



Title: View Benefit Event Change
Functional Area: Benefits Administration
Role: Employee Benefits Division, Agency Benefits Coordinators, and Agency Benefits Liaison

View Benefit Event Change

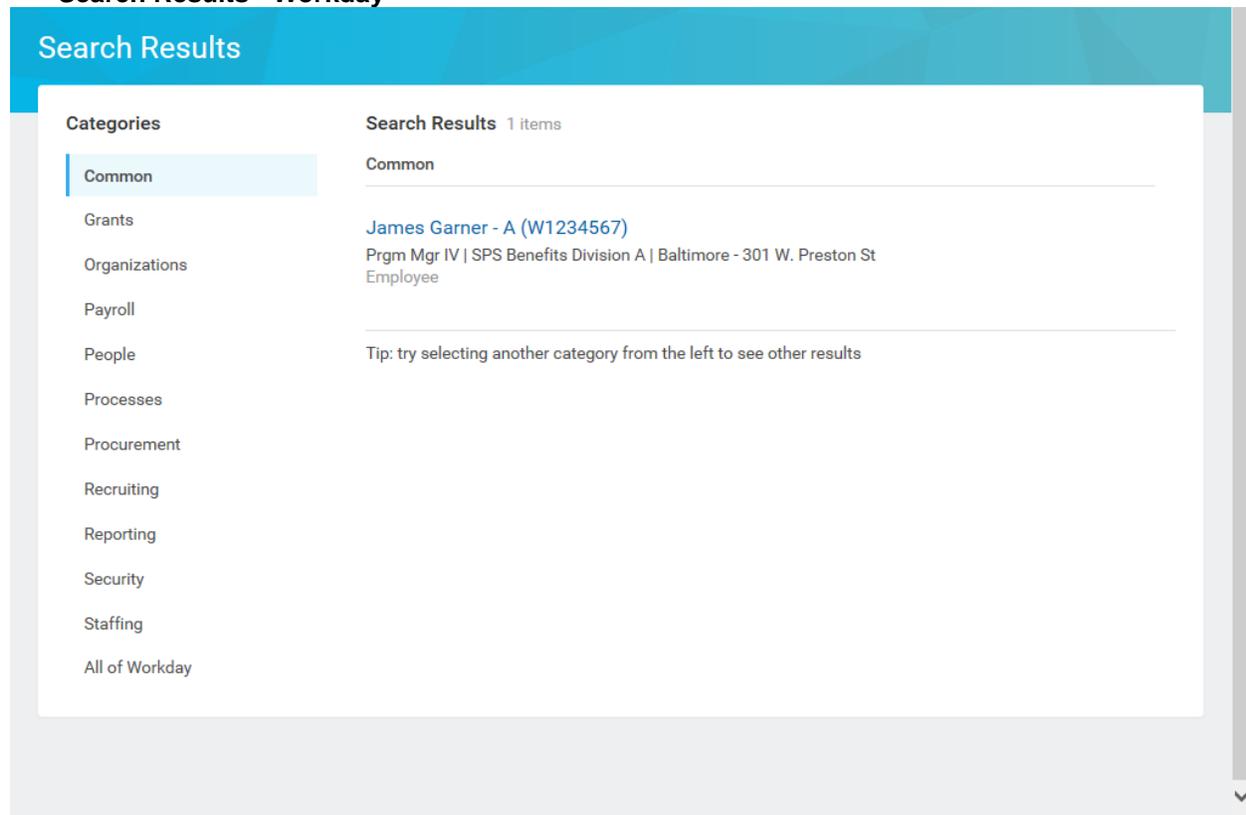
Use this procedure to view benefit event changes for an employee or retiree.

Note that SPMS Agency Benefits Coordinators and Agency Benefits Liaisons can only view benefit event changes for their employees. The Employee Benefits Division can view benefit event changes 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 results 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 content area is titled 'Search Results 1 items' and shows a result for 'James Garner - A (W1234567)'. Below the name, it lists '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.



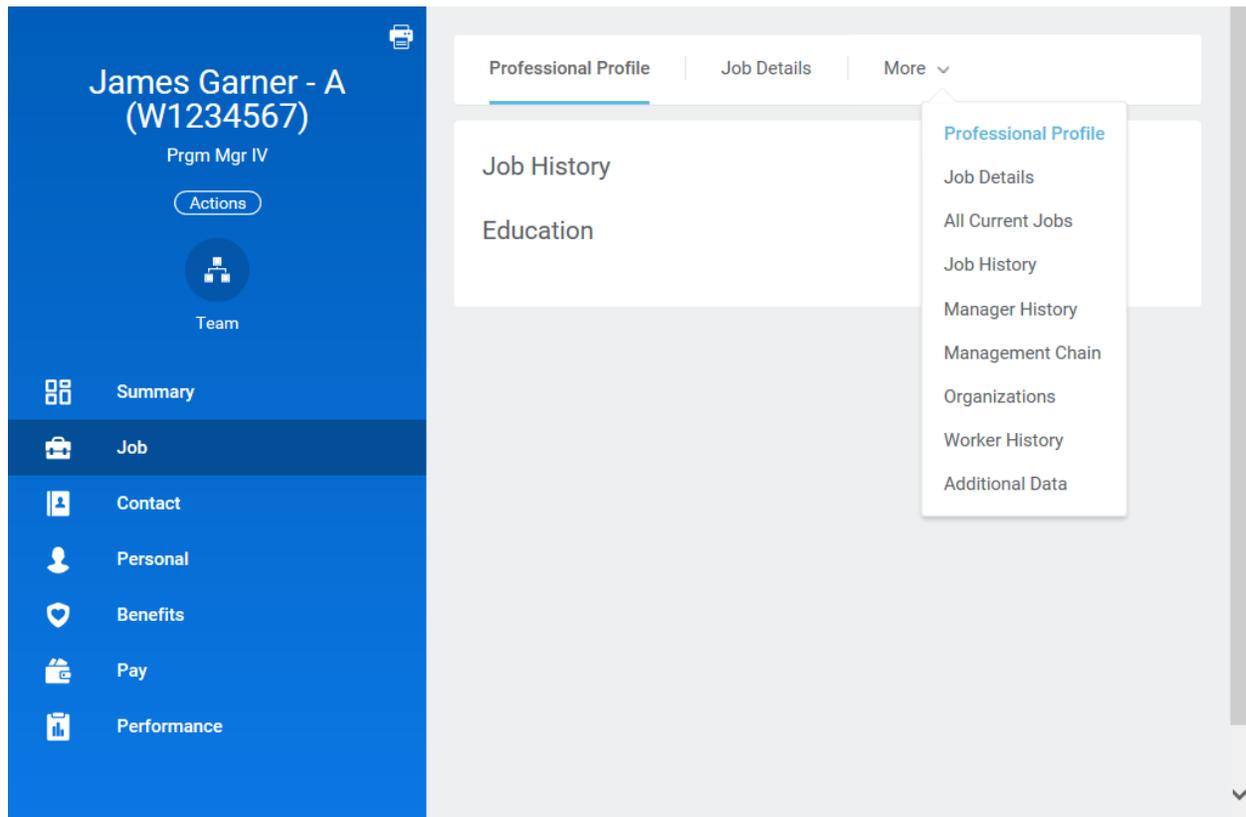
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The screenshot displays a worker profile for James Garner - A (W1234567), who is a Program Manager IV. The interface includes a blue sidebar with navigation options: Summary, Job, Contact, Personal, Compensation, Benefits, Pay, and More (3). The main content area shows the worker's location as Baltimore - 301 W. Preston St and their manager as David Hayden (W1231234). There is also an 'Actions' button and a 'Team' icon in the sidebar.

4. On the Worker Profile, click the Job tab.



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5. On the Job tab, click the More  sub tab and select Worker History from the drop-down menu.



Note: You may have to click the More



drop down arrow to find a complete list of options.



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View Worker - Workday

James Garner - A (W1234567)
Prgm Mgr IV

Actions

Team

Summary

Job

Contact

Personal

Benefits

Pay

Performance

Worker History | Additional Data | More

View Worker History by Category

Worker History 21 items

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

6. Click the **View Worker History by Category** button.



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View Worker - Workday

View Worker History by Category James Garner - A (W1234567) Actions  

View Worker History

Staffing | Organization | Personal Data | Benefits

Hire History 1 item    

Business Process	Initiated On	Start Date	Status	Reason	
Hire: James Garner - A (W1234567)	08/16/2017 11:13:34 AM	02/12/2014	Successfully Completed	New Hire > JobAps	 

< >

Benefits

7. Click the **Benefits** tab to view benefits related events.



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View Worker - Workday

View Worker History by Category James Garner - A (W1234567) Actions Print

View Worker History

Staffing | Organization | Personal Data | **Benefits**

Benefits 2 items Filter Refresh Export

Business Process	Benefit Event Type	Initiated On	Event Date	Status
Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018	Open Enrollment 2018	08/22/2017 03:46:07.160 PM	01/01/2018	Successfully Comple
Benefit Change - Z Conversion-Health : James Garner - A (W1234567) on 01/01/2017	Z Conversion-Health	08/22/2017 12:32:46.122 PM	01/01/2017	Successfully Comple

Dependents 5 items Filter Refresh Export

Business Process	Dependent	Relationship	Initiated On	Status
Dependent Event: James Garner - A (W1234567) - Prgm Mgr IV on 01/01/2017	Selena Garner - A	Spouse	08/21/2017	Successfully Completed
Dependent Event: James Garner - A (W1234567) - Prgm Mgr IV on 01/01/2017	Jay Garner - A	Child	08/21/2017	Successfully Completed

8. A list of benefits related events for the employee will display. Click the hyperlink in the Business Process column for the event for which you want to see details.



Note that you can see the status of the event in the Status column. In this example, the event is still in progress and has not yet been completed.



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View Event - Workday

View Event

Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018

Actions

For James Garner - A (W1234567)
Overall Process Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018
Overall Status Successfully Completed

Details | **Process**

Benefit Event Type	Open Enrollment 2018	Attachments 1 item Attachment BirthCertificate.PDF
Initiated On	08/22/2017	
Submit Elections By	11/30/2017	
Event Date	01/01/2018	
Finalized Date	09/26/2017	
Benefit Group	FT & PT FTE 50% Bi-Weekly	
Enrollment Status	Finalized	

Elected Coverages 6 items

9. View the details of the event.

10. Click the **Process** tab to view all individual tasks in the event.



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View Event - Workday

View Event

Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018

Actions

For James Garner - A (W1234567)
Overall Process Open Enrollment Change: James Garner - A (W1234567) on 01/01/2018
Overall Status Successfully Completed

Details | **Process**

Process History 6 items

Process	Step	Status	Completed On	Due Date
Change Benefits for Open Enrollment	Change Benefits for Open Enrollment	Step Completed	08/22/2017 03:46:07 PM	
Change Benefits for Open Enrollment	Change Benefits for Open Enrollment	Reassigned	08/22/2017 03:46:07 PM	
Change Benefits for Open Enrollment	Change Benefits for Open Enrollment	Not Required		
Change Benefits for Open Enrollment		On Hold	08/24/2017 02:21:15 PM	

11. View the information.



On this screen, you can view status of individual tasks in the event, which steps have/have not been completed, which tasks are awaiting action, and who needs to complete the action.

12. The System Task is complete.