

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. A Change Benefits event must be added and submitted within 31 days of the date of the event.

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 45 days of birth. Social Security number must be provided within 90 days of birth.

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

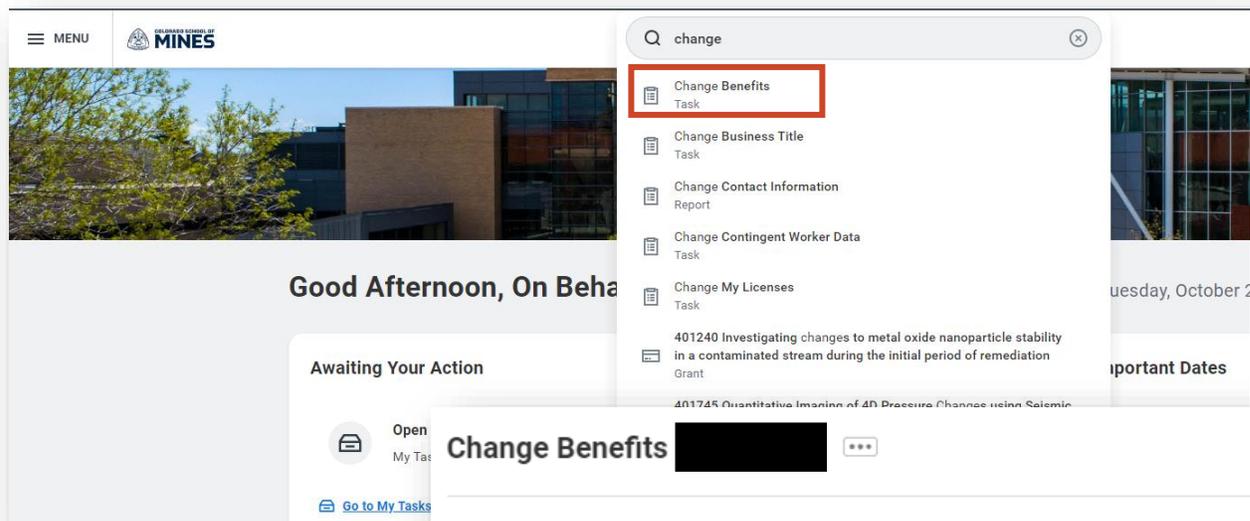
Divorce: A divorce decree.

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.

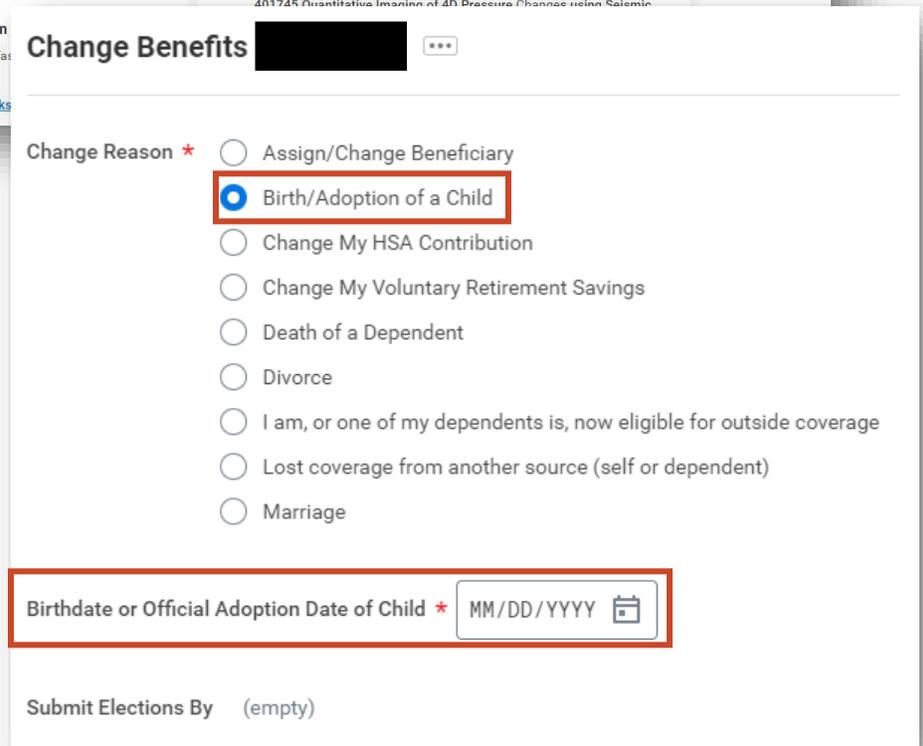
The employee must provide a certified and notarized translation of any documents presented which are in a foreign language.

Start by logging into Workday at workday.mines.edu.

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 you can upload a copy of the birth certificate application as a placeholder until you receive the official birth certificate. The registered birth certificate must be provided within 45 days of birth.



- 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.

Submit Elections By 02/02/2024

Benefits Offered

- Accident
- Basic Life and AD&D Employee
- Critical Illness
- Dental
- Dependent Care FSA
- + More (11)

- Click **Submit**.

Submit Save for Later Cancel

- 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.

Event saved. Awaiting submission

Up Next: Rakhi Ihiga | Revise Benefit Changes

[View Details](#)

Revise

Errors: 1 [View All](#)

1. - Required Documentation for Benefit Event is Not Attached (Life Change Event)

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

- Click **Submit**.

Submit Save for Later Cancel

Revise Benefit Changes

Change Reason

- Assign/Change Beneficiary
- Birth/Adoption of a Child
- Change My HSA Contribution
- Change My Voluntary Retirement Savings
- Death of a Dependent
- Divorce
- I am, or one of my dependents is, now eligible for outside coverage
- Lost coverage from another source (self or dependent)
- Marriage

Birthdate or Official Adoption Date of Child 01/03/2024

Submit Elections By 02/02/2024

Benefits Offered

- Accident
- Basic Life and AD&D Employee
- Critical Illness
- Dental
- Dependent Care FSA
- + More (11)

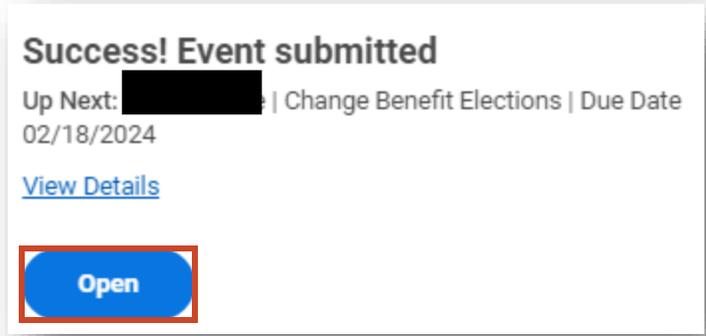
Attachments

Drop files here

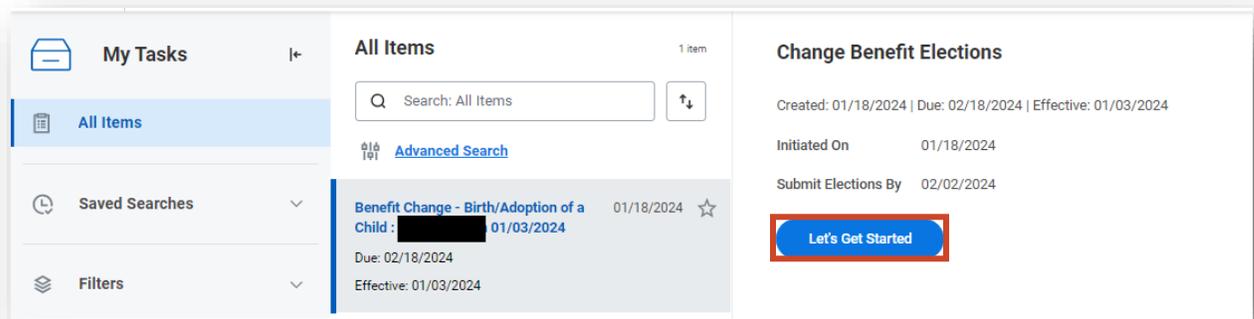
or

Select files

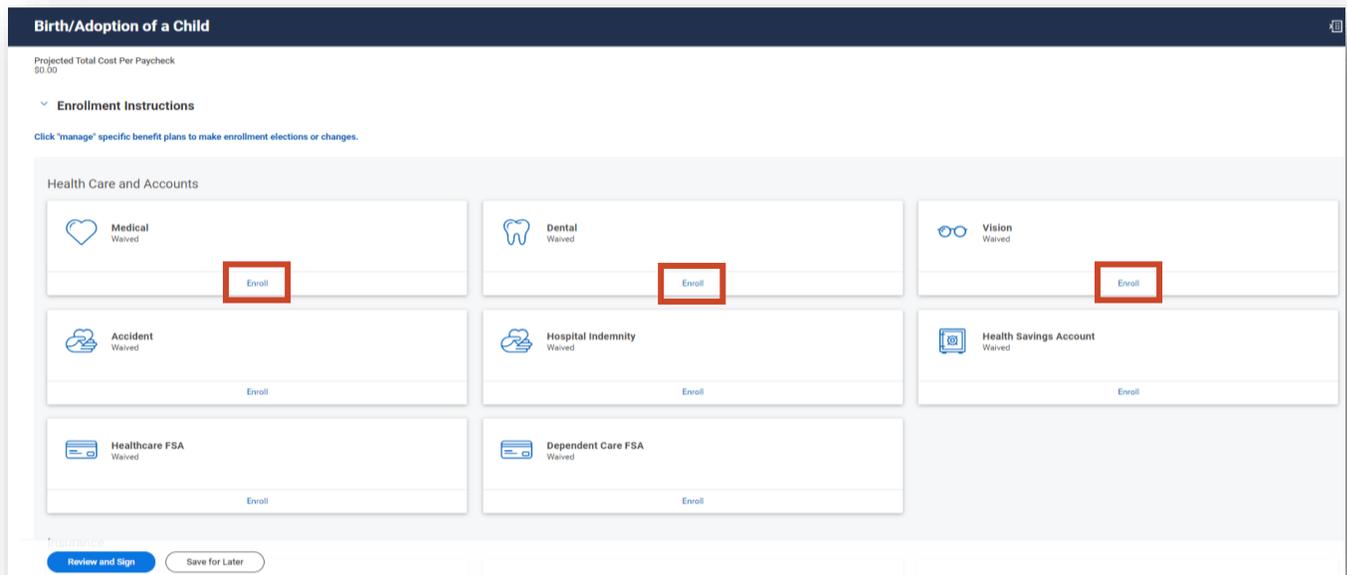
8) Your event has been successfully submitted. Click **Open** to be taken to the event you just created. You can only make elections or add/remove dependents in your Workday event.



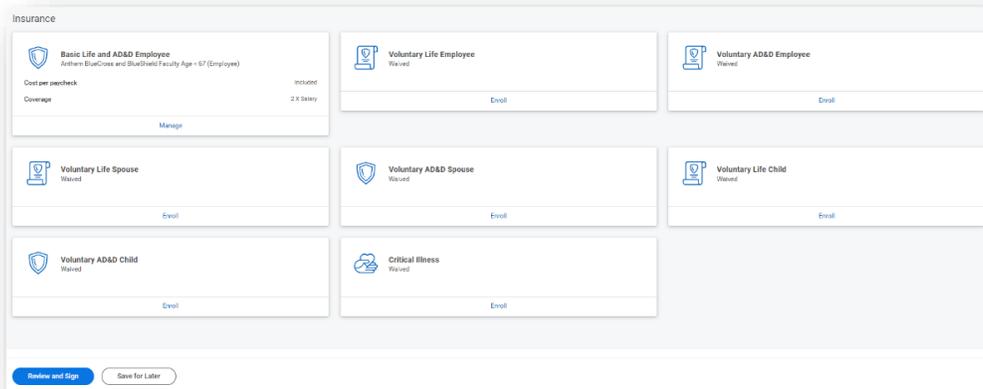
9) After your event has been created and you are unable to complete all the steps at one time, you can go the inbox icon on your Workday home screen to find the task. Click **Let's Get Started**. This will remain in your inbox until you have fully submitted for approval from the benefits team.



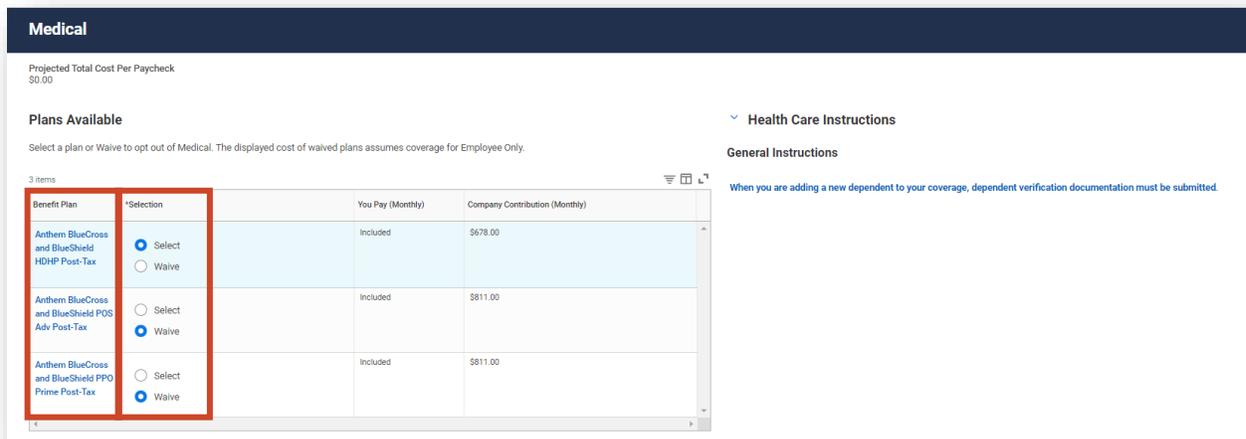
10) In the **Birth/Adoption of a Child** event, you can now click **Manage/Enroll** for each benefit offering to review the details and add dependents. Please click manage on all tiles where you need to make a change. There may be employer (MINES) paid benefits viewable that you are unable to elect or decline. Please know you cannot make edits to these and can only view them. Scroll down to see all the options.



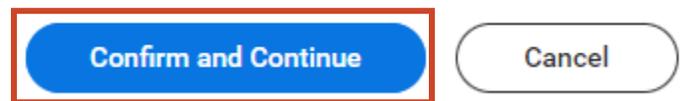
If you see **Enroll** under a benefit type that shows you may be eligible for this and do not currently have any elections. If you want to enroll during your qualifying event, you may do so.



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.

Medical - Anthem BlueCross and BlueShield HDHP Post-Tax

Projected Total Cost Per Paycheck
\$0.00

Dependents
Add a new dependent or select an existing dependent from the list below.

Coverage * Employee Only

Plan cost per paycheck

Add New Dependent

Health Care Instructions
Provider Website [Anthem BlueCross and BlueShield](#)

General Instructions
When you are adding a new dependent to your coverage, dependent verification documentation must be submitted.

2 Items

Select	Dependent	Relationship	Date of Birth
<input type="checkbox"/>	[REDACTED]	Spouse	08/09/1981
<input type="checkbox"/>	[REDACTED]	Child	11/29/2016

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**.

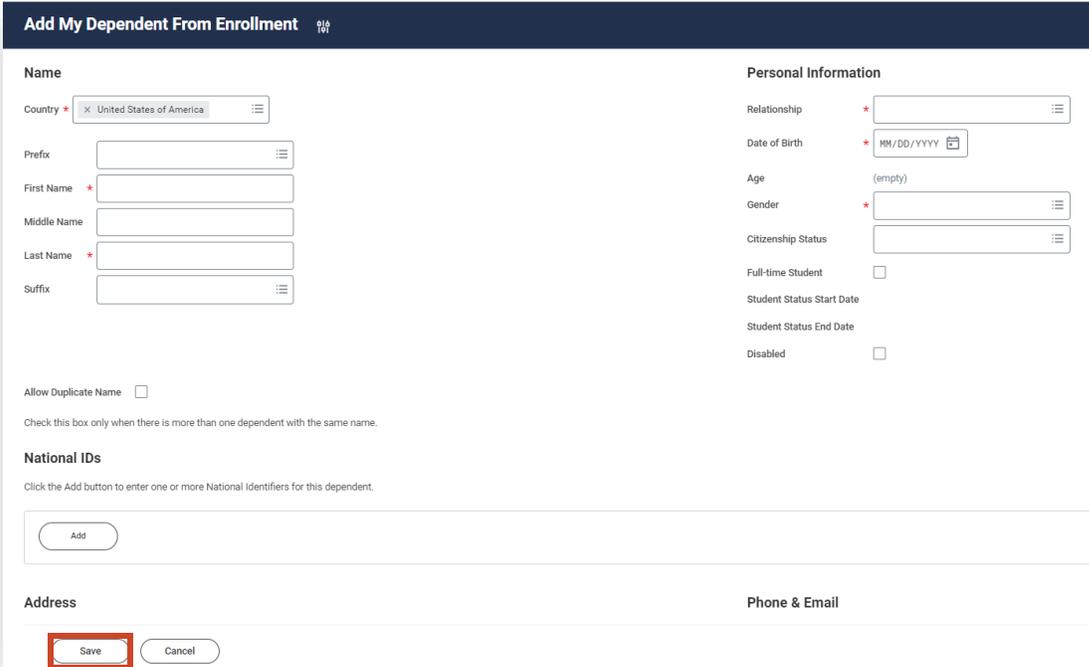
Add My Dependent From Enrollment [REDACTED] ⋮

Use as Beneficiary

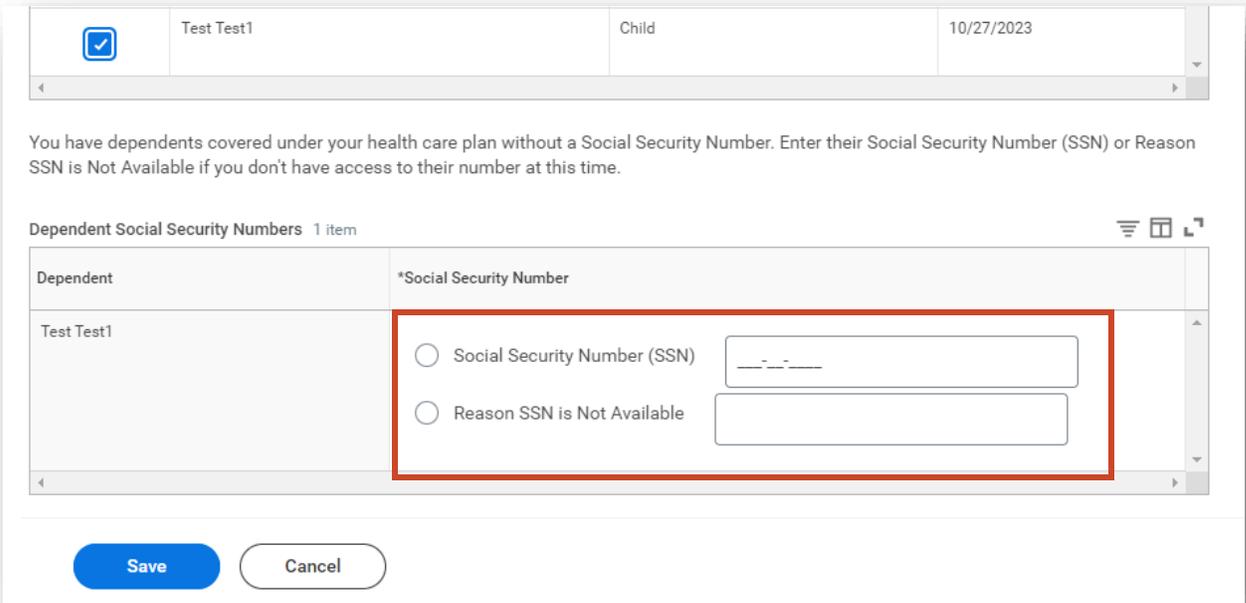
Please submit dependent verification documents. You can attach your documents during your review and sign steps.

OK Cancel

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**.



- a. 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.

a. Your updates have been saved. You will continue to make these additions/deletions from all benefit plan offerings. Once you have reviewed all and are satisfied with your elections.

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.

Review and Sign

Save for Later

Attachments

Drop files here

or

Select files

Electronic Signature

Legal Notice: Please Read

Your name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

- You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your benefit elections during the calendar year unless you experience a qualified change in status.
- You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Account contributions. These benefits are paid through the Flexible Benefits Plan on a pre-tax basis.
- Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.
- Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a qualified change in status event during the calendar year.
- If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 31 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within 31 days after the marriage, birth or adoption.

I Accept

Submit

Save for Later

Cancel

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 \(office365.com\)](https://office365.com)