Benefits: Manage Your Benefits

In Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. The university will define the steps to accomplish these objectives. This job aid covers generic events, so please contact the university’s HR department or benefits representative if you have further questions.

**View and Edit Benefit Elections**

Employees can change benefit elections when a qualifying event occurs, such as a change in marital status, the birth or adoption of a child, or a beneficiary change.

From the Benefits application:

1. Click the **Benefit Elections** button under View.
2. Review your benefit elections and costs.
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3. Click your Related Actions button.


5. Enter all required information, denoted by asterisks, and make any permitted changes.

6. Click Submit.

Add Dependents

A dependent is an individual who receives benefits under your plan, such as a child or spouse.

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: If you add an additional dependent, you may need to update your Federal Tax elections, as well as your Benefit elections. If you add an additional beneficiary, you may need to update your Benefit elections.

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.
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**Manage Beneficiaries**

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can change, edit, and add beneficiaries from the Benefits application.

From the Benefits application:

1. Click the **Beneficiaries** button under **Change**.
2. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking **Edit**.
3. Click **Add** to add a new beneficiary. The Add Beneficiary page displays.
4. Select **Existing Dependent or Emergency Contact**, **New Person as Beneficiary**, or **New Trust as Beneficiary**.
5. Click **OK**.
6. Enter all required information, denoted by an asterisk.
7. Click **Submit**.

<table>
<thead>
<tr>
<th>Beneficiaries</th>
<th>1 item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beneficiary</td>
<td>Relationship</td>
</tr>
<tr>
<td>Test Beneficiary</td>
<td>Friend</td>
</tr>
</tbody>
</table>

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Print Benefits Statement

From the Home page:

1. Click the Profile menu > 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 icon. The selected Benefit Event will open as a PDF document, which can be saved and printed.