Benefits – Adding or removing a Dependent

Overview

This process is for Employee who have an IRS qualified life event. Changes to benefits must be made within 30 days of the life event.

Before starting this process in Workday be sure to have any required documents as they will be required as uploads during this process.

Required Document* Examples -

Marriage Certificate, Divorce Decree, Insurance Coverage Effective Letter, Birth Certificate, or Insurance Coverage Effective Letter

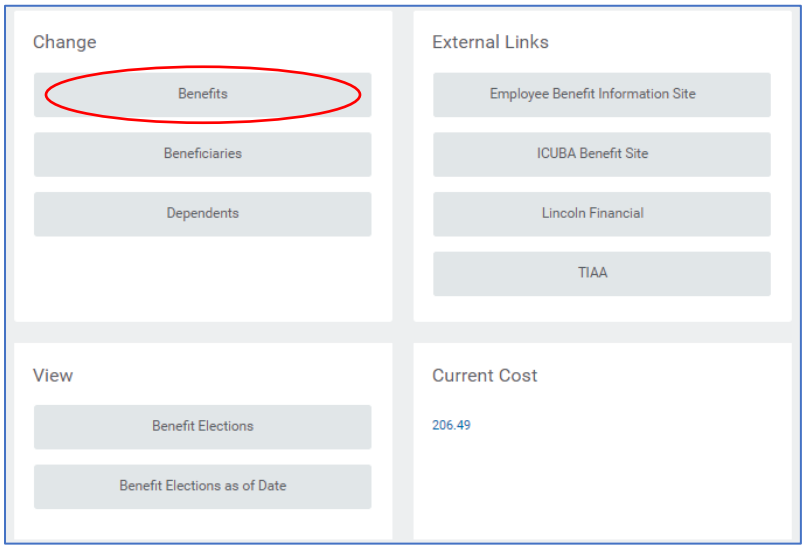
Life event change reason details* -

a. **Beneficiary Change** – Select this to add a new person as a beneficiary
b. **Birth/Adoption/Legal Child Custody** –
    i. Select this to add a child to current benefits
    ii. Must use the date of birth or adoption
    iii. Required - Birth certificate, hospital release document, or adoption agreement must be uploaded during this step
    iv. This type of Life Event must be completed within 30 days of the event
c. **Divorce** –
    i. Select this to remove a spouse from current benefits
    ii. Divorce must be finalized by the court system, use the date of divorce
    iii. Required - Divorce Decree must be uploaded during this step
    iv. This type of Life Event must be completed within 30 days of the event
d. **Eligible Dependent Gains or Loses Coverage** –
    i. Select this to add or remove a dependent due to the dependent gaining or losing coverage elsewhere
    ii. Must use the date the coverage began or ended
    iii. Required – Letter from insurance company with effective dates must be uploaded during this step
    iv. This type of Life Event must be completed within 30 days of the event
e. **Employee Gains or Loses Coverage from Elsewhere** –
    i. Select this to add or remove yourself from benefits due to you (employee) gaining or losing coverage elsewhere
    ii. Must use the date the coverage began or ended
    iii. Required – Letter from insurance company with effective dates must be uploaded during this step
    iv. This type of Life Event must be completed within 30 days of the event
f. **Gym Membership** – Select this to add, drop or change a gym membership
    i. This can be done at any time of year
    ii. Use today's date or a future date you cannot back date this change
g. **Marriage** – Select this to add or drop benefits or dependents due to a recent marriage
    i. Must use the date of the marriage

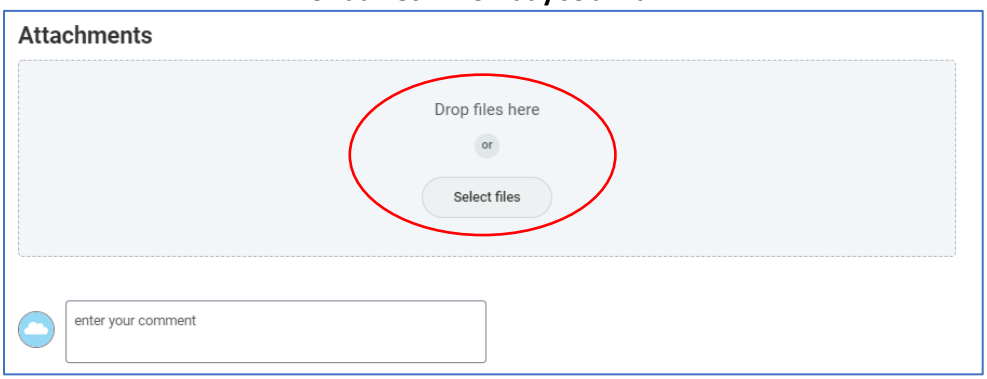
ii. Required – Marriage Certificate must be uploaded during this step
iii. This type of Life Event must be completed within 30 days of the event

From Workday main screen

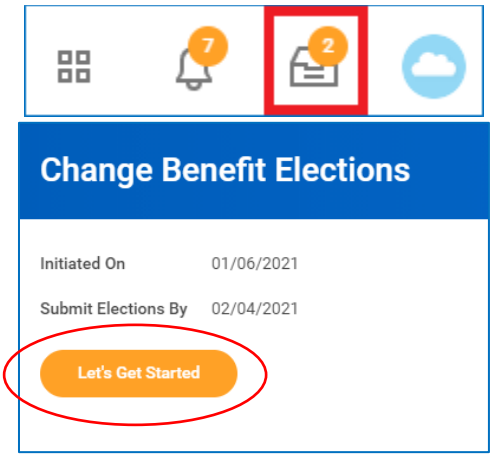
2. Select the **Benefits** Application, it looks like a shield.
3. Select the **Benefits** link in the Change box



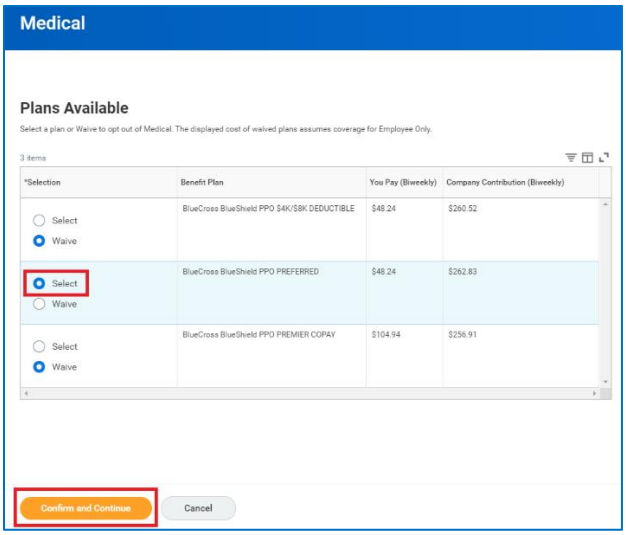
4. Select a Change Reason - *must upload document to prove life event, see list above



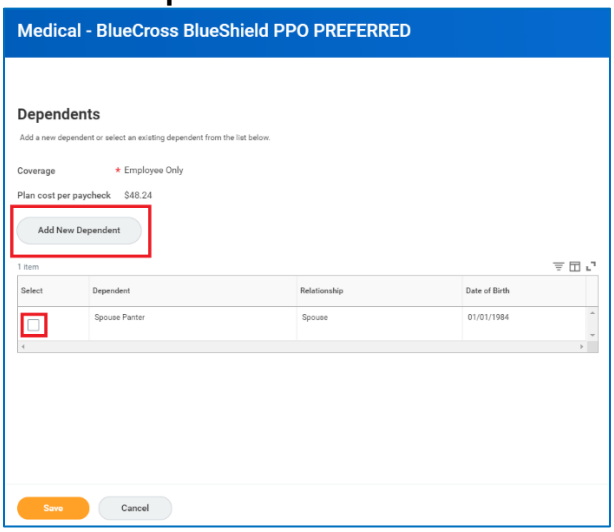
5. Upload attachments if your Change Reason requires documentation. Comments can be made if needed.
6. Go to your Workday Inbox
7. You'll find the Change Benefit Action item, click on **Let's Get Started**



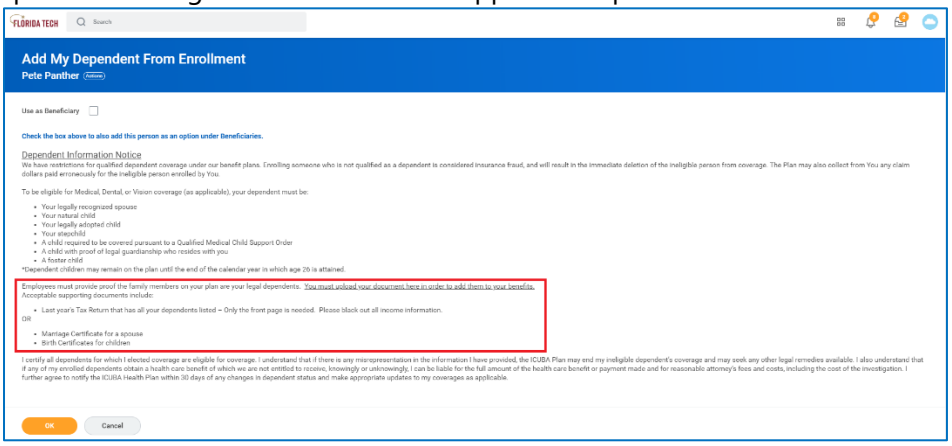
8. To add your new dependent, you'll click on **Manage** in the benefit you are adding them. The coverage you currently have will show up. Click **Confirm and Continue**.



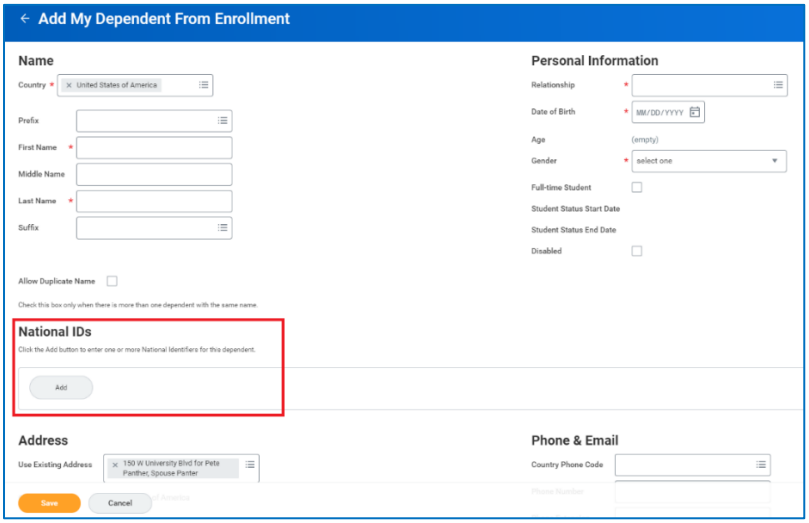
9. The Dependents screen will show up next. This is where you can add/remove a dependent to that plan. If you already have dependents in Workday you can check the box next to their name. If you need to add a new dependent, you'll click **Add New Dependent.**



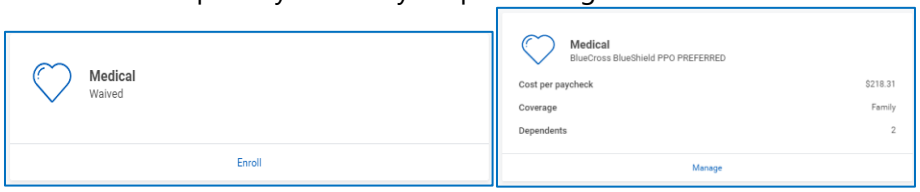
10. If you are adding a new dependent that is not already in Workday you must provide documentation proving dependency. The message below will show up and you'll need to provide one of the example documents. This can be uploaded during the final review and approval step.



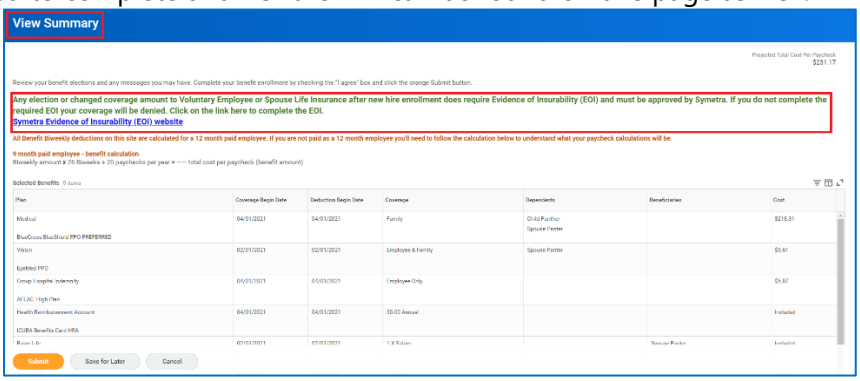
11. The required information is marked with a red star; however, Social Security Numbers are required if you are adding them to Medical, Dental, or Vision.



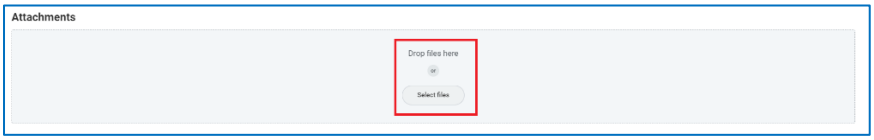
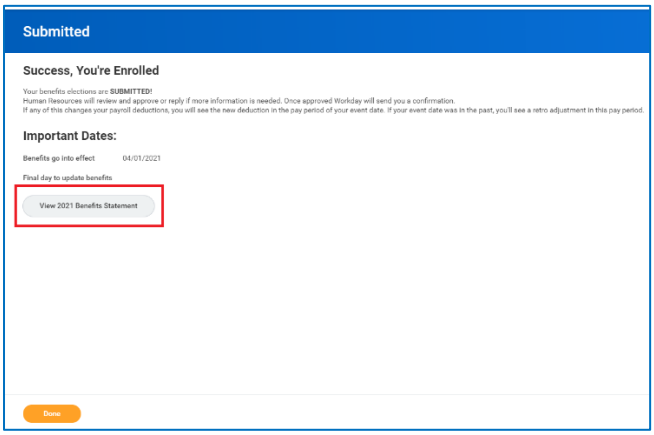
12. Once you have added the new dependent you will see their name show up in the dependent area, check the box next to their name and save that coverage election.
13. The main screen will then show up and you'll see your plan changes in the benefit box.



14. If you are adding or removing this dependent to multiple benefits, you'll need to click into each benefit to check or uncheck the box next to their name. You will not need to add their information each time as they will show up as dependent with a check box next to their name.
15. Once you have made all your benefit changes click the **Review and Sign** at the bottom of the screen. The View Summary page will show up and you'll want to read each part of this to make sure everything is as you expect. If you need to complete and EOI the link can be found on this page as well.



16. Before submitting your elections, if you are adding a new dependent to your benefits you must upload the required documents*.



17. After reviewing your elections, scroll down and provide your electronic signature by checking **I Accept.**
18. Once the Submitted screen comes up you can select **View Benefit Statement** and from there you can save or print a copy for your records. Then select **Done** and congratulations you are finished!