

Change Benefits for Life Event

USER GUIDE

Outside of Open Enrollment, benefit enrollments can only be done if there is a Qualifying Life Event. These would include Birth or Adoption of Child, Dependent Coverage, Divorce or Marriage. Further questions, please reach out to the Benefits Partners: BenefitsCounty@co.marathon.wi.us, or call Sharon Prasnicky at 715-261-1180.

CHANGE BENEFITS FOR LIFE EVENT

From the Home page:



1. Click on the **Menu** icon and find **Benefits & Pay App**



2. Click on **Change Benefits** at the top.

Tasks and Reports



3. Select the **Change Reason** from the list:
*HSA Change- is not a County Benefit. Do not select.

- Change Reason *
- Birth/Adoption of Child
 - Dependent Gains / Loses Coverage
 - Divorce
 - Drop Life Insurance
 - Employee Gains Coverage
 - Employee Loses Coverage
 - HSA Change (City/IT Only)
 - Marriage

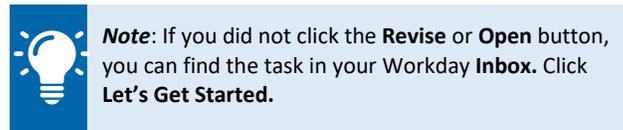
4. Enter the **Benefit Event Date**. (IE- Date of child's birth). Your screen will now show the *Submit Elections By* date and all the *Benefits Offered* for that change.

Employee Loses Coverage- if chosen, make sure the Benefit Event Date is AFTER the coverage you are losing has ended. IE- Coverage losing ends on 2/15/22, Benefit Event Date should be 2/16/22.

5. If you have supporting documents that are present, **Attach** them here. IE- Birth Certificate, Social Security Card, Marriage License. **If document is not present, you will need to upload as soon as you have received it.**

You will receive an orange "soft alert" stating you need an attachment, but this will not prevent you from moving forward.

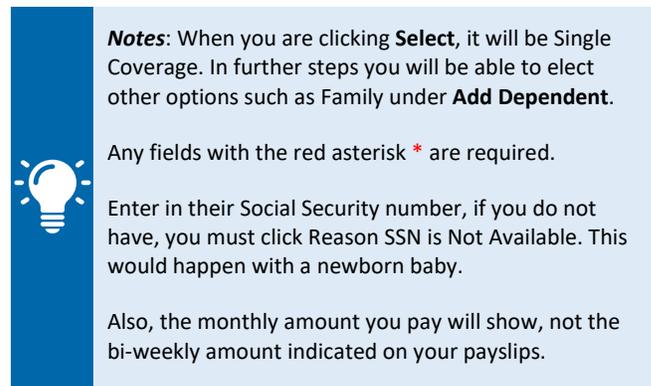
6. Click **Submit**.
7. If you *did not* attach documentation, a pop up will appear with Event Saved, Awaiting Submission, click **Revise** to continue with the benefit change. Then **Submit** and **Open**.
8. If you *did* attach documentation, a pop up will appear with You have submitted, click **Open** to continue with the benefit change.



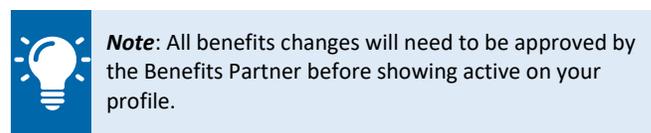
9. Click on **Let's Get Started**. The benefits available to choose will depend upon which Life Event you have selected.

HEALTH CARE AND ACCOUNTS

Medical (Vision), Dental, Healthcare FSA, & Dependent Care FSA may be available. *Life Insurance and ICI are managed outside of Workday.* **Read the notes below before starting:**



To change elections, click on the Coverage type and take the following steps.



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MEDICAL (INCLUDES VISION)

Click **Manage** if already enrolled and **Enroll** if adding.
Current elections are displayed.

1. Click **Manage** or **Enroll**.
2. Click **Select (Single Coverage first)** or **Waive**.
3. Click **Confirm and Continue**.
4. Click **OK** to add Dependents.
5. Click **Save**.
6. Enter in Dependents National ID (SSN)
Once dependents are added you can select them as you proceed in managing and enrolling.
7. Follow the steps listed under **Review and Sign**.

DENTAL

1. Click **Manage** or **Enroll**.
2. Click **Select** or **Waive**.
3. Click **Confirm and Continue**.
4. Click **Save**.
5. Once finished, refer to the **Review and Sign** section.

HEALTHCARE- FLEX SPENDING ACCOUNT

1. Click **Manage** or **Enroll**.
2. Click **Select** or **Waive**.
3. Click **Confirm and Continue**.
4. If enrolling, enter the amount to contribute either **Per Paycheck** or by **Annual** amount.
The amount cannot be over \$3,050.00/year.
5. Click **Save**.
6. *If electing in FSA, you will receive the required direct deposit form to complete at New Hire Orientation.*
7. Follow the steps listed under **Review and Sign**.

DEPENDENT CARE- FLEX SPENDING ACCOUNT

1. Click **Manage** or **Enroll**.
2. Click **Select** or **Waive**.
3. Click **Confirm and Continue**.
4. If enrolling, enter the amount to contribute either **Per Paycheck** or by **Annual** amount.
The amount cannot be over \$5,000.00/year.
5. Click **Save**.
6. *If electing in FSA, you will receive the required direct deposit form to complete at New Hire Orientation.*
7. Follow the steps listed under **Review and Sign**.

REVIEW AND SIGN

Once you have enrolled in or managed all the benefits you wish to, take the following steps:

1. Click **Review** and **Sign**.
2. **Review** the summary of the selected benefits and the projected total monthly cost.
3. **Read** the Legal Notice, then click the checkbox next to **I Accept**.
4. Click **Submit**.
5. Click **Done**. You can view your benefits selections and print off a summary.

CHANGE BENEFITS FOR DEPENDENT EVENT

If a dependent has a life event that qualifies or disqualifies them for coverage, take the following steps to change benefit elections:

From the Home page:



1. Click on the **Menu** icon and find **Benefits & Pay App**



Benefits and Pay

2. Click on **Change Benefits** at the top.
3. Select **Dependent Gains/Losses Coverage** for the Change Reason.
4. Enter the **Benefit Event Date**.
5. If necessary, upload an **Attachment**.
6. Click **Submit**.
7. You will receive a task to complete the next step of the process by clicking on the **Open** button.
8. Follow the previous steps in this document to make changes to Medical, Dental, Healthcare FSA, or Dependent Care FSA as necessary.
9. Follow the steps listed under **Review and Sign**.



Note: Further questions, please reach out to the Benefits Partners at BenefitsCounty@co.marathon.wi.us -or- call Sharon Prasnicky at 715-261-1180.