Add Benefits Documentation for an Employee or Retiree

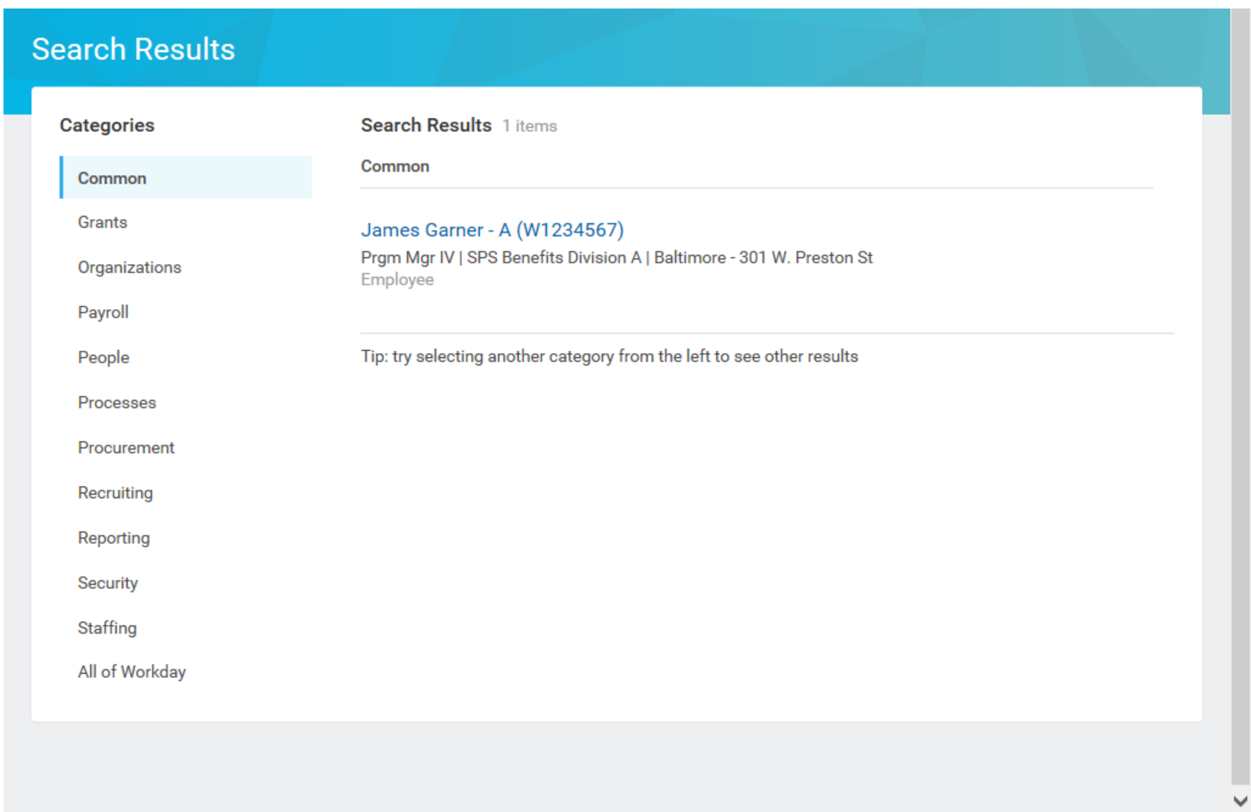
Use this procedure to add, update, or remove benefits documentation for an employee (or retiree) in Workday.

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

Procedure:

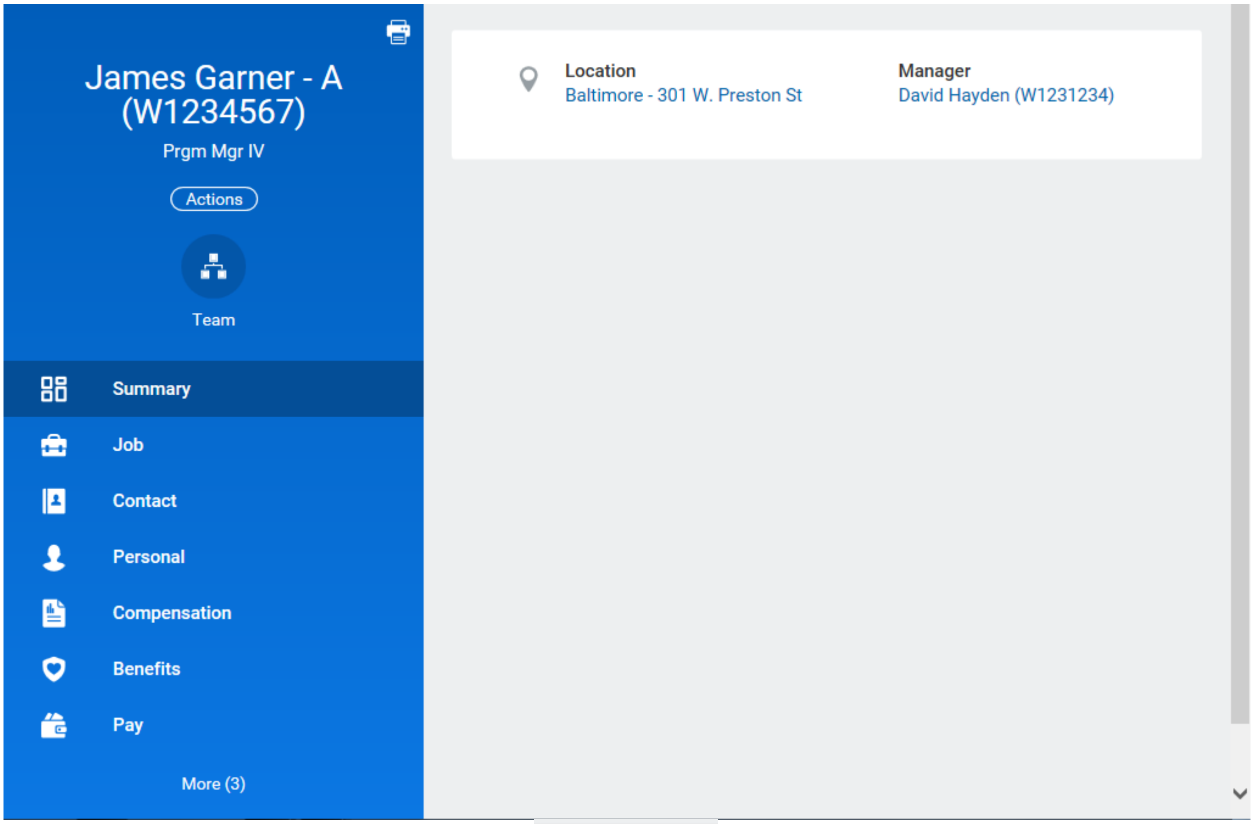
1. Enter the employee name or W number in the **Search** field.
2. Click the **search**  icon.

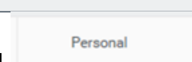
Search Results



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

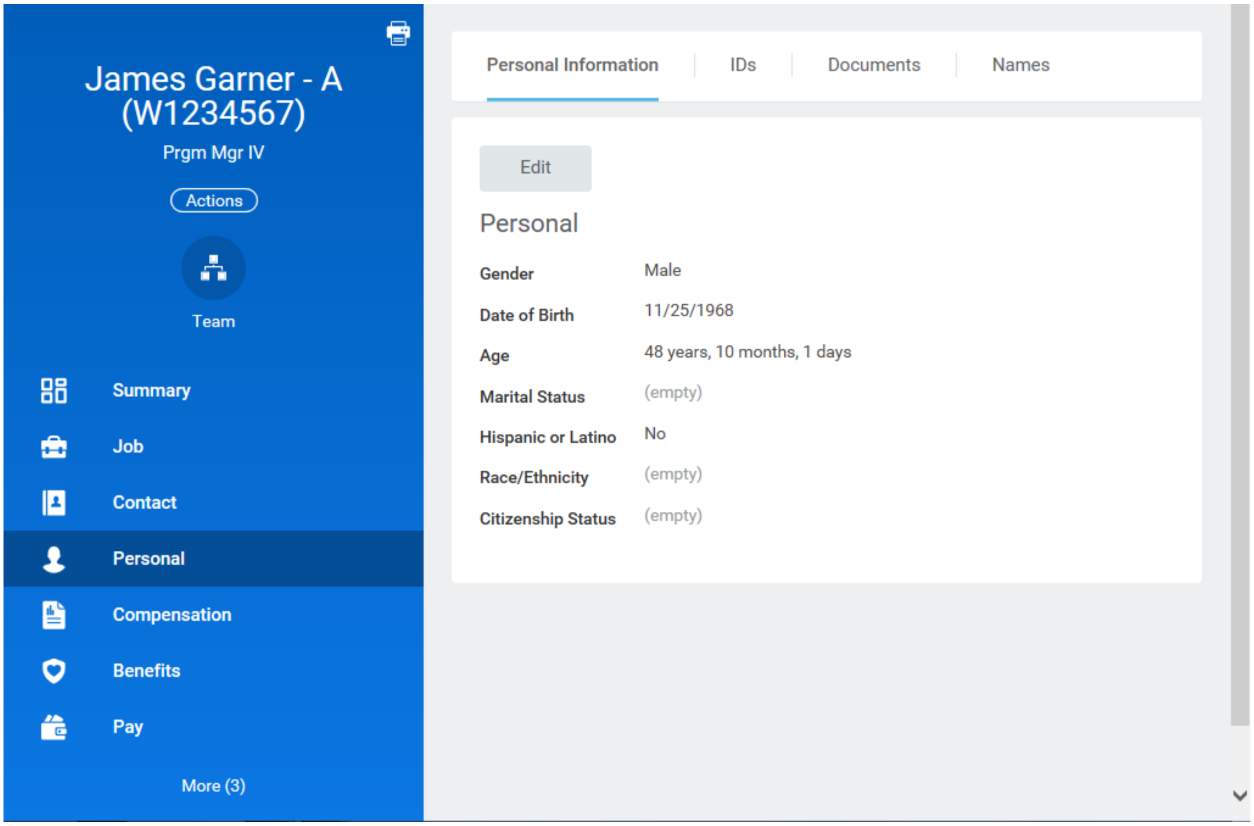
View Worker

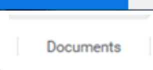


4. On the worker profile, click the **Personal** 

tab.

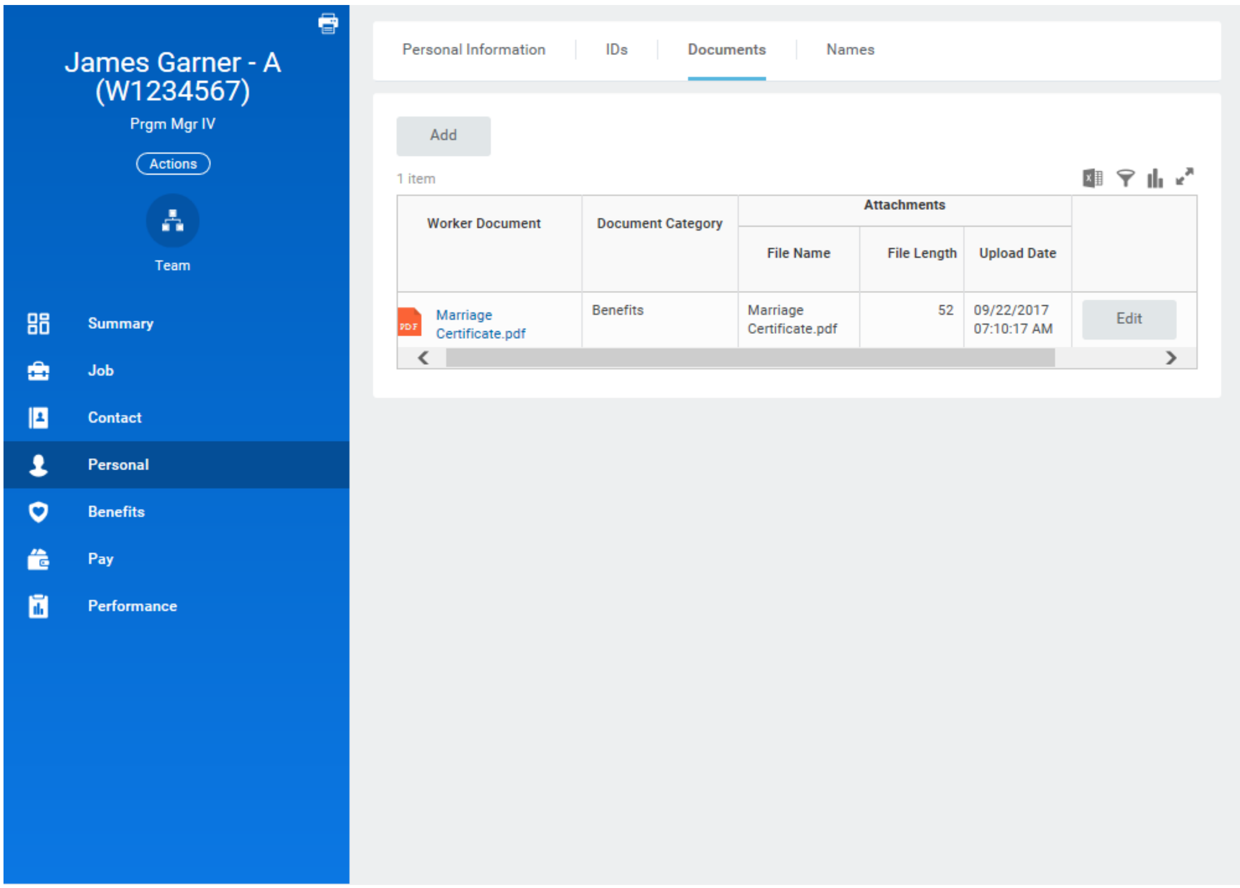
View Worker



5. Click the **Documents** 

sub-tab to access employee documentation.

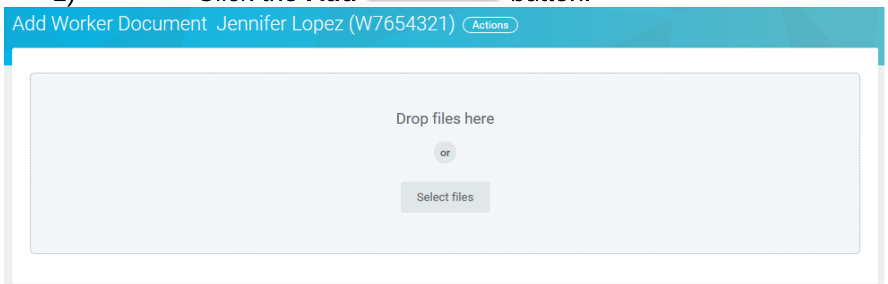
View Worker



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

Information: All worker documents display on the Documents tab, including supporting documents for employee benefits. Benefits worker documents display in the following document categories:

- Benefits
- Dependent disability
- EBD reports
- Education Reimbursement
- Legal Name Change
- Marital Status Change
- ORP Documents

Task	Procedure
To add a document…	1) Click the **Add** [Add] button.  2) Click the **Select Files** [Select files] button. 3) Browse for and select the document. 4) Select **Document Category**. 5) Enter a comment if applicable. 6) Click the [OK] button.
To edit document information …	1) Click the **Edit** [Edit] button. 2) Update as needed. 3) Click the [OK] button.
To delete a document…	1) Click the **Delete** [Delete] button. 2) Verify the document to be deleted. 3) Click the [OK] button.

7. The System Task is complete.