Benefits: Manage Your Benefits

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 a USF HR or Benefits Representative if you have further questions at benefits@usfca.edu or dial (415) 422-2442.

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. Before you begin:

- If you are adding child dependents, please upload proof or birth or adoption for each child.
- If you are adding a spouse or domestic partner, please provide proof of marriage or registered domestic partnership.
- If you are dropping a dependent due to coverage elsewhere, you will need to provide proof of other healthcare coverage.
- If you are dropping a dependent due to a divorce, you will need to change your dependent from spouse to ex-spouse in the dependent worklet.

From the Benefits application:

1. Click the **Benefits** button under Change.
2. Select the **Benefit Event Type**.
3. Click the **Calendar** icon to enter the date of the Benefit event.
4. Attach required documents, if applicable.
5. Click **Submit**, then, click **Done**. A task will route to your Inbox, if applicable.
6. Navigate to your **Inbox**.
7. Click the **Benefit Event** task.
8. Complete and continue through all required screens. Check the **I Agree** checkbox, 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.

Part Time employees will NOT make changes to any life events in Workday as they are not eligible for any benefits managed within Workday.

Retirement Savings Changes – To enroll or make changes to your 403(b) Plan elections, log on to the Retirement@Work website. The website is available for employees to simplify and manage their 403(b) contributions and choose an investment provider(s) all in one location. Employees can choose TIAA and/or Fidelity as their 403(b) provider. Employees will choose their investments with each investment provider.
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**VIEW AND EDIT BENEFIT ELECTIONS**

From the Benefits application:

1. Click the **Benefit Elections** button under View.
2. Review your benefit elections and costs.
3. Click your **Related Actions** button.
4. Select **Benefits > Change Benefits**.
5. Enter all required information, denoted by asterisks, and make any permitted changes.
6. Click **Submit**.

**ADD DEPENDENTS**

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

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.
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.
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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. You can change, edit, and add beneficiaries from the Benefits application.

From the Benefits application:
1. Click the Beneficiaries button under Change.
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.
4. Click the prompt 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.