

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.

Benefit Plan	*Elect / Waive	Enroll Dependents	Employee Cost (Monthly)	Employer Contribution (Monthly)
Tobacco Pledge - UA System - Election and Coverage is Required	<input checked="" type="radio"/> Elect <input type="radio"/> Waive			

## 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.

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employer Contribution (Monthly)
Basic Life - The Standard ER Paid 1x (Employee)	03/31/2020	03/31/2020	1 X Salary	\$50,000.00			\$7.75
Basic Long Term Disability (LTD) - The Standard (Employee)	03/31/2020	03/31/2020	100% of Salary				
403(b) Employee Required Contribution - TIAA 5%	03/31/2020	03/31/2020	4%				
Employee Assistance Plan - AEAP	03/31/2020	03/31/2020	EAP				
Total:							\$7.75

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)
Tobacco Pledge - UA System - Election and Coverage is Required	05/01/2020	05/01/2020	Not a tobacco user.			
Total:						

### CHANGE ELECTIONS


From the Benefits application:

1. Under **Change**, click **Benefits**.
2. Select the **Benefit Event Type** and the **Benefit Event Date**.
3. Enter all required information, denoted by asterisks, and make any permitted changes.
4. Click **Submit**.

### 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.

### VIEW DEPENDENTS' BENEFIT ELECTIONS

From the Benefits application:

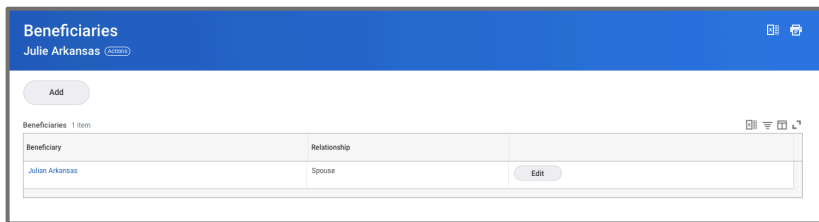
1. Click the **Dependents** button under Change.
2. Review your existing dependents and their benefit plan coverage.

## MANAGE BENEFICIARIES

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

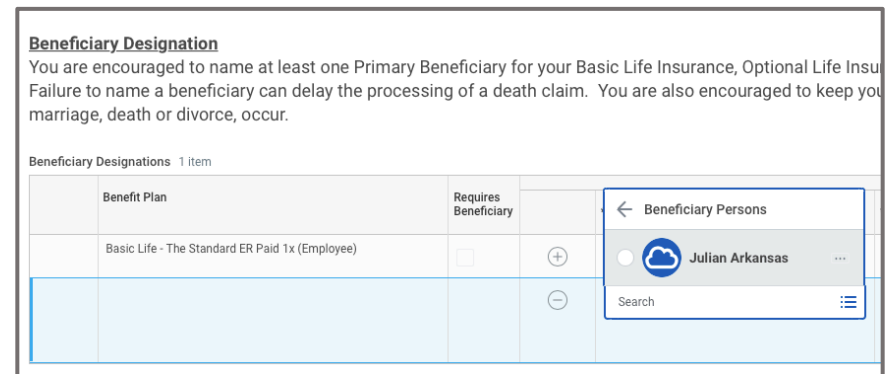
From the Benefits application:

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.

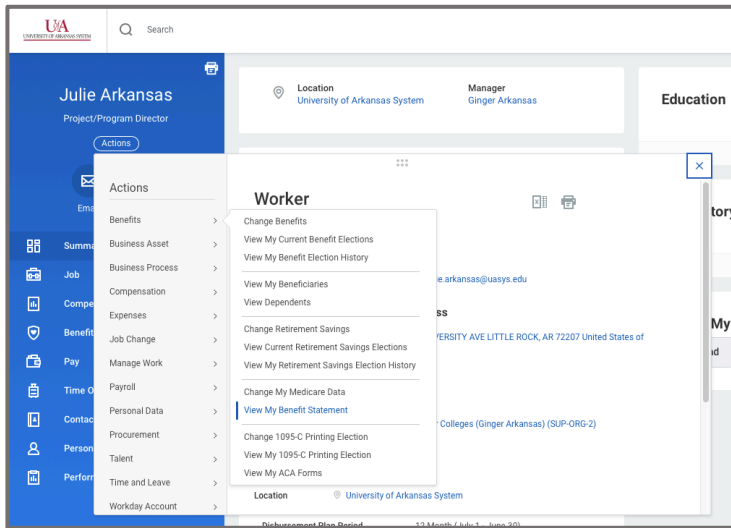


14. Continue adding all beneficiaries. Click **Continue**, then click **Submit**.

## PRINT BENEFITS STATEMENT

From the Home page:

1. Click the **Profile** icon > **View Profile**.
2. Click the **Actions** button
3. Select **Benefits** > **View My Benefit Statement**.



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.

Benefit Plan	*Elect / Waive	Employee Contribution
403(b) Employee Required Contribution - Fidelity 5%	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0
403(b) Employee Required Contribution - TIAA 5%	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 5

6. **Elect** any additional voluntary contributions in the 403(b) Voluntary rows. Note: the same vendor must be selected for 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.