# Add Coverage to Your New Dependent

## Overview

This job aid outlines the process for an Employee to add or edit Dependents and add or remove those Dependents from benefits coverages in Workday

**Prerequisites:** N/A

**Important Information:**

* + Supporting documentation is required when a Dependent is added or information is updated
	+ In case of a **DIVORCE**, you must change the relationship of your spouse to ex-spouse and any stepchildren to ex-stepchildren in order for them to be offered COBRA continuation coverage
	+ The required information for this process is the **Effective Date**, **Reason**, **Legal Name**, **Gender**, **Date of Birth**, **Relationship** and **Contact Information**
	+ You must enter life event changes within 60 days of the life event
	+ You must add a Dependent or edit a Dependent’s personal information before starting a benefit change

### Steps

To begin, you need to enter the person’s information into Workday and identify them as a Dependent

#### Add the Dependent to Your Profile

From the Workday Home page:

1. Click the **Benefits** worklet



1. Click the **Dependents** link



1. On the **Dependents** page, perform one of the following actions:
* Click **Add** to add a new Dependent
* Click **Edit** to update existing Dependent



1. In the **Dependent Options** section, add or edit the information including:
* **Effective Date.** Enter today’s date or the date this person can legally be identified as a Dependent for benefits purposes
* **Reason.** Enter the reason for adding the Dependent or making changes

**Note:** Click on the boxes or the **Edit** icon to add Dependent details



1. In the **Dependent Personal Information** section, add the following information:
* Legal Name. Enter the Dependent’s full name
* Gender. Select one
* Date of Birth. Enter the birthdate
* Relationship. Select one
* Tobacco Usage. Select Yes or No



**IMPORTANT:** Only System Benefits Administration can update the **Disability Status** field. Contact your Benefits Office for assistance with this section

1. Add the necessary **Contact Information**
2. Add information in the **Identifier Information** section for the Dependent’s National ID
* **Country**
* **National ID Type (SSN/ ITIN)**
* **Add/Edit ID Number**



1. Click **Submit**

You will receive a To Do in your inbox to upload supporting documentation to **HRConnect**

##### Upload Supporting Documentation

1. Go to your Workday inbox
2. Click the To Do: Upload Dependent Documentation
3. On the **Complete To Do Upload Documentation** page, click the link to be directed to HRConnect



1. Select the **Document Category**, **Document Type** and upload the supporting documentation for the Dependent by clicking the **Choose File** button



1. Click **Upload** after attaching the document
2. Click the **Submit For Approval** button after uploading the necessary documentation
3. Once you have uploaded the document, you will see a message display that the documents were submitted successfully



1. Return to your Workday inbox using the tabs at the top of your browser’s screen
2. Click **Submit** at the bottom of the **Upload Dependent Documentation** To Do after you have uploaded your documents on HRConnect

#### Up Next

The **Benefits Partner** receives a To Do to review the Dependent documents



#### Add Coverage to Dependent

You are now ready to add the Dependent to coverage. This process involves two steps. First you will initiate a Benefit event, then you will make your changes to coverage for the Dependent

**IMPORTANT**: If your new Dependent is a grandchild, your Benefits Office must review and certify the Dependent *before* coverages can be added

##### Initiate Benefit Event in Workday

1. From the Workday Home page, click the **Benefits** worklet



1. Click the **Benefits** link



1. Read all of the instructions at the top of the **Change Benefits** page before making a benefits change
2. Complete the following fields:
* **Benefit Event Type.** Select a type
* **Benefit Event Date.** Enterthedate of the event



**Note:** The **Submit Elections By** and **Enrollment Offering Types** fields will auto-populate depending on the entries in the first two fields



**Note:** Do not attach or upload any documents on this screen

1. Click **Submit**

Next, you will receive an inbox task to **Change Benefit Elections**

##### Change Benefits Elections

1. Navigate to your inbox
2. Click the “**Benefit Change**” inbox action item

**Note:** The Change Benefit Elections task is a multi-step process

###### Select Health Care Elections

1. Change your election if necessary, for the tobacco usage question



1. In the **Health Care Elections** section, do the following:
	* Make changes to elections as needed. Any plans in which you are already enrolled will appear as elected, all other plans will be waived.
	* Add a Dependent to a plan by clicking the cell in the column **Enroll Dependents.** This will provide a prompt for you to make selections.



**IMPORTANT:** Only people you have formally added as a Dependent in Workday will appear as options

1. Click **Continue**
2. Enter a Social Security Number (SSN) for each Dependent



**Note**: If you have already provided an SSN for your Dependent, this screen will not display

1. Click **Continue**

###### Spending Account Elections

1. Select coverage for Healthcare or Dependent Day Care Spending Accounts



1. If a Spending Account is elected, enter an amount for *either* a yearly contribution *or* per pay check. Workday will automatically calculate remaining fields



**Note**: Mid-year changes may result in discrepancies with the calculated bi-weekly premium. Contact your Benefits Partner if the amount does not calculate correctly

1. Click **Continue**

###### Insurance Elections

1. Select coverage for Dependents for the elected plan, as needed
2. Click the prompt menu in the box for Dependents to get a list of Dependents that can be added



**Note:** Any plans in which you are already enrolled will appear as elected, all other plans will be waived

1. Click **Continue**

###### Select Beneficiary Designations

In the **Beneficiary Designations** section, do the following, as needed:

1. Add one or more **Beneficiaries**
2. Select Primary or Contingent Percentage and enter the percentage using whole numbers



**Note:** You must elect one or more Primary Beneficiaries totaling 100%

1. Click **Continue**

###### Review Benefit Elections

1. Review all of the Benefit Elections made on the previous pages including elected or waived coverages, beneficiary designations, etc.
2. In the **Electronic Signature** section, review the statements and click the **I Agree** checkbox



1. Click **Submit**

###### Submit Elections Confirmation

1. You can see the additional cost and view the change you have made

**Note:** You may print your coverages if desired. Click the **Print** button. The details will be saved in a PDF format from which you can print the document

1. Click **Done**

This completes the **Add Coverage to New Dependent** process