



Title: Check the Status of a Benefit Event
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators and Agency Benefits Liaisons

Check the Status of a Benefit Event

Use this procedure to check the status of a benefit event for an employee. The worker history will show all of the information for each benefit event.

Note that Agency Benefits Coordinators and Agency Benefits Liaisons can only view benefit event changes for their employees. The Employee Benefits Division can view benefit event changes 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

Search Results

Categories

Common

Organizations

People

Processes

Procurement

Revenue

Security

Staffing

All of Workday

Search Results 9 items

Common

[Shailene Woodley - E \(W1000082\)](#)

Benefits Employee | SPS Benefits Division E | Baltimore - 301 W. Preston St
Employee

3. Click the employee name hyperlink.



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Shailene Woodley - E
(W1000082)
Benefits Employee

Actions

Team

Summary

Job

Contact

Personal

Benefits

Pay

Performance

Location
Baltimore - 301 W. Preston St

4. On the Worker Profile, click the **Job** tab.



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5. On the **Job** tab, click the **More**  sub tab and select **Worker History** from the drop-down menu.



Note: You may have to click the **More**  drop down arrow to find a complete list of options.



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View Worker - Workday

Shailene Woodley - E (W1000082)
Benefits Employee

Actions

Team

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

Organizations **Worker History** Additional Data More ▾

View Worker History by Category

Worker History 7 items

Business Process	Effective Date	Initiated On	Completed On	Status
Dependent Event: Kyle Woodley - E on 10/09/2018	10/09/2018	10/09/2018 05:30:50 AM	10/09/2018 05:30:50 AM	Successfully Co
Benefit Change - Employee: Birth/Adoption : Shailene Woodley - E (W1000082) on 10/01/2018	10/01/2018	10/09/2018 05:35:07 AM		In Progress
Benefit Change - Z Conversion-Health : Shailene Woodley - E (W1000082) on 01/01/2018	01/01/2018	09/27/2018 05:18:46 PM	09/27/2018 05:18:46 PM	Successfully Co
Benefit Change - Z Conversion-Insurance : Shailene Woodley - E (W1000082) on 01/01/2018	01/01/2018	09/27/2018 04:36:52 PM	09/27/2018 04:36:52 PM	Successfully Co
Dependent Event: Shailene Woodley - E (W1000082) -	01/01/2017	09/26/2018 09:56:35 PM	09/26/2018 09:56:35 PM	Successfully Co

6. Click the View Worker History by Category **View Worker History by Category** button.



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View Worker - Workday

View Worker History by Category

Shailene Woodley - E (W1000082) [Actions](#)



View Worker History

Staffing Personal Data **Benefits**

Hire History 1 item



Business Process	Initiated On	Start Date	Status	Reason	Organization
Hire: Shailene Woodley - E (W1000082)	09/26/2018 12:16:48 PM	02/12/2014	Successfully Completed	New Hire > JobAps	SPS Benefits Division E

Benefits

7. Click the **Benefits** tab to view benefits related events.



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View Worker - Workday

View Worker History by Category

Shailene Woodley - E (W1000082) [Actions](#)

View Worker History

Staffing Personal Data **Benefits**

Benefits 3 items

Business Process	Benefit Event Type	Initiated On	Event Date	Status
Benefit Change - Z Conversion-Insurance : Shailene Woodley - E (W1000082) on 01/01/2018	Z Conversion-Insurance	09/27/2018 04:36:52.246 PM	01/01/2018	Successfully Completed
Benefit Change - Z Conversion-Health : Shailene Woodley - E (W1000082) on 01/01/2018	Z Conversion-Health	09/27/2018 05:18:46.380 PM	01/01/2018	Successfully Completed
Benefit Change - Employee: Birth/Adoption : Shailene Woodley - E (W1000082) on 10/01/2018	Employee: Birth/Adoption	10/09/2018 05:35:07.711 AM	10/01/2018	In Progress

Dependents 3 items

Business Process	Dependent	Relationship	Initiated On	Status
Dependent Event: Shailene Woodley - E (W1000082) - Benefits Employee on 01/01/2017	Kyle Woodley - E	Spouse	09/26/2018	Successfully Completed

8. A list of benefits related events for the employee will display. Click the hyperlink in the Business Process column for the event for which you want to see details.



Note that you can see the status of the event in the Status column. In this example, the event is still in progress and has not yet been completed.



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View Event - Workday

View Event

Benefit Change - Employee: Birth/Adoption : Shailene Woodley - E (W1000082) on 10/01/2018

Actions

For Shailene Woodley - E (W1000082)
Overall Process Benefit Event: Shailene Woodley - E (W1000082) on 10/01/2018
Overall Status Successfully Completed

Details Process

Benefit Event Type Employee: Birth/Adoption
Initiated On 10/09/2018
Submit Elections By 11/29/2018
Event Date 10/01/2018
Finalized Date (empty)
Benefit Group FT & PT FTE 50% Bi-Weekly
Enrollment Status In Progress

Attachments 1 item

Attachment
 Demo Cheat Sheet for Trainers.xlsx

Elected Coverages 4 items

Coverage	Deduction	Calculated
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- View the details of the event.
- Click the **Overall Process** at the top of the page to view all of the steps involved in the process for the benefit event.

Note: In this example, we click the [Benefit Event: Shailene Woodley - E \(W1000082\) on 10/01/2018](#) link.



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View Event



Benefit Event: Shailene Woodley - E (W1000082) on 10/01/2018 [Actions](#)

For Shailene Woodley - E (W1000082)
Overall Process Benefit Event: Shailene Woodley - E (W1000082) on 10/01/2018
Overall Status Successfully Completed

Details Process

Employee Shailene Woodley - E (W1000082)
Benefit Event Type Employee: Birth/Adoption
Event Date 10/01/2018
Submit Elections By 11/29/2018
Open Elections for AD&D
Child Life
Dental
Dependent Care FSA
Healthcare FSA
[+ More \(5\)](#)

11. Click the Process tab.



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View Event - Workday

View Event

Benefit Event: Shailene Woodley - E (W1000082) on 10/01/2018 Actions



For Shailene Woodley - E (W1000082)
Overall Process Benefit Event: Shailene Woodley - E (W1000082) on 10/01/2018
Overall Status Successfully Completed

Details **Process**

Process History 23 items

Process	Step	Status	Completed On	Due Date	Person	Comme
Change Benefits	Change Benefits	Step Completed	10/09/2018 05:32:47 AM		Benefits Coordinator - E19 (B2000099)	
Change Benefits	Attach Supporting Documentation	Not Required				
Change Benefits	Attach Supporting Documentation	Approved	10/09/2018 05:33:22 AM		Benefits Coordinator - E19 (B2000099) (Agency Benefits Coordinator)	
Change Benefits	Change Benefit: Please Review and Approve Documentation	Approved	10/09/2018 05:35:07 AM		Minnie Mouse (W123457) (Central Benefits Partner)	
Change Benefits	Medicare Documentation is Required. Please review	Not Required				
Change Benefits	To Do: Update Dependent Information	Not Required				
Change Benefits	Integration: INT332_AD&D_Plan_Rollover	Not Required				
Change Benefits	Change Benefit	Not Required				

12. View the information.



On this screen, you can view status of individual tasks in the event, which steps have/have not been completed, which tasks are awaiting action, and who needs to complete the action.

Note: You may have to scroll down to see all of the steps.

13. The System Task is complete.