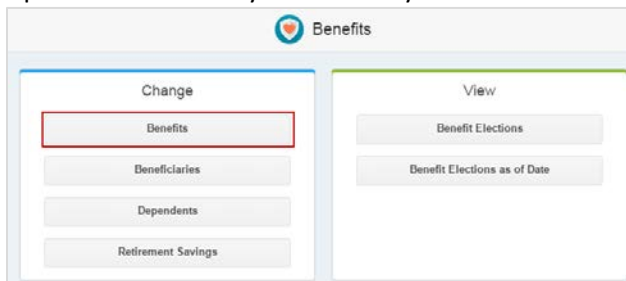


STAFF AND FACULTY: BENEFIT CHANGES

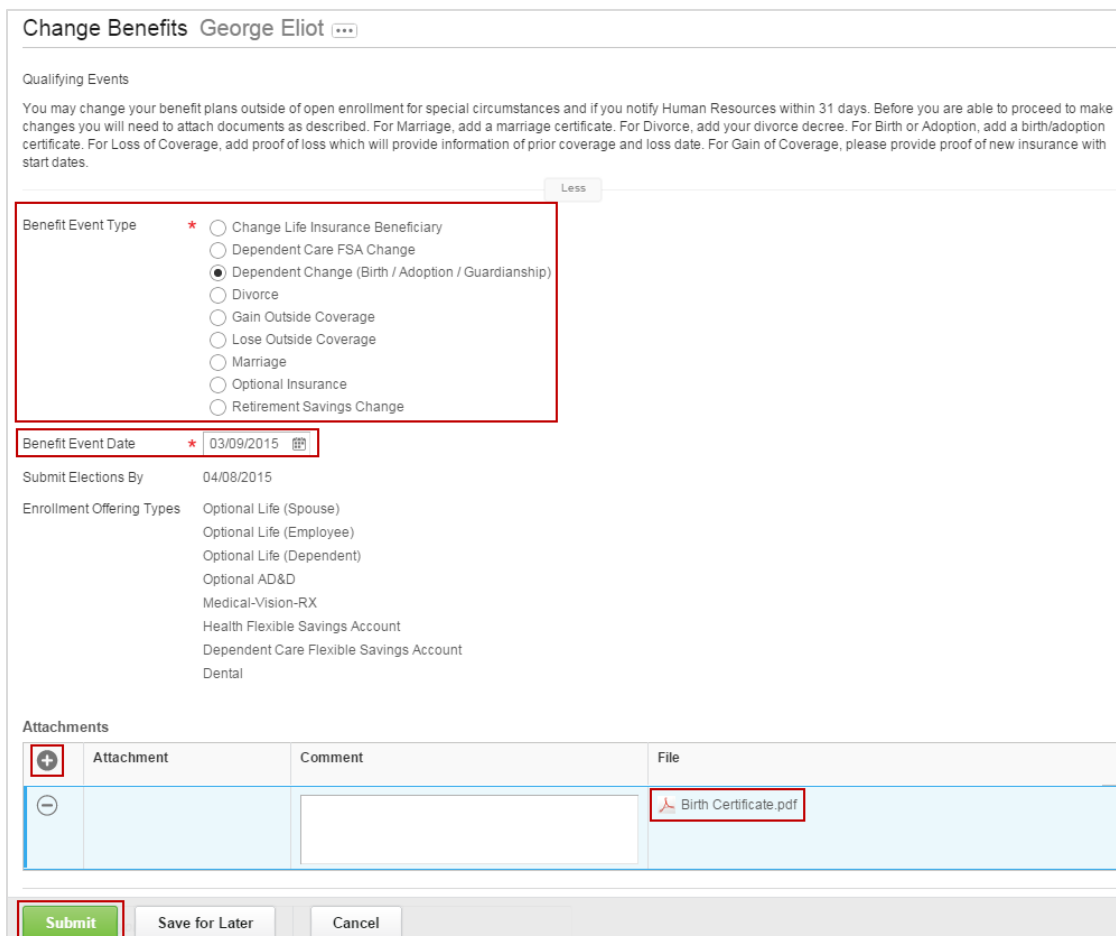
Changes to benefit elections outside of the annual open enrollment period can be made for qualifying life events: for example, marriage, divorce, birth, adoption, loss or gain of other insurance. When a qualifying life event occurs, you have **31 days from the date of the event** to make changes to your benefits.

To begin the change process in Workday, you must have proof of the qualifying event in electronic document format for attachment to the request.

1. Open **Benefits** from your Workday **Home** screen and select the **Benefits** link in the **Change** section.



2. Select the **Benefit Event Type** and **Date**, click the **Add icon** to attach required documents as indicated, and click **Submit** to forward your request to Human Resources for review and approval. The example used in this guide is adding a new dependent for reason of birth/adoption/guardianship.



Change Benefits George Eliot ...

Qualifying Events

You may change your benefit plans outside of open enrollment for special circumstances and if you notify Human Resources within 31 days. Before you are able to proceed to make changes you will need to attach documents as described. For Marriage, add a marriage certificate. For Divorce, add your divorce decree. For Birth or Adoption, add a birth/adoption certificate. For Loss of Coverage, add proof of loss which will provide information of prior coverage and loss date. For Gain of Coverage, please provide proof of new insurance with start dates.

Less

Benefit Event Type *

- ☐ Change Life Insurance Beneficiary
- ☐ Dependent Care FSA Change
- ☒ Dependent Change (Birth / Adoption / Guardianship)
- ☐ Divorce
- ☐ Gain Outside Coverage
- ☐ Lose Outside Coverage
- ☐ Marriage
- ☐ Optional Insurance
- ☐ Retirement Savings Change

Benefit Event Date * 03/09/2015

Submit Elections By 04/08/2015

Enrollment Offering Types

- Optional Life (Spouse)
- Optional Life (Employee)
- Optional Life (Dependent)
- Optional AD&D
- Medical-Vision-RX
- Health Flexible Savings Account
- Dependent Care Flexible Savings Account
- Dental

Attachments

	Attachment	Comment	File
+			
-			Birth Certificate.pdf

Submit Save for Later Cancel

3. Click **Done** to return to your Workday landing page:

You have submitted **Benefit Event: George Eliot on 03/09/2015** ...

Up Next
Benefits Partner
Review Benefit Changes
Due Date: 03/15/2015

Do Another
[Change Benefits](#)

[Details and Process](#)

Done

4. Once Human Resources has approved your request, you will receive an email notifying you that you can start the next steps of your change. There will then be an action item in your Workday **Inbox**. Navigate to your Workday Inbox, and find the Benefit Change task.

Actions 59 **Archive** 2

Viewing: **All** Sort By: **Newest**

Benefit Change - Dependent Change (Birth / Adoption / Guardianship) : George Eliot on 03/09/2015

12 second(s) ago - Due 03/15/2015; Effective 03/09/2015

5. *Health Care Elections*

Enroll your dependent in your desired (current) options. You can add a dependent by changing the option in the **Coverage** column to **Employee + 1**, then enroll your dependent by adding their name to the **Enroll Dependents** column. If you need to add a new dependent, click **Create** from menu, then **Add My Dependent From Enrollment**.

Health Care Elections 5 Items

Benefit Plan	*Elect / Waive	Coverage	Enroll Dependents	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Provider Website
Medical-Vision-RX - Kaiser Traditional (HMO)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Employee + 1	<input type="text" value="search"/>		\$631.25	0.00	Kaiser
Medical-Vision-RX - Pioneer Educators Health Trust (PEHT) (Regence) PPO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	PEHT - Regence
Dental - Kaiser DMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Kaiser
Dental - Pioneer Educators Health Trust (PEHT) (Regence) FFS	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	PEHT - Regence
Dental - Willamette DMO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Employee Only			\$29.18	0.00	Willamette Dental
					660.43	0.00	

Continue **Save for Later** **Cancel**

6. Add your dependent from enrollment (unless you are adding a dependent who is already a beneficiary or emergency contact) and click **OK** to continue:

Add My Dependent From Enrollment George Eliot ...

26 minute(s) ago - Due 03/15/2015; Effective 03/09/2015

Is your new dependent already a beneficiary or emergency contact?

☐ Yes
☒ No

Use your new dependent as a beneficiary?

☒ Yes
☐ No

OK **Cancel**

7. Complete the required personal and contact information fields for your dependent. Make sure to include their Social Security number by clicking the **Add** button under **National IDs**. *If you do not have a social security number for your dependent yet, you may skip this step and submit to HR at a later date.* Please note that your dependent's contact information will be automatically linked to yours, unless you choose another option in the Address section. Press **OK** to save information.
8. The next screen will show your current benefits elections with your added dependent, and your new monthly cost will be at the top of the screen. Review your elections, then click the **Continue** button to confirm your changes.

Health Care Elections 5 items

Benefit Plan	*Elect / Waive	Coverage	Enroll Dependents	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Provider Website
Medical-Vision-RX - Kaiser Traditional (HMO)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Employee + 1	search X Emily Bronte	\$270.54	\$631.25	0.00	Kaiser
Medical-Vision-RX - Pioneer Educators Health Trust (PEHT) (Regence) FPO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	PEHT - Regence
Dental - Kaiser DMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Kaiser
Dental - Pioneer Educators Health Trust (PEHT) (Regence) FFS	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	PEHT - Regence
Dental - Willamette DMO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Employee Only		\$11.52	\$29.18	0.00	Willamette Dental
				282.06	660.43	0.00	

Continue Save for Later Cancel

9. **Spending Account Elections**
Elect or waive Flexible Spending Accounts for your dependent. Click **Continue**.
10. **Insurance Elections**
Elect or waive optional Life and Accidental Death and Dismemberment Insurance for your dependent, then click **Continue**.
11. **Review and Submit**
The next screen is a summary of all of your elected changes. Check the **I Agree** box to provide your electronic signature, then click the **Submit** button to finish.


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 ☒

 enter your comment

Submit Save for Later Cancel

12. On the final summary screen, Click **Print** to print a copy of your revised benefit elections, then click **Done** to complete the benefit change process.

13. The following forms will be available in a step called “Review Documents” in your **Workday Inbox**:

- If adding a spouse/domestic partner who has not been covered previously, you will need to complete a **Marriage/Domestic Partner Affidavit**.
- If you have chosen LifeMap voluntary life, AD&D, 90 day LTD buy up (non-exempt), LTD buy-up (exempt), Dependent Life Insurance, you may need to complete a LifeMap Voluntary insurance form for the **health statement (evidence of insurability)**.
- If you want Genworth Long Term Care insurance outside of 31 days from date of hire, you will need to complete an **application**.