Change Benefits Life Event (ESS)

Overview

This job aid outlines the activities for an employee to change benefits for a life event such as marriage, a birth or adoption, divorce, tobacco usage, etc.

Prerequisites: If the life event involves adding coverage for a dependent, the employee must add the dependent and related information in Workday first. Use the Dependent Event job aid

Important Information:

- You must enter life event changes within 60 days of the life event
- You must add a dependent or change a dependent’s personal information before starting a benefit change
- For Divorce - Your spouse and stepchildren must first be changed to “ex-spouse” and “ex-stepchildren” so that they will receive a COBRA notice. To do this, go to the Benefits worklet and click Change Dependents and follow the steps in the Dependent Event job aid

Steps

Initiate the Change Benefits Process

From the Workday Home page:

1. Click the Benefits worklet

   ![Benefits worklet]

2. Click the Benefits button under the Change column

   ![Change benefits page]

The Change Benefits page displays

3. Read all of the instructions at the top of the Change Benefits page before making a benefits change

4. Complete the following fields:
   - **Benefit Event Type** (e.g., Beneficiary Change Only, Birth / Adoption, Divorce, Marriage, Tobacco Usage Change, ORP, TDA Plan Change, Medicaid Change, etc.)
   - **Benefit Event Date**

   ![Benefit event type and date]

   **Note:** The Submit Elections By and Enrollment Offering Types fields will auto-populate depending on the entries in the first two fields
5. Click **Submit**

Next, you will receive an inbox task to **Change Benefit Elections**

**Change Benefits Elections**

From the Workday Home page:

1. Navigate to your **Inbox**
2. Click the “Benefit Change” inbox action item
3. At the top of the Change Benefits Elections page, view the Total Cost, Total Credits and Total Employee Net Cost / Credit

**Note:** The Change Benefit Elections task is a multi-step process

**Step 1: Select Health Care Elections**

4. Change your election if necessary, for the tobacco usage question

   **Have you used tobacco products in the last three months?**
   
   - Yes
   - No

5. In the **Health Care Elections** section, do the following:
   - Any plans in which you are already enrolled will appear as elected, all other plans will be waived. Elect any additional or alternative plans you would like
   - Enroll Dependents and select Coverage

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Enroll Dependents</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical: Blue Cross Blue Shield of TX PPO A&amp;M Care</td>
<td>Elect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental: Delta Dental DMHO</td>
<td>Elect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental: Delta Dental DIPO</td>
<td>Elect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vision: Superior Vision V5</td>
<td>Elect</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Step 2: Select Spending Account Elections**

7. In the **Spending Account Elections** section, do the following:
   - Any plans in which you are already enrolled will appear as elected, all other plans will be waived. Elect any additional or alternative plans you would like
   - Enter how much you want to contribute for the total year or per paycheck for the elected plan

**Note:**
- 1% paid employees, the amounts you see are per paycheck, not per month (maximum two per month).
- If you or your use tobacco products, the health plan rates include an additional 50% per month.
Step 3: Select Insurance Elections

8. In the Insurance Elections section, do the following:

- Any plans in which you are already enrolled will appear as elected, all other plans will be waived. Elect any additional or alternative plans you would like
- Add the Coverage Level and select coverage for Dependents for the elected plan, as needed
- Click the prompt menu in the box for dependents to get a list of dependents that can be added

Step 4: Select Beneficiary Designations

9. In the Beneficiary Designations section, do the following, as needed:

- Add one or more Beneficiaries
- Select Primary Percentage or Contingent Percentage and enter the percentage

Note: You must elect one or more Primary Beneficiaries totaling 100%

10. Click Continue

Step 5: Review Benefit Elections

11. Review all of the benefit elections made in the previous pages including elected or waived coverage, beneficiary designations, etc.

12. In the Electronic Signature section, review the statements and click the I Agree checkbox

Note: After you submit your elections, print your coverage if desired. Click the Print button. The details will be saved in a PDF format from which you can print the document

Step 6: Submit Elections Confirmation

13. Click Submit

14. You can see the additional cost in red, review the change you have made, and print if desired

15. Click Done

This completes the Change Benefits process

All completed events are fed nightly from Workday to legacy applications such as Datawarehouse and FAMIS