STAFF AND FACULTY: BENEFIT CHANGES

Changes to benefit elections outside of the annual open enrollment period can be made for qualifying life events, for example, marriage, divorce, birth, adoption, loss or gain of other insurance. When a qualifying life event occurs, you have 31 days from the date of the event to make changes to your benefits. **To begin the change process in Workday, you must have proof of the qualifying event in electronic document format for attachment to the change request.** Follow the steps below to make changes to your benefits in Workday.

1. Open the **Benefits** worklet on your Workday **All About Me** screen and select the **Benefits** link in the **Change** section of the pop-up window:

2. Select the **Benefit Event Type** and **Date**, click the **Add icon** to attach required documents as indicated, then click **Submit** to forward your request to Human Resources for review and approval:

Lewis & Clark   1

3. Click **Close** to return to your Workday landing page:
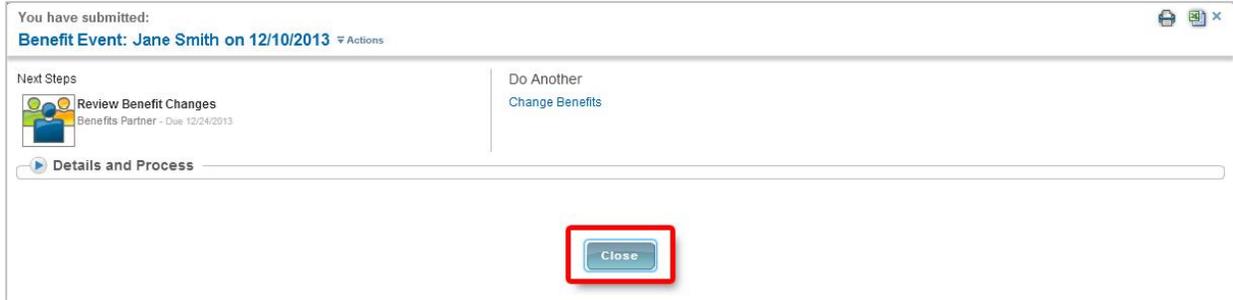
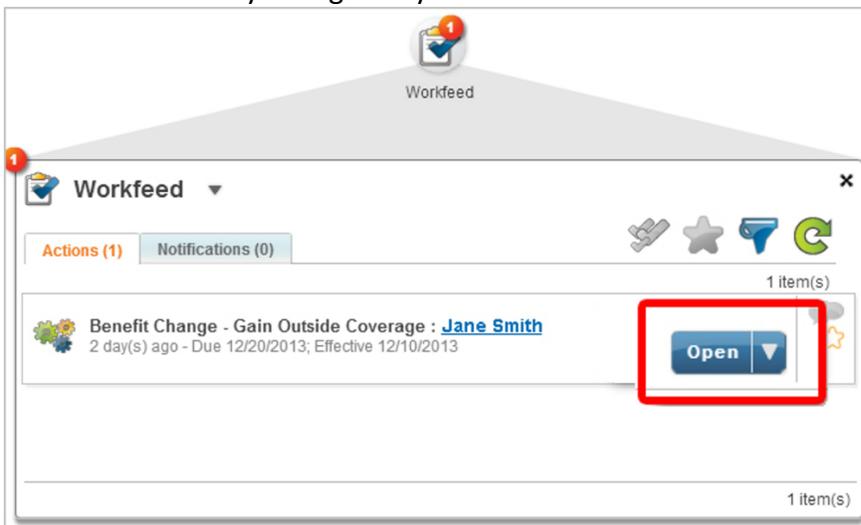4. When Human Resources approves your benefits change request, an action item is generated in your **Workfeed**. Move your cursor over the action item in the **Actions tab** and click the **Open** button to make the necessary changes to your benefits:

5. **Elect** or **waive** benefits as needed and click **Continue** to navigate through the benefit election screens:

In this example, Jane has new health care insurance coverage through her husband's company so she is waiving those Lewis & Clark benefit elections.

6. After navigating through the benefit elections screens and making the desired changes, review your elections, click the **I Agree** checkbox to confirm your changes, then click the **Submit** button to save your entries:

Elected Coverages 6 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)
Basic Life - LifeMap Assurance Company (Employee)	01/01/2014	11/16/2013	1.5 X Salary	$45,000.00		John Smith		$6.17	
Group AD&D - LifeMap Assurance Company (Employee)	01/01/2014	11/16/2013	1.5 X Salary	$45,000.00				$0.72	
Long-Term Disability - LifeMap Assurance Company Basic (Employee)	01/01/2014	11/16/2013	60% of Salary	$1,494.68				$7.17	
LTD Buy-Up - LifeMap Assurance Company (LTD wait period 90 Days) (Employee)	01/01/2014	11/16/2013	60% of Salary	$1,494.68			$5.26		
403(b) - TIAA-CREF (SRA)	01/01/2014	12/16/2013	3%						
Employee Assistance Program - Cascade Centers EAP	01/01/2014	12/16/2013						$1.71	
						Total:	5.26	15.77	0.00

▶ **Waived Coverages**

▶ **Beneficiary Designations**

Benefit Credits Summary

Benefit Credits		Total
Medical-Vision-RX		$25.00
	Total:	25.00

Attachments

➕	Attachment	Comment	File

Electronic Signature

Clicking the checkbox is considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. You declare that you have examined your elections and to the best of your knowledge and belief, they are true, correct, and complete.
2. You understand that all submissions are contingent upon acceptance by your Benefits representative.

These elections are not valid without an electronic signature.

I Agree ☑

[Submit] [Save for Later] [Go Back] Cancel

7. Click **Print** to print a copy of your revised benefit elections, then click **Close** to complete the benefit change process:

Electronic Signature

Clicking the checkbox is considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you click in the "I Agree" checkbox, you are certifying that:

1. You declare that you have examined your elections and to the best of your knowledge and belief, they are true, correct, and complete.
2. You understand that all submissions are contingent upon acceptance by your Benefits representative.

These elections are not valid without an electronic signature.

Signed By ▼ Jane Smith
Date 12/17/2013

[Print] [Close]