

Review Benefits Changes

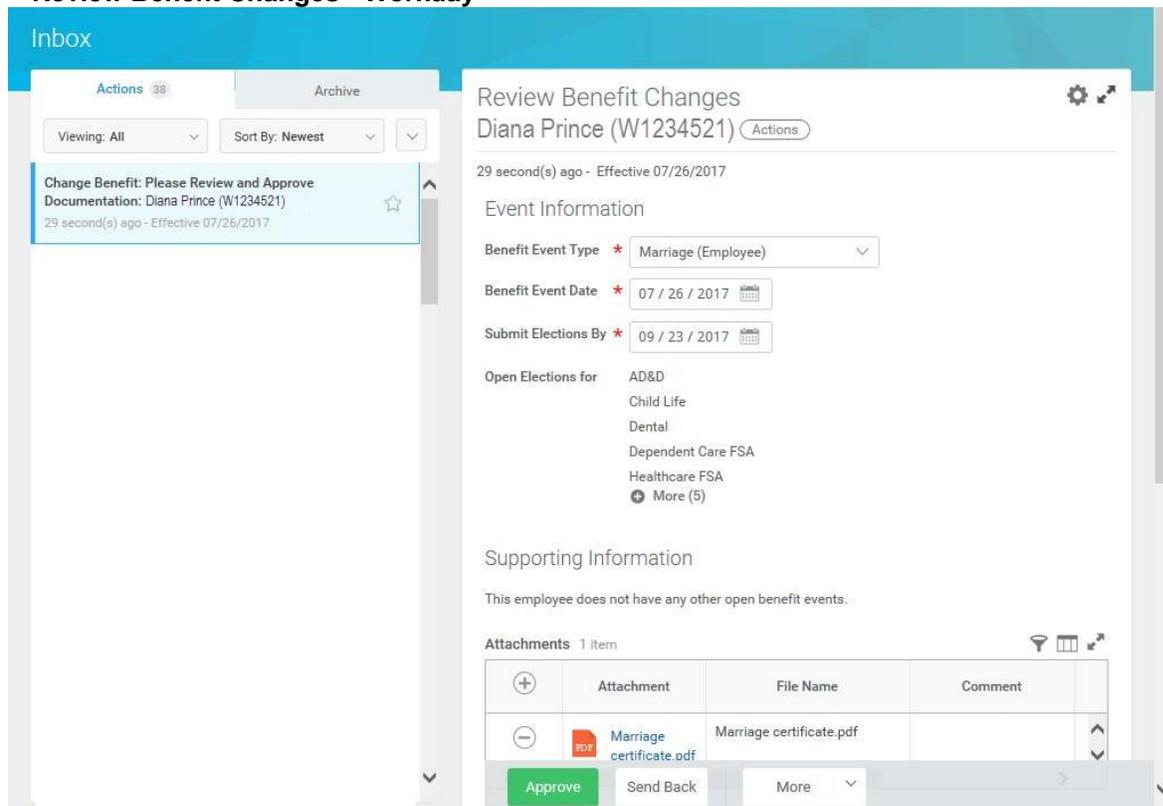
Use this procedure to access your Inbox and review benefits changes that have been routed to you for approval. When an employee initiates a Change Benefits for Life Event, it will be routed to the Central Benefits Partner to review the information and approve if accurate.

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



The screenshot displays the 'Review Benefit Changes' interface in Workday. The main content area shows the following details:

- Event Information:**
 - Benefit Event Type: Marriage (Employee)
 - Benefit Event Date: 07 / 26 / 2017
 - Submit Elections By: 09 / 23 / 2017
 - Open Elections for: AD&D, Child Life, Dental, Dependent Care FSA, Healthcare FSA, and More (5)
- Supporting Information:** This employee does not have any other open benefit events.
- Attachments:** 1 item: Marriage certificate.pdf

At the bottom of the interface, there are buttons for 'Approve', 'Send Back', and '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) ⚙️

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

Event Information

Benefit Event Type * Marriage (Employee) ⌵

Benefit Event Date * 07 / 26 / 2017 📅

Submit Elections By * 09 / 23 / 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	File
-	Marriage certificate.pdf	Marriage certificate.pdf		Attach

enter your comment

Approve
Send Back
Deny
Cancel

5. Review the benefit change.

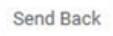


You will need to ensure that the correct **Benefit Event Type** and **Benefit Event Date** are correct. Also, review the attachment to validate that it is the correct document that is needed for this life event.



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 Deny  button.	Click this button to deny the request. NOTE: It is recommended that you use the Send Back function (instead of denying) to request additional information or clarification.
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.



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Success! Event approved - Workday

The screenshot shows a notification interface. At the top, a blue bar contains a back arrow and the text "1 of 38". Below this, the notification title is "Success! Event approved Diana Prince (W1234521) on 07/26/2017" with an "Actions" button to its right. Underneath the title, it says "29 second(s) ago - Effective 07/26/2017". The main content area is divided into two sections: "Up Next" and "Others Awaiting My Action". Under "Up Next", there is a profile icon for Diana Prince (W1234521) and a description: "Benefit Change - Marriage (Employee) : Diana Prince (W1234521) on 07/26/2017 - Change Benefits for Life Event". Below this, there is a link labeled "Details and Process" with a right-pointing arrow. At the bottom of the notification, there is a yellow "Done" button.

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.