

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.

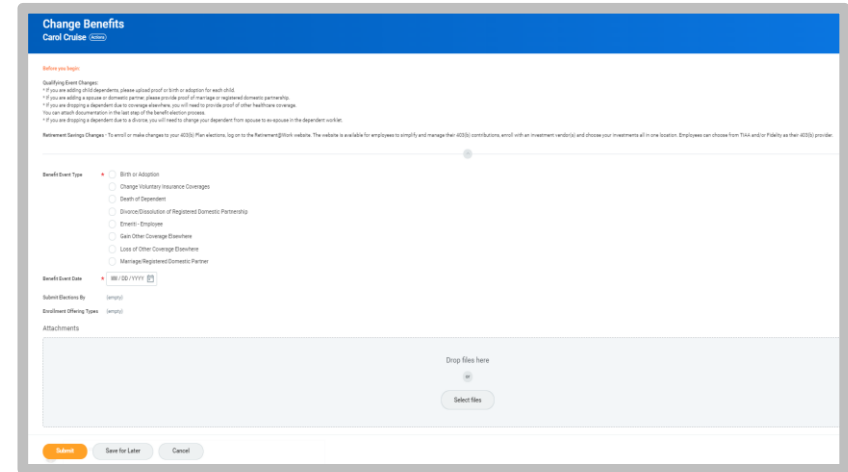
REPORT A COVERAGE CHANGE EVENT

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.

VIEW AND EDIT BENEFIT ELECTIONS

From the Benefits application:

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

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Semi-monthly)	Employer Contribution (Semi-monthly)
Medical - Kaiser Permanente HMO NorCal	01/01/2018	01/01/2018	Employee Plus One		Dependent Name		\$92.50	\$524.21
Dental - Delta Dental DPO	01/01/2018	01/01/2018	Employee Plus One		Dependent Name		\$1.00	\$56.88
Healthcare FSA - BASIC Pacific	01/01/2018	01/01/2018	\$2,649.96 Annual				\$110.42	
Basic Life & AD&D - CIGNA (Employee)	01/01/2018	01/01/2018	1 X Salary	\$89,000.00				\$5.03
Long Term Disability (LTD) - CIGNA (Employee)	01/01/2018	01/01/2018	60% of Salary	\$4,427.09				\$9.41
401 (a) Defined Contribution Plan - TIAA	01/01/2018	01/01/2018						
403 (b) TIAA Voluntary Plan - TIAA	01/01/2018	01/01/2018	5%					
Employee Assistance Program - CONCERN - EAP	01/01/2018	01/01/2018						\$2.34
Total:							\$203.92	\$597.87

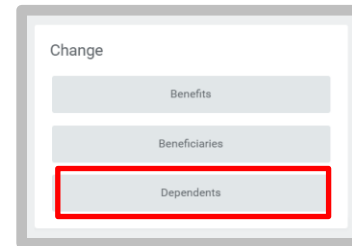
3. Click your **Related Actions** button.
4. Select **Benefits > Change Benefits**.
5. Enter all required information, denoted by asterisks, and make any permitted changes.
6. Click **Submit**.

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**.

Dependent Name	Relationship	Age	Benefit Elections	Edit
Dependent Name	Spouse	30 years, 0 months, 23 days	Benefit Elections Active on 01/01/2018 (Dental - Delta Dental DPO) (Elect)	Benefit Elections Active on 01/01/2018 (Medical - Kaiser Permanente HMO NorCal) (Elect)

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.

View Dependents' Benefit Elections

From the Benefits application:

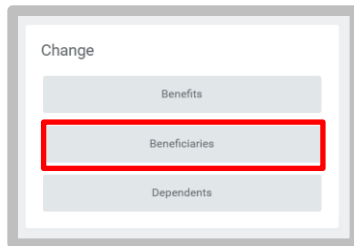
1. Click the **Dependents** button under Change.
2. Review your existing dependents and their benefit plan coverage.

MANAGE BENEFICIARIES

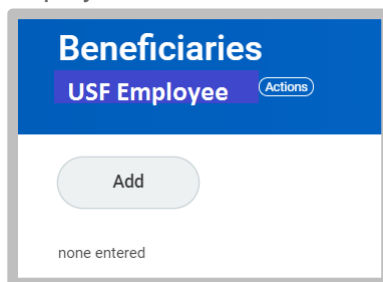
A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can change, edit, and add beneficiaries from the Benefits application.

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. 
3. Select **Benefits** > **View My Benefit Statement**.
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.

