Workday@OK

BENEFITS ELECTIONS

THIS GUIDE IS FOR: ALL

Once a year, a task will be pushed to your inbox to review and update your benefit elections during the enrollment period. You can also complete midyear benefit election changes.

CHANGE BENEFITS FOR LIFE EVENT

1. From the Workday@OK homepage, select **View All Apps** then select **Benefits**.
2. From the **Change menu**, select **Benefits**.
3. Use the **Change Reason** drop-down menu to select the appropriate **Benefit Event Type**.

Note: The **Enrollment Offering Types** available to change will update based on the event type selected.

4. Enter the **Benefit Event Date** for which you want this to take effect.
5. Check the instructions on the right side of the page for any documentation requirements.

Note: Any required documentation must be uploaded before the **Change Benefits Reason** can be submitted. If documents are not uploaded, the event will be saved, not submitted. You will receive an inbox item listed as **Benefit Event** to allow you to revise the benefit changes or upload documents to complete the request.

6. Select **Submit.**
7. From the **Event Success** pop-up, select **Open** to begin editing benefit elections.

Note: If you choose not to immediately select your new benefit elections, you can navigate back to them by selecting the **inbox icon → Benefit Change → Let's Get Started**.

SELECTING YOUR COVERAGE

1. To edit benefit elections, select **Open** from the **Event Success** pop-up at the end of the **Change Benefits from Life Event** process, or select the **inbox icon → Benefit Change → Let's Get Started**.

2. From the bottom of each insurance type (e.g., health, vision, dental) select **Enroll** or **Manage.** The benefit options and view will differ depending on the **Change Reason** selected previously.

    a. Use the **Elect** or **Waive** radio buttons to indicate the desired coverage and select **Confirm and Continue** at the bottom of the page to review additional available benefits.

3. To add a **Dependent** to a specific coverage type, check the box next to their name in the **Select** column on the table listed under **Dependents**. To add a new dependent, select the **Add New Dependent** button above the dependents table. If they will also be a beneficiary, select the box next to **Use as Beneficiary**, then select **OK**.

4. Now complete the details for this dependent. This individual can now be added to this and other coverage types.
    a. If you need to add a **Beneficiary** to a specific coverage type, select the **Plus (+)** icon, then choose the **Beneficiary** field and select one of the following:
        i. **Existing Beneficiary Persons.**
        ii. **Existing Trusts.**
        iii. **Add New Beneficiary or Trust.**
            1. Select **Add New Beneficiary** or **Add New Trust**, then select **Continue**.
5. Enter details and select **OK.** On the final page, review the **Legal Notice** and select **OK.**
6. For multiple beneficiaries, input the percentage for each, ensuring it totals 100%. Note: Secondary beneficiaries will receive the benefit if the primary beneficiary is unable to do so.
7. Select **Save**.

UPDATING INFORMATION FOR EXISTING DEPENDENTS AND BENEFICIARIES

1. From the Workday@OK homepage, select **View All Apps** → **Benefits**.
2. From the **Change** menu, select **Dependents** or **Beneficiaries.**
3. Select the **Edit** button in the row with the name of the individual to update an existing dependent or beneficiary and fill out the required information on the following screen. Note: From the **Beneficiaries** page, individual beneficiaries may also be deleted.
4. Select **Submit**.