



Change Benefits for Life Events

Overview

This is a process that any employee can initiate. When you enroll in medical insurance, dental insurance, life insurance, health flexible spending, or dependent care assistance program, you cannot make any changes to your benefit elections until the next open enrollment period (unless you experience a qualified life event and the benefit change you request is consistent with the event).

Considerations

Benefit Event Samples include:

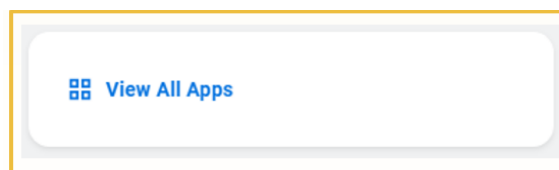
- Birth or Adoption
- Change in Dependent Care Provider
- Change in Marital Status
- HSA Contribution Change
- Dependent Status Change
- Employment Status Change
- Retirement

For an exhaustive listing of all potential life events, changes allowed, and documentation required, please reach out to HR.

Initiation

Security Roles: Employee as Self

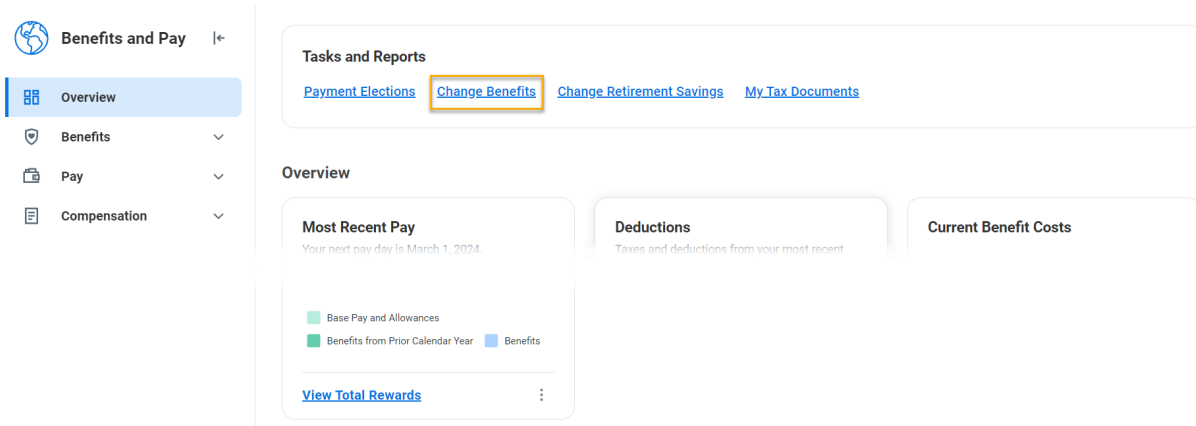
1. From the Workday Landing Page, select **View All Apps**.



2. Select the **Benefits and Pay** application.

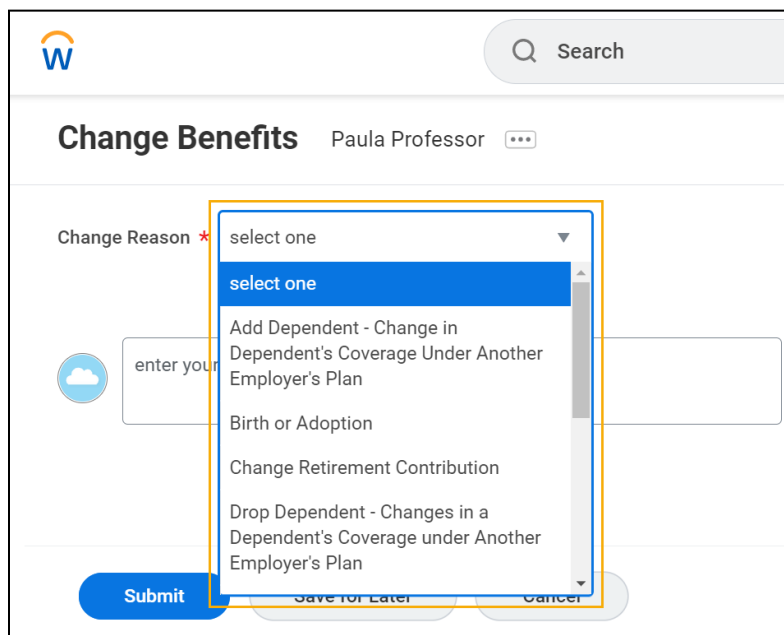


- Under the Tasks and Reports section, select **Change Benefits**. You will then be directed to the Change Benefits page.



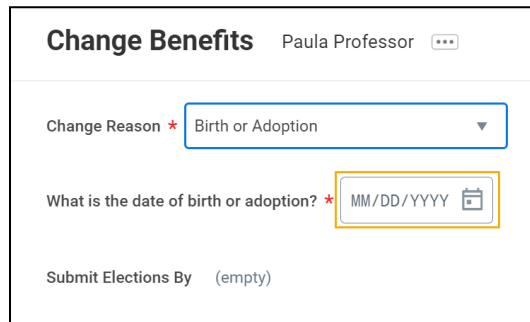
- In the Benefit Event Type field, use the drop-down arrow to select the appropriate reason for changing your benefits.

Note: For benefit events such as birth or adoption of a child, marriage, divorce, or death, you may be required to attach the appropriate documentation prior to submitting, or you will receive an error when you try to submit the request.



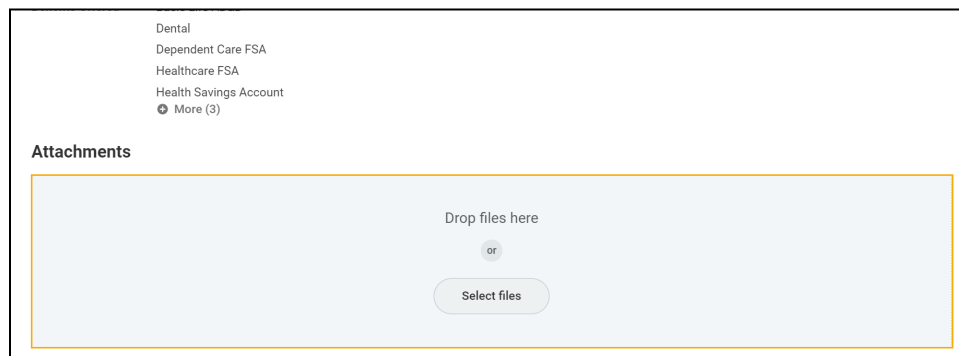
5. Select the appropriate benefit event **date**.

Note: This should be the day the event occurred and should match the date on the supporting documentation.



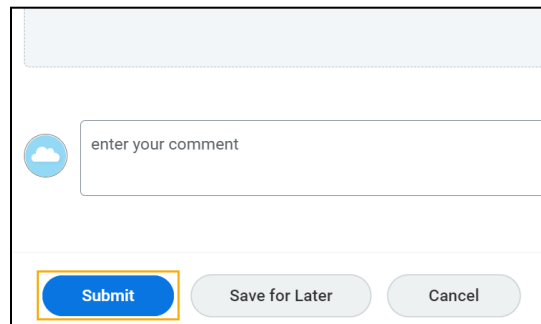
The screenshot shows a form titled "Change Benefits" for Paula Professor. It includes a "Change Reason" dropdown menu set to "Birth or Adoption", a date field labeled "What is the date of birth or adoption?" with a calendar icon, and a "Submit Elections By" field which is empty.

6. Attach documentation (if needed) for the benefit change under the Attachments section.



The screenshot shows the "Attachments" section of the form. It features a list of benefit types: Dental, Dependent Care FSA, Healthcare FSA, Health Savings Account, and a "More (3)" link. Below this is a large rectangular area with the text "Drop files here" and a "Select files" button.

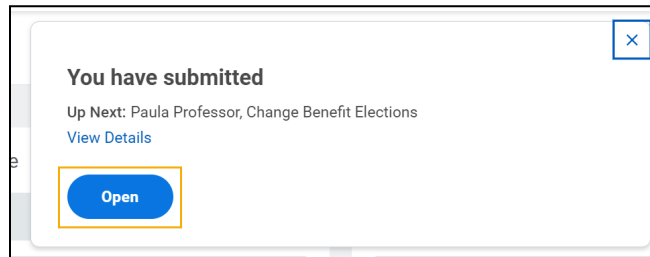
7. Once complete, select the **Submit** button.



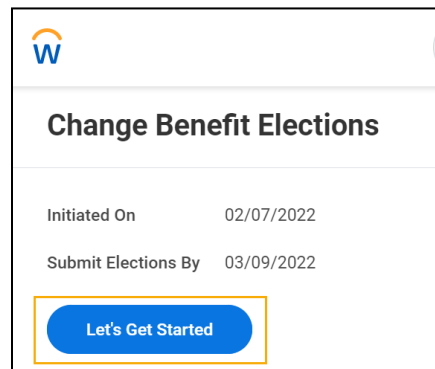
The screenshot shows the bottom of the form. It includes a text input field labeled "enter your comment" and three buttons: "Submit", "Save for Later", and "Cancel". The "Submit" button is highlighted with a yellow border.

8. On the following screen, select the **Open** button in the popup box to continue with this request.

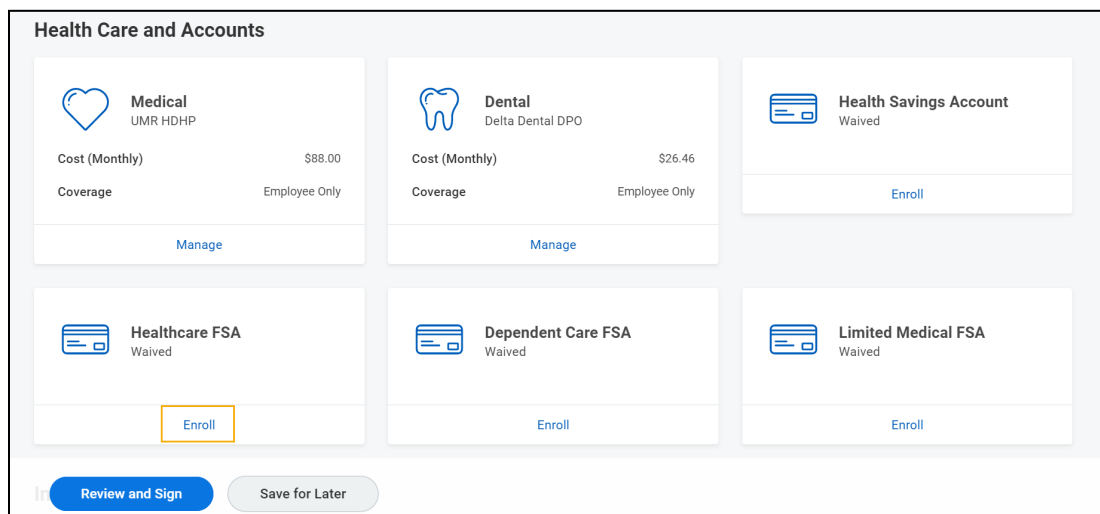
Note: You can also view this in your Inbox.



9. Select **Let's Get Started**.



10. On the following screen, navigate through each coverage election by selecting **Enroll** or **Manage**, making any allowable changes to benefit elections as needed until reaching the final page, where you can select the **Submit** button. Review your benefit elections for accuracy, and select the **Go Back** button if you need to update anything.



11. After enrolling and managing your allowable plans, select **Review and Sign**.

Health Care and Accounts

 **Medical**
UMR HDHP

Cost (Monthly) \$88.00

Coverage Employee Only

[Manage](#)

Review and Sign Save for Later

12. Review the changes you have made to your benefits, cost, and terms on the screen. After doing so, select the **I Accept** checkbox and select the **Submit** button.

Employee Certification

I hereby certify that I read all the above statements, or they have been read to me and I understand them. I understand that any misrepresentation contained herein and relied on by the employer is subject to a 90-day testable period if such misrepresentation materially affects the acceptance risk. I am required for me to participate in and of the Plans.

I Accept ☒

 enter your comment

Process History

 **Paula Professor**
Change Benefits for Life Event - Awaiting Action

Submit Save for Later Cancel

13. Select **Done**.

Note: If there are any changes to Insurance Elections, you will receive a **Beneficiary To Do** in your Workday Inbox.

Submitted

You've submitted your elections.

[View 2022 Benefits Statement](#)

Done

Remaining Process Steps

1. The process will route to HR for approval. **Note:** Approval by HR is not immediate. Please allow time for review. After this approval, the process is complete and in Approved status. The initiator will receive a Workday notification.
2. To confirm that your benefit elections were approved, you can select the **Benefits and Pay** application on your landing page.



3. In the **Benefits** section, select **Benefit Elections**.

Benefits and Pay

Overview

Benefits

Benefit Elections

Benefits by Date

Dependents

Beneficiaries

ACA Forms

Pay

Compensation

Benefit Elections

Change Benefits

Change Retirement Savings

Current Benefit Elections and Costs 7 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)
Healthcare - Flex Spending Account - Associated Bank	01/01/2024	12/17/2023	\$ Annual				\$
Basic Life AD&D - Mutual of Omaha (Employee)	01/01/2022	01/01/2022	2 X Salary	\$			
Voluntary Life & AD&D - Mutual of Omaha (Employee)	01/01/2023	12/18/2022	1 X Salary	\$			\$
Long Term Disability (LTD) - Mutual of Omaha (Employee)	01/01/2022	01/01/2022	67% of Salary	\$			
Short Term Disability (STD) - SNC - Staff (Employee)	01/01/2022	01/01/2022	66.67% of Salary	\$			