Change Benefits – Life Events
Employee Job Aid
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Complete Initial Benefit Elections (New Hires)

When you are first hired, you will get a “New Hire” task in your Workday Inbox to complete your initial benefit elections. Use this procedure to find the task to complete in your Inbox.

Procedure:

1. Click the My Account icon.

Search Results - Workday

2. Select the Inbox hyperlink.

CPBI and Benefits Only employees will not have all of the worklets shown on this page.

⚠️ Shortcut: You can also access your Inbox by clicking the Inbox worklet from your home page.
3. Select the Toggle Fullscreen Viewing Mode button to enlarge the screen.
Change Benefits Elections

Refer to the Elect or Change Benefit Elections section of this job aid for instructions on how to complete your benefit elections.

4. The System Task is complete.
Change Benefits (Initiate a Life Event)

Use this procedure to initiate a life event. Examples of life events include birth/adoption, marriage, divorce, death of dependent, etc. When you perform this initial task, you are initiating the event and submitting the applicable documentation. You will have an opportunity later in the process to change your benefit elections.

Procedure:

1. Click the **Benefits** worklet.

2. In the Change section, click the **Benefits** button.
3. Select the applicable **Benefit Event Type** from the drop down box.
<table>
<thead>
<tr>
<th>Benefit Event Type</th>
<th>Required Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee: Birth/Adoption</strong></td>
<td>Biological child:&lt;br&gt;• Copy of child’s official state birth certificate with name of employee listed as child’s parent.</td>
</tr>
<tr>
<td><strong>Retiree: Birth/Adoption</strong></td>
<td><strong>Adopted Child:</strong>&lt;br&gt;• Pending Adoption: Notice of placement for adoption on adoption agency letterhead or copy of court order placing child pending final adoption.&lt;br&gt;• Final Adoption: Copy of final adoption decree signed by a judge or a state-issued birth certificate showing employee as parent.</td>
</tr>
<tr>
<td><strong>Employee: Change in Dependent Daycare</strong></td>
<td><strong>To Reduce the Annual Amount:</strong>&lt;br&gt;• Letter from the daycare provider on letterhead indicating a reduction in rate or a reduction in hours with the effective date of the change.</td>
</tr>
<tr>
<td><strong>Retiree: Change in Dependent Daycare</strong></td>
<td><strong>To Cancel:</strong>&lt;br&gt;• Letter from the daycare provider on letterhead indicating the last day the dependent attended the daycare.</td>
</tr>
<tr>
<td><strong>Employee: Child Support Order</strong></td>
<td>Copy of child support order</td>
</tr>
<tr>
<td><strong>Retiree: Child Support Order</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Employee: Death of Dependent</strong></td>
<td>Death certificate</td>
</tr>
<tr>
<td><strong>Retiree: Death of Dependent</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Employee: Dependent Arriving in US</strong></td>
<td>In addition to the documentation required to show proof of relationship, a copy of the passport with the arrival date indicated and proof of permanent residency.&lt;br&gt;<strong>For children:</strong>&lt;br&gt;• One of the following – letter from school, daycare provider or pediatrician on letterhead indicating address on file, driver’s license/identification card, or lease agreement. &lt;br&gt;<strong>For spouse:</strong>&lt;br&gt;• One of the following – driver’s license/identification card, mortgage/lease agreement, letter from employer on letterhead indicating address on file.</td>
</tr>
</tbody>
</table>
**Title:** Change Benefits (Initiate a Life Event)  
**Functional Area:** Benefits Administration  
**Role:** Employees

| Employee: Dependent Leaving US | One of the following –  
| Retiree: Dependent Leaving US | • Copy of flight itinerary,  
| | • Copy of Lease agreement or mortgage.  
| | • Letter from employer on letterhead indicating permanent address on file.  
| | For children - letter from school/daycare on letterhead indicating permanent address on file.  

| Employee: Divorce | Divorce decree  
| Retiree: Divorce |  

| Employee: Gains Coverage Elsewhere | Letter from other employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents and the effective date of the new coverage.  
| Retiree: Gains Coverage Elsewhere |  

| Employee: Legal Guardianship | Copy of Legal Ward/Testamentary court document, signed by a judge.  
| Retiree: Legal Guardianship |  

| Employee: Loses Coverage Elsewhere | Letter from previous employer (on company letterhead) or the insurance provider. The letter must list the names of your covered dependents and the effective date of the loss of coverage.  
| Retiree: Loses Coverage Elsewhere |  

| Employee: Marriage | Official State marriage certificate (must be a certified copy and dated by the appropriate State or County official after the date of marriage, such as the Clerk of Court).  
| Retiree: Marriage |  

4. **Enter or select the Benefit Event Date.**

   ![Info icon](image)

   This is the date that the life event occurred. For example, a child was born on January 15<sup>th</sup> – the **Benefit Event Date** is January 15<sup>th</sup>.  

   The **Submit Elections By date** will automatically populate based on the date entered for the **Benefit Event Date**. It will populate to 60 days after the **Benefit Event Date**.

   In general, the Benefit Event Date can NOT be greater than 60 days in the past except for the following:

<table>
<thead>
<tr>
<th>Benefit Event Type</th>
<th>Benefit Event Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee: Death of Dependent</td>
<td>Date can be &gt; 60 days in the past</td>
</tr>
<tr>
<td>Employee: Divorce</td>
<td>Date can be &gt; 60 days in the past</td>
</tr>
<tr>
<td>Employee: Gains Coverage Elsewhere</td>
<td>Date can be in the future</td>
</tr>
<tr>
<td>Employee: Loses Coverage Elsewhere</td>
<td>Date can be in the future</td>
</tr>
</tbody>
</table>
5. Attach the applicable document for the event.
   - In the **Attachments** section, click the **Select Files** button.
   - Browse to the document on your computer and select it.
   - Click the **Open** button to attach the required documentation.

   ![Drop files here](image)

   See the table in step 3 for details on which documents should be attached for each **Benefit Event Type**.

**IMPORTANT:** *If you cannot attach the documents, you have two options:*
1) Go to your ABC and log in to the system. Have the ABC help you attach the docs.
2) Submit the event without the docs and take the docs to your ABC for them to scan/attach.
The document that you attached will be displayed in the Attachments section.

If you need to attach additional documents, click the Upload button. You can attach one additional document at a time or select multiple documents to attach at once.

6. 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 the Save for Later button to save your changes but not submit. You can find this task in your Workday Inbox later to complete it.
- Click the Cancel button to cancel the process and start at another time.
You have submitted - Workday

7. Click the **Done** button.

   The life event change that you initiated will be routed to the Central Benefits Partner at the Employee Benefits Division to review and approve the documentation. Once the event is approved, you will receive a task in your Workday Inbox to change benefit elections. See the **Elect or Change Benefit Elections** section of this job aid for instructions on how to complete this.

8. The System Task is complete.
Elect or Change Benefits Elections

Use this procedure to elect or change benefit elections.

**EMPLOYEES WHO HAVE INITIATED A LIFE EVENT:** Start at step 1 of this procedure.

**NEW HIRES:** Start at step 3 of this procedure.

**Procedure:**

1. Click the My Account icon.

**Search Results - Workday**

2. Select the Inbox hyperlink.

**Shortcut:** You can also access your Inbox by clicking the Inbox worklet from your homepage.
Worker - Workday

Inbox

Change Benefit Elections
Employee: Birth/Adoption for Chris King (W2009364) - Step 1 of 4

Total Employee Net Cost/Credit
$291.92 Monthly Cost

Event Date: 10/01/2018
Initiated On: 10/12/2018
Submit Elections By: 11/29/2018

7 second(s) ago - Effective 10/01/2018

Health Care Elections: 8 items

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>'Elect / Waive'</th>
<th>Enroll Depen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - CaeFirst BCBS EPO (Employee)</td>
<td>[ ] Elect</td>
<td>[ ] Kay Pratt</td>
</tr>
<tr>
<td>Medical - CaeFirst BCBS PPO (Fmo/None)</td>
<td>[ ] Elect</td>
<td>[ ] Selena Pnt</td>
</tr>
</tbody>
</table>

Continue | Save for Later | Cancel
3. You are now on the **Health Care Elections** page of Change Benefit Elections. Scroll down if necessary to view all items.
4. Make your elections on this screen. Note that benefits plans are automatically waived if you are not currently enrolled in the plan.
   - Select **Elect** to enroll in Medical.
   - Select **Elect** to enroll in Prescription drug coverage.
   - Select **Elect** to enroll in Dental coverage.

   Note that the system will only allow you to elect one of the medical and one dental plan.

   Note: Leave election set to Waive for coverage in which you do not wish to enroll.

   - 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](#) section of this job aid.

   The coverage level will update based on the dependents selected.
5. Click the **Continue** button to go to the next screen.

### Change Benefits Elections

![Change Benefits Elections screenshot](image)

6. You are now on the **Spending Account Elections** page of Change Benefit Elections. Scroll down if necessary to view all items.

**Note:** Contractual and Temporary employees will not have the **Spending Account Elections** page. They will go directly to the **Insurance Elections** page.
7. On this screen:
   - To enroll in the Healthcare FSA, select **Elect**.
   - To enroll in the Dependent Care FSA, select **Elect**.

   You will have to enter the amount that you want to contribute for the whole year or per paycheck for both Healthcare FSA and Dependent Care FSA. The system will calculate the monthly deduction amount.

   The minimum and maximum contribution amounts are listed on the screen.

8. Click the **Continue** button to go to the next screen.
9. You are now on the **Insurance Elections** page of Change Benefit Elections. Scroll down if necessary to view all items.
10. On this screen:

- To enroll in Term Life insurance select **Elect**.
  
  You can select up to $50,000 of term life insurance under the Life Ins – Guaranteed – MetLife (Employee). **Ensure that you select the value of the life insurance that you want to choose FROM THE COVERAGE LEVEL LIST. Do not type it in manually. (To see the values, click in the Coverage Level field).**

- If you want to enroll in more than $50,000 of term life insurance, select **Elect** Life Ins – Supplemental – MetLife (Employee).
  
  **DO NOT select an amount in this field unless you have entered $50,000 in the term life insurance guaranteed election. Any life insurance above $50,000 will be a post-tax deduction from your paycheck which means you WILL have to pay taxes on the amount deducted.**
Evidence of insurability is required for amounts over $50,000.

You need to add the Guaranteed and Supplemental insurance together to get the total amount elected.

- To enroll in Spouse Life select Elect and select dependent(s) covered.

In order to be eligible for Spouse Term Life insurance you must be enrolled in Term Life insurance. The amount for Spouse Term life insurance cannot be more than half of the amount that you have selected for Guaranteed and Supplemental insurance combined.

- To enroll in Child Life select Elect and select dependent(s) covered.

In order to be eligible for Child Life insurance, you must be enrolled in Life insurance. The amount for Child life insurance cannot be more than half of the amount that you have selected for Guaranteed and Supplemental insurance combined.

Note that if you elect life insurance to any amount above the guaranteed amount (or any amount already above that amount), you will not see the new amount until Securian approves the additional life insurance.

- To enroll in AD&D Insurance select Elect. Select either Employee or Employee + Family and select the amount from the list. Select dependents covered if Employee + Family is selected.

11. Click the Continue button to go to the next screen.
12. On the **Benefit Elections Review** page, review your benefit elections and the total monthly cost for your benefit elections.
13. **New Hires Only**: Attach any documents for new dependents.

If you are selecting **Employee Only** coverage for new hire election, no documentation is needed.

14. Scroll down if necessary to view all items.
15. Check the "I Agree" checkbox to certify the benefit elections benefit elections you have chosen.

16. Click the Submit button to submit your benefit elections.
17. The benefit elections have been submitted. Select the Print button from this screen if you want to print the Confirmation Summary Statement, otherwise you will not be able to go back and print until after review by Employee Benefits Division is complete. Click the Done button to finish.

Note that the benefit elections that you have submitted have to be approved by Employee Benefits Division before they will be in effect. Once approved, you will be able to view the benefits. Refer to the View Benefit Elections as of Date section of this job aid for instructions on how to view the benefit elections.

18. 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 Health Care Elections page of Change Benefits Elections, select the item(s) to elect under health care elections.
2. Use the prompt in the Enroll Dependents field to enroll dependents for benefits.

- If you are not enrolling in medical coverage, follow the steps for the coverage type for which you want to enroll the dependent.
3. To add a new dependent, select the **Add My Dependent From Enrollment** menu item.

   If you already have an existing dependent, the dependent can be selected using the **Existing Dependents** menu item. **YOU SHOULD CHECK TO SEE IF THE DEPENDENT ALREADY EXISTS BEFORE ADDING A NEW DEPENDENT.**
4. **For SPMS employees only**: Select the **Yes** radio button under the **Is your new dependent already a beneficiary or emergency contact?** question 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, select the **No** radio button.

**CPBI and Benefits Only** employees: Select **No** for this question.

5. **Important System Note**: Answer **No** to the “Use your new dependent as a beneficiary” question.

**Information**: Life insurance beneficiaries are not managed in SPS. Beneficiaries are managed directly by the life insurance vendor. See the Beneficiary Designation form on the DBM Health Benefits website under Term Life and AD&D to designate beneficiaries for your life insurance.
6. Click the OK button.

Add My Dependent From Enrollment - Workday

7. On this screen, 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.
   - Enter the last name of the dependent you are adding in the **Last Name** field.
   - Use the prompt to select the **Relationship** of the dependent.
     - NEVER select “Employee” or “Other” for the **Relationship** or any relationship that indicates it is for “Internal Use Only”.
   - Enter or select the **Date of Birth** of the dependent.
   - Select the **Gender** of the dependent.

8. Scroll down to continue.
Add My Dependent From Enrollment - Workday

Allow Duplicate Name

Check this box only when there is more than one dependent with the same name.

Additional Nationalities

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Address

Use Existing Address

Country

Address Line 1

Address Line 2

City

State

Postal Code

County

Phone & Email

Use Existing Phone

Country Phone Code

Area Code

Phone Number

Phone Extension

Email Address

OK Cancel
9. In the National IDs section, click the Add button.

<table>
<thead>
<tr>
<th>Add</th>
<th>Remove</th>
</tr>
</thead>
</table>

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

- **Country**: United States of America
- **National ID Type**: (either Social Security Number or Tax Identification Number for foreign nationals)
- **Identification #**: 
- **Issued Date**: 
- **Expiration Date**: 

10. Complete the following fields:

   - Use the prompt to select the **Country**.
   - Select the **National ID Type** (either Social Security Number or Tax Identification Number for foreign nationals).
   - Enter the Social Security Number for the dependent in the **Identification #** field OR enter the Tax Identification Number for foreign nationals.

   ![Note icon] Note that if you do not enter the Social Security Number or Tax Identification 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).
11. In the **Address** section, click the **Add** button to enter the address for the dependent.

   ![](image1)

   The **Use Existing Address** prompt can be used to select the address associated with the employee.

   - 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.

12. Click the **OK** button.

   ![](image2)

   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.

13. The System Task is complete.
View Benefit Elections as of Date

Your current benefit elections will display using the View Benefit Elections button. If you want to view future-effective elections or your benefit election history as of a certain date use the View Benefits Elections as of Date button.

**Procedure:**

1. From the home page, click the Benefits worklet.

2. Scroll down to the “View” section.

3. Click the **Benefit Elections as of Date** button.
4. Enter the date for which you want to view your benefit elections.

You have to select an appropriate date otherwise you won’t see the change in benefits.

Example: If you are a New Hire you would enter the 1st of the month on or after your Hire Date (the day the benefits would take effect).

i.e. Hire Date = 3/1/18  View as of 3/1/18
Hire Date = 4/2/18  View as of 5/1/18

5. Click the OK button.
6. View your benefit elections as of a certain date.
   Note: You can use the printer icon {insert icon} to print a copy of the elections.

7. The System Task is complete.