Workday Job Aid – Life Event Benefit Enrollment
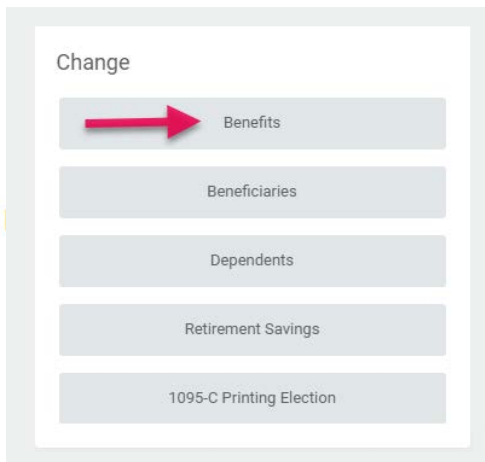
You have 31 days from your life event date to submit benefit changes. Qualifying life events may include (but are not limited to):

- Birth or adoption of a baby or child
- Loss of other healthcare coverage
- Eligibility for new healthcare coverage
- Marriage
- Divorce

1. To begin your life event benefit enrollment, select the **Workday** icon **workday** on OKTA. On the Workday homepage, select **Benefits** from **Applications**.
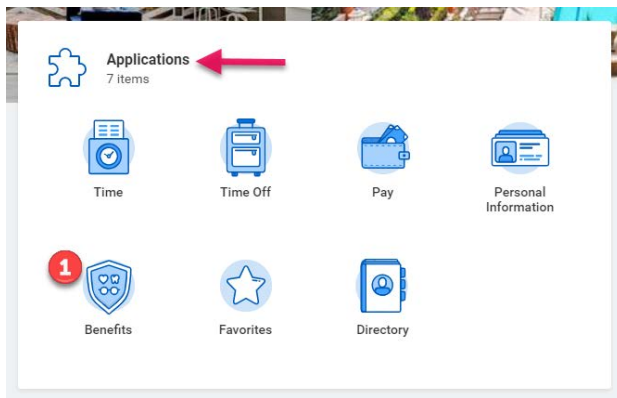
2. Click **Benefits** under the **Change** box.

[Type here]

3. Select the **Benefit Event Type** that best fits your life event.

4. The **Benefits Event Date** will be the date of your event. For example, if the effective date for when you are being involuntarily dropped from coverage is the last day of May, please use 05/31/YYYY as your event date.

5. Correlating <u>documentation</u> of your life event is required before approving your life event request. This must be submitted under **Attachments**.

6. After completing the required fields, click **Submit** at the bottom of the screen. You will be prompted to open another screen to review and make your elections.

7. Click **Elect** to choose the benefit(s) you want to add and **Waive** for the benefit(s) you want to decline.

[Type here]

8. **Enrolling Dependent(s)?** Once you elect the benefit plan, click the white box under Enroll Dependent and choose **Add My Dependent From Enrollment**. *If you are not enrolling dependents, jump to #12.*

9. A new page will open where you will choose whether or not you want your dependent to also be a beneficiary. Select **Yes** or **No,** then click the **OK** button on the bottom of the screen.

Use your new dependent as a beneficiary?

10. Complete all the required fields marked with a *. Please note that you will need to add your dependent's Social Security Number. This can be done by clicking **Add** under **Nation IDs**. When you click **OK** at the bottom of the screen, your dependent will appear under the **Enroll Dependents** column.

11. If you want to add your dependent to the other benefit(s) available, click the white box under Enroll Dependent and choose **Existing Dependents**.

3. Email: **support@dsiverify.com**

Submit Documentation:
Documents may be submitted via one of several methods:
• Upload documents online at **www.dsiverify.com**
• Securely Email documents to **verify@dsiverify.com**
• Fax documents to 949-502-0734
• Mail copies (no originals) to P.O. Box 80133, Rancho Santa Margarita, CA 92688
• Don't have a scanner/fax? You can take legible pictures of your documents and upload or email them.

12. Click the **Continue** button to move through the screens after you review and make your elections.

13. Please note that you will be required to add beneficiaries to your life insurance benefits. To add beneficiaries, click the **+** button and either **Create** a beneficiary or choose an existing **Beneficiary Persons**. **Primary** is your main beneficiary/beneficiaries and **Contingent** is your secondary beneficiary/beneficiaries.

14. After reviewing your benefit elections on the Benefit Elections Review page, check the **I Agree** check box *(you may need to scroll to the bottom)*.

15. Click **Submit**. Your elections will not be processed until you click Submit on the last screen.

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