Benefits in Workday
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Enrolling in benefits in Workday

Overview

This section provides instructions on how to enroll in benefits as a new hire or newly eligible employee and add a dependent or beneficiary in Workday. This only applies to employees located in the U.S. as international employees will continue to use a third party for benefits enrollment.

**Note:** Employees need to add their dependents and beneficiaries before they begin the benefits enrollment process in Workday. If you do not have a dependent or beneficiary to add, skip to section B of this user guide for instructions on how to enroll in benefits.

Step-by-step guidance

WalkMe is available for additional guidance as you complete the benefits enrollment process.

A. Add a dependent and designate that dependent as a beneficiary (if applicable)

1. Select **View all Apps** on the Workday homepage, and then select the **Benefits** app.

2. On the **Benefits** page, view the related tasks under the **Change** and **View** sections. Select **Dependents** under the **Change** section.

   **Note:** To add a beneficiary who is not a dependent, select **Beneficiaries** under the **Change** section and select the radio button next to **Create a New Beneficiary**.

3. On the **Dependents** page, select **Add** to add a new dependent.
On the Add My Dependent page, in the Dependent Options section, select the pencil icon or the specific field to make edits. Enter the Effective Date, select the reason as Add Dependent, and confirm if the new dependent should be listed as a beneficiary.

Note: This step does not automatically enroll dependents or beneficiaries in any benefits plans. Employees have to add beneficiaries and dependents when enrolling in benefits.

In the Dependent Personal Information section, enter the dependent’s Legal Name, Sex, Date of Birth, and Relationship to you.
6. In the **Contact Information** section, enter the primary address of the dependent if it is different from your own.

7. In the **Identifier Information** section, enter the **Country**, **National ID Type**, and the identifier information in the **Add/Edit ID** section. U.S. employees will add the social security number (SSN) or individual taxpayer identification number (TIN) for their dependent.
Note: A spouse or domestic partner is the only dependent type that requires the National ID information for benefit enrollment. If the dependent is a child, the National ID information is not required.

8. Select Submit.

Note: You must add a dependent before you can make any benefits elections on their behalf.

B. Enroll in benefits as a new hire or newly eligible employee

1. Go to your Workday Inbox, in the upper right corner on the Workday homepage, to view your assigned onboarding tasks.

2. From the Workday Inbox tasks, found under the Actions tab, select the task named Benefit Change – New Hire / Newly Eligible.
Note: Employees must add their dependents and beneficiaries before they complete the Benefit Change – New Hire / Newly Eligible task. Further instructions are found in section A of this user guide.

3. Select the Let’s Get Started button.

4. On the Health Information page, answer the Nicotine Use question and select Continue.

5. On the Information Updated page, select Continue to proceed.
6. Enroll in the benefits of your choice by selecting **Enroll** under each benefit. You have the choice to view any company designated benefits and add dependents for those benefits by selecting **Manage** under the election type.
7. After selecting **Enroll** under a benefits category, you can view the **Plans Available** and select the plan in which you want to enroll. Select **Confirm and Continue**.

8. Add **Dependents** to Health Care Plans, select your contribution amount for Health Saving and Flexible Saving Account plans, or select your coverage level for Insurance and Additional Benefit plans.

**Note:** If you are enrolling in a high deductible medical plan, you must enroll in a Health Savings Account (HSA). If you do not enroll in a HSA, you will receive an error when you attempt to submit your enrollment.
9. Complete the same steps to select any other benefits elections.
10. Review your dependents details, coverage, and plan cost per paycheck.

**Note:** You must add any dependents prior to enrolling in benefits on their behalf.

11. Once you're satisfied with your elections, select **Review and Sign**. If you’re not ready to complete your elections, select **Save for Later**. You must review, sign, and submit your benefit elections on or before the **Submit Elections By** date listed on the task in your Workday **Inbox**.
12. View the summary of benefits and provide your electronic signature and acknowledgement by selecting the I Accept check box. Select Submit.

**Note:** Changes are not submitted until you acknowledge the I Accept check box at the bottom left of the page and submit.

13. On the Submitted page, you can view your Benefits Statement, and then select Done to complete the process.
Initiating a benefit change due to a qualified event in Workday

Overview

This section provides instructions on how to initiate a change in benefits due to a qualified life event. Qualified events can include the birth or adoption of a child, marriage or formation of a domestic partnership, and divorce or termination of a domestic partnership.

Information required: Reason for changes and event date.

Step-by-step guidance

WalkMe is available for additional guidance as you complete the benefits enrollment process.

A. Add a dependent

9. Select View all Apps on the Workday homepage, and then select the Benefits app.

10. On the Benefits page, view the related tasks under the Change and View sections. Select Dependents under the Change section.
11. On the **Dependents** page, select **Add** if you need to add a new dependent or **Edit** if you need to remove a dependent due to divorce or termination of a domestic partnership or for any other reason.

12. On the **Add My Dependent** page, in the **Dependent Options** section, select the pencil icon or the specific field to make edits. Enter the **Effective Date**, select the reason as **Add Dependent**, and confirm if the new dependent should be listed as a beneficiary.
Note: This step does not automatically add dependents or beneficiaries to the enrolled plans. After adding a dependent or beneficiary, the employee must update each benefits election to include the dependent or beneficiary. See more information in section B of this user guide.

13. In the Dependent Personal Information section, enter the dependent’s Legal Name, Sex, Date of Birth, and Relationship to you.

14. In the Contact Information section, enter the primary address of the dependent if it is different from your own.
15. In the **Identifier Information** section, enter the **Country**, **National ID Type**, and the identifier information in the **Add/Edit ID** section. U.S. employees will add the social security number (SSN) or individual taxpayer identification number (TIN) for their dependent.

![Identifier Information Section](image)

**Note:** A spouse or domestic partner is the only dependent type that requires the National ID information for benefit enrollment. If the dependent is a child, the National ID information is not required.

16. Select **Submit**.

**Note:** You must add a dependent before you can make any benefits elections on their behalf.

B. Initiate a change in benefits due to a qualified event

1. Select **View all Apps** on the Workday homepage, and then select the **Benefits** app.
2. Select **Benefits** under the **Change** section.

3. The **Change Benefits** page opens. Select the appropriate **Change Reason** from the drop-down list.

4. Enter the **Benefit Event Date**. The due date to submit your benefit changes populates in the **Submit Elections By** section. The list of **Benefits Offered** shows all the benefit plans you can change as a result of this event.
5. Select the **Submit** button.
6. A window opens with the confirmation. Select the **Open** button.

7. Select the **Let's Get Started** button on the **Change Benefit Elections** page.
8. On the **Health Information** page, answer the **Nicotine Use** question and select **Continue**.

9. On the **Information Updated** page, select **Continue** to proceed.
10. Enroll in the benefits of your choice by selecting **Enroll** under each benefit type. Select **Manage** to update any current elections or company designated benefits if something has changed, for example, the addition of a dependent.

11. After selecting **Enroll** or **Manage**, you can view the **Plans Available** and select the plan you want to add, change, or update. Select **Confirm and Continue** when each selection is complete.
12. Add **Dependents** to your Health Care Plans, select your contribution amount for your Health Saving and Flexible Saving Account plans, or select your coverage level for Insurance and Additional Benefit plans. Select **Save** to view summary.

**Note:** If you are enrolling in a high deductible medical plan, you must enroll in a Health Savings Account (HSA). If you do not enroll in a HSA, you will receive an error when you attempt to submit your enrollment. The medical plan you select will also change the FSA options you are eligible to select.
13. Once you’re satisfied with your elections, select **Review and Sign**. If you’re not ready to complete your elections, select **Save for Later**. You must review, sign, and submit your benefit elections on or before the **Submit Elections By** date.
14. View the summary of benefits and provide your electronic signature and acknowledgement by selecting the I Accept check box.

Note: Changes are not submitted until you acknowledge the I Accept check box at the bottom left of the page and select Submit. Once you complete this step, the enrollment is routed for approval.

15. Select Submit. On the Submitted page, you can view your Benefits Statement and select Done to complete the process.