



Title: View and Manage Documentation for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

View and Manage Documentation for an Employee

Documents uploaded as part of a benefit event can be viewed using this procedure. You can also use this procedure to add, update, or remove benefits documentation for an employee in SPS Benefits such as permanent documentation for dependent verification.

Note that Agency Benefits Coordinators can view and manage benefits documentation for their employees. The Employee Benefits Division can view and manage benefits documentation 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

Search Results

Categories

- Common
- Organizations
- People
- Processes
- Procurement
- Revenue
- Security
- Staffing
- All of Workday

Search Results 9 items

Common

Margot Robie - E (B1000083)
Benefits Employee | SPS Benefits Division E | Baltimore - 301 W. Preston St
Employee

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

3. In the search results, click the employee name hyperlink.



Title: View and Manage Documentation for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

View Worker

Margot Robie - E
(B1000083)
Benefits Employee

Actions

Team

Summary
Job
Contact
Personal
Benefits
Pay
Performance

Location
Baltimore - 301 W. Preston St

Personal

4. On the worker profile, click the **Personal** tab.



Title: View and Manage Documentation for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

View Worker

Margot Robie - E
(B1000083)
Benefits Employee

Actions

Team

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

Personal Information | IDs | Documents | Names

Personal

Gender	Male
Date of Birth	01/31/1957
Age	61 years, 8 months, 12 days
Marital Status	(empty)
Citizenship Status	(empty)

5. Click the **Documents**  sub-tab to access employee documentation.



Title: View and Manage Documentation for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

View Worker

6. Add, update, or delete a document using the applicable procedure below.

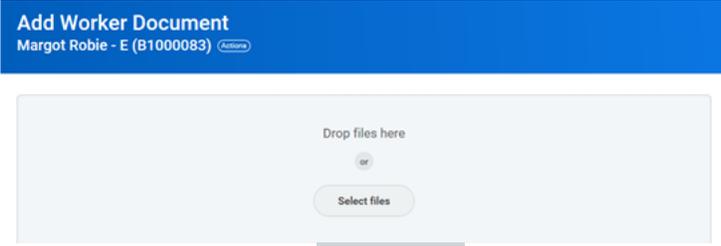
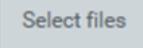


Information: The ABC and ABC Liaison roles have access to the following document categories/folders. Refer to this table for what types of documents are housed in each folder. Refer to the Benefits Supporting Documentation Naming Convention document for naming conventions.

CATEGORY	MODE	USED FOR
Benefits	Add, View	Benefit event documents
Dependent Verification To Be Reviewed	Add, Edit, Delete, View	DVA documents Permanent birth documents
Legal Name Change	View	SPMS agencies can view supporting documents uploaded during HR events
Marital Status Change	View	SPMS agencies can view supporting documents uploaded during HR events



Title: View and Manage Documentation for an Employee
Functional Area: Benefits Administration
Role: Agency Benefits Coordinators

Task	Procedure
To add a document:	<p>1. Click the Add  button.</p>  <p>2. Click the Select Files  button.</p> <p>3. Browse for and select the document.</p> <p>4. Select Document Category.</p> <p>5. Enter a comment if applicable.</p> <p>6. Click the OK  button.</p>
To edit document information:	<p>1. Click the Edit  button.</p> <p>2. Update as needed.</p> <p>3. Click the OK  button.</p>
To delete a document:	<p>1. Click the Delete  button.</p> <p>2. Verify the document to be deleted.</p> <p>3. Click the OK  button.</p>
To view a document:	<p>1. Click the name in the Worker Document Name column to download the file.</p>

7. The System Task is complete.