



STATEWIDE PERSONNEL
— S Y S T E M —

Change Benefits for Life Events

Contents

Enroll a New Employee in Benefits.....	3
Change Spouse to Ex-Spouse	9
Enter Death of Dependent	15
Change Benefits	21
Change Benefit Elections	27
Add a Dependent During an Enrollment Event.....	37
Review Benefits Changes.....	47
View Benefit Election History for an Employee	52

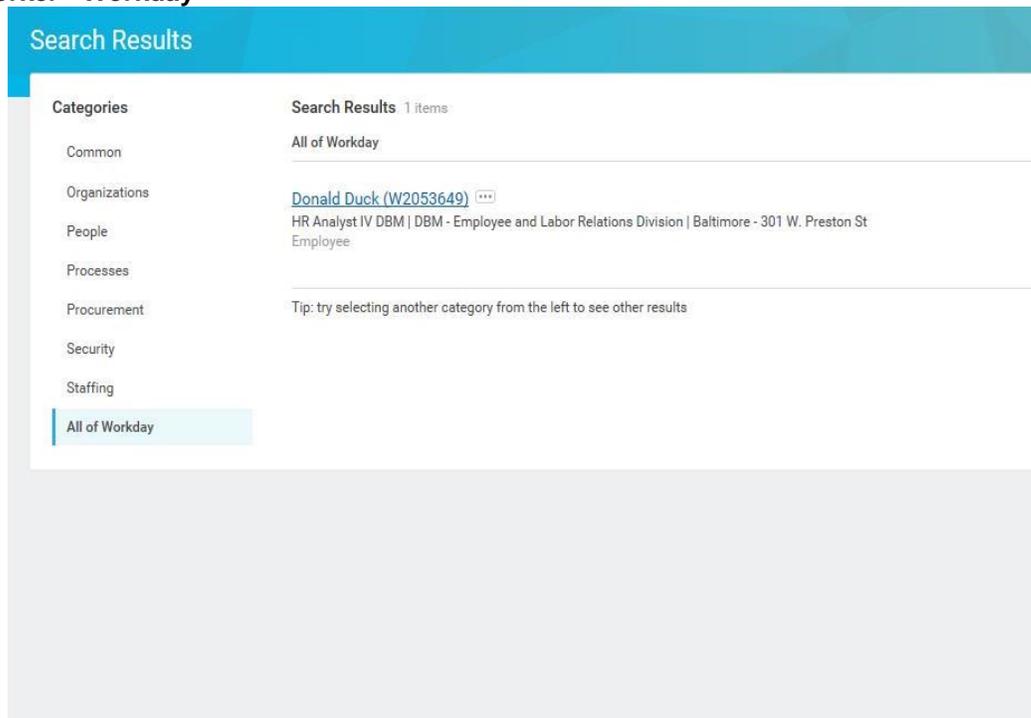
Enroll a New Employee in Benefits

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.



Title: Enroll a New Employee in Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner) and Agency Benefits Coordinator

View Worker - Workday

Donald Duck (W2053649)
HR Analyst IV DBM

Actions

Team

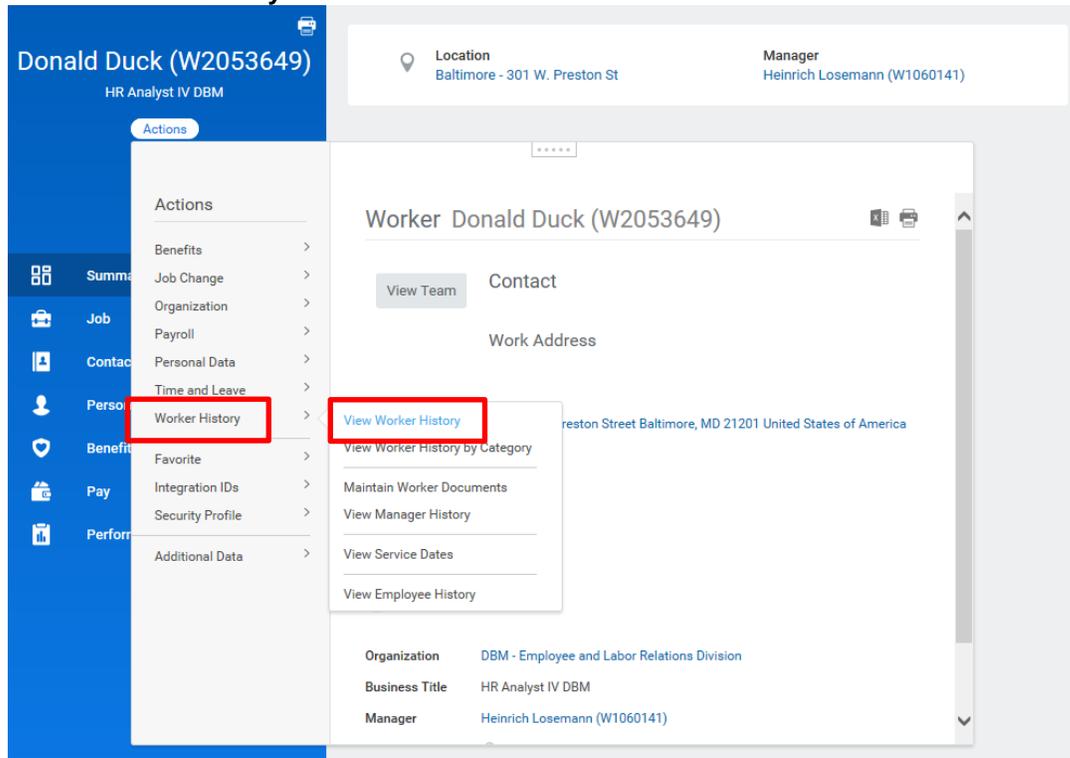
Summary
Job
Contact
Personal
Benefits
Pay
Performance

Location
Baltimore - 301 W. Preston St

Manager
Heinrich Losemann (W1060141)

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

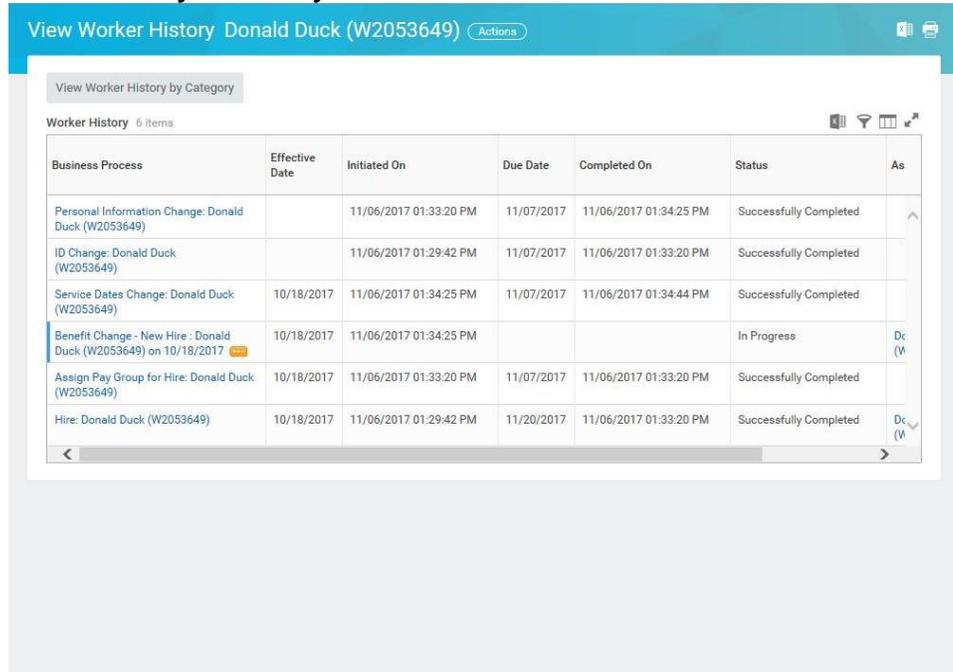
View Worker - Workday



The screenshot displays the Workday interface for viewing a worker's profile. The worker is Donald Duck (W2053649), an HR Analyst IV DBM. The left-hand navigation menu includes sections for Summary, Job, Contact, Personal, Benefits, Pay, and Performance. The 'Worker History' option is highlighted with a red box. A sub-menu is open, showing options like 'View Worker History', 'View Worker History by Category', 'Maintain Worker Documents', 'View Manager History', 'View Service Dates', and 'View Employee History'. The 'View Worker History' option is also highlighted with a red box. The main content area shows the worker's details, including Location (Baltimore - 301 W. Preston St), Manager (Heinrich Losemann (W1060141)), and Work Address (Preston Street Baltimore, MD 21201 United States of America). Below this, there are fields for Organization (DBM - Employee and Labor Relations Division), Business Title (HR Analyst IV DBM), and Manager (Heinrich Losemann (W1060141)).

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

View Worker History - Workday



View Worker History Donald Duck (W2053649) Actions

View Worker History by Category

Worker History 6 Items

Business Process	Effective Date	Initiated On	Due Date	Completed On	Status	As
Personal Information Change: Donald Duck (W2053649)		11/06/2017 01:33:20 PM	11/07/2017	11/06/2017 01:34:25 PM	Successfully Completed	
ID Change: Donald Duck (W2053649)		11/06/2017 01:29:42 PM	11/07/2017	11/06/2017 01:33:20 PM	Successfully Completed	
Service Dates Change: Donald Duck (W2053649)	10/18/2017	11/06/2017 01:34:25 PM	11/07/2017	11/06/2017 01:34:44 PM	Successfully Completed	
Benefit Change - New Hire : Donald Duck (W2053649) on 10/18/2017 	10/18/2017	11/06/2017 01:34:25 PM			In Progress	Dc (W)
Assign Pay Group for Hire: Donald Duck (W2053649)	10/18/2017	11/06/2017 01:33:20 PM	11/07/2017	11/06/2017 01:33:20 PM	Successfully Completed	
Hire: Donald Duck (W2053649)	10/18/2017	11/06/2017 01:29:42 PM	11/20/2017	11/06/2017 01:33:20 PM	Successfully Completed	Dc (W)

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.



Title: Enroll a New Employee in Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner) and Agency Benefits Coordinator

Action Event - Workday

The screenshot displays the 'View Worker History' page for Donald Duck (W2053649). On the left, a 'Worker History' list shows various events, including 'Benefit Change - New Hire : Donald Duck (W2053649) on 10/18/2017'. An 'Actions' menu is open, highlighting 'Enroll in Benefits'. A detailed 'Action Event' window is shown, containing the following information:

- Subject:** Donald Duck (W2053649)
- Overall Status:** In Progress
- Initiated On:** 11/06/2017 01:34:25 PM
- Effective Date:** 10/18/2017

Below the event details is a table with columns for dates and times:

10/18/2017	11/06/2017 01:33:20 PM	11/07/2017	11/06/2017 01:33:20 PM	Successfully Completed	
10/18/2017	11/06/2017 01:29:42 PM	11/20/2017	11/06/2017 01:33:20 PM	Successfully Completed	Dx (W)

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



Title: Enroll a New Employee in Benefits
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner) and Agency Benefits Coordinator

Change Benefit Elections - Workday

Change Benefit Elections New Hire for Donald Duck (W2053649) - Step 1 of 4 Actions

Total Employee Net Cost/Credit
\$0.00 Monthly Cost

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

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)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - CareFirst BCBS PPO (Employee)	<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			

Continue Save for Later Cancel

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.

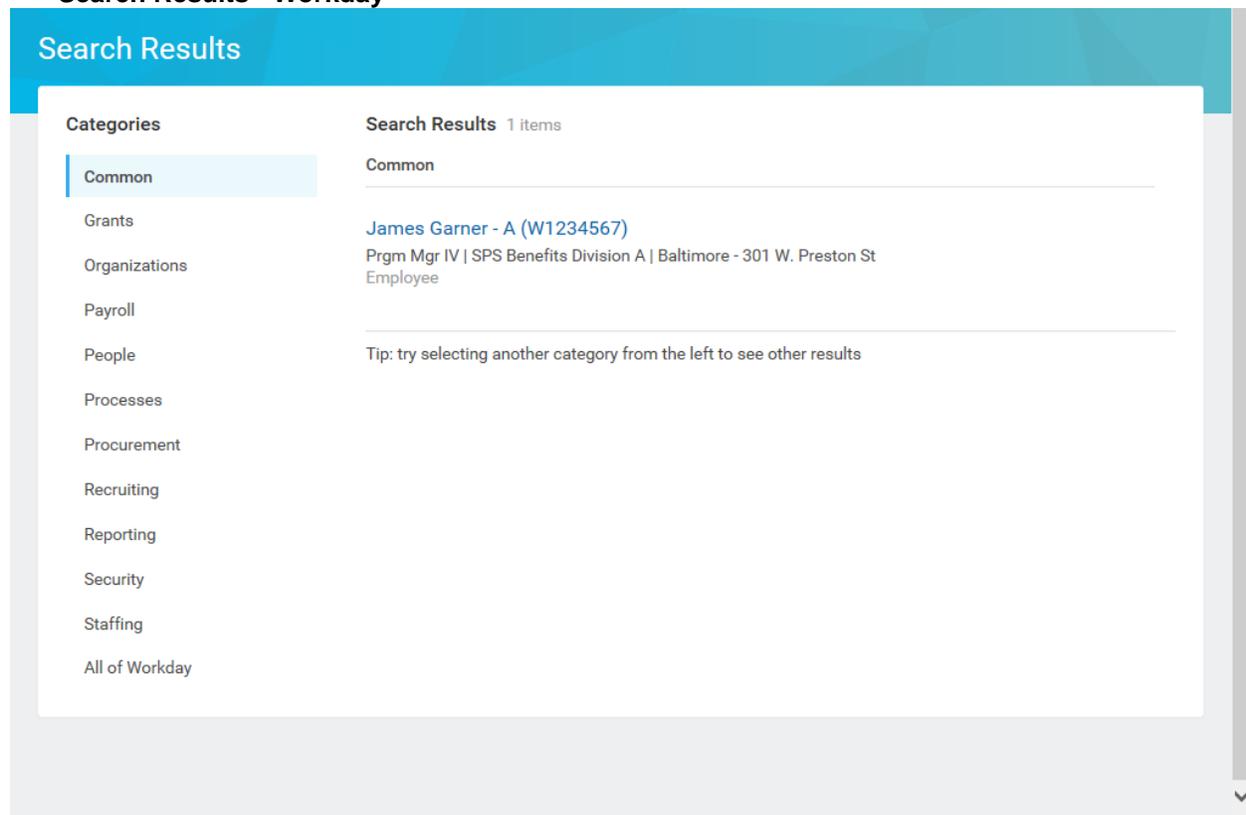
NOTE THAT THIS TASK IS PERFORMED BY EMPLOYEE BENEFITS DIVISION ONLY.

Procedure:

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

2. Click the **search**  icon.

Search Results - Workday



The screenshot shows the Workday search results interface. On the left is a 'Categories' sidebar with 'Common' selected. The main area shows 'Search Results 1 items' under the 'Common' category. The result is for 'James Garner - A (W1234567)', a Program Manager IV in the SPS Benefits Division A at Baltimore, with the address 301 W. Preston St. A tip at the bottom suggests selecting another category for more 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

Summary

Job

Contact

Personal

Compensation

Benefits

Pay

More (3)

Location
Baltimore - 301 W. Preston St

Manager
David Hayden (W1231234)



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

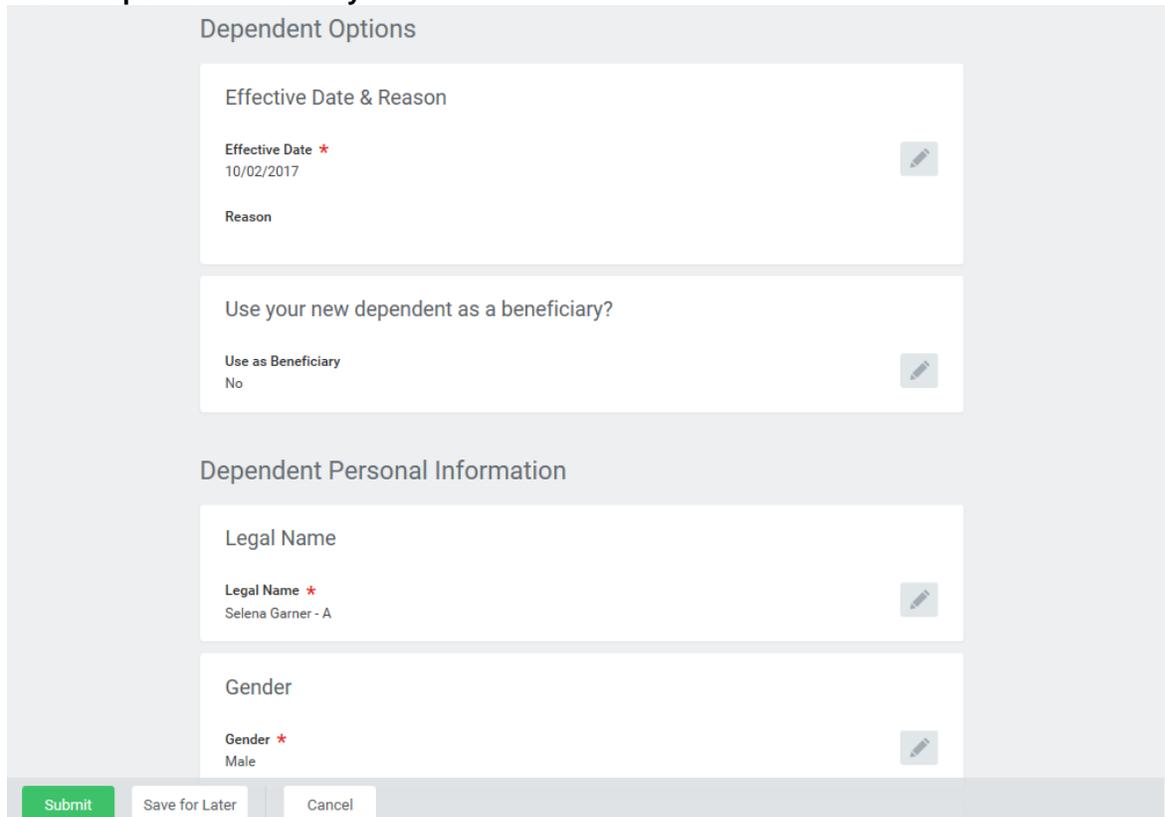
Add

Dependents 5 items

Dependent	Relationship	Age	Benefit Elections	
Cody Garner	Child	0 years, 2 months, 0 days		Delete Edit
Jay Garner - A	Child	22 years, 3 months, 29 days		Delete Edit
Kay Garner - A	Child	21 years, 3 months, 28 days		Delete Edit
Richard Garner - A	Child	20 years, 4 months, 0 days		Delete Edit
Selena Garner - A	Spouse	49 years, 4 months, 15 days	James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Dental - United Concordia DPPD (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



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.



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

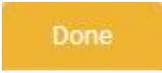
You have submitted Dependent Event: Selena Garner - A on 10/02/2017 Actions  



Process Successfully Completed

[Details and Process](#)

Done

9. Click the **Done**  button.

 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.



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

Enter Death of Dependent

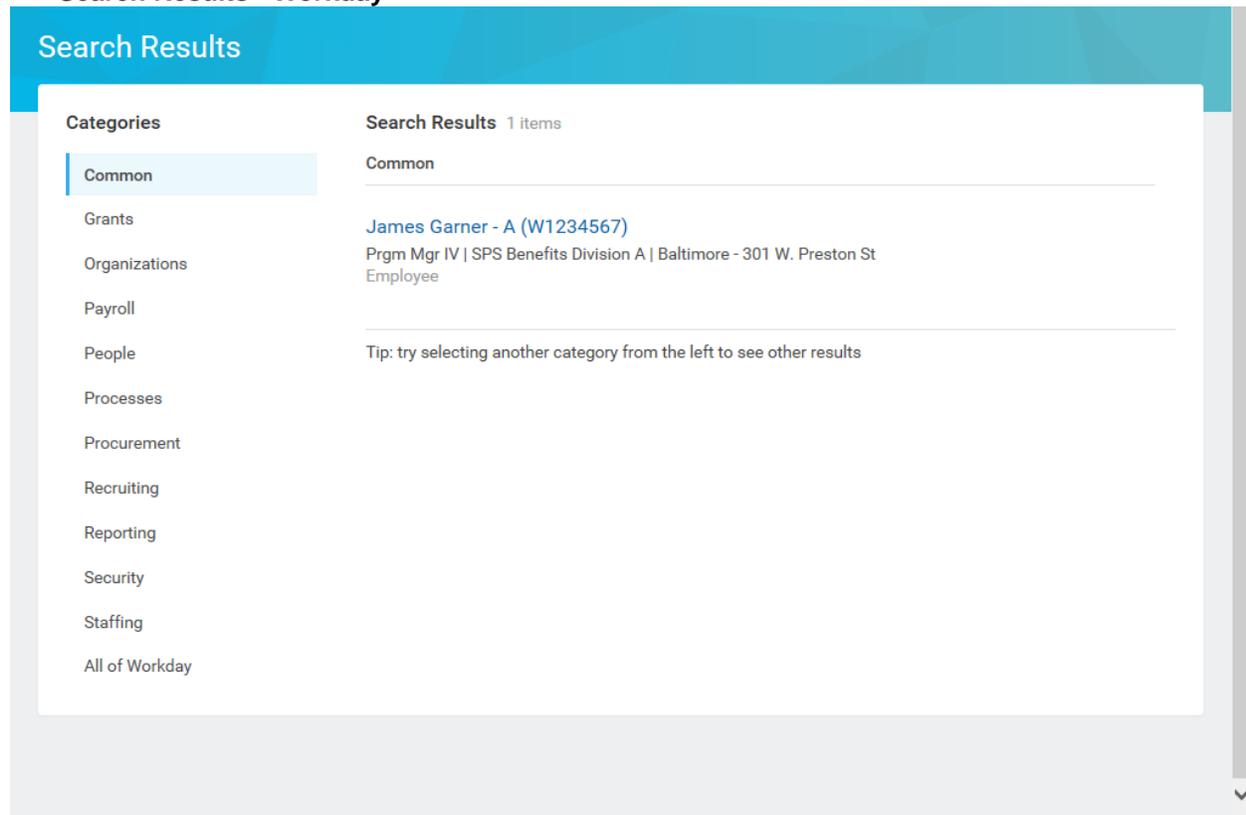
In this procedure you will mark the dependent as deceased and enter the date of death.

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



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 and highlighted. The main content area shows 'Search Results 1 items' under the 'Common' category. A search result is displayed for 'James Garner - A (W1234567)', with the job title 'Prgm Mgr IV | SPS Benefits Division A | Baltimore - 301 W. Preston St' and the role '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 search results area.

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

Summary

Job

Contact

Personal

Compensation

Benefits

Pay

More (3)

Location
Baltimore - 301 W. Preston St

Manager
David Hayden (W1231234)



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

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

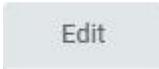
Summary
Job
Contact
Personal
Benefits
Pay
Performance

Benefits | Dependents

Add

Dependents 5 items

Dependent	Relationship	Age	Benefit Elections	
Cody Garner	Child	0 years, 2 months, 0 days		Delete Edit
Jay Garner - A	Child	22 years, 3 months, 29 days		Delete Edit
Kay Garner - A	Child	21 years, 3 months, 28 days		Delete Edit
Richard Garner - A	Child	20 years, 4 months, 0 days		Delete Edit
Selena Garner - A	Spouse	49 years, 4 months, 15 days	James Garner - A (W1234567) Benefit Elections Active on 01/01/2017 (Dental - United Concordia DPPD (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

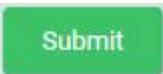
Legal Name *
Selena Garner - A 

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)

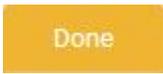
You have submitted - Workday

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.



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.



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

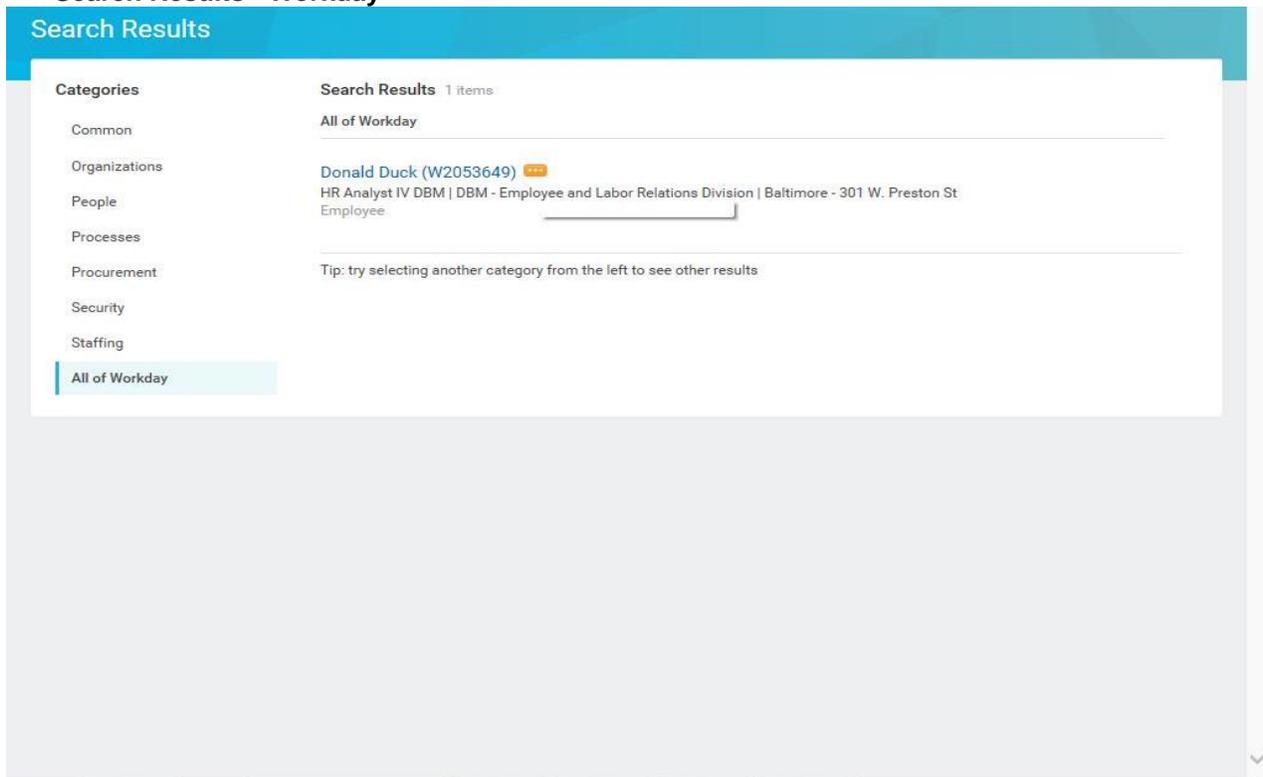
Change Benefits

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



The screenshot shows the Workday search results interface. On the left, there is a 'Categories' sidebar with options: Common, Organizations, People, Processes, Procurement, Security, Staffing, and All of Workday (which is selected). The main area is titled 'Search Results 1 items' and shows 'All of Workday' as the selected category. Below this, a search result is displayed for 'Donald Duck (W2053649)' with a 'More' icon. The details for this result are: 'HR Analyst IV DBM | DBM - Employee and Labor Relations Division | Baltimore - 301 W. Preston St Employee'. A tip at the bottom of the results area reads: 'Tip: try selecting another category from the left to see other results'.

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) and Agency Benefits Coordinators

Worker - Workday

The screenshot shows the Workday interface for a worker named Donald Duck (W2053649). The 'Search Results' section displays the worker's name and title: 'HR Analyst IV DBM | DBM - Employee'. A 'Categories' sidebar on the left lists various filters, with 'All of Workday' selected. An 'Actions' dropdown menu is open, listing various options such as 'Job Change', 'Payroll', and 'Benefits'. The 'Benefits' option is highlighted with a red box. A secondary dropdown menu is visible, listing numerous benefit-related actions, with 'Change Benefits' at the top, also highlighted with a red box. Other actions 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', '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 Donald Duck (W2053649) Actions

Benefit Event Type *

Benefit Event Date *

Submit Elections By *

Open Elections for (empty)

Attachments

Drop files here
 or

Benefit Election History 1 item 🔍 📄 ↻

Event	Current	Benefits Details	Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed	Corre Hi
🔍	<input type="checkbox"/>	Donald Duck (W2053649) Benefit Elections Active on 10/18/2017	New Hire	10/18/2017	11/06/2017	12/16/2017	11/08/2017 01:28:01.490 PM	⬆️ ⬆️

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

Change Benefits Donald Duck (W2053649) Actions

Benefit Event Type *

Benefit Event Date *

Submit Elections By *

Open Elections for

- Spouse Life
- Prescription
- Medical
- Life Ins - Supplemental
- Life Ins - Guaranteed
- [+ More \(5\)](#)

Attachments

Drop files here
 or

Benefit Election History 1 item 🔍 📄 🗑️

Event	Current	Benefits Details	Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed	Corre Hi
Submit	Save for Later	Cancel	Benefit	New	10/19/2017	11/08/2017	12/16/2017	11/09/2017 01:28:01:490 PM

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

Change Benefits Donald Duck (W2053649) Actions

Benefit Event Type * Birth/Adoption (Employee)

Benefit Event Date * 11 / 08 / 2017

Submit Elections By * 01 / 06 / 2018

Open Elections for

- Spouse Life
- Prescription
- Medical
- Life Ins - Supplemental
- Life Ins - Guaranteed
- [More \(5\)](#)

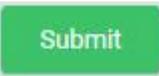
Attachments

 Birth Certificate.pdf 

Comment

Benefit Election History 1 item   

Event	Current	Benefits Details	Enrollment Event Type	Event Date	Initiated On	Submit Elections By	Last Changed	Corre Hi
<input type="text"/>		Donald Duck (W2053649) Benefit Elections Active on 10/18/2017	New Hire	10/18/2017	11/06/2017	12/16/2017	11/08/2017 01:28:01.490 PM	 

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) and Agency Benefits Coordinators

You have submitted - Workday

You have submitted Benefit Event: Donald Duck (W2053649) on 11/08/2017 [Actions](#)  

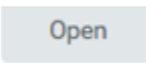


Process Successfully Completed

[Do Another](#)
[Change Benefits](#)

[Details and Process](#)



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) and Agency Benefits Coordinators

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

Change Benefit Elections New Hire for Donald Duck (W2053649) - Step 1 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

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)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>	Employee
Medical - CareFirst BCBS PPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - UnitedHealthcare EPO (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

Continue

Save for Later

Cancel

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)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>	Employee
Medical - CareFirst BCBS PPO (Employee)	<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		
Prescription - Drug RX (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Dental - Delta Dental DHMO	<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) and Agency Benefits Coordinators

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

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

Spending Account Elections 2 items   

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Healthcare FSA - P&A Group	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 2 Your estimated contributions made this year 0.00 Manual override by user <input type="checkbox"/>	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 Your actual contributions from payroll
\$0.00

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) and Agency Benefits Coordinators

Remaining Payroll Deductions 2

Remaining Deductions Override

Spending Account Elections 2 items

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Healthcare FSA - P&A Group	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 2 Your estimated contributions made this year 0.00 Manual override by user <input type="checkbox"/> 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

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) and Agency Benefits Coordinators

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)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive			

Continue Save for Later Go Back Elect 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)	<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		
AD&D - Securian (Family)	<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 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



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

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) and Agency Benefits Coordinators

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.



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

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) and Agency Benefits Coordinators

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**  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**  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) and Agency Benefits Coordinators

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](#) [Next](#)

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) and Agency Benefits Coordinators

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		

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	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<div style="border: 1px solid #ccc; padding: 5px;"> <p>Existing Dependents</p> <p>Add My Dependent From Enrollment</p> </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

- 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) and Agency Benefits Coordinators

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.



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

6. Click the **OK**  button.

Add My Dependent From Enrollment - Workday

Add Dependent

Relationship *

Use as Dependent

Use as Beneficiary

Inactive Date (empty)

Date of Birth *

Age (empty)

Gender *

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.

OK **Cancel** Personal Information National IDs Additional Government IDs Other IDs

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.



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

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) and Agency Benefits Coordinators

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

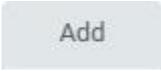
Email
Add

Instant Messenger
Add

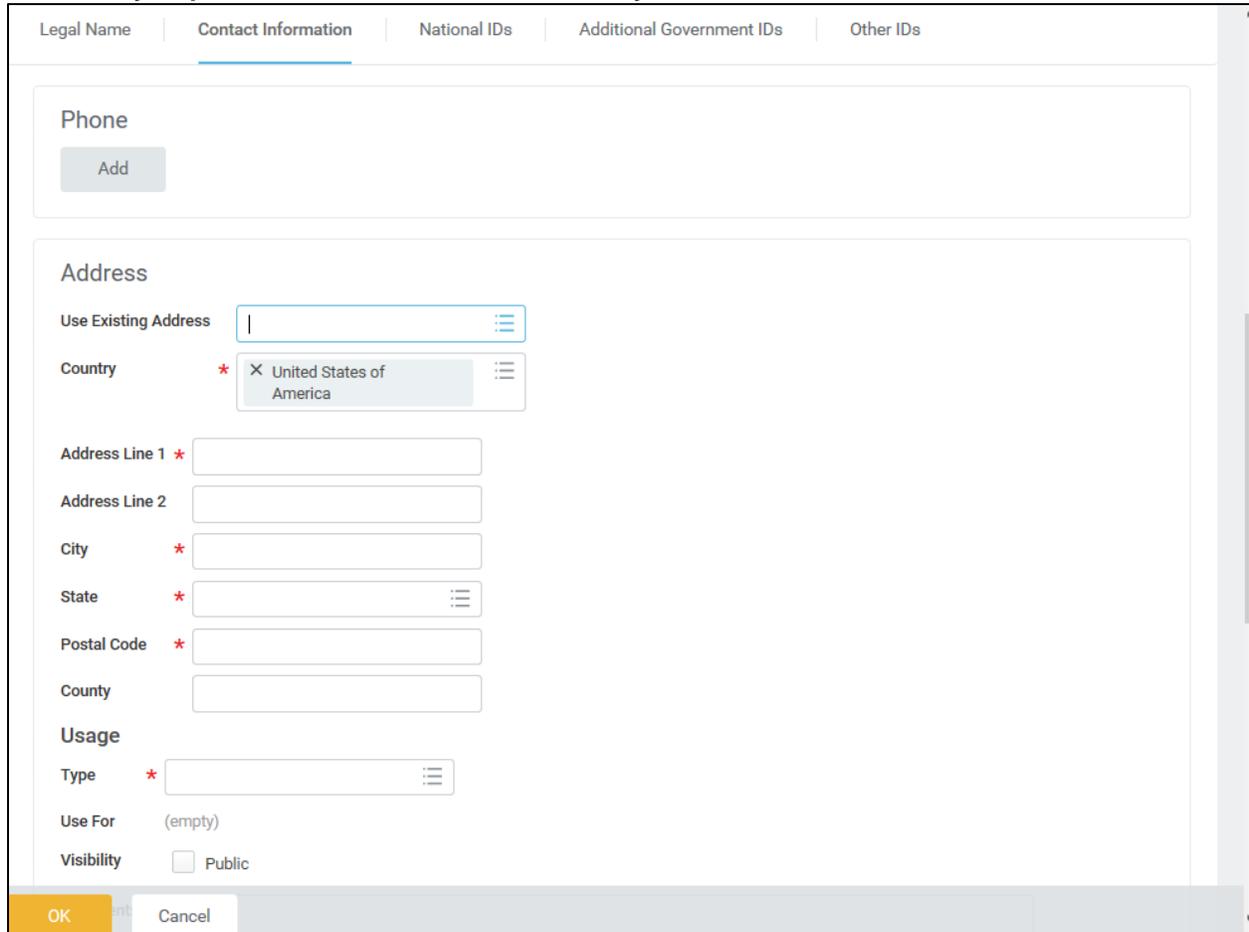
W... ..

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.

Add My Dependent From Enrollment - Workday



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) and Agency Benefits Coordinators

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

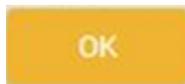
13. Select the **National IDs** **National IDs** tab.

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) and Agency Benefits Coordinators



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.

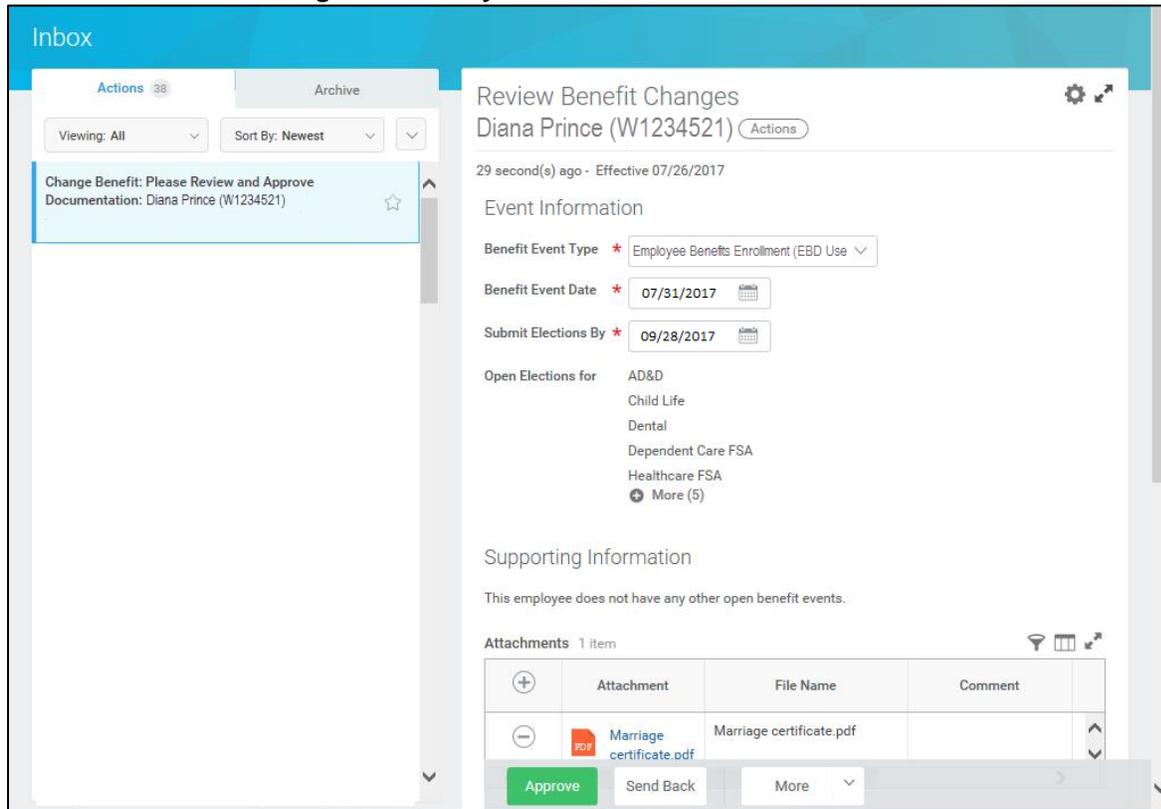
Procedure:

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



Inbox

Actions 33 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.



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

1 of 38 - Workday

← 1 of 38

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	File
	Marriage certificate.pdf	Marriage certificate.pdf		Attach

enter your comment

Approve Send Back Deny Cancel

5. Review the benefit change.

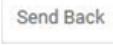


Important! Review before approving to ensure that the correct **Benefit Event Type** and **Benefit Event Date** are correct. Also, review the attachment(s) to validate that it is the correct document(s) needed for this life event.

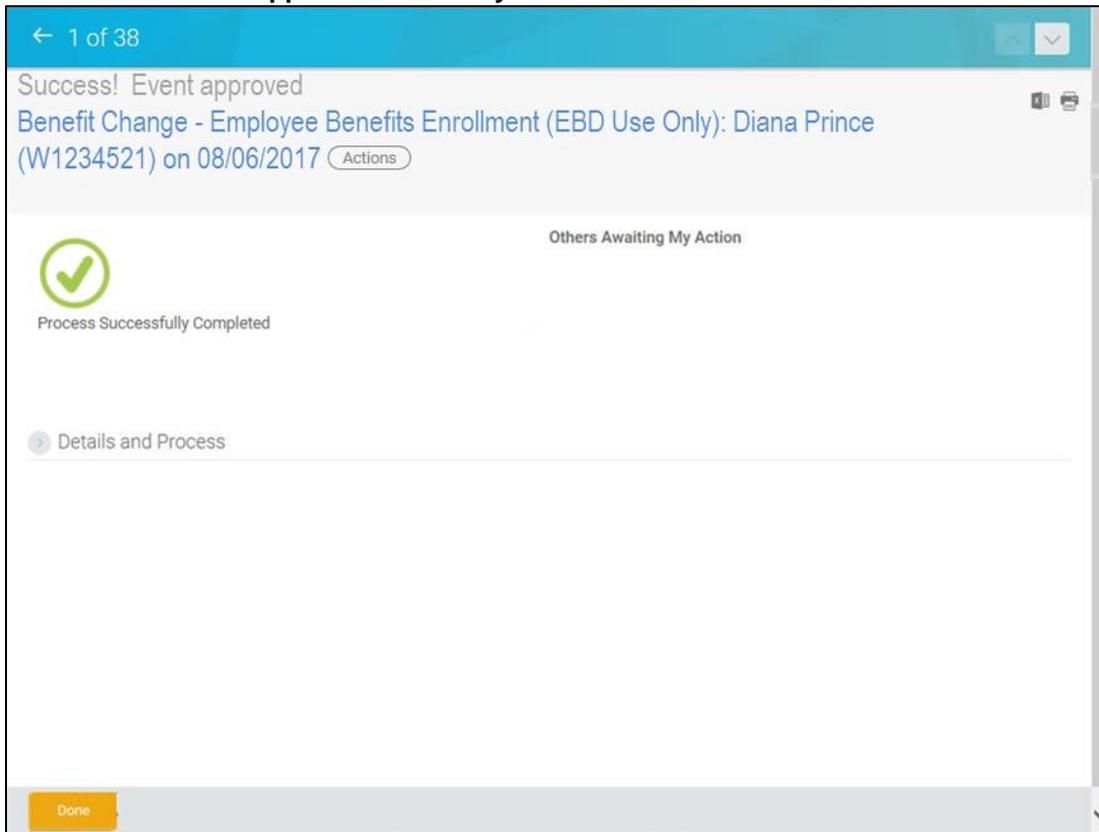


Title: Review Benefits Changes
Functional Area: Benefits Administration
Role: Employee Benefits Division (Central Benefits Partner)

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. Note that your changes will not be changed if canceled.

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 because you have completed the action on it.

8. The System Task is complete.



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

View Benefit Election History for an Employee

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

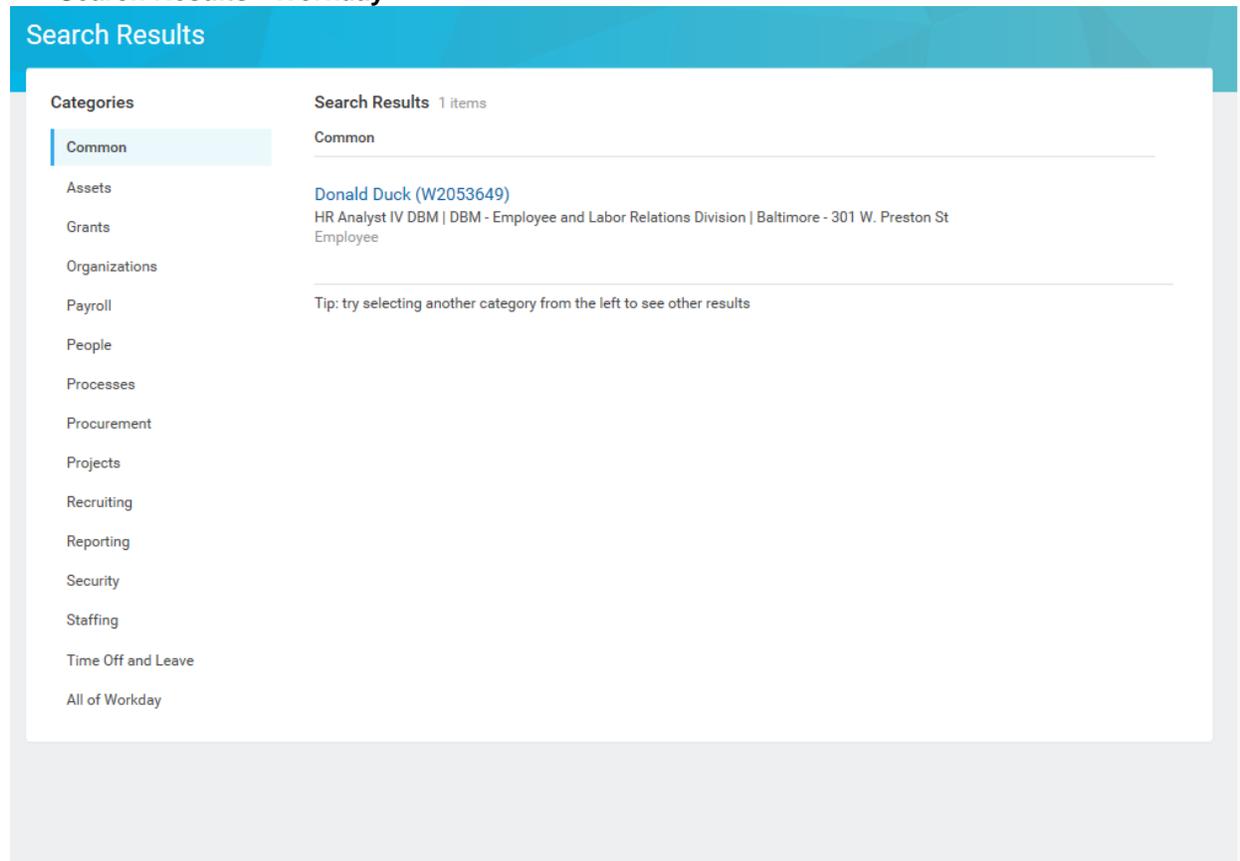
The Employee Benefits Division can view benefit election history for all employees and retirees.

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 results interface. On the left is a 'Categories' sidebar with 'Common' selected. The main area shows 'Search Results 1 items' under the 'Common' category. The result is for 'Donald Duck (W2053649)', an HR Analyst IV DBM in the Employee and Labor Relations Division. A tip at the bottom suggests selecting another category to see other results.

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) and Agency Benefits Coordinator

Worker - Workday

Search Results

The screenshot displays the Workday interface for a worker. On the left, a 'Categories' sidebar lists various organizational areas, with 'Common' selected. The main area shows search results for 'Donald Duck (W2053649)', an HR Analyst IV DBM | DBM - Employee. A dropdown menu is open over the 'Benefits' action, listing various options. The 'View Benefit Election History' option is highlighted with a red box. The 'Worker' section on the right lists various actions related to benefits, including 'Change Benefits', 'View Current Benefit Elections', 'View Benefit Election History', 'View Benefit Coverage History', 'View Benefits Eligibility', 'View Benefit Eligibility Rule Results', 'View Beneficiaries', 'View Dependents', 'Change Benefits Annual Rate', 'View Benefits Annual Rate', 'Change Benefits Annual Credit', 'View Benefits Annual Credit', 'View Benefit Jobs', 'View Passive Alerts', 'Change Medicare Data', 'Change Medicare Part D EGWP Data', and 'Change My Medicare Data'.

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) and Agency Benefits Coordinator

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
Q		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	^ v

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.



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

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.



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

Search Results

Search Results

Categories

- Common
- Grants
- Organizations
- Payroll
- People
- Processes
- Procurement
- Recruiting
- Reporting
- Security
- Staffing
- Time Off and Leave
- All of Workday

Search Results 1 items

Common



Jennifer Lopez (W1234567)
Corr Officer II | DPSCS - MCIJ Major 7-3 | Baltimore - 401 E. Eager St
Employee

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

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



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

Search Results

The screenshot shows a web application interface for 'Search Results'. On the left is a 'Categories' sidebar with options like Common, Organizations, Payroll, People, Processes, Procurement, Recruiting, Reporting, Security, Staffing, Time Off and Leave, and All of Workday. The main content area shows 'Search Results 1 Items' under the 'Common' category. A profile card for 'Jennifer Lopez (W1234567)' is displayed, with her title 'Corr Officer II | DPSCS - MCIJ Me' and role 'Employee'. A 'Tip: try selecting another category from the' is visible below the profile. An 'Actions' menu is open over the profile, listing various options such as 'Change Benefits', 'View Current Benefit Elections', 'View Benefit Election History', 'View Benefit Coverage History' (highlighted with a red box), 'View Benefits Eligibility', 'View Benefit Eligibility Rule Results', 'View Beneficiaries', 'View Dependents', 'View Current Retirement Savings Elections', 'View Retirement Savings Election History', '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', '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 View Benefit Coverage History.



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

Benefit Coverage History

Benefit Coverage History Jennifer Lopez (W1234567) Actions

Benefit Group FT & PT FTE 50% Bi-Weekly

Health Care | Insurance

Health Care 9 items

Current	Benefit Plan	Event Date	Enrollment Event Type	Coverage Begin Date	Deduction Begin Date	Coverage End Date	Deduction End Date	Co
Yes	Medical - CareFirst BCBS PPO (Employee)	01/31/2018	Loses Coverage Elsewhere (Employee)	02/01/2018	02/01/2018			En
	Medical - CareFirst BCBS PPO (Employee)	01/01/2018	Open Enrollment 2018	01/01/2017	01/01/2017			En
	Medical - CareFirst BCBS PPO (Employee)	01/01/2017	Z Conversion-Health	01/01/2017	01/01/2017			En
Yes	Prescription - Drug - (Employee)	01/31/2018	Loses Coverage Elsewhere (Employee)	02/01/2018	02/01/2018			En
	Prescription - Drug - (Employee)	01/01/2018	Open Enrollment 2018	01/01/2017	01/01/2017			En
	Prescription - Drug - (Employee)	01/01/2017	Z Conversion-Health	01/01/2017	01/01/2017			En
Yes	Dental - United Concordia DPPO (Employee)	01/31/2018	Loses Coverage Elsewhere (Employee)	02/01/2018	02/01/2018			En
	Dental - United Concordia DPPO (Employee)	01/01/2018	Open Enrollment 2018	01/01/2017	01/01/2017			En
	Dental - United Concordia DPPO (Employee)	01/01/2017	Z Conversion-Health	01/01/2017	01/01/2017			En

- View the benefits coverage history.
- 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.

- The System Task is complete.