



Title: Add Benefits Documentation for an Employee or Retiree
Functional Area: Benefits Administration
Role: Employee Benefits Division and Agency Benefits Coordinators

Add Benefits Documentation for an Employee or Retiree

Use this procedure to add, update, or remove benefits documentation for an employee (or retiree) in Workday.

Note that SPMS Agency Benefits Coordinators can only view and manage benefits documentation for their employees. The Employee Benefits Division can view and manage benefits documentation 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

Search Results

Categories

- Common
- Grants
- Organizations
- Payroll
- People
- Processes
- Procurement
- Recruiting
- Reporting
- Security
- Staffing
- All of Workday

Search Results 1 items

Common

[James Garner - A \(W1234567\)](#)
Prgm Mgr IV | SPS Benefits Division A | Baltimore - 301 W. Preston St
Employee

Tip: try selecting another category from the left to see other results

3. In the search results, click the employee name hyperlink.



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View Worker

The screenshot displays the 'View Worker' page for James Garner - A (W1234567). The left sidebar contains navigation options: Summary, Job, Contact, Personal, Compensation, Benefits, Pay, and More (3). The main content area shows worker details: Name (James Garner - A, W1234567), Title (Prgm Mgr IV), Location (Baltimore - 301 W. Preston St), and Manager (David Hayden (W1231234)). A 'Personal' tab is highlighted at the bottom of the main content area.

4. On the worker profile, click the **Personal** tab.



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View Worker

The screenshot shows the 'View Worker' page for James Garner - A (W1234567), a Program Manager IV. The left sidebar contains navigation options: Summary, Job, Contact, Personal (selected), Compensation, Benefits, and Pay. The main content area has tabs for Personal Information, IDs, Documents, and Names. The 'Personal Information' tab is active, showing an 'Edit' button and a list of personal details:

Field	Value
Gender	Male
Date of Birth	11/25/1968
Age	48 years, 10 months, 1 days
Marital Status	(empty)
Hispanic or Latino	No
Race/Ethnicity	(empty)
Citizenship Status	(empty)

5. Click the **Documents**  sub-tab to access employee documentation.



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View Worker

The screenshot shows a user interface for viewing worker information. On the left is a blue sidebar for 'James Garner - A (W1234567)', 'Prgm Mgr IV', with options for Actions, Team, Summary, Job, Contact, Personal, Benefits, Pay, and Performance. The main area has tabs for Personal Information, IDs, Documents, and Names. The 'Documents' tab is active, showing an 'Add' button and a table with 1 item. The table has columns for Worker Document, Document Category, Attachments (File Name, File Length, Upload Date), and an Edit button.

Worker Document	Document Category	Attachments			Edit
		File Name	File Length	Upload Date	
Marriage Certificate.pdf	Benefits	Marriage Certificate.pdf	52	09/22/2017 07:10:17 AM	Edit

6. Add, update, or delete a document using the applicable procedure below.

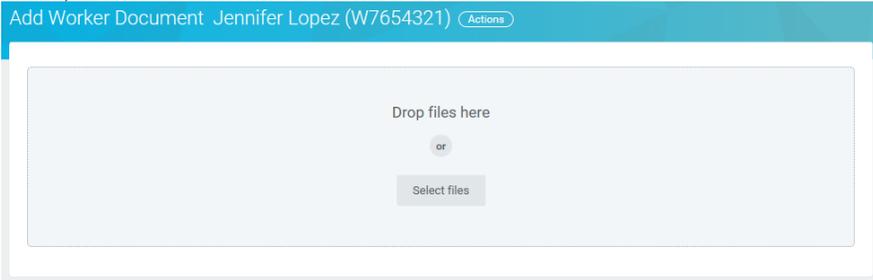


Information: All worker documents display on the Documents tab, including supporting documents for employee benefits. Benefits worker documents display in the following document categories:

- Benefits
- Dependent disability
- EBD reports
- Education Reimbursement
- Legal Name Change
- Marital Status Change
- ORP Documents



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Task	Procedure
To add a document...	<p>1) Click the Add  button.</p>  <p>2) Click the Select Files  button.</p> <p>3) Browse for and select the document.</p> <p>4) Select Document Category.</p> <p>5) Enter a comment if applicable.</p> <p>6) Click the OK  button.</p>
To edit document information ...	<p>1) Click the Edit  button.</p> <p>2) Update as needed.</p> <p>3) Click the OK  button.</p>
To delete a document...	<p>1) Click the Delete  button.</p> <p>2) Verify the document to be deleted.</p> <p>3) Click the OK  button.</p>

7. The System Task is complete.