Workday: Change Benefits Due to Qualifying Event
Job Aid

In this job aid we will cover how to change your benefits due to a qualifying event.

Qualifying Events and Documentation Requirements

Below is a list of events that qualify you to make a change to benefits outside of Open Enrollment during the current year.

1. Birth/Adoption of a Child
2. Marriage
3. I am, or one of my dependents is, now eligible for outside coverage (letter of proof of gain and must include who is gaining and what type of coverages and effective date e.g. child under 26 moves in or decided to use spousal coverage)
4. Lost coverage from another source (self or dependent) (letter of proof of loss and must include who is losing and what type of coverages and when they terminated)
5. Divorce
6. Death of a Dependent

Documentation

The eligibility documentation must be provided within the following time frames:

- Within 31 days of benefits-eligibility, or
- During the annual Open Enrollment period as scheduled by the member institutions for benefit changes effective the following January 1st, or
- Within 31 days of all changes related to IRS-defined change of status, or

Legal Spouse: Registered copy of marriage certificate.

Civil Union Partner: Civil Union License

Common-law Spouse:

- Common-law marriage affidavit AND
- A document dated within the last 60 days showing current relationship status such as a monthly or quarterly household bill or statement of account. The document must list your spouse’s name, the date, and your mailing address.

Children:

- The child’s birth or adoption certificate, naming you or your spouse/DP as the child’s parent, or appropriate custody or allocation of parental responsibility documents naming you or your spouse/DP as the responsible party to provide insurance for the child.
- For newborns, the registered birth certificate must be provided within 31 days of birth. Social Security number must be provided within 90 days of birth.

Death: A death certificate with the dependent’s full name.

Divorce: A divorce decree.
For gain of coverage in addition to the dependent verification documents, please show a letter of proof showing who is gaining coverage, what type of coverage has been elected and the effective date coverage begins. For loss of coverage in addition to the dependent verification documents, please provide a letter of proof including who is losing coverage, what type of coverage(s) have ended with the termination date the coverage was lost.

*The employee must provide a certified and notarized translation of any documents presented which are in a foreign language.*

Start by logging into Workday at [workday.mines.edu](http://workday.mines.edu).

1) Type and select **Change Benefits** in the search bar.

2) Select one of the listed events at the top of this document. An additional date field will be displayed for you to enter the appropriate information. In this example we have selected **Birth/Adoption of a Child** and will enter the Birthdate. Please note for birth of a child only you can upload a copy of the birth certificate application as a placeholder until you receive the official birth certificate.
3) Once you enter the date, the **Submit Elections By** date will be automated. This is the date by which you must submit any documentation. Please remember this must be fully submitted within 31 days of the event date.

4) Click **Submit**.

5) If you fail to upload your dependent verification documents your event will save and is awaiting submission of documentation. Click **Revise** to add your documents and then submit.

6) On the **Revise Benefit Changes** page, scroll down and attach the appropriate documentation as listed above.

7) Click **Submit**.
8) Your event has been successfully submitted. Click **Open** to be taken to the event you just created. You can only make elections or add/remove dependents in your Workday event.

9) After your event has been created and you are unable to complete all the steps at one time, you can go the inbox icon on your Workday home screen to find the task. Click **Let's Get Started**. This will remain in your inbox until you have fully submitted for approval from the benefits team.

10) In the **Birth/Adoption of a Child** event, you can now click **Manage/Enroll** for each benefit offering to review the details and add dependents. Please click manage on all tiles where you need to make a change. There may be employer (MINES) paid benefits viewable that you are unable to elect or decline. Please know you cannot make edits to these and can only view them. Scroll down to see all the options.
If you see Enroll under a benefit type that shows you may be eligible for this and do not currently have any elections. If you want to enroll during your qualifying event, you may do so.

11) When you click manage on a tile you have elections, it will automatically show what you are currently enrolled in.

a. Click Confirm and Continue once you make the appropriate selection. This will take you to the Dependents page where you will add or remove dependents.
12) Click **Add New Dependents** to enter any new dependent details.

![Add New Dependent button](image1)

13) Select the checkbox **Use as Beneficiary** if you would like to add them to your list of dependents eligible to be assigned as beneficiaries. Clicking this box does not make them your beneficiary - please follow the [Workday Add or Update Beneficiary Job Aid](#) located [here](#) for more information on how to assign beneficiaries.

   a. Click **OK**.

![Use as Beneficiary checkbox](image2)
14) On the **Add My Dependent From Enrollment** page, add all the required details for the new dependent. The red asterisk indicates required fields. Click **Save**.

![Add My Dependent From Enrollment page]

- After your dependent(s) have been added, you will be prompted to add additional details as needed. If you do not have a SSN for a dependent that is ok. You will select **Reason SSN is Not Available** and add a reason. Enter the information and click **Save**.
15) To remove a dependent from a benefit plan, simply uncheck the box to remove them as a covered dependent.

Your Medical changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you’re ready to submit your changes.

16) Click **Review and Sign** to View Summary of all elected benefits. This screen is like a receipt of the changes you have made.

   a. Notice there is another location at the end for you to upload required documents if you have not already done so.
   
   b. If everything looks accurate, scroll down to the **Electronic Signature** and check I Accept.
   
   c. Click Submit again. This is the final submit button that will send this to a benefits analyst for review.
17) You have successfully updated your benefits!

On the next screen you will see a benefits statement if you click this button, you can save a copy of the elections you made during this event for your records. This document can also be used as proof of coverage.

Benefits integrations run weekly and bi-weekly. Anthem Medical, dental, and vision run every Thursday. If your benefits are approved before Thursday in the current week then you can expect information to be updated in Anthem by the following week. It then takes 7-14 business days for any new insurance cards to be generated and mailed out.

Alerus Medical Flex Spending account and Dependent Care spending account enrollments will be sent according to your pay schedule and should be completed in the month you enroll unless payroll has already closed. You can expect the enrollment to occur by the next pay period if this is the case.

Catch up payments may always apply. If your event is approved after payroll has run and you were eligible in that month you can expect the retro payment to be applied on the next pay period.

For any questions or concerns, please contact the Mines benefits team at benefits@mines.edu or book an appointment for 1:1 assistance here: Benefits Office Hours Scheduling (office365.com)