

Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. This job aid covers generic events, so please contact WellEarned@teamexos.com if you have further questions.

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, loss/gain of coverage, etc., you can change your benefits to reflect your Life Event.

From the Benefits and Pay worklet:

1. Click the **Benefits** dropdown and select **Benefit Elections** and click **Change Benefits**.
2. Select the **Change Reason**.
3. Click the Calendar icon to enter **Benefit Event Date**.
4. Attach required documents that support the reason of the Life Event.

Table of Contents

- Page 1: Reporting a Life Event
- Page 2-3: Viewing Benefits/Dependents/Beneficiaries
- Page 3: Print Benefits Statement

- Change Reason *
- Beneficiary Change
 - Birth / Adoption of Child
 - Divorce / Dissolution of Domestic Partnership
 - Gains / Loses Coverage from another Source
 - HSA Contribution Change
 - Marriage / Domestic Partnership
 - Parking/Transit Contribution Change



enter your comment

Submit

Save for Later

Cancel

5. Click **Submit**, then click **Done**. A task will route to your Inbox.
6. Click your **Profile icon** > **Inbox**.
7. Click the **Benefit Change** task and click **Let's Get Started**.
8. Complete and continue through all required screens. Check the **I Agree** checkbox, if required, to provide an electronic signature, confirming your changes.
9. Click **Submit**.
10. Click **Done** to complete the task or Print to launch a printable version of the summary for your records.
11. Once approved, you will receive confirmation in your inbox.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan.

From the Benefits and Pay worklet:

1. Click the **Benefits** and then select **Dependents**.
2. Click **Add**.

3. Click the **Edit** icon or click in the field to modify. Required fields are denoted by asterisks.

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 and Pay worklet:

1. Click **Benefits** and then select **Dependents**.
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. You can change, edit, and add beneficiaries from the Benefits worklet.

From the Benefits and Pay worklet:

1. Click **Benefits** and select **Beneficiaries**.
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**.

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 icon 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.
Note: All changes to your 401(k) will be made directly through The Standard at www.standard.com/retirement.