Within Workday, you can manage your benefits by reporting coverage change events (life events), viewing your current benefit elections, and making changes to your retirement savings. All of this is done from the Benefits application.

REPORT A COVERAGE CHANGE EVENT

Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, divorce, or similar life event, you can change your benefits to better fit your needs.

From the Benefits application:
1. Click the Benefits button under Change.
2. Select the Benefit Event Type.
3. Click the Calendar icon to enter the date of the Benefit event.
4. Attach required documentation when making changes to health, dental, or vision coverage. Enrollments or additions will not be approved until documentation is received. You will not be able to submit without attaching documentation.
5. Click Submit, then click Open under Change Benefit Elections to make your selections.
6. Review the various Benefit Plans under Health Care Elections then elect or waive plans as needed.
7. Continue moving through the benefit elections, electing or waiving plans as needed.
8. On the final screen, you will see all the coverages you have elected or waived.
9. Check the box next to I Agree to electronically sign your elections.
10. Click Submit. Your change request is not finalized until after Human Resources has reviewed and approved your documentation.
11. Optional: your elections can be printed by selecting Print at the bottom of the screen, otherwise click Done.

Note: When electing a medical plan for the first time, you must elect the Tobacco Pledge benefit plan. After electing, select the appropriate option under Coverage.
Benefits: Manage My Benefits

VIEW AND EDIT BENEFIT ELECTIONS

VIEW ELECTIONS

From the Benefits application:
1. Click the **Benefit Elections** button under View.
2. Review your benefit elections and costs.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan.

From the Benefits application:
1. Click the **Dependents** button under Change.
2. Click **Add**.
3. Click the **Edit** icon or click in the field to modify. Asterisks denote required fields.
4. Click the **Add** button to add new information.
5. Click **Submit**.

Note: Adding a dependent does not add them to health, vision or dental coverages. You must complete the Change Benefits process to add them to coverage.

CHANGE ELECTIONS

From the Benefits application:
1. Click your **Related Actions** button.
2. Select **Benefits > Change Benefits**.
3. Enter all required information, denoted by asterisks, and make any permitted changes.
4. Click **Submit**.

VIEW DEPENDENTS’ BENEFIT ELECTIONS

From the Benefits application:
1. Click the **Dependents** button under Change.
2. Review your existing dependents and their benefit plan coverage.
MANAGE BENEFICIARIES

A beneficiary is a designated individual who would receive your benefits if something were to happen to you.

From the Benefits application:
1. Click the **Beneficiaries** button under Change.

2. View existing beneficiaries or modify the existing information by clicking **Edit**.
3. Click **Add** to add a new beneficiary. The Add Beneficiary page displays.
4. Select **New Person as Beneficiary** or **New Trust as Beneficiary**.
5. Click **OK**.
6. Enter all required information, denoted by an asterisk.
7. Click **Submit**.

8. You will then be prompted to update your benefits to include your new beneficiary.
9. Click **To Do**, then click **Change Benefits**.
10. Under Benefit Event Type, select **Beneficiary Change Only**.
11. Click **Submit**, then click **Open**.
12. Once you arrive at the Life Insurance page with the Beneficiary Designation section, click the + to add a beneficiary.
13. Select the beneficiary and the percentage they will receive.

14. Continue adding all beneficiaries. Click **Continue**, then click **Submit**.
PRINT BENEFITS STATEMENT

From the Home page:
1. Click the Profile icon > View Profile.
2. Click the Actions button.
4. Click the prompt in the Benefit Event field.
5. Select the desired Benefit Event you would like to view and print.
6. Click OK.
7. Click the Print button. The selected Benefit Event will open as a PDF document, which can be saved and printed.

CHANGE RETIREMENT SAVINGS PLAN ELECTIONS

From the Benefits application:
1. Click the Retirement Savings button under Change.
2. Click the Edit button to change Retirement Savings Elections.
3. Select the Event Date for which you want the changes to take effect then click OK.
4. UA System employees are required to contribute a certain percentage to their retirement. Select Elect next to the 403(b) Employee Required Contribution vendor of your choice. Note: only one vendor can be selected- contributions cannot be split between vendors.
5. Enter the required contribution number in the Employee Contribution field.
6. Elect any additional voluntary contributions in the 403(b) Voluntary rows. Note: the same vendor must be selected for voluntary and mandatory contributions.
7. Click Submit then click Done.

Note: While only one retirement vendor can be selected each pay period, you can switch vendors as often as you choose.