Review Benefit Changes
 Diana Prince (W1234521) Actions

29 second(s) ago - Effective 07/26/2017

Event Information

Benefit Event Type * Employee Benefits Enrollment (EBD Use)

Benefit Event Date * 07/31/2017

Submit Elections By * 09/28/2017


Open Elections for

- AD&D
- Child Life
- Dental
- Dependent Care FSA
- Healthcare FSA
- More (5)

Supporting Information

This employee does not have any other open benefit events.

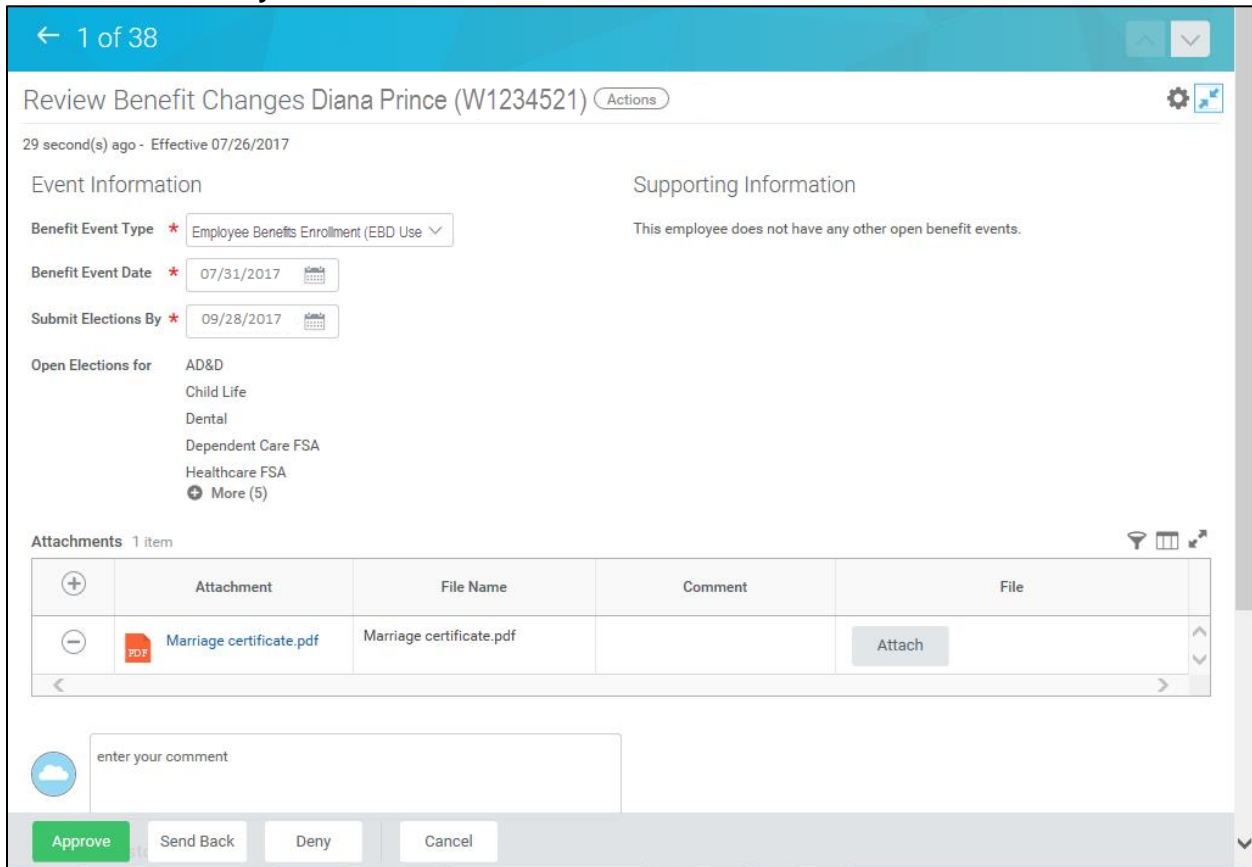
Attachments 1 item

| Attachment | File Name | Comment |
|--|--------------------------|---------|
|  Marriage certificate.pdf | Marriage certificate.pdf | |

Approve Send Back More

3. Click the task in your Inbox.
4. Click the **Toggle Fullscreen Viewing Mode**  icon to enlarge the screen.

1 of 38 - Workday



← 1 of 38

Review Benefit Changes Diana Prince (W1234521) Actions Settings

29 second(s) ago - Effective 07/26/2017

Event Information

Benefit Event Type * Employee Benefits Enrollment (EBD Use ▾)

Benefit Event Date * 07/31/2017 Calendar

Submit Elections By * 09/28/2017 Calendar


Open Elections for

- AD&D
- Child Life
- Dental
- Dependent Care FSA
- Healthcare FSA
- ⊕ More (5)

Supporting Information

This employee does not have any other open benefit events.

Attachments 1 item Filter Grid Fullscreen

| | Attachment | File Name | Comment | File |
|---|--|--------------------------|---------|---------------------|
| + |  Marriage certificate.pdf | Marriage certificate.pdf | | Attach |

enter your comment

Approve
Send Back
Deny
Cancel

5. Review the benefit change.


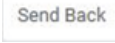



You will need to ensure that the correct **Benefit Event Type** and **Benefit Event Date** are correct. Also, review the attachment(s) to validate that it is the correct document(s) needed for this life event.

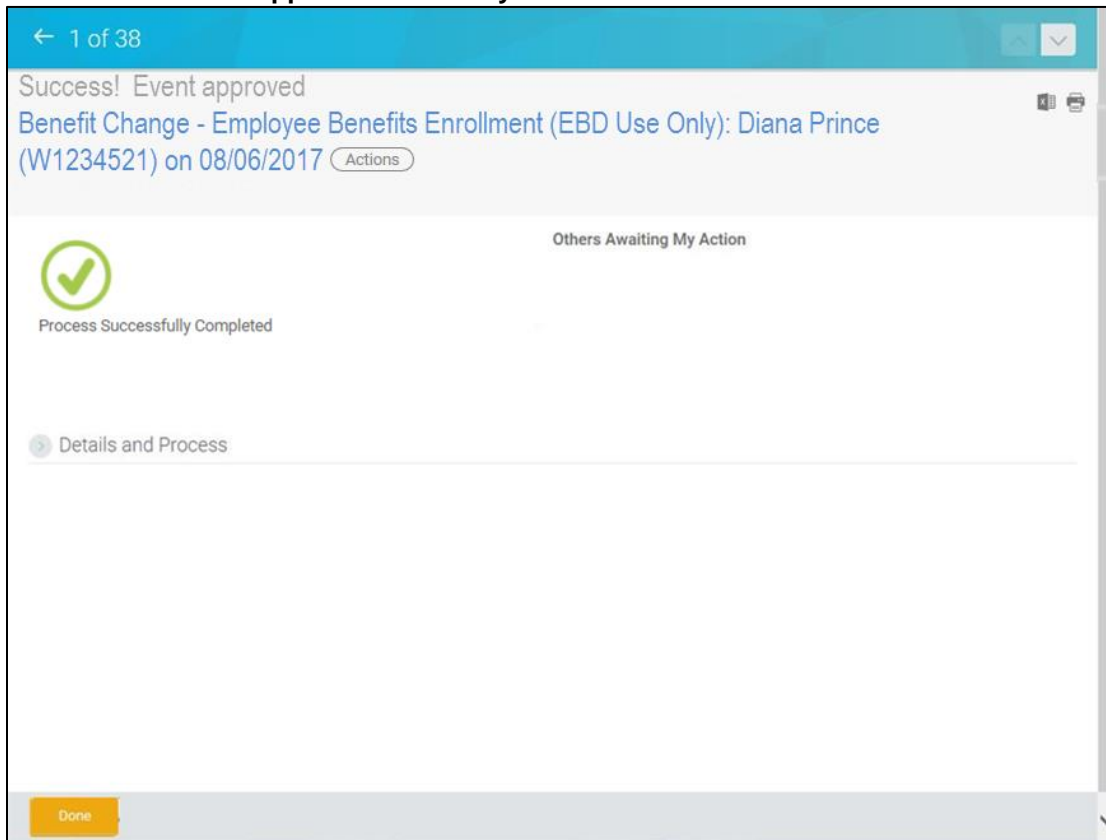


Title: Review Benefits Changes
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

6. After reviewing the benefit change, select one of the following actions:

| Action | Description |
|--|--|
| Click the Approve  button. | Click this button to approve the benefit change. |
| Click the Send Back  button. | Click this button to send the benefit change back to the initiator for corrections. When you send back a task or event, you must enter a comment. The action may be updated and/or changed and resubmitted by the initiator. |
| Click the Cancel  button. | Click this button to cancel the task and come back to it later. You will be able to access the task later from your Inbox. |

Success! Event approved - Workday





Title: Review Benefits Changes
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

7. Click the **Done**  button.



The task will no longer appear in your Inbox once you have taken action on it.

8. The System Task is complete.


View Benefit Election History for an Employee

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

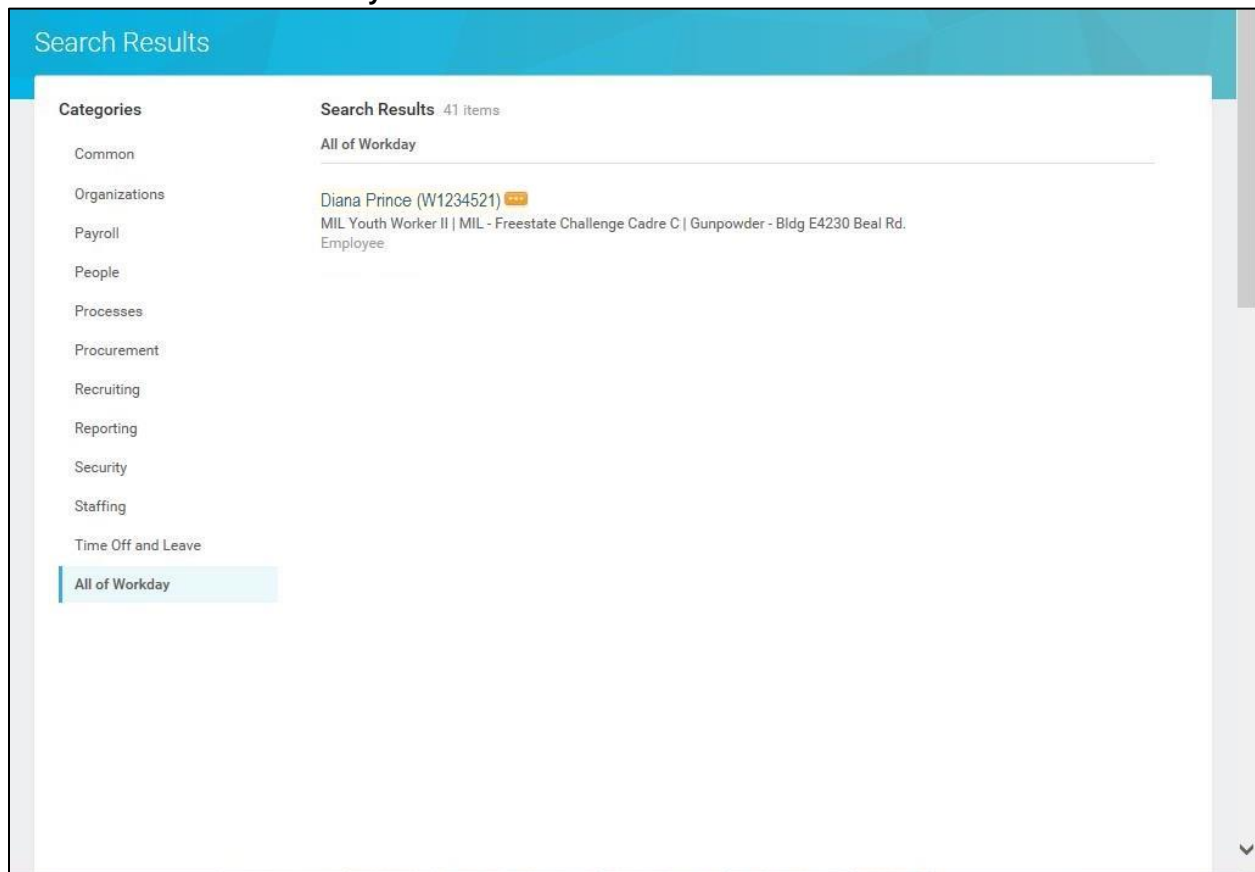
The Employee Benefits Division can view benefit election history for all employees and retirees.

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 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. Below the 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.



Title: View Benefit Election History for an Employee
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

Worker - Workday

The screenshot shows the Workday interface for a worker named Diana Prince. On the left, there is a 'Categories' sidebar with 'All of Workday' selected. The main area displays 'Search Results' for 41 items, with 'All of Workday' as the filter. The worker's name and job title are visible. An 'Actions' menu is open, listing various categories like Benefits, Business Process, Compensation, etc. The 'Benefits' category is expanded, and a secondary menu is shown with 'View Benefit Election History' highlighted by a red rectangular box. Other options in this menu include 'Change Benefits', 'View Current Benefit Elections', '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.



Title: View Benefit Election History for an Employee
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Coordinator)

Benefit Election History - Workday

Benefit Election History Diana Prince (W1234521) Actions

5 items

| Event | Current | Benefits Details | Enrollment Event Type | Event Date | Initiated On | Submit Elections By | Last Char |
|-------|---------|--|-------------------------------------|------------|--------------|---------------------|------------|
| Q | | Diana Prince (W1234521) Benefit Elections Active on 07/02/2017 | Employee Benefits Enrollment (EBD U | 07/31/2017 | 08/10/2017 | 09/28/2017 | 08/10/2017 |

5. View the benefit election history.



Information: Note that while the benefit elections have been submitted, they are not yet active.

6. The System Task is complete.