

Qualifying Life Event Benefit Changes

Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. Changing benefits outside the open enrollment period is permitted only for qualified life events. Submitting a benefits change for any of the following life events will result in a pending status until approved by the benefits team.

Birth/Adoption of a Child (Legal Guardianship)

This life event allows you to add a new child by birth, adoption, or legal guardianship within 30 days of the effective date of the birth, adoption, or guardianship. You must provide documentation to complete the life event.

Eligible forms of documentation include a copy of the birth certificate, hospital birth announcement, hospital birth card, statement of live birth, court-signed adoption paperwork, and court-signed guardianship paperwork.

The life event effective date is the child's date of birth, the date of the adoption document, or legal guardianship document was signed by the judge/court.

Please note you cannot change plans during this event. Plan changes can only be made during open enrollment.

1. From the Home screen, click the **Personal** icon on the left side of the screen, then click on **Benefits & Pay**.
2. Click **Change Benefits** at the top of the page under the Tasks and Reports section.
3. Click the **Birth/Adoption of a Child (Legal Guardianship)** radio button.
4. Enter the **Date of Birth or Adoption** using the calendar field. This date must be within the past 30 calendar days.
5. Note the Benefits Offered that may need to be updated based on this life event.
6. Drop required files (e.g., Birth Certificate, Hospital Records, Certificate of Live Birth, Adoption Records) in the Attachments box or click the **Select files** button to locate your documents.
7. Click the **Submit** button.
8. Continue to the below section within this document, [Selecting Your Coverage](#).

Employee or Dependent Gains/Losses Other Coverage

This life event allows you to add or remove self and/or dependent(s) when other coverage has been lost or gained. You must submit the change within 30 days of losing or gaining other coverage. Documentation of proof of other coverage lost or gained must be provided within completion of the life event. This documentation must include all of the following details:

- All the **benefit coverages** being dropped or added (Medical, Dental, Vision, etc.)
- All the **dependents** involved in the change
- The **final date** (if adding Firm benefits) or **beginning date** (if dropping Firm benefits) of benefits coverage

Types of eligible documentation include a copy of new coverage enrollment including all details listed above, a letter from the HR department including all details listed above, a copy of your COBRA paperwork including all details listed above, a copy of a new insurance card showing the effective date of coverage and covered dependents, or a copy of your Certificate of Coverage including all details listed above.

Please note you cannot change plans during this event. You must add dependents to your current plan enrollments, as plan changes may only be made during open enrollment.

1. From the Home screen, click the **Personal** icon on the left side of the screen, then click on **Benefits & Pay**.
2. Click **Change Benefits** at the top of the page under the Tasks and Reports section.
3. Click the **Employee or Dependent Gains/Losses Other Coverage** radio button.
4. Enter the **new coverage start date (day after prior coverage ends)** (i.e., the date that is 1 day after the date previous coverage terminated. For ex: if previous coverage terminated 02/20/2024, enter 02/21/2024) using the calendar field. You have 30 days from the selected date to submit your elections as indicated by

the Submit Elections By date.

5. Note the Benefits Offered that may need to be updated based on this life event.
6. Drop required files (e.g., Proof of New Coverage or Loss of Coverage) in the Attachments box or click the **Select files** button to locate your documents.
7. Click the **Submit** button.
8. Continue to the below section within this document, [Selecting Your Coverage](#).

Marriage

This life event is for anyone who has gotten married. You must provide documentation (e.g., copy of the marriage certificate) when completing the life event.

Please note you cannot change plans during this event. If you are adding a spouse and/or dependent, you must add to your current plans. Plan changes may only be made during open enrollment.

The life event effective date is the date of the marriage.

You have 30 days from the date of the marriage to complete this life event.

1. From the Home screen, click the **Personal** icon on the left side of the screen, then click on **Benefits & Pay**.
2. Click **Change Benefits** at the top of the page under the Tasks and Reports section.
3. Click the **Marriage** radio button.
4. Enter **Date of Marriage** using the calendar field. You have 30 days from the selected date to submit your elections as indicated by the Submit Elections By date.
5. Note the Benefits Offered that may need to be updated based on this life event.
6. Drop required files (e.g., Marriage Certificate or License, Domestic Partner Affidavit) in the Attachments box or click the **Select files** button to locate your documents.
7. Click the **Submit** button.
8. Continue to the below section within this document, [Selecting Your Coverage](#).

Divorce/Dissolution of Domestic Partnership

Please note you cannot change plans during this event. Plan changes may only be made during open enrollment.

The effective date is the date the divorce/legal separation is signed by the judge/court as indicated in the documentation. You have 30 days from the date of the divorce and/or legal separation to complete this life event.

Before initiating a Divorce/Dissolution of Domestic Partnership, update your dependent's relationship to Ex-Spouse or Ex-Domestic Partner. Follow these steps:

1. From the Home screen, click the **Personal** icon on the left side of the screen, then click on **Benefits & Pay**.
2. In the menu on the left, expand **Benefits** (shield with heart) and click **Dependents**.
3. In the Dependents table, click the **Edit** button in the row for the dependent that you will be updating to Ex-Spouse or Ex-Domestic Partner.
4. Click the **Pencil** icon in the Effective Date & Reason section.
5. Use the **Calendar** field to enter the effective date.
6. Click the **Reason** field and then click **Change Dependent**.
7. Click the **Change Dependent > Divorce / Dissolution of Domestic Partnership** radio button.
8. Click the **Check** icon.
9. Scroll down the page to the Relationship section and click the **Pencil** icon.
10. Click the **Search** field to display available options.
11. Click the **Ex-Spouse** radio button.
12. Click the **Check** icon to confirm the edit.
13. Scroll down to Attachments and click the **Select files** button.
14. Add attachment (e.g., divorce decree).
15. Add a simple description in the Description field (e.g., divorce decree).
16. Click the **Category** field.

17. Click the **Benefits** radio button.
18. Click the **Submit** button.

A confirmation message, "Success! Event submitted" will appear. The next step is an approval by a benefits partner.

Death of Child/Spouse

This life event allows you to remove a dependent child or spouse from your benefits and/or beneficiaries upon the death of that dependent. You have 30 days from the effective date of the dependent's passing. You will need to provide a copy of the death certificate.

The life event effective date is the date of the death.

1. From the Home screen, click the **Personal** icon on the left side of the screen, then click on **Benefits & Pay**.
2. Click **Change Benefits** at the top of the page under the Tasks and Reports section.
3. Click the **Death of Child/Spouse** radio button.
4. Enter **Date of Death** using the calendar field. You have 30 days from the selected date to submit your elections as indicated by the Submit Elections By date.
5. Note the Benefits Offered that may need to be updated based on this life event.
6. Drop required files (e.g., Death Certificate) in the Attachments box or click the **Select files** button to locate your documents.
7. Click the **Submit** button.
8. Continue to the below section within this document, [Selecting Your Coverage](#).

Dependent Care FSA Change

This life event allows you to elect and/or change this benefit due to changes in the need for or cost of childcare.

1. From the Home screen, click the **Personal** icon on the left side of the screen, then click on **Benefits & Pay**.
2. Click **Change Benefits** at the top of the page under the Tasks and Reports section.
3. Click the **Dependent Care FSA Change** radio button.
4. Enter **Today's Date** using the calendar field. You have 4 days from the selected date to submit your elections as indicated by the Submit Elections By date.
5. Note the Benefits Offered that may need to be updated based on this life event.
6. Drop required files (e.g., Proof of the change in childcare needs or costs) in the Attachments box or click the **Select files** button to locate your documents.
7. Click the **Submit** button.
8. Continue to the below section within this document, [Selecting Your Coverage](#).

Selecting Your Coverage

Once you've submitted your life event information, a pop-up window will display where you can begin to select/update your coverage based on your life event.

1. Click the **Open** button in the pop-up window.
Note: If the **On Hold** button appears instead, this means you either have a duplicate request for this life event or another change request must be completed first before proceeding with this one. To view recent change requests that were initiated but not completed, click the **My Tasks** icon in the top menu bar.
2. Click the **Let's Get Started** button in the Change Benefit Elections screen to make changes to your benefits associated with this life event.
3. Complete and continue through all required screens. Once you have made all desired elections/changes, click the **Review and Sign** button.
4. Once you have reviewed your summary, select the **I Accept** checkbox to provide an electronic signature confirming your changes.
5. Click the **Submit** button.
6. Click the **Done** button to complete the task or click the **View 20XX Benefits Statement** button to review and print a summary of your benefits.

Working with Requests in My Tasks

Once you've submitted your life event information, a pop-up window will display where you can begin to select/update your coverage based on your life event. If you choose to exit the process at this time and come back later to update your coverage, the task will be available in My Tasks in the top menu bar.

1. From the Home screen, click **My Tasks** icon.
2. Your unfinished tasks are located in the All Items pane.
3. Click a task to reveal its information.

Completing Your Task

1. In the body/description of your task, click the **Let's Get Started** button.
2. Complete and continue through all required screens. Once you have made all desired elections/changes, click the **Review and Sign** button.
3. Once you have reviewed your summary, select the **I Accept** checkbox to provide an electronic signature confirming your changes.
4. Click the **Submit** button.
5. Click the **Done** button to complete the task or click the **View 20XX Benefits Statement** button to review and print a summary of your benefits.

Canceling Your Task

1. Click the **Gear** icon at the top of the body/description of your task.
2. Select **Cancel** from the drop-down menu.
3. Review the details of the task in the Cancel Business Process section.
4. Scroll to the bottom of the task details and enter a comment/reason for canceling this task in the enter your comment field.
5. Click the **Submit** button.
6. A confirmation message, "Event Canceled" will appear and the task will be moved from All Items to Archive in My Tasks.

Printing Benefits Statement

From the Home page:

1. Click the **Profile** photo/icon and click the **View Profile** button.
2. Click the **Actions** button.
3. Hover over **Benefits** and click **View My Benefit Statement** from the context menu.
4. Click the **Benefit Event** prompt.
5. Click the desired benefit event you would like to view and print.
6. Click the **OK** button.
7. Click the **Print** button in the Submit Elections Confirmation screen.
8. From the Export Document pop-up, click the **Download** button. The selected benefit event saves to your device as a PDF document that you can open and print.