

How to Make Benefits for Life Event Changes in Workday



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[Change your benefits in Workday here.](#)

Steps

1	Submit request with applicable documentation.
2	Request reviewed and approved by Teammate Care (takes up to four days, if applicable).
3	Change benefits elections.
4	Benefits elections reviewed and approved by Teammate Care (takes up to four days).
5	New elections in place and pay adjusted as applicable.

Review requirements

According to federal law, benefits elections during the year are allowed only when you have a major life event such as a change in family or employment status.

It also requires a benefits change request be made within [a specific timeframe](#) depending on the type of life event. There are no exceptions.

Review the [life events that are eligible](#) for benefits changes and the [documentation](#) that may be required.

Depending on the life event type, the documentation must include:

- Name(s) of affected individual(s) (spouse/domestic partner or dependent)
- Event type (such as birth of child, divorce, or employment change)
- Effective date of change(s) (such as date coverage was gained or lost)
- Type of coverage changed (medical, vision, dental)

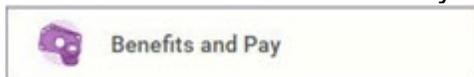
For example, if you're adding or dropping coverage, acceptable documentation would include insurance card or letter with details from the other employer or employer's plan containing the information above.

If you're within your first 31 days as a new hire, follow [these instructions](#) to enroll in benefits.

Your benefits change won't be approved if it isn't for an eligible event, doesn't have the applicable supporting documentation, or isn't requested within the specified timeframe. Only like coverage will be approved (added or dropped). For example, if a spouse loses medical coverage only, they may be added to medical coverage only (not also to dental and vision).

Submit your life event

- From the menu on the Workday homepage, click the **Benefits and Pay** icon.



- Click **Benefits**, then **Benefit Elections**.



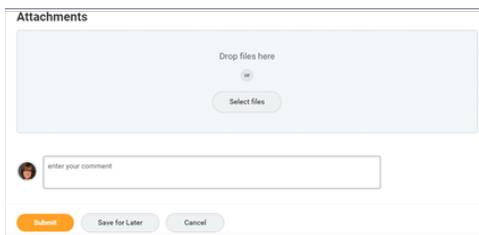
- Under **Benefit Elections**, select **Change Benefits**.

- Select the relevant **Change Reason**, then the **date** of the event. The date may be in the past or future.

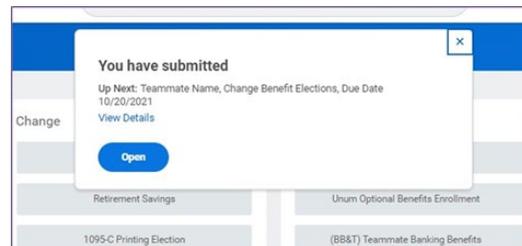
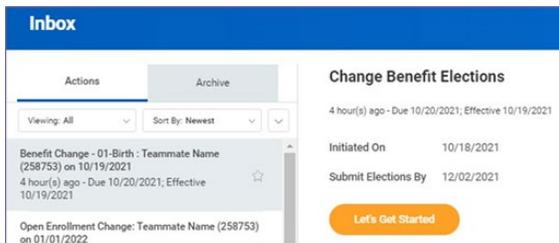
For example, if your spouse's employment ends on Jan. 31 but benefits coverage ends on Feb. 15, you would enter the coverage end date of Feb. 15. If you're unsure of the effective date, select your best estimate.

- If documentation is required, **attach** it here. Ensure it's readable — PDFs are preferred over photos.

If you don't have all the documentation yet, submit this benefits change request now so that it's within the timeframe requirement. You'll have to submit the required documentation once you have a task in your Workday inbox to proceed with any benefits changes.



Except for births and marriage, you'll need to wait for approval before continuing to the next step.



- If the event doesn't need approval, open it from the pop-up or the task in your Workday Inbox.
- If it needs approval, you'll receive additional information **in your Workday inbox within four business days** of submitting this request. Once approved, you can make benefits election changes.

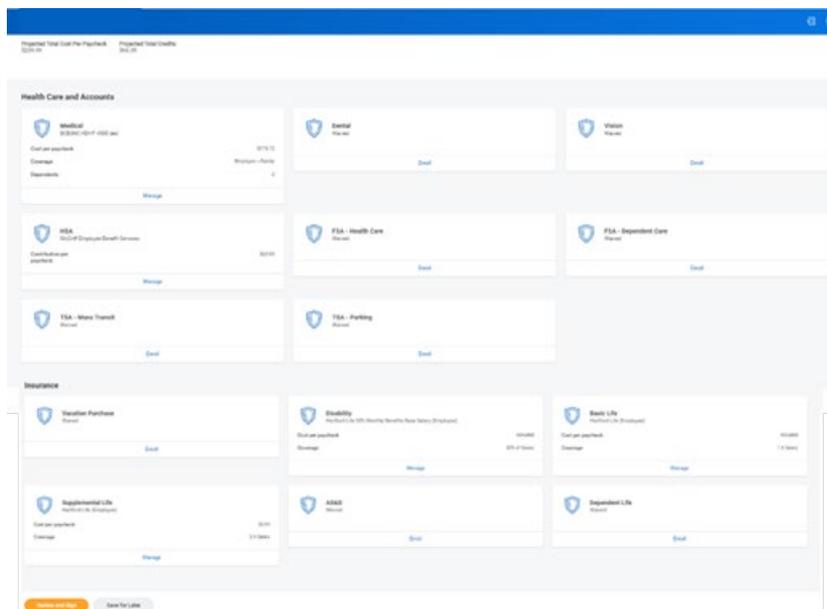
Change your benefits elections

You'll see a screen with your benefits options. Make your health care benefits elections and go through the subsequent pages.

Your benefit changes must be aligned with the circumstances of your life event. For example, if your spouse lost medical coverage but wasn't previously enrolled in dental coverage, you may not enroll them in dental coverage at this time.

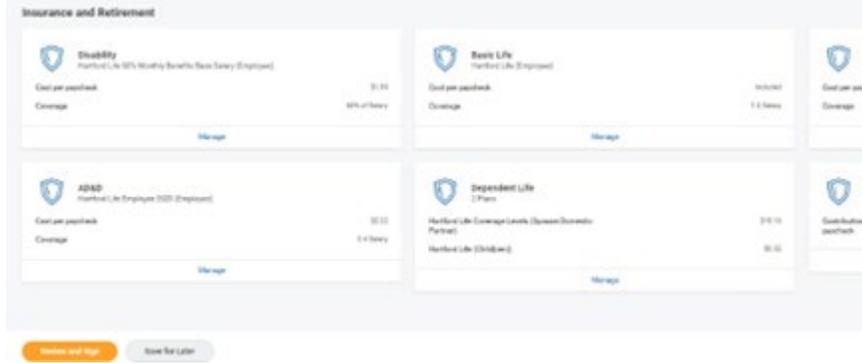
Additionally, changes might affect your premiums, and your pay will be adjusted accordingly (credited or deducted) based on the effective date of the benefit change.

- You'll enroll in or make changes to each benefit separately, as desired.
- "Manage" indicates you're currently enrolled in a particular benefit. "Enroll" indicates you aren't enrolled.
- To change or enroll in benefits, click **Manage or Enroll** on each tile.
- **Be sure to click "manage" for any plans for which you want to change or add dependents/beneficiaries.**
- **Once your plan is selected, click "Confirm and Continue" to move to the next page to add/remove dependents.**



When you've made elections, you can review a summary, change them, and sign and submit to complete enrollment

- On the main screen, click **Review and Sign** in the bottom left.



View Summary

- Review all the elections you made, making sure to scroll down to see all of them.
- The projected total cost per paycheck is in the upper left.

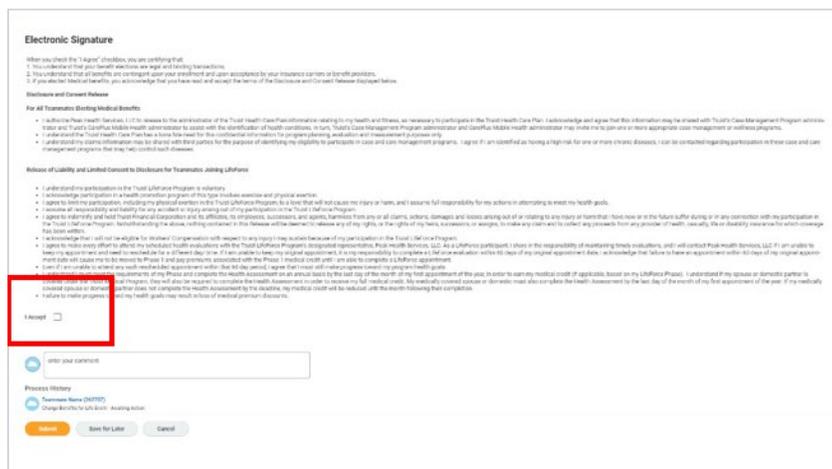
Note: This total includes any projected medical credits earned through LifeForce.

- You can:
 - Click **Cancel** to return to the main screen and make any changes.
 - Click **Save for Later** to return to Workday to complete enrollment at another time.

Or:

Sign and Submit

- If you're ready to complete enrollment, scroll to the **Electronic Signature** section.
- Check the box next to **I agree**.
- Click **Submit** to provide an electronic signature and complete enrollment.
- On the next screen, you can view and print your benefits elections.



Note: The confirmation shows the itemized costs and credits.

Your premiums will be adjusted accordingly, and you will get an email once your life event change has been approved and receive a pay adjustment notification if applicable.

Other considerations:

- If you have a dependent child who reaches the age of 26, they'll be removed from your benefits effective the last date of the month in which they turn age 26.
- If you change your address to a Zip code that is no longer eligible within your enrolled benefits plan, Teammate Care will contact you with other plan options.
- If you request a benefits change due to a life event during open enrollment, your open enrollment Workday task will be put on hold and reopened once your benefits change for the current year is processed.