

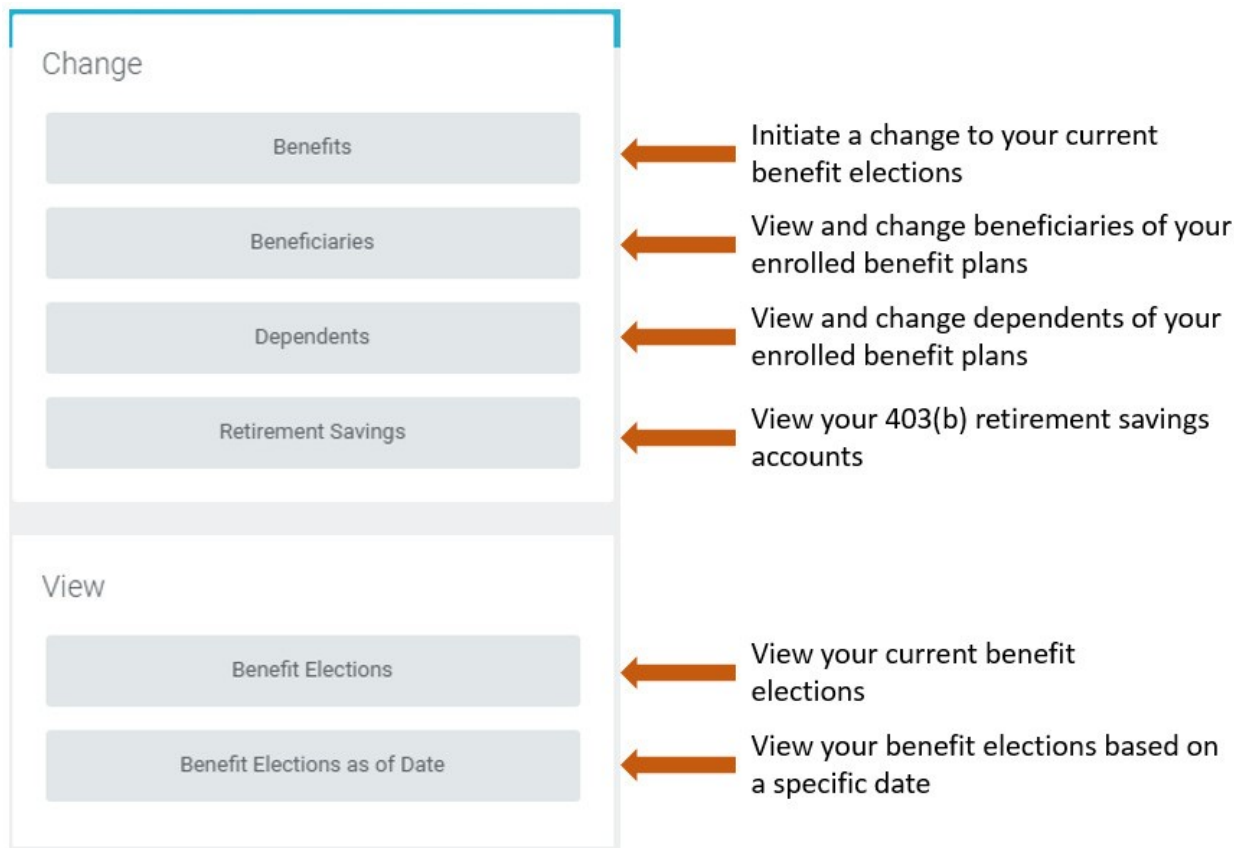
## Viewing and Changing Benefits

Willamette University offers a robust benefit package to employees, all of which is captured in Workday. You will use the Benefits worklet to view and change your benefits, and the annual open enrollment period will be conducted in Workday as well.



### Benefits

The following options are available in the worklet:



The screenshot shows a 'Benefits' worklet interface divided into two sections: 'Change' and 'View'. The 'Change' section contains four options: 'Benefits', 'Beneficiaries', 'Dependents', and 'Retirement Savings'. The 'View' section contains two options: 'Benefit Elections' and 'Benefit Elections as of Date'. Orange arrows point from each option to a descriptive text block on the right.

Option	Description
Benefits	Initiate a change to your current benefit elections
Beneficiaries	View and change beneficiaries of your enrolled benefit plans
Dependents	View and change dependents of your enrolled benefit plans
Retirement Savings	View your 403(b) retirement savings accounts
Benefit Elections	View your current benefit elections
Benefit Elections as of Date	View your benefit elections based on a specific date

Most benefits, like medical and dental, can only be changed during the annual open enrollment period or because of a qualified life event (like a marriage or birth of a child). Each February, you will participate in open enrollment through Workday (an Inbox item will be sent to you). If you need to make changes mid-year, you will use the “Benefits” option under the “Change” list. (Note: You may change your beneficiaries or retirement contributions at any time.)

## Viewing and Changing Benefits

To change your benefits, select the applicable Benefit Event Type (pictured below), enter the Benefit Event Date, and attach documentation for the change (say, a marriage certificate). Once completed, hit the green “Submit” button at the bottom of the screen.

**Benefit Event Type** \*  Beneficiary Change  
 Birth / Adoption of Child  
 Commuter Contribution Change  
 Dependent Gains Coverage from another source  
 Dependent Loses Coverage from another source  
 Divorce / Dissolution of Domestic Partnership  
 Marriage / Domestic Partnership  
 Retirement Contribution Change

**Benefit Event Date** \*

Attachments 1 item

	Attachment	Comment	
		proof of loss of other coverage	

Note: For detailed information about qualifying life events, [click here](#).

Hit the orange “Submit” button at the bottom of the screen to proceed to changing benefits.

The subsequent screen lists all of the benefits available to you, allowing you to make any desired changes. You can elect or waive coverage as you proceed by clicking ‘Manage’ in each section. Each benefit exists in its own tile. Be sure not to miss any!

The screenshot displays a grid of benefit tiles under two main categories: "Health Care and Accounts" and "Insurance and Retirement".

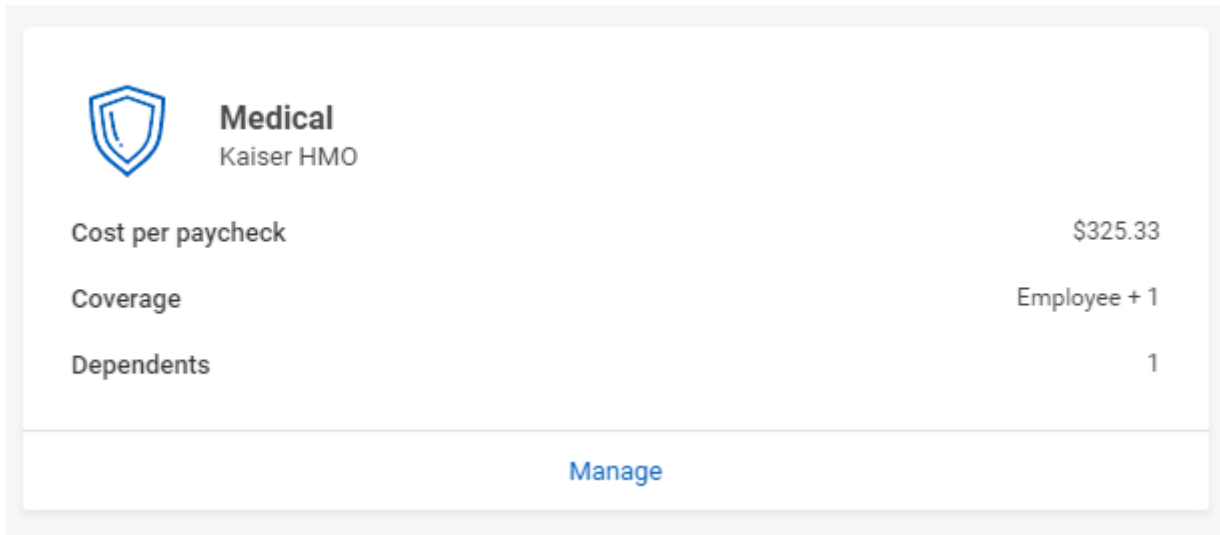
- Health Care and Accounts:**
  - Medical:** Kaiser HMO. Cost per paycheck: \$225.33. Coverage: Employee + 1. Dependents: 1. [Manage](#)
  - Dental:** Kaiser DHMO. Cost per paycheck: \$6.37. Coverage: Employee Only. [Manage](#)
  - Healthcare FSA:** Waived. [Enroll](#)
  - Dependent Care FSA:** TABC. Contribution per paycheck: \$14.29. [Manage](#)
- Insurance and Retirement:**
  - Basic Life:** Guardian (Employee). Included. Coverage: 2 X Salary. [Manage](#)
  - Basic Accidental Death and Dismemberment (AD&D):** Guardian (Employee). Included. Coverage: 2 X Salary. [Manage](#)
  - Supplemental Life:** Waived. [Enroll](#)

## Viewing and Changing Benefits

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Here are a few tips for using the Workday interface:

- Take your time – there are quite a few sections, and they contain detailed information, some or all of which you will be changing by click the ‘Manage’ button for each one:



Medical	
Kaiser HMO	
Cost per paycheck	\$325.33
Coverage	Employee + 1
Dependents	1

[Manage](#)

- You can choose to elect or waive coverage for each benefit available, and when you choose to elect coverage you will often see new boxes open up for you to fill in
- If you’re electing coverage for additional family members, click this button to add them:

[Add New Dependent](#)

- The plus and minus icons allow you to add or remove rows



- The final page is a recap screen, where you will have one final opportunity to review your requested benefit changes – you must check the “I Agree” box to submit

I Agree

**Examples: Dependents**

To add a dependent to your plans, first select or confirm your coverage choice, then click the orange 'Confirm and Continue' button.

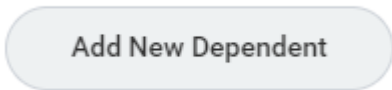


On the next screen, you can either choose a dependent you have already entered previously, or you may create a new dependent profile.

If the dependent already exists in the system, select them from the menu:

<input type="checkbox"/>	Spouse Smith	Spouse	06/06/1975
<input type="checkbox"/>	Teenage Smith	Child	05/05/2006
<input type="checkbox"/>	Baby Smith	Child	09/09/2020

If they do not exist, you can create a profile for them by clicking the 'Add New Dependent' button:



Once these dependents / beneficiaries are in Workday, here are several ways you could add them to your plans. Depending on your selections, Workday will automatically determine your coverage level (i.e., employee only, employee + 1, or family)

A single dependent:

Coverage \* Employee + 1

<input checked="" type="checkbox"/>	Spouse Smith	Spouse	06/06/1975
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Multiple dependents:

Coverage \* Family

<input checked="" type="checkbox"/>	Spouse Smith	Spouse	06/06/1975
<input checked="" type="checkbox"/>	Teenage Smith	Child	05/05/2006
<input checked="" type="checkbox"/>	Baby Smith	Child	09/09/2020

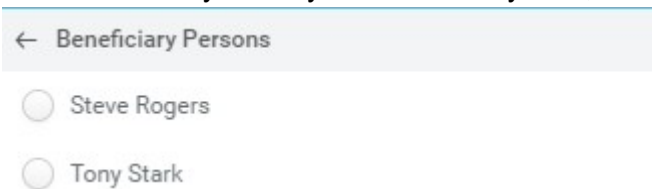
**Examples: Beneficiaries**

To add a beneficiary to your plans, start by clicking on the empty row under “Beneficiary”.

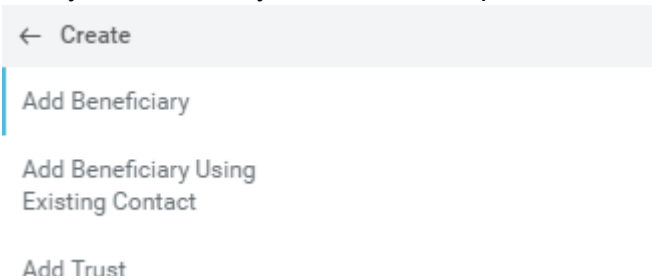


The row will expand to give you the option to select an existing beneficiary or create a new one.

If the beneficiary already exists in the system, select them from the menu:



If they do not exist, you can create a profile for them:



Once beneficiaries are in Workday, here are several ways you could add them to your plans.

A single beneficiary:

Primary Beneficiaries 1 item

	Beneficiary	Percentage
+		
-	× Tony Stark	100

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One primary beneficiary and one secondary beneficiary:

Primary Beneficiaries 1 item ☰ ☐ ↗

	+	Beneficiary	Percentage	
	⊖	<input type="text" value="x Tony Stark"/> <span style="float: right;">☰</span>	<input type="text" value="100"/>	↑

Secondary Beneficiaries 1 item ☰ ☐ ↗

	+	Beneficiary	Percentage	
	⊖	<input type="text" value="x Steve Rogers"/> <span style="float: right;">☰</span>	<input type="text" value="100"/>	↑

Two beneficiaries (the benefit is split between two people as you choose):

Primary Beneficiaries 2 items ☰ ☐ ↗

	+	Beneficiary	Percentage	
	⊖	<input type="text" value="x Tony Stark"/> <span style="float: right;">☰</span>	<input type="text" value="50"/>	↑
	⊖	<input type="text" value="x Steve Rogers"/> <span style="float: right;">☰</span>	<input type="text" value="50"/>	↓

Adding life insurance for a spouse:

Coverage \*  ☰

<input checked="" type="checkbox"/>	Spouse Smith	Spouse	06/06/1975
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