

## Manage Your Benefits: View or Modify Your Benefits

### Topics covered in this guide:

- [View Existing Benefit Elections](#) (formerly Benefits Summary)
- [Report a Benefit Event](#) (formerly Qualifying Life Event)
- [View Benefit Changes in Progress](#)
- [Submit Your Benefit Event](#) (Benefit Elections Review)
- [Cancel a Benefit Event Change](#)
- [Add Dependents](#) or [Add Beneficiaries](#)
- [Edit a Dependent's Demographic Information](#) or [Edit a Beneficiary's Demographic Information](#)

For all other qualifying events, see the instructions outlined below. For more information, please visit the [HR Benefits website](#) for more detail on cost, or contact the [Employee Service Center](#).

Qualifying Life Events*	Workday Benefit Event Type
<b>Birth or Adoption</b>	<b>Birth/Adoption/Acquired Guardianship of a Child</b>
<b>Civil Court Award</b>	Contact the <a href="#">Employee Service Center</a> for assistance
<b>Change in Daycare Rates</b>	<b>Change in Daycare Rates</b>
<b>Child Status</b>	<b>Change in Child/Dependent Status</b>
<b>Death (Child/Spouse)</b>	<b>Death of Spouse/Child</b>
<b>Divorce – Separation</b>	<b>Marital Status Change</b> If you wish to make a benefits change due to a marital status change for a partner currently covered, you must first change your marital status in Workday.
<b>Guardianship</b>	<b>Birth/Adoption/Acquired Guardianship of a Child</b>
<b>Loss Domestic Partner</b>	<b>Change in Child/Dependent Status</b>
<b>Loss-Gain of Other Coverage</b>	<b>Spouse Loses/Gains Coverage</b>
<b>Marriage</b>	<b>Marital Status Change</b> If you wish to make a benefits change due to a marital status change for a partner currently covered, you must first change your marital status in Workday.
<b>Spouse Eligibility</b>	<b>Spouse Loses/Gain Coverage</b>
<b>N/A – No life event required to occur in order to change</b>	<b>Health Savings Account Change Insurance/LTD/Beneficiary Change Elect YURAP (Waive Pension)</b>

\* You must finish changing benefits due to one life event before you can make additional changes.

**Note:** Benefit Events must be entered in Workday within 30 days of the date of the benefit event. If it has been more than 30 days since the event, call or email the [Employee Service Center](#) for assistance.

For help contact the Employee Service Center: 432-5552 or [employee.services@yale.edu](mailto:employee.services@yale.edu)  
or visit the Workday@Yale website: <http://workday.yale.edu/training>

## Manage Your Benefits: View or Modify Your Benefits

### View Existing Benefit Elections (formerly Benefits Summary)

1. On the Workday Homepage, click the **Benefits worklet**:



2. Click **Benefit Elections** in the View box.

**Note:** See **External Links** in the Benefits worklet for additional information and links to manage flex spending accounts, commuter transit options, pension resources, and more.

3. Review your benefit elections.

**Note:** This view includes both retirement plans you are enrolled in and plans in which you are eligible to participate.


### Report a Benefit Event (formerly Qualifying Life Event)

1. On the Workday Homepage, click the **Benefits worklet**:



2. Click **Benefits** in the Change box.
3. Select the appropriate Benefit Event Type.

**Note:** See list of [Workday Benefit Events](#).

4. Click the **Calendar** icon  to enter the date that the benefit event change happened.

**Note:** Benefit Event changes must be entered within 30 days of the benefit event. If it has been more than 30 days since the event, call or email the [Employee Service Center](#) for assistance.

**Note:** The attachment feature in Workday is not enabled at this time. If you have questions about providing documentation, please contact the [Employee Service Center](#).


5. Skip the field labeled **enter your comments**.

**Note:** Any comments entered are part of a permanent record and cannot be deleted or changed.

6. Click **Submit**.
7. Click **Open** to view the information you just submitted.

### View Benefit Changes in Progress

If you have moved on to another Workday page or closed your browser, here's how you can view your submission:

1. Click the **Profile** icon  in the upper right corner and click on **Inbox**.
2. Select the appropriate **Action** in your **Inbox**.

**Note:** If you find an error that needs to be corrected, contact the [Employee Service Center](#) for assistance.

Follow the instructions outlined below based on the Workday Benefit Event Type you selected.



**Not all steps may be applicable or editable based on your eligibility.**

- [Health Care Elections](#)
- [Health Savings Election](#)
- [Spending Account Elections](#)
- [Life Insurance Elections](#)

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## Manage Your Benefits: View or Modify Your Benefits

### Health Care Elections

1. Make your Health Care Elections, choosing **Elect** or **Waive**.
2. For each Health Care Election, your current **Coverage** is displayed. To change Coverage, click on the Coverage field, click on the **Prompt**  icon, and select the appropriate Coverage.
3. Click the **Enroll Dependents** field to add your dependent(s). Click on the **Prompt**  icon and click **Dependents** to select your dependent. If your dependents have not yet been entered in Workday, select **Create**, click on **Add My Dependent from Enrollment**, and follow the subsequent steps.
4. Indicate if your new dependent is already a beneficiary or emergency contact. Indicate if you'd like your new dependent to be available to be selected as a beneficiary.
5. Click **OK**.
6. Type in your new dependent's **Name, Address, Personal** and **Contact Information**.

**Note:** Fields marked \* are required.

7. Skip **National IDs** (do not click **Add**) – you will be prompted to enter a Social Security Number later. If the Social Security Number is not yet available, such as for a newborn, you will be given the chance to indicate this.
8. Click **OK** to return to the Health Care Elections screen. If applicable, repeat steps 1-7 for other dependents and for other plans, including health, dental and vision.
9. Click **Continue**.

**Note:** If you encounter an error that you cannot resolve, contact the [Employee Services Center](#).

Clicking **Cancel** will not cancel the process as a whole, but rather exit out of the current screen.

10. If you have enrolled a new dependent, you will be prompted to enter a Social Security Number (SSN). If you do not have the SSN (such as for a newborn), select **Reason ID is Not Available**, and enter a supporting comment.

**NOTE:** You must supply an SSN for your dependent within six months of entering that dependent in Workday. To add it later, see the instructions for how to [Edit a Dependent's Demographic Information](#).

11. Click **Continue** (or click **Go Back** to make changes).

### Health Savings Election

1. If eligible, elect (or waive) the Health Savings Account and complete the appropriate fields under **Contribution Range (Annual)**.
- Note:** See [Benefits Eligibility Requirements](#) to see if you are eligible.
2. Click **Continue** (or click **Go Back** to make changes).




### Spending Account Elections

1. If eligible, elect (or waive) Flexible Spending Accounts (Healthcare and/or Dependent Care) and complete the appropriate fields under **Contributions**.
- Note:** See [Benefits Eligibility Requirements](#) to see if you are eligible.
2. Click **Continue** (or click **Go Back** to make changes).

### Life Insurance Elections

1. If eligible, elect (or waive) the Life Insurance Benefit Plans that appear and complete the appropriate fields under **Coverage Level**.
- Note:** See [Benefits Eligibility Requirements](#) to see if you are eligible.


The **Coverage Level** may be pre-populated based on the **Benefit Plan** you elect.

2. Click **Continue** (or click **Go Back** to make changes).
  3. If applicable, add or remove a **Beneficiary** using the **Plus**  or **Minus**  icons.
  4. If you are adding a **Beneficiary**, click the **Prompt** icon  and select the appropriate person. If your beneficiary has not yet been entered in Workday, click **Create** and enter all of the appropriate information.
- Note:** Fields marked \* are required.
5. Click **OK**.
  6. Select **Primary** or **Contingent** along with the percentage distribution.
  7. Click **Continue** (or click **Go Back** to make changes).

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## Manage Your Benefits: View or Modify Your Benefits

### Submit Your Benefit Event (Benefit Elections Review)

1. Review the summary of your benefit elections.
- Note:** To make changes to your benefits elections, click **Go Back**.
2. The **Waived Coverage** section is collapsed. Click the **Pull Down**  icon to see what you are waiving.
  3. If your benefit elections are correct, check the **I Agree** check box to provide an electronic signature confirming your changes.
  4. Click **Submit**.
  5. Click **Print** located at the bottom of the screen to print a copy of your elections.
  6. Click **Done** to finish and return to the Homepage.

### Cancel a Benefit Event Change

If you wish to cancel a coverage change event before or after you have submitted changes, contact the [Employee Service Center](#).

### Add Dependents

Dependents can be added during the Enrollment process. Once a [Benefit Event](#) has been selected, refer to the [Health Care Elections](#) instructions listed above.

### Add Beneficiaries


If you wish to add a beneficiary outside of another life event, select the [Benefit Event](#) Type **Insurance/LTD/Beneficiary Change** and follow the instructions for [Life Insurance Elections](#) listed above.

**Note:** Selecting the Benefit Event Type **Insurance/LTD/Beneficiary Change** does not require you to change your coverage. This Benefit Event Type can be selected if you wish

to add or edit beneficiaries and/or the percent allocation.

### Edit a Dependent's Demographic Information


**Note:** To update the status for full-time student/disabled dependent, contact the [Employee Service Center](#).

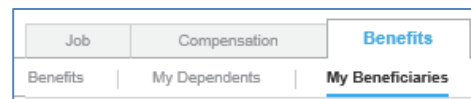
1. If you wish to edit the demographic information for one of your dependents, click the **Profile**  in the upper right corner and click on **View Profile**.
2. Click the **Benefits** tab.
3. Click the **My Dependents** sub-tab.



4. Click **Edit** for the dependent whose information you wish to update.
5. To add a Social Security Number, click **Add** in the National IDs field.

### Edit a Beneficiary's Demographic Information

1. If you wish to edit the demographic information for one of your beneficiaries, click the **Profile**  icon in the upper right corner and click on **View Profile**.
2. Click the **Benefits** tab.
3. Click the **My Beneficiaries** sub-tab.



4. Click **Edit** for the beneficiary whose information you wish to update.
5. To add a Social Security Number, click **Add** in the National IDs field.

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