

## Benefits: Manage Your Benefits

Within Workday, you can manage your benefits by reporting coverage change events and viewing your current benefit elections. This job aid covers generic events. Please contact your HR or Benefits representative if you have further questions.

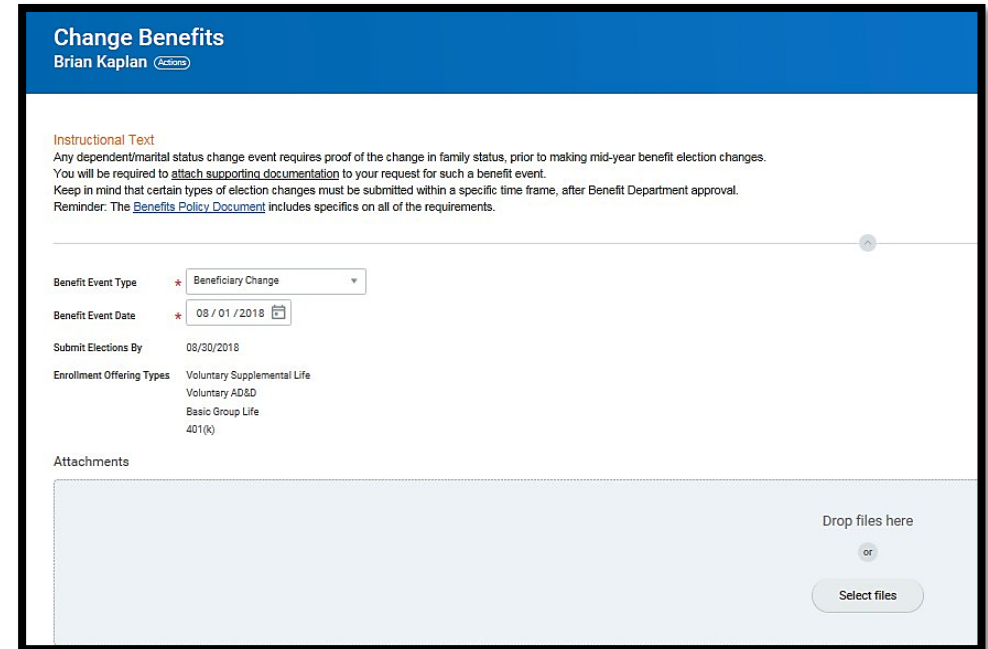


### REPORT A COVERAGE CHANGE EVENT

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 IRS qualifying life event, you can update your benefits to better fit your needs.

From the Benefits Application:

1. Click the **Benefits** button under the **Change** section.
2. Select the **Change Reason** from the drop-down menu.
3. Click the **Calendar** icon to enter the date of the benefit event.



**Change Benefits**  
Brian Kaplan [Actions](#)

**Instructional Text**  
Any dependent/marital status change event requires proof of the change in family status, prior to making mid-year benefit election changes. You will be required to [attach supporting documentation](#) to your request for such a benefit event. Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval. Reminder: The [Benefits Policy Document](#) includes specifics on all of the requirements.

Benefit Event Type: \* Beneficiary Change

Benefit Event Date: \* 08/01/2018

Submit Elections By: 08/30/2018

Enrollment Offering Types: Voluntary Supplemental Life  
Voluntary AD&D  
Basic Group Life  
401(k)

Attachments

Drop files here  
or  
Select files

4. Click **Submit**, then click **Open** in the pop-up box that appears.
5. Click the **Let's Get Started** button.
6. Answer the Health Information questions if they appear, then click **Continue**. Click **Continue** again on the screen that follows.
7. Click **Manage** or **Enroll** at the bottom of the tile for each benefit plan you would like to update.
8. Once all updates are made, click **Review and Sign**.
9. Review elections for accuracy. Click the **I Accept** check box to provide an electronic signature, confirming your changes, then click **Submit**.
10. Click **Done** to complete the task or the **View Benefits Statement** to launch a printable version of the summary for your records.

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## VIEW CURRENT BENEFIT ELECTIONS

From the Benefits Application:


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

Benefit Elections						
Current Benefit Elections and Costs 15 Items						
Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage End Date	Deduction End Date	Coverage	Calculated Coverage
Optional Life - Lincoln Financial Life Insurance (Employee)	01/01/2019	01/01/2019	11/30/2019	11/30/2019	1 X Salary	\$65,000.00
Business Travel Accident Insurance - Geisinger Health Plan (Employee)	01/01/2019	01/01/2019			5 X Salary	\$324,000.00
Spouse Life - Lincoln Financial Optional Life Insurance (Spouse or Domestic Partner)	01/01/2019	01/01/2019	11/30/2019	11/30/2019	\$10,000	\$10,000.00
Child Life - Lincoln Financial Optional Life Insurance (Child(ren))	01/01/2019	01/01/2019	11/30/2019	11/30/2019	\$5,000	\$5,000.00
Long Term Disability - Cigna LTD - 60% Salary Replacement Bi-Weekly (Employee)	01/01/2019	01/01/2019	11/30/2019	11/30/2019	60% of Salary	\$38,850.24
457(b) - Fidelity Geisinger System Services Key Executive Physician Section	01/01/2019	01/01/2019				
401(k) - Fidelity Geisinger Health Plan	01/01/2019	01/01/2019				
401(k) - Fidelity Geisinger Health Plan ROTH	01/01/2019	01/01/2019				
401(k) - Fidelity Geisinger System Services	01/02/2019	01/02/2019			10%	
401(k) - Fidelity Geisinger System Services ROTH	01/01/2019	01/01/2019				
401(k) - Fidelity GMMC Safe Harbor Plan	01/01/2019	01/01/2019				
401(k) - Fidelity GMMC Safe Harbor Plan ROTH	01/02/2019	01/02/2019				
403(b) - Fidelity Geisinger System Services	01/02/2019	01/02/2019				

## ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who is eligible to receive 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. Red asterisks denote required fields.
4. Click **Submit**, then click **Open** in the pop-up box that appears.
5. Click the **Let's Get Started** button.
6. Answer the Health Information questions if they appear, then click **Continue**. Click **Continue** again on the screen that follows.
7. Click **Manage** or **Enroll** at the bottom of the tile for each benefit plan you would like to update.
8. Once all updates are made, click **Review and Sign**.
9. Review elections for accuracy. Click the **I Accept** check box to provide an electronic signature, confirming your changes, then click **Submit**.



**Note:** When you add dependents, you may need to update your federal tax elections, as well as your benefit elections. Adding a dependent does not automatically attach that dependent to benefit plans.

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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 add and edit beneficiaries from the Benefits application.

From the Benefits Application:

1. Click the **Beneficiaries** button under **Change**.
2. View existing beneficiaries for enrolled benefit plans or modify the existing information by clicking **Edit**.
3. Click the pencil icon to make any necessary edits. Click **Submit**.



Adding a New Beneficiary

1. Click **Add**. The Add Beneficiary page displays.
2. Select **Existing Dependent or Emergency Contact**, **Create a New Beneficiary**, or **Create a New Trust as Beneficiary**.
3. Click **OK**.
4. Enter all required information, denoted by an asterisk.
5. Click **Submit**.

Geisinger

## ASSIGNING A BENEFICIARY TO A BENEFITS PLAN

From your Worker Profile:


Click the **Actions**  button.

1. Go to **Benefits** and **Change Benefits**.
2. From the drop-down menu, select **Change Beneficiaries**.
3. Enter **Benefit Event Date**.
4. Click **Submit**, then click **Open** in the pop-up box that appears.
5. Click the **Let's Get Started** button.
6. Answer the Health Information questions if they appear, then click **Continue**. Click **Continue** again on the screen that follows.
7. Click **Manage** or **Enroll** at the bottom of the tile for each benefit plan you would like to update.
8. On the **Plans Available** screen, click **Confirm and Continue**.
9. Click **+** for a new line to begin adding Primary and Secondary Beneficiaries. Enter percentage(s), making sure the percentage for each category equals **100%**.
10. Click **Save**.
11. Once you have updated all plans, click **Review and Sign**.
12. Review elections for accuracy. Click the **I Accept** check box to provide an electronic signature, confirming your changes, then click **Submit**.

## Benefits: Manage Your Benefits

### PRINTING A BENEFITS STATEMENT

From your Worker Profile:

1. Click the **Actions**  button.
2. Select **Benefits**, then scroll down to **View My Benefit Statement**.
3. Click the drop-down and select the desired Benefit Event you would like to view and print.
4. Click **OK**.
5. Click **Print**. The selected Benefit Event will open as a PDF document, which can be saved and printed.