Dependent Event (ESS)

Overview
This job aid outlines the process for an employee to add or edit dependents for benefits coverage in Workday

Prerequisites: N/A

Important Information:
- Supporting documentation is required when a dependent is added or information is updated
- In case of a DIVORCE, you must change the relationship of your spouse to ex-spouse and any stepchildren to ex-stepchildren, in order for them to offered COBRA continuation coverage
- The required information for this process is the Effective Date, Reason, Legal Name, Gender, Date of Birth, Relationship, and Contact Information

Steps
From the Workday Home page:

Initiate the Dependent Event (Employee)

From the Workday Home page:
1. Click the Benefits worklet
2. From the Benefits page, click Dependents in the Change column on the left
   
   The Dependents page displays

3. On the Dependents page, perform one of the following actions:
   - Click Add to add a new dependent
   - Click Edit to update existing dependent

4. In the Dependent Options section, add or edit the information including:
   - Effective Date
   - Reason
   - Use as Beneficiary (Optional)

   Note: Click on the boxes or the Edit icon to add dependent details

5. In the Dependent Personal Information section, add or edit the information as needed, including:
   - Legal Name
- Gender
- Date of Birth
- Date of Death
- Relationship
- Disability Status
- Tobacco Usage

**Note:** Click on the boxes or the edit icon to add dependent details

6. Add or edit information in the **Contact Information** or **Identifier Information** if applicable

7. Click **Submit**

You will receive a To Do in your Inbox to upload supporting documentation on HRConnect

### Upload Supporting Documentation (Employee)

From the Workday homepage:

1. Go to your **Inbox**
2. Click the “Upload Documentation” action item
3. On the **Complete To Do Upload Documentation** page, click the link to be directed to HRConnect

4. Select the **Document Category**, **Document Type** and upload the supporting documentation for the dependent by clicking the **Browse** button

5. Click **Upload** after attaching the document

6. Click the **Submit For Approval** button after uploading the necessary documentation

7. Once you have uploaded the document, you will see a message saying that the documents were submitted successfully

8. Return to your Workday Inbox (by using the tabs at the top of your screen) and click **Submit** at the bottom of the **Upload Documentation** To Do after you have uploaded your documents on HRConnect

The next step is for the **Benefits Partner** to review the dependent documents

**Up Next**

- Benefits Partner
- To Do: Review Dependent Document(s) in HRConnect and Verify Any New Dependents
Review Dependent Documents (Benefits Partner)

From the Workday Home page:

1. Go to your Inbox
2. Click the “Review Dependent Document(s) and Verify Any New Dependents” action item
3. Click the link to be directed to HRConnect

4. Open dependent document and review it for accuracy of dates, events, etc.
5. After reviewing the document, return to Workday. In the Search bar enter the employee’s name and press Enter
6. From the employee’s related actions, go to Benefits and click View Dependents

The Dependents page displays

7. Click the Edit button for the newly added Dependent

8. On the Edit Dependent page, use the edit icon to enter the Reason (Edit Dependent - Dependent Certification) for the dependent
9. Scroll to the bottom of the page to the Other IDs section and click the Add button

10. Complete the following fields:
   - **Other ID Type:** Select Dependent Certification from the list
   - **Identification #:** Enter Y

11. Click Save icon after entering the fields
12. Click Submit

After the new dependent is added and information verified, the employee updates their benefit elections. Use the Change Benefits job aid to do so

This completes the Dependent Event process

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