

# Change Benefits for Life Event

## USER GUIDE

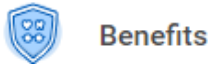
Outside of Open Enrollment, benefit enrollments can only be done if there is a Qualifying Life Event. These would include Birth or Adoption of Child, Dependent Coverage, Divorce or Marriage. Further questions, please reach out to the Benefits Partners: [BenefitsCounty@co.marathon.wi.us](mailto:BenefitsCounty@co.marathon.wi.us),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

### CHANGE BENEFITS FOR LIFE EVENT

From the Home page:



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



2. In the **Change** section, click **Benefits**

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.




**Note:** If you did not click the **Revise** or **Open** button, you can find the task in your Workday **Inbox**. Click **Let's Get Started**.

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:**




**Notes:** When you are clicking **Select**, it will be Single Coverage. In further steps you will be able to elect other options such as Family under **Add Dependent**.

Any fields with the red asterisk \* are required.

Enter in their Social Security number, if you do not have, you must click Reason SSN is Not Available. This would happen with a newborn baby.

Also, the monthly amount you pay will show, not the bi-weekly amount indicated on your paylips.

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



**Note:** All benefits changes will need to be approved by the Benefits Partner before showing active on your profile.

## Change Benefits for Life Event

## USER GUIDE

### 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.

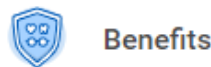
### CHANGE BENEFITS FOR DEPENDENT EVENT

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 the **Benefits App**



2. In the **Change** section, click **Benefits**.
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, Vision, Accident, Health Savings Account, 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](mailto:BenefitsCounty@co.marathon.wi.us) -or- call Sharon Prasnicky at 715-261-1180.