Change Benefits for Life Events
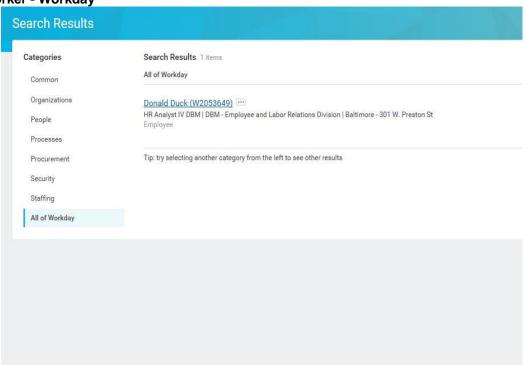
Contents

Enroll a New Employee in Benefits

Use this procedure to enroll a new hire in benefits. DBM and DoIT hires will receive a task in their Workday Inbox to enroll in benefits. If for some reason they are unable to enroll in benefits, use this procedure to enroll the new hire in benefits.

Procedure:

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

2. Click the **search** icon.

   Worker - Workday

3. Click the employee name hyperlink.
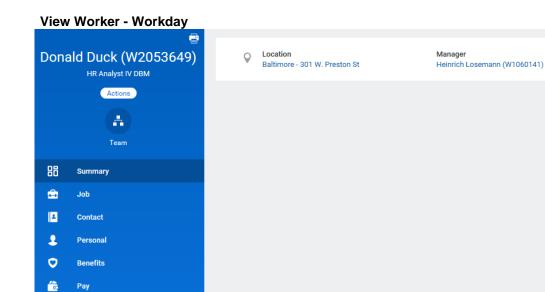
View Worker - Workday

4. Click the **Actions** [Actions] button underneath the employee's name**.**

View Worker - Workday

5. In the menu, hover over **Worker History** and then click the **View Worker History** hyperlink.

View Worker History - Workday

6. Click the **Related Actions and Preview** icon next to the New Hire event for the employee.

You can click the **View Worker History** View Worker History by Category button and go to the Benefits category to more easily find the event.

Action Event - Workday

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

Change Benefit Elections - Workday

8. Change the benefit elections.

For detailed instructions on how to change benefit elections for an employee go to the **Change Benefit Elections** section of this job aid.

9. The System Task is complete.

Change Spouse to Ex-Spouse

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

NOTE THAT THIS TASK IS PERFORMED BY EMPLOYEE BENEFITS DIVISION ONLY.

Procedure:

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

2. Click the **search** icon.

    Search Results - Workday

3. Click the employee name hyperlink.

View Worker - Workday

4. Click the **Benefits** [Benefits] tab.

View Worker - Workday

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

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

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

Submit   Save for Later   Cancel

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.

8. Click the **Submit**   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**   Done   button.

🛈 Go to the **Change Benefits** section of this job aid for instructions on the next steps in the process.

10. The System Task is complete.

Enter Death of Dependent

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

NOTE THAT THIS TASK IS PERFORMED BY EMPLOYEE BENEFITS DIVISION ONLY.

Procedure:

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

2. Click the **search** icon.

   Search Results - Workday

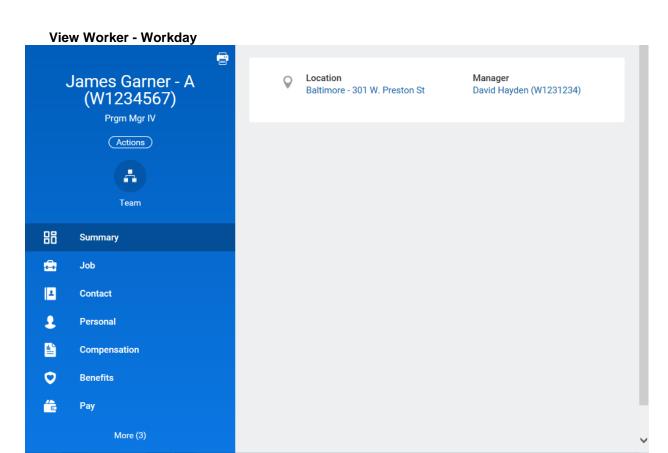3. Click the employee name hyperlink.

View Worker - Workday

4. Click the **Benefits** tab.

View Worker - Workday

Benefits	Dependents

Benefits 3 items

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	

James Garner - A (W1234567)

Prgm Mgr IV

Actions

Team

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

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

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

Edit Dependent - Workday

7. On the Dependent Options page:

   - Click the **Edit** [edit icon] icon in the Effective Date & Reason section.

   - Change the **Effective Date** to the actual date of death for the dependent.

   [info icon] **DO NOT** enter today's date in the **Effective Date** field.

   - Select the Update Dependent > Death of Dependent reason.

   - Click the **Edit** [edit icon] icon in the Date of Death section and enter the date of death for the dependent.

8. Click the **Submit** [Submit button] 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** [Done] button.

ℹ️ Go to the **Change Benefits** section of this job aid for instructions on the next steps in the process.

10. The System Task is complete.

Change Benefits

Use this procedure to initiate life events for DBM and DoIT employees.

Procedure:

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

2. Click the **search** icon.

   Search Results - Workday

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

Worker - Workday

4. In the menu, hover over **Benefits** and then click the **Change Benefits** hyperlink.

Change Benefits - Workday
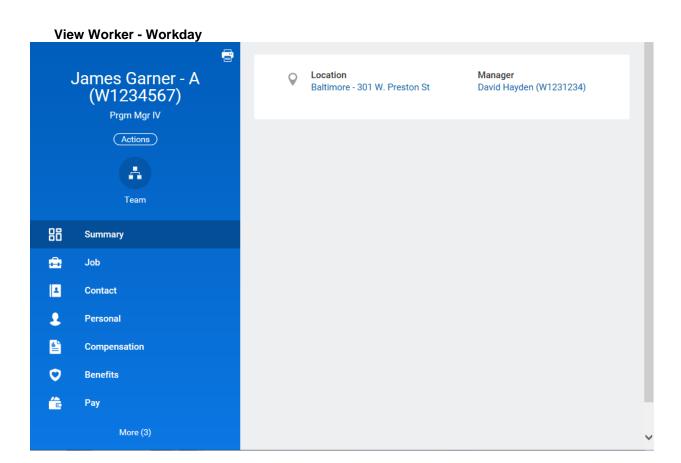

5. Select the applicable **Benefit Event Type** from the drop down box.

6. 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

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).

8. Enter the reason in the **Comment** field if applicable.

Change Benefits - Workday

Submit

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.

You have submitted - Workday

10. Click the **Open** Open button.

11. The System Task is complete.

Change Benefit Elections

Use this procedure to change benefit elections on behalf of an employee. The task will be accessed via the Workday Inbox after initiating the life event.

Procedure:

Change Benefits for Life Event - Workday

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

Note: You must enroll in a plan before adding a dependent. Once the dependent(s) has been added, you can select him/her for other benefits.

Health Care Elections 7 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - CareFirst BCBS EPO (Employee)	● Elect ○ Waive		Employee
Medical - CareFirst BCBS PPO (Employee)	○ Elect ● Waive		
Medical - UnitedHealthcare EPO (Employee)	○ Elect ● Waive		
Medical - UnitedHealthcare PPO (Employee)	○ Elect ● Waive		
Prescription - Drug RX (Employee)	○ Elect ● Waive		
Dental - Delta Dental DHMO			

[Continue] [Save for Later] [Cancel]

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

to the **Add a Dependent During an Enrollment Event** job aid. ![info icon] The coverage level will update based on the dependents selected.

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

Change Benefits for Life Event - Workday

Change Benefit Elections New Hire for Donald Duck (W2053649) - Step 2 of 4 (Actions)

Total Employee Net Cost/Credit
$68.08 Monthly Cost

Event Date	10/18/2017
Initiated On	11/06/2017
Submit Elections By	12/16/2017

You may enter an amount per pay or for the whole year.

Remaining Payroll Deductions   2

Remaining Deductions Override   [0]

Spending Account Elections 2 items

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Healthcare FSA - P&A Group	○ Elect ◉ Waive	Your number of remaining payroll deductions for the year 2 Your estimated contributions made this year 0.00 Manual override by user ☐	Minimum Contribution (Annual) $5.00 Maximum Contribution (Annual) $2,600.00 Provider Website P&A Plan Description P&A

Your actual contributions from payroll
$0.00

[Continue] [Save for Later] [Go Back] [Cancel]

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

| Remaining Payroll Deductions | 2 |
| Remaining Deductions Override | 0 |

Spending Account Elections 2 items

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Healthcare FSA - P&A Group	○ Elect ● Waive	Your number of remaining payroll deductions for the year 2 Your estimated contributions made this year 0.00 Manual override by user ☐ Your actual contributions from payroll $0.00 How much do you want to contribute for the total year? 0.00 How much do you want to contribute per paycheck (Semi-monthly)? 0.00 Your contribution (Monthly) $0.00	Minimum Contribution (Annual) $5.00 Maximum Contribution (Annual) $2,600.00 Provider Website P&A Plan Description P&A

Continue   Save for Later   Go Back   Cancel

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** [Continue] button to go to the next screen.

Change Benefit Elections New Hire for Donald Duck (W2053649) - Step 3 of 4 (Actions)

Total Employee Net Cost/Credit
$68.08 Monthly Cost

Event Date	10/18/2017
Initiated On	11/06/2017
Submit Elections By	12/16/2017

- You may enroll in up to $50,000 of Employee Life without submitting evidence of insurability. You must have elected the guaranteed amount of $50,000 before you can enroll in supplemental life insurance.
- 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. You must have elected the guaranteed amount of $50,000 before you can enroll in supplemental spouse life insurance. 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. You must have elected the guaranteed amount of $50,000 before you can enroll in supplemental Child Life insurance. Child Life cannot exceed half of your life amount.

> Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 6 items

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Ca C
Life Ins - Guaranteed - Securian (Employee)	○ Elect ◉ Waive			

[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.

can enroll in supplemental Child Life insurance. Child Life cannot exceed half of your life amount.

> Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 6 items

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents
Life Ins - Guaranteed - Securian (Employee)	⚪ Elect 🔵 Waive		
Life Ins - Supplemental - Securian (Employee)	⚪ Elect 🔵 Waive		
Spouse Life - Securian (Spouse)	⚪ Elect 🔵 Waive		
Child Life - Securian (Dependent)	⚪ Elect 🔵 Waive		
AD&D - Securian (Employee)	⚪ Elect 🔵 Waive		
AD&D - Securian (Family)	⚪		

[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 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.

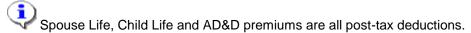- Select **Elect** if the employee wants to enroll in Spouse Term Life Insurance.

  ⓘ 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.

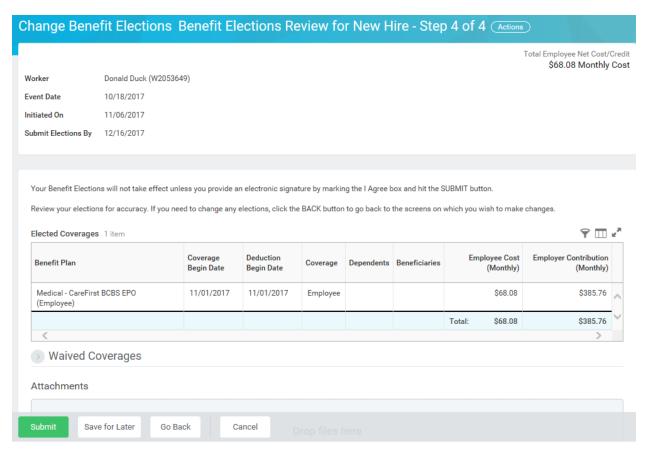 ⓘ Spouse Life, Child Life and AD&D premiums are all post-tax deductions.

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

Change Benefit Elections Benefit Elections Review for New Hire - Step 4 of 4   (Actions)

Total Employee Net Cost/Credit
$68.08 Monthly Cost

Worker	Donald Duck (W2053649)
Event Date	10/18/2017
Initiated On	11/06/2017
Submit Elections By	12/16/2017

Your Benefit Elections will not take effect unless you provide an electronic signature by marking the I Agree box and hit the SUBMIT button.

Review your elections for accuracy. If you need to change any elections, click the BACK button to go back to the screens on which you wish to make changes.

Elected Coverages 1 item

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - CareFirst BCBS EPO (Employee)	11/01/2017	11/01/2017	Employee			$68.08	$385.76
					Total:	$68.08	$385.76

> **Waived Coverages**

Attachments

Submit   Save for Later   Go Back   Cancel   Drop files here

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

11. Attach all verification documents for new dependents.

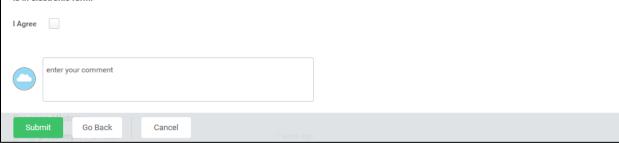12. Scroll down, if necessary, to view all items.

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.
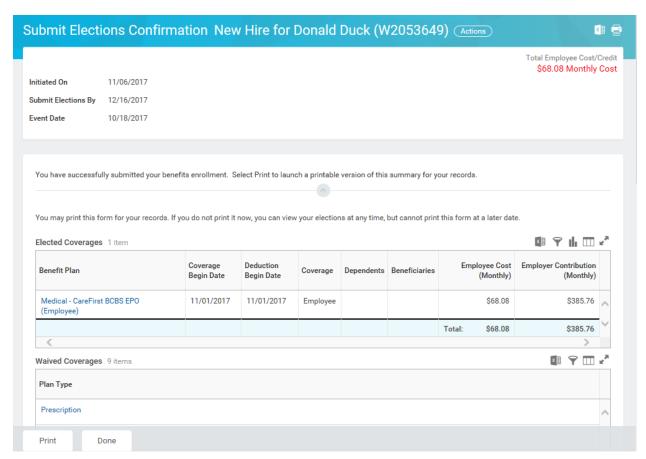
I Agree ☐

enter your comment

Submit   Go Back   Cancel

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

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

Submit Elections Confirmation New Hire for Donald Duck (W2053649) (Actions)

Total Employee Cost/Credit
$68.08 Monthly Cost

Initiated On   11/06/2017

Submit Elections By   12/16/2017

Event Date   10/18/2017

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

You may print this form for your records. If you do not print it now, you can view your elections at any time, but cannot print this form at a later date.

Elected Coverages 1 item

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - CareFirst BCBS EPO (Employee)	11/01/2017	11/01/2017	Employee			$68.08	$385.76
					Total:	$68.08	$385.76

Waived Coverages 9 items

Plan Type
Prescription

Print   Done

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

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

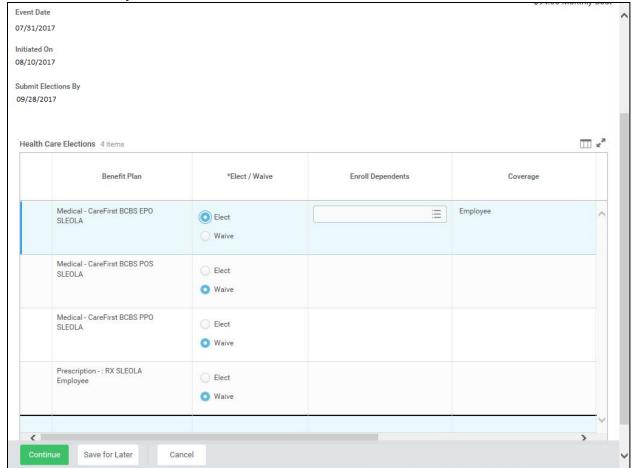1. On the Change Benefits Elections (Step 1 of 4) screen, select the item(s) to elect under health care elections.

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	◉ Elect ○ Waive	[☰]	Employee
	Medical - CareFirst BCBS POS SLEOLA	○ Elect ◉ Waive		
	Medical - CareFirst BCBS PPO SLEOLA	○ Elect ◉ Waive		
	Prescription - : RX SLEOLA Employee	○ Elect ◉ 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
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	◉ Elect ○ Waive	[blank field] ≔ Existing Dependents > Add My Dependent From Enrollment	Employee
	Medical - CareFirst BCBS POS SLEOLA	○ Elect ◉ Waive		
	Medical - CareFirst BCBS PPO SLEOLA	○ Elect ◉ Waive		
	Prescription - : RX SLEOLA Employee	○ Elect ◉ Waive		

Continue   Save for Later   Cancel

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

> ℹ If the dependent is already listed, 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. Employees are referred to the Beneficiary Designation form on the DBM Health Benefits website under Term Life and AD&D.

6. Click the **OK** [OK] button.

Add My Dependent From Enrollment - Workday

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.
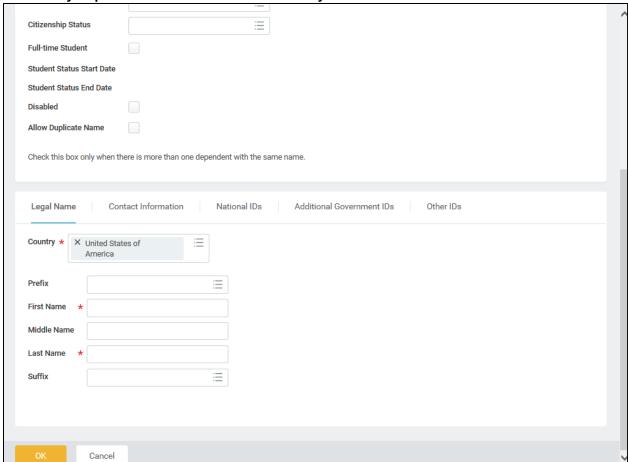
8. Scroll down to continue.

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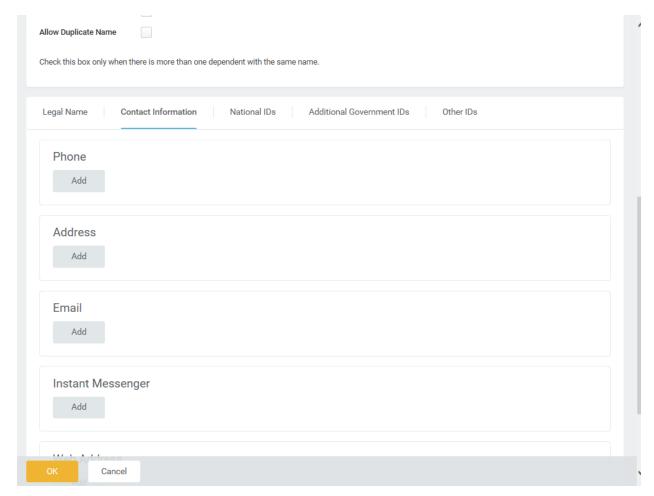
    - Enter the last name of the dependent you are adding in the **Last Name** field.

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

OK   Cancel

10. Select the Contact Information Contact Information tab:

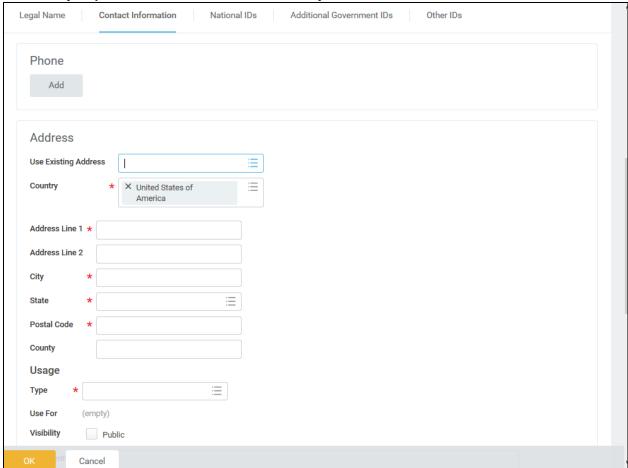11. In the **Address** section, click the **Add** Add button to enter the address for the dependent.

Add My Dependent From Enrollment - Workday

Legal Name	Contact Information	National IDs	Additional Government IDs	Other IDs

Phone

Add

Address

Use Existing Address		
Country	*	X United States of America
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.

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 Da
		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**   OK   button.

ⓘ 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 at the Employee Benefits Division to review the information and approve or deny as appropriate.

NOTE THAT THIS TASK IS PERFORMED BY EMPLOYEE BENEFITS DIVISION ONLY.

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

3. Click the task in your Inbox.

4. Click the **Toggle Fullscreen Viewing Mode** icon to enlarge the screen.

1 of 38 - Workday

5. Review the benefit change.

Important! Review before approving 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.

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

Action	Description
Click the **Approve** [Approve] button.	Click this button to approve the benefit change.
Click the **Send Back** [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** [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. Note that your changes will not be changed if canceled.

Success! Event approved - Workday

← 1 of 38

Success! Event approved
Benefit Change - Employee Benefits Enrollment (EBD Use Only): Diana Prince (W1234521) on 08/06/2017 (Actions)

Others Awaiting My Action

Process Successfully Completed

Details and Process

Done

7. Click the **Done** Done button.

The task will no longer appear in your Inbox because you have completed the action on it.

8. The System Task is complete.
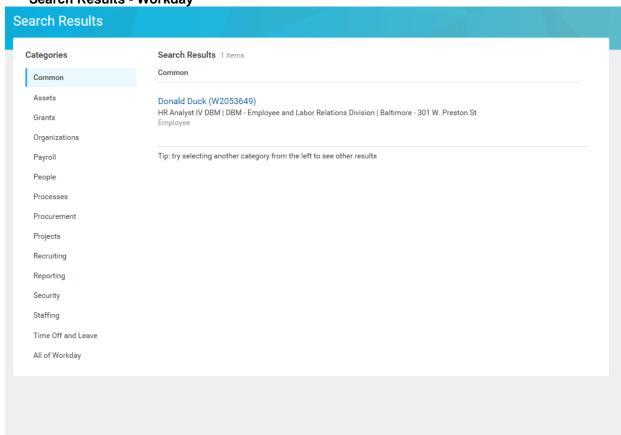
View Benefit Election History for an Employee

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

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

Worker - Workday

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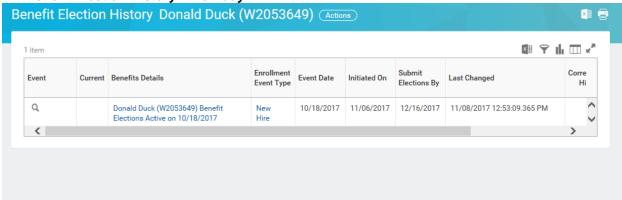
Benefit Election History - Workday

Benefit Election History Donald Duck (W2053649) (Actions)

1 item

Event	Current	Benefits Details	Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed	Corre Hi
🔍		Donald Duck (W2053649) Benefit Elections Active on 10/18/2017	New Hire	10/18/2017	11/06/2017	12/16/2017	11/08/2017 12:53:09.365 PM	

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.

View Benefits Coverage History for an Employee

Use this procedure to view benefit coverage history for an employee or retiree. The benefit coverage history includes:

- Benefit Plan
- Event Date
- Enrollment Event Type
- Coverage Begin Date
- Deduction Begin Date
- Coverage End Date
- Deduction End Date
- Coverage
- Dependents
- Employee Cost
- Employer Contribution

Note that SPMS Agency Benefits Coordinators can only view benefits coverage history for their employees. Employee Benefits Division personnel can view benefits coverage history for all employees and retirees.

You will only be able to see benefits coverage history starting from Go-Live date through the current date. Any benefit elections prior to Go-Live will not be shown here.

Procedure:

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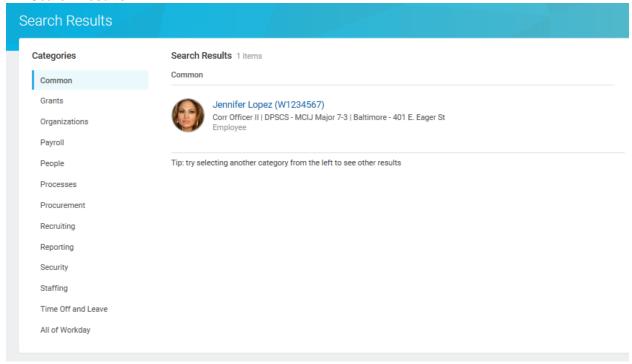
2. Click the **Search** icon.

Search Results

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

Search Results

4. In the menu, hover over Benefits and then click View Benefit Coverage History.

Benefit Coverage History

5. View the benefits coverage history.

6. Click a tab to view the respective coverage type information, including:

Item	Description
Current	Indicates if coverage in row is the employee's current coverage. (Yes/No).
Benefit Plan	State of Maryland benefit plan in which the employee is enrolled.
Event Date	Benefit event date.
Enrollment Event Type	Enrollment type.
Coverage Begin Date	Date that coverage begins for the benefit plan.
Deduction Begin Date	Date that deductions begin for the benefit plan.
Coverage End Date	Date that coverage ends for the benefit plan.
Deduction End Date	Date that deductions end for the benefit plan.
Coverage	Coverage type for the employee benefit plan (e.g., who is covered in the benefit plan: Employee + Child, Employee + Spouse, Employee Only; or coverage amount)
Dependents	Dependents covered under the employee benefit plan.
Employee Cost	Employee cost per pay period (e.g., monthly, etc.).
Employer Contribution	Employer contribution per pay period.

7. The System Task is complete.