# Add or Change Dependents or Beneficiaries

*Workday Job Aid for Employees*

## Overview

This job aid details how to add or change your dependents or beneficiaries. For information regarding open enrollment or benefits elections, please refer to the *Complete Open Enrollment* or *Change Benefits for Life Event* job aids.

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## View Benefits Information

Benefits information is available to you before or after your life event.

1. From the Workday home page, click **View All Apps** and select the **Benefits** application.
2. From the External Links column, click the available links to read more information as needed.
3. From the View column, select one of the following options, as applicable:
    - **My ACA Forms**: View applicable ACA (Affordable Care Act) Forms.
    - **Benefit Elections**: View all current benefit elections.
    - **Benefit Elections as of Date**: View benefit elections as of a specific date.

## Add/Change Dependents During Benefit Change

You can add a dependent for a life change event, such as the birth of a child, or when completing the Open Enrollment Change task.

1. *To initiate for a life change event*, from the Workday home page, click **View All Apps** and select the **Benefits** application.
2. Under the Change column, click **Benefits**.
3. Select the applicable **Change Reason**.
4. Enter the **Benefit Event Date**.
5. Review when to **Submit Elections By**.
6. Review the **Benefits Offered**.
7. Drag and drop or click **Select files** to upload the required supporting documentation, if applicable.
8. Click **Submit**.

    **Note**: Upon submission, you will receive a Change Benefit Elections Inbox task. Continue with the **Change Benefit Elections** section immediately.
9. From your Workday Inbox, click the **Benefits Change** task.
10. Click **Let’s Get Started**.
11. The page displays with the following sections and related options:
    - Health Care and Accounts
    - Insurance
    - Additional Benefits
12. Select one of the following actions for the benefit option(s) that requires modification:
    - To enroll in a plan, click **Enroll**.

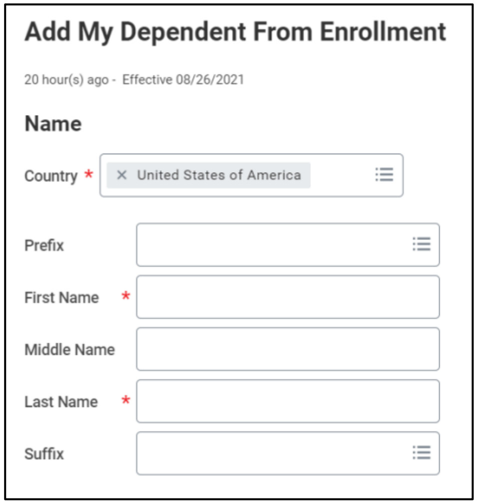
- To edit an existing plan, click **Manage**.

13. Read the **Important Information** and **General Instructions**.
14. Under the Plans Available section, view the plan details.
15. Select one of the following actions:
    - To enroll in a plan, click **Select**.
    - To waive a plan, click **Waive**.
16. Click **Confirm and Continue**.
17. Use the following table to determine your next step:

| If… | Then… |
|---|---|
| You are not adding Dependents to a plan | • Click **Save**.<br>• You automatically return to the Open Enrollment screen to continue elections |
| You are adding an existing Dependent to a plan | • A list of dependents displays<br>• Select the applicable dependent(s) from the list |
| You are adding a new Dependent to a plan | • Click **Add New Dependent**<br>• Click **OK**<br>• Continue to Step 18 |

18. Enter or modify the details for the Dependent.

    **Note**: You need to fill out the fields marked with an asterisk (*).



| Field | Description |
|---|---|
| Country | United States of America |
| Prefix | Select Dr., Mr., Mrs., or Ms. |
| First Name | Enter the given name. |
| Middle Name | Enter the given middle name. |
| Last Name | Enter the family name. |
| Allow Duplicate Name | Click the checkbox if this person shares a name with another individual in your family (e.g. father and son). |
| Relationship | Select one of the options. |
| Date of Birth | Enter the person’s date of birth. |
| Age | Auto-populates based on the DOB. |
| Gender | Select Male or Female. |
| Full-Time Student | Click the checkbox if the dependent is a full-time student. |
| Disabled | Click the checkbox if the dependent is disabled. |

19. Click **Add** in the National IDs section. If needed, enter the following information:

| Field | Description |
|---|---|
| Country | Select United States of America. |
| National ID Type | Select Social Security Number (SSN). |
| Add/Edit ID | Enter the SSN. |

20. Click **Save**.
21. Once dependents have been modified, click **Review and Sign**.
22. Review the instructions at the top of the screen.
23. Carefully review your benefits.
24. Under the Electronic Signature section, carefully read the Legal Notice.
25. Select the **I Accept** checkbox.

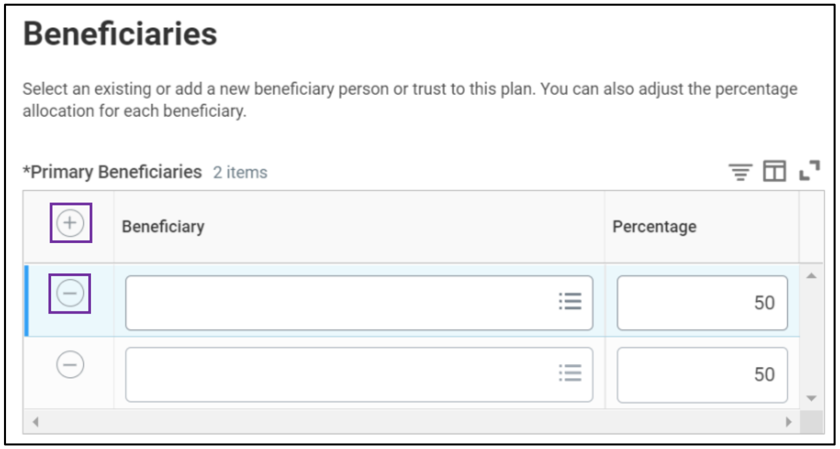
    **Note**: This acknowledgement is equivalent to a formal signature.
26. Click **Submit**.
27. Click **Print** to print a copy of your enrollment for your records as proof of what you changed in your benefit elections.

    **Note**: Changes to your benefits route to the Benefits Partner or Retiree Partner for review, then to relevant benefits providers to update coverage.

## Designate Beneficiaries During Benefit Change

**Note**: Benefit Plans that require a beneficiary will have a **Beneficiaries** section to review and/or modify.

1. Review the **Beneficiary Designations** for the Benefit Plans for which they are required.
2. To add a Beneficiary, click the **+ icon**.




   **Note**: To remove a Beneficiary, click the **– icon** next to their name.

3. Select a beneficiary via the **Beneficiary Persons**, **Trusts**, or **Create** menu.

   **Note**: The Beneficiary cannot be the employee.

4. For each Beneficiary designated to each Benefit Plan, enter the applicable **Percentage**.

   **Note**: A contingent Beneficiary is a secondary beneficiary. The percentage amount across all primary beneficiaries must add up to 100% each. Add secondary beneficiaries as applicable.

5. Click **Save**.
6. Once dependents have been modified, click **Review and Sign**.
7. Review the instructions at the top of the screen.
8. Carefully review your benefits.
9. Under the Electronic Signature section, carefully read the Legal Notice.
10. Select the **I Accept** checkbox.

    **Note**: This acknowledgement is equivalent to a formal signature.

11. Click **Submit**.
12. Click **Print** to print a copy of your enrollment for your records as proof of what you changed in your benefit elections.

    **Note**: Changes to your benefits route to the Benefits Partner or Retiree Partner for review, then to relevant benefits providers to update coverage.

## Change Dependents

For changes to existing dependents, for example, because of a Divorce follow the steps below.

1. From the Workday home page, click the **Benefits** application.
2. Under the Change column, click **Dependents**.
3. Click **Edit** next to the applicable Dependent.
4. Select the **Reason** for the change using the table below.

| Category | Reason |
|---|---|
| Change Dependent | Loss of Dependent |
| Gain Dependent | Birth/Adoption of Child |
| | Marriage |
| Lose Dependent | Dependent Child Ages Out |
| | Divorce |

5. Verify the **Dependent Personal Information** and make updates as applicable.
6. Update the **Relationship** as applicable.

   **Note**: For a Divorce benefit event, select **Ex-Spouse**.

7. Verify the **Contact Information** and **Identifier Information** and make updates as applicable.

   **Note**: Process will route to the Benefits Partner or Retiree Partner for approval. The Benefits Partner or Retiree Partner approves if the dependent is NOT a surviving spouse or child.

## Change Beneficiaries

For changes to existing beneficiaries, follow the steps below.

1. From the Workday home page, click the **Benefits** application.
2. Under the Change column, click **Beneficiaries**.
3. Click **Edit** next to the applicable Beneficiary.
4. Verify the **Beneficiary Personal Information** and make updates as applicable.
5. Update the **Relationship** as applicable.
6. Verify the **Contact Information** and **Identifier Information** and make updates as applicable.

   **Note**: Process will route to the Benefits Partner or Retiree Partner for approval. The Benefits Partner or Retiree Partner approves if the dependent is NOT a surviving spouse or child.