

Benefits: Manage My Benefits

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. If your coverage change includes adding a dependent, complete the steps under 'Add Dependent' on the next page first.

From the Workday home page:

1. Click the **Benefits** app.
2. Click the **Benefits** button under Change.
3. Select the **Change Reason**.
4. Click the **Calendar** icon to enter the Benefit Event Date.
5. 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.
6. Click **Submit**. A popup will open, prompting you to change your benefit elections. Click **Open**.
7. Note the dates your elections must be submitted by, then click **Let's Get Started**.

8. Review the various Benefit Plans under Health Care & Accounts, Insurance & Retirement, and Additional Benefits. Click the **Manage** button on a tile to change benefits or the **Enroll** button to elect a new benefit. Once you have completed all selections, click **Review and Sign**.
9. On the final screen, you will see all the coverages you have elected or waived and their cost. You will also need to upload dependent documentation here.
10. Check the box next to **I Accept** to electronically sign your elections.
11. Click **Submit**. Your change request is not finalized until after Human Resources has reviewed and approved your documentation.
12. Optional: Click the Benefit Elections button to view and print your elections. Click the Print button at the bottom of the screen to print, otherwise click **Done**.



Note: When electing any benefits for the first time, you must click into the Tobacco Pledge benefit plan tile, even if you are not electing a medical plan. If you are not electing medical, waive the plan. If you are electing in medical, select the plan. On the next screen, you will indicate your tobacco usage under Coverage.

*Selection	Benefit Plan
<input checked="" type="radio"/> Select	UA System - UAF - Enrolling in UA Medical Insurance (Annual Tobacco Attestation)
<input type="radio"/> Waive	

Search


- Not a tobacco user
- Tobacco User - Agrees to participate in a cessation program within three months of the beginning of coverage
- Tobacco User - Not participating in cessation program - Surcharge Applied
- Do Not Disclose Tobacco Usage - Employee Did Not Attest & Enrolled in Medical - Surcharge Applied

Screenshot: choosing tobacco coverage if enrolling in medical coverage.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan. Outside of open enrollment, dependents can only be added within 31 days of an eligible life event.

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. You may elect to name a dependent as a beneficiary at this point.
4. In the Dependent Personal Information section, select **Country** as United States of America.
5. Click the **Add** button to add new information.
6. Click **Submit**.



Note: Adding a dependent does not add them to health, vision or dental coverages. After adding a dependent, follow the steps on the previous page for change benefits for life event to add them to coverage.

VIEW BENEFIT ELECTIONS

VIEW ELECTIONS

From the Benefits application:

1. Click the **Benefit Elections** button under View.
2. Review your benefit elections and costs.

Benefit Elections
Julie Arkansas ACCOUNT

Current Benefit Elections and Costs: 4 items

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				
402(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

VIEW DEPENDENTS' BENEFIT ELECTIONS

From the Benefits application:

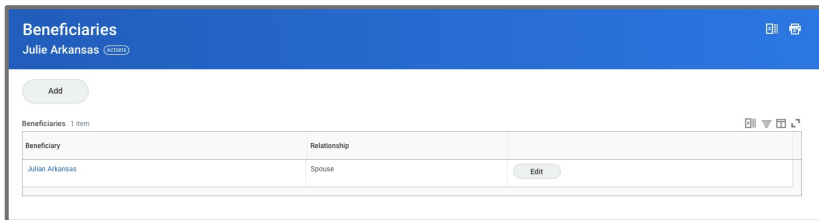
1. Click the **Dependents** button under Change.
2. Review your existing dependents and their benefit plan coverage.

MANAGE BENEFICIARIES

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. Beneficiaries must be elected for Basic Life, Optional Life (if enrolled), and Accidental Death and Dismemberment (if enrolled).

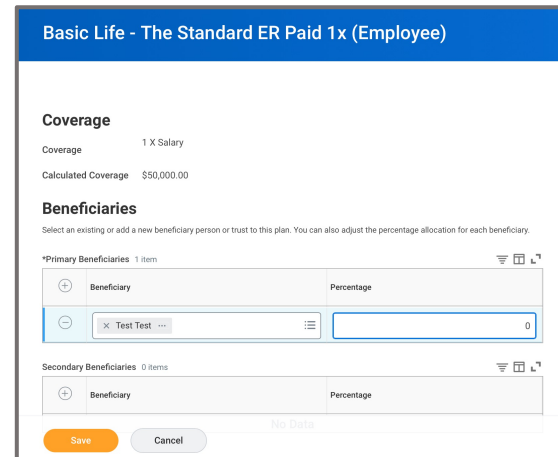
From the Benefits application:

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 **Create a New Beneficiary** or **Create a New Trust Beneficiary**.
5. Click **OK**.
6. Enter all required information, denoted by an asterisk. Note that you must add at least one contact method for the beneficiary.
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 Change Reason, select **Beneficiary Change Only**.
11. Click the **Calendar** icon to enter **today's date** as the Benefit Event Date. Enter today's date and not the effective date of the trust if using a trust.
12. Click **Submit**, then click **Open** from the popup that displays, then click **Let's Get Started**.
13. Once you arrive to the Insurance page, click **Manage** under the the insurances you are enrolled in. Click **Confirm and Continue**, then click the **+** to add a beneficiary.
14. Select the beneficiary and the percentage they will receive. You must add at least one primary beneficiary and can add secondary as well.



15. Continue adding all beneficiaries. Click **Save**.
16. Once you have added beneficiaries for all enrolled coverages, click **Review and Sign**, check the box next to **I Accept**, then click **Submit**.

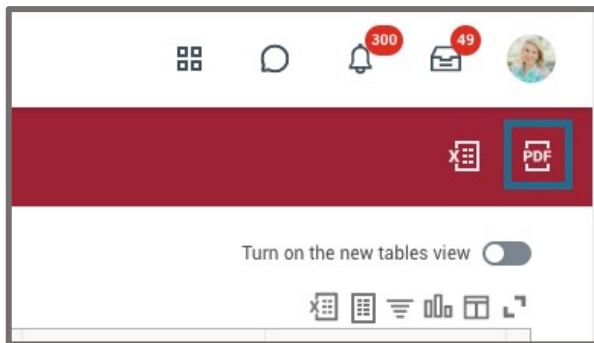
VIEW/PRINT BENEFITS ELECTIONS

From the Benefits application:

1. Click **Benefit Elections** under View. Your current elections and costs will display.

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
Tobacco Pledge - UA System Tobacco Pledge 1 - UAC - Enrolling / Enrolled in UA Medical Insurance (Tobacco Abstinence)	01/01/2021	01/01/2021	(2) Enrolling in Medical & Not a Tobacco User					
Medical - UMW HEMP Health Savings Plan UAC	02/01/2021	02/01/2021	1. Employee Only				\$49.64	\$372.44
Vision - Superior Vision Basic Plan	01/01/2020	01/01/2020	2. Employee and Spouse				\$10.86	
Health Savings Account (HSA) - Optum Bank 12 Month - Health Savings Account - (Under 95)	02/01/2021	02/01/2021	\$0.00 Annual					\$41.67
Basic Employee Life - The Standard Employee Paid 1 x Salary for UASYS (Benefit Coverage Max \$50,000) (Employee)	01/01/2020	01/01/2020	1 x Salary	\$60,000.00				\$3.95
Basic Long Term Disability (LTD) - The Standard Employer Paid 100% of Salary for UASYS (Max Covered Salary up to \$25,000) (Employee)	01/01/2020	01/01/2020	100% of Salary	\$20,000.00				\$2.72
403(b) Required Employee Retirement - TIAA 5%	01/01/2020	01/01/2020	5%					
403(b) Voluntary Employee Retirement - TIAA Tax Deferred	08/16/2021	08/01/2021	2%					
Employee Assistance Plan - ADAP Employee Program Assistance available at UMCA, UACA, UAC, UALR, UAMES, UARK, & UARPC	01/01/2020	01/01/2020	Employee and Immediate Family					
Total							\$60.50	\$4

2. Click the **PDF icon** at the top right to generate a PDF of your benefits that can be saved.



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 **Benefit Event Date** for which you want the changes to take effect then click **Continue**. Click **Continue** again.
4. UA System employees are required to contribute a certain percentage to their retirement. Under the Retirement section, click **Manage** in the 403(b) Employee Required Contribution box.
5. Click **Select** next to the 403(b) Employee Required Contribution vendor of your choice. Note: only one vendor can be selected for both required and voluntary contributions - contributions cannot be split between vendors.

*Selection	Benefit Plan	You Contribute (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Fidelity 4%		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	TIAA 4%	4%	

6. Click **Confirm and Continue**. Enter the required contribution percentage in the **Contribution (%)** field. Click **Save**.
7. Click **Manage** in the 403(b) Voluntary box.

8. **Select** any additional voluntary contributions in the 403(b) Voluntary rows. Note: the same vendor must be selected for for voluntary and mandatory contributions.



Note: While only one retirement vendor can be selected each pay period, you can switch vendors as often as you choose.

9. Click **Confirm and Continue**. Enter the contribution percentage in the **Contribution (%)** field. Click **Save**.
10. Click **Review**. Review the information you have entered, then click **Submit**.
11. Click **Done**.