

Human Resource Management System

Workday Job Aid Benefits



This Job Aid describes the information employees can view/change regarding their benefits as well as how a Benefits Partner may make benefits changes.

- Employees
- People Managers
- Human Resources

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1. Benefits Overview

Within Workday, you can manage your benefits by reporting coverage change events. You can also view and edit your benefit elections. This reference guide provides instructions on how to manage **change benefits** events in Workday. These instructional materials do not review County policies and procedures. The criteria for a change benefit event may vary depending on the reason for the change. These instructions are intended to show you Workday functionality, not to replace or override the direction of the Employee Benefits Unit. This job aid covers generic events and the most common functions that an employee or **Benefits Partner (Employee Benefit Representatives)** will be performing. Please be advised that Workday uses the term "Benefits Partner" to refer to "Employee Benefits Representatives." Please contact the Employee Benefits Unit at 631-853-5866 if you have specific questions regarding benefits. If you need assistance navigating Workday, you may contact HRMShelpline@suffolkcountyny.gov.



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2. View Current Elections

Employees may view current benefit elections and benefit elections as of a certain date.

1. View your Benefit Elections:

- From your Workday Homepage, click on the **Benefits** application.

There are four sections to the **Benefits** application:

Change Benefits Dependents Medicare Information	External Links Domestic Partner Application Medicare Part D – Opt-Out Form Employee Benefits Address Change Form
View Benefit Elections Benefit Elections as of Date	Current Cost 57.47

- Under the **View** section, click **Benefit Elections**.
- Your **Current Benefit Elections and Costs** are displayed.



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Note: Your Health Benefits coverage under the Suffolk County Employee Medical Health Plan (EMHP) consists of three parts:

- a. Hospital/Medical coverage is administered by Empire Blue Cross Blue Shield/EMHP
- b. Prescription coverage is administered by Welldyne/EMHP for active employees, their dependents, and non-Medicare eligible retirees/non-Medicare eligible retiree's dependents. Prescription coverage is administered by Express Scripts for Medicare-eligible retirees and Medicare-eligible dependents).
- c. Mental Health/Substance Use Disorder coverage is administered by Beacon Health Options/EMHP.

Note: Depending on your enrollment, you may see the following listed:

- a. A contribution is listed for the County's Flexible Spending Account (FSA Medical, Dependent Care) through – Pullano & Company (M.A. Services).
 - b. A dollar amount or percentage listed for contributions towards the County 457(b) – T.Rowe Price Deferred Compensation Plan
 - c. The percentage of employee contribution toward New York State Retirement System.
- Your **Employee Cost (Biweekly)** is shown on the far right column. This represents the amount deducted from your paycheck to contribute towards your benefits elections (i.e. health benefits, Pension, etc.).
 - You may print this information by clicking the PDF icon on the top right of the page. You may also export this information to Microsoft Excel by clicking on the grid icon to the left of the PDF icon.

2. View Benefit Elections as of Date:

Your current benefit elections will display using the **Benefit Elections** button as described in the [previous step](#). If you want to view a benefit election enrollment event (up to as early as 1/1/2021 if hired before this date), you can use the **Benefits Elections as of Date** button:

- From your Workday Homepage, click the **Benefits** application.
- From the **View** section, click **Benefit Elections as of Date**.
- Enter the date for which you want to view your benefit elections.
- Click **Ok**.
- You are now viewing your benefit elections as of a certain date.
- You may print this information by clicking the PDF icon on the top right of the page. You may also export this information to Microsoft Excel by clicking on the grid icon to the left of the PDF icon.



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3. View Benefits Statement

Employees:

1. From your Workday Homepage, navigate to your Workday profile by clicking on your profile picture on the top right of the screen (or picture of the Workday cloud if your employee profile picture has not yet been set up), then click **View Profile**.
2. Click the **Actions** button directly under your employee name and job title on the left of the screen, within the blue bar.
3. Select **Benefits > View My Benefit Statement**.
4. Click within the **Benefit Event** field and select the desired Benefit Event you would like to view and print.
5. Click **Ok**.
6. Click the **Print** button at the bottom of the screen. The selected Benefit Event will open as a PDF document, which can be saved and printed.



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4. View 1095 Printing Election

Employees:

1. From your Workday Homepage, navigate to your Workday profile by clicking on your profile picture on the top right of the screen (or picture of the Workday cloud if your employee profile picture has not yet been set up), then click **View Profile**.
2. Click the **Actions** button directly under your employee name and job title on the left of the screen, within the blue bar.
3. Select **Benefits > View My 1095-C Printing Election**.
4. You are now able to see how you currently receive the 1095-C Tax Document (electronic and paper copies).

Note: Employees are set to the default: receiving both electronic and paper copies of your 1095-C Tax Document.

Note: To change your 1095-C printing election, go back to your Workday profile. Click the **Actions** button below your employee name and job title, within the blue bar. Select **Benefits > Change 1095-C Printing Election**. Choose your new printing election then click **Ok**, then click **Done**.



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5. View / Add Dependents

Employees can view and add dependents

1. When choosing to enroll a dependent under your current health benefits coverage, you must first add the dependent in Workday. If you are not adding dependents but wish to **change benefits** elections, skip to the [Change Benefits](#) lesson.

Note: Follow the below instructions to first add dependents, then follow the [Change Benefits](#) lesson to change your benefits to add your dependent onto your benefits.

To add dependents in Workday as an employee:

- a. From the Workday Homepage, click on the **Benefits** application.
- b. Under the Change menu, select the **Dependents** button.
- c. You should see your dependents who have already been entered into Workday listed, along with your relationship to the dependent, the dependent's age, and the dependent's Benefit Elections.
- d. Click the **Add** button on the top of the screen.
- e. Review the instructions listed at the top of the page.
- f. Fill in the required fields. The **Effective Date** is the date you wish to add this dependent.
- g. Upload relevant documentation regarding the dependent you wish to add. When you upload each document, you must enter a description of the document and select a category- **Benefits**.

Note: You must choose the correct category of **benefits** for any documentation you wish to upload.

- h. Click **Submit**.
- i. You will see a notification box appear on the screen that states you have submitted this task. You may select the **View Details** hyperlink to view additional information about the task. A Benefits Partner will review your adding of dependents.

Note: You will not be able to see your newly added dependent until the Benefits Partner reviews and approves it. You will also not be able to change your benefits to add this dependent onto your health benefits coverage until the Benefits Partner approves the newly added dependent.



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To change existing information regarding current dependents:

- a. From the Workday Homepage, click on the **Benefits** application.
- b. You should see your dependents who have already been entered into Workday listed, along with your relationship to the dependent, the dependent's age, and the dependent's Benefit Elections.
- c. Click the **Edit** button on the far right column under the specific dependent you wish to modify.
- d. Review the instructions listed at the top of the page.
- e. Enter the **Effective Date** as the date the change is taking place.
- f. Edit the information you wish to change.
- g. Upload relevant documentation regarding the dependent you wish to add. When you upload each document, you must enter a description of the document and select a category- **Benefits**.

Note: You must choose the correct category of **benefits** for any documentation you wish to upload.

- h. Click **Submit**.

Note: When a domestic partner marries a member, the domestic partner's children will be changed from domestic partner children to stepchildren.

Note: If you wish to remove a Dependent entirely, you must do so within the [Change Benefits](#) function. The Edit function will not remove a Dependent and should only be used for changing specific information on file for a dependent.

You should now see your newly added dependent listed (or updated information reflected). You may click **Edit** on the far right column if the information has been incorrectly entered. You may also enter another dependent at this time by clicking **Add**.

Note: If you added a dependent into Workday, you must now change your benefit elections to enroll your dependent in your health benefits coverage. If you do not change your benefit elections, your newly added dependent will not be enrolled in health benefits coverage.



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6. Change Benefits (Life Events) – Employee Self Service (ESS) and Benefits Administration

Employees can change benefit elections when a qualifying event occurs, such as a change in marital status/domestic partnership, the birth/adoption of a child, death of a dependent, or a change in other employee or dependent coverage.

If you have a question regarding a specific benefits election, contact the Employee Benefits Unit at (631) 853-4866.

Note: When enrolling in health benefits, you will need to complete all required fields as well as provide the required documentation (see the below Benefit Event Documents chart).



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Benefit Event Documents

Benefit Event Type	Required Documentation for Workday enrollment	Required Documentation within 30 days of Workday enrollment
Birth/Adoption of Child	<p>If available, needs to be provided at the time of enrollment, but not required upon enrollment (must be provided within 30 days):</p> <ul style="list-style-type: none"> -Copy of child's Social Security Card -Copy of child's Birth Certificate -If adoption, Certificate of Adoption or Order of Placement 	<p>If not immediately available,</p> <ul style="list-style-type: none"> - Copy of child's Social Security Card - Copy of child's birth certificate -If adoption, Certificate of Adoption or Order of Placement
Marriage	<ul style="list-style-type: none"> - Copy of official Marriage Certificate - Copy of Social Security Card 	None
Domestic Partnership	<ul style="list-style-type: none"> - Copy of Social Security Card -Completed Domestic Partnership Packet (including all required documentation to prove financial interdependence and residency) 	
Divorce	<ul style="list-style-type: none"> - Official copy of signed Divorce Decree indicating the date of divorce 	None
Dissolution of Domestic partnership	<ul style="list-style-type: none"> -Signed and notarized Termination of Domestic Partnership form 	
Death of Dependent/spouse	<p>If available, needs to be provided:</p> <ul style="list-style-type: none"> - Copy of death certificate. If not available, then within 30 days 	Within 30 days: Copy of death certificate
Add Legal Guardian Child (Grandchild or other Child)	<ul style="list-style-type: none"> - Copy of Social Security Card - Copy of birth certificate -Court order of custody or guardianship 	None
Employee or Dependent Gains/Loses Other Coverage	Documentation from a previous employer or the insurance provider. The document must list the names of the covered dependents and the effective date of coverage.	None



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Enter the benefit event:

1. **Add Birth/Adoption of Child, Legal Guardian Child, Marriage/Domestic Partnership**

Adding dependents to your health benefits coverage:

- You should have already added a dependent to Workday already through the **View/Add Dependents** task. Please be advised that you are unable to change your benefits to add the new dependent onto the health benefits coverage until the Benefits Partner approves the "Add Dependent" task you recently completed.
- Now you must change your benefits to add your newly added dependent(s). From your Workday homepage, click on the Benefits application.
- Under the **Change** menu, click **Benefits**.
- Select the Benefit Event Type under **Change Reason**.

Note: Any reason to **change benefits** will be listed under the Change Reason. Read the instructions on the right side of the page carefully to understand what documents you must have available at the time of changing benefit elections. Also, use the [Benefit Event Documents chart](#) for reference.

- Enter the **Benefit Event Date**.

Note: The date of the benefit event is the date that the life event occurred. For example, a child was born on November 21, 2020. The benefit event date is November 21, 2020.

- Attach required documents, if applicable.



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Note: If you are unable to attach documents or do not have them accessible, you must submit them to the Employee Benefits Unit directly. Most benefit election changes must be submitted with the required documentation. [See the Benefit Event Documents chart.](#)

- Click **Submit**. You will see a notification box appear that states you have submitted this task. You can click **View Details** to view additional information regarding your submitted task or you can click **Open** to begin changing your benefit elections. If you close out the message, you can begin changing your benefit elections by finding the task in your inbox (a task will route to your inbox to **change benefits elections**).


Note: You just entered the benefit event. Now you must change your benefits.

Select **Let's Get Started**.

Change your benefits:

Prescription, Medical/Hospital, and Mental Health/Substance Use Disorder

All three portions are under the same Suffolk County Employee Medical Health Plan (EMHP). Begin by clicking **Manage** under the **Prescription** coverage.



Prescription
WellDyne EMHP

Cost per paycheck	Included
Coverage	Employee + Spouse
Dependents	1

[Manage](#)



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- You will next see the County prescription plan. Select **Confirm and Continue**.
- Add the dependent by checking the select box to the left of the dependent's name. Enter the dependent's social security number if available. If the dependent's social security number is not available, enter a reason.
- Click **Save**.
- You will see a notification box appear that states your Prescription changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

- Next click **Manage** under the **Medical/Hospital** coverage.
- Select **Confirm and Continue**.
- Add the dependent by checking the select box to the left of the dependent's name. Then click **Save**.
- You will see a notification box appear that states your Medical/Hospital changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

- Next click **Manage** under the **Mental Health/Substance Use Disorder** coverage.
- Select **Confirm and Continue**.
- Add the dependent by checking the select box to the left of the dependent's name. Then click **Save**.
- You will see a notification box appear that states your Mental Health/Substance Use Disorder changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

Note: If you wish to enroll in the FSA Dependent Care plan (if applicable to our newly added dependents), click **Enroll** under FSA Dependent Care.

- When you have completed enrollment of your dependent in all three sections of the Health Benefits coverage, click **Review and Sign** at the bottom of the page.
- You should now see a summary of your Health Benefits coverage.
- Verify your newly added dependent is listed on all sections of the Health Benefits coverage.
- Read the electronic signature legal notice, then select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
- Click **Submit**.
- You may select **View 2021 Benefits Statement** to see a summary of your new benefit changes.



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Note: Employee Benefits will review your submitted information. If additional information is required, you will be notified by Employee Benefits.

- Click **Done**.

Note: If you have added a spouse/domestic partner onto your health benefits coverage you must complete these additional steps: Update Marital Status and Update W2 Withholdings

If Marriage/Domestic Partnership: Update Marital Status

- From your Workday Homepage, click on your inbox.
- Select the message **Update Marital Status: Benefit Change –Marriage/Domestic Partnership: [Employee Name]**

Note: This message serves as a reminder that you must update your marital information.

- Go to your Workday homepage.
- Click the **Personal Information** application.
- Under the **Change** section, click **Personal Information**.
- You are now on the Change Personal information page. Click the **Edit** button (pencil icon) to the right of **Marital Status** to change your Marital Status.
- Enter the **Marital Status** and **Marital Status Date**.
- Click **Submit** at the bottom of the page.
- Click **Done**.

If Marriage/Domestic Partnership: Update W2 Withholdings

Note: See [Job Aid SC-CM-TRN-005 Job Aid – View-Change Personal Information Section 13 View/Edit/Print Tax Information](#) to view additional information on how to update your tax information.

- Once your W2 Withholdings are updated, go back to this inbox message and click **Submit**. You may enter a comment including the date you completed this task.
- Click **Done**.



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2. **Removing Dependents from your Health Benefits Coverage (divorce):**

Before entering the benefit event, you must change the dependent relationship within Workday:

- From the Workday Homepage, select the **Benefits** application.
- Under the **Change** menu, click **Dependents**.
- Select the **Edit** button to the right of the dependent's name.
- Scroll down to the **Relationship** section, and change the relationship to ex-spouse.
- Click **Submit** at the bottom of the screen.
- A Benefits Partner must approve this relationship change before you enter the benefit event below.

Enter the benefit event:

- From your Workday homepage, click on the **Benefits** application.
- Under the **Change** menu, click **Benefits**.
- Select the Benefit Event Type under **Change Reason**.

Note: Any reason to **change benefits** will be listed under the Change Reason. Read the instructions on the right side of the page carefully to understand what documents you must have available at the time of changing benefit elections. Also, use the [Benefit Event Documents chart](#) for reference.

- Enter the **Benefit Event Date**.

Note: The date of the benefit event is the date that the life event occurred. For example, a divorce was finalized on November 21, 2020. The benefit event date is November 21, 2020.

- Attach required documents, if applicable.



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Note: If you are unable to attach documents or do not have them accessible, you must submit them to the Employee Benefits Unit directly. Most benefit election changes must be submitted with the required documentation. [See the Benefit Event Documents chart.](#)

- Click **Submit**. Click **Done**.
- Next, you must modify your dependents by updating your spouse to ex-spouse. From your Workday Homepage, go to your inbox.
- Select the message **Update Spouse to Ex-Spouse: Benefit Event: [Employee Name]**.
- Click the **Dependents** button.
- Next to your dependent's name, click **Edit**.
- Enter the **Effective Date** and the Reason (listed under Change Dependent).
- Click **Submit**.
- Click **Done**.
- Next, you must go back to your Workday inbox, select the message **Update Spouse to Ex-Spouse: Benefit Event: [Employee name]** again, and click **Submit** at the bottom of the message (you just completed this step, you now must mark it as completed by clicking submit).

Change your benefits:

- From your Workday Homepage, go to your Workday inbox.
- Select the message **Benefit Change- Divorce/Dissolution of Domestic Partnership: [Employee Name]**.
- Click **Let's Get Started**.
- Remove your dependent from all three sections of the Health Benefits Coverage:

Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder Coverage


All three portions are under the same Suffolk County Employee Medical Health Plan (EMHP). Begin by clicking **Manage** under the **Prescription** coverage.



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	Prescription WellDyne EMHP
Cost per paycheck	Included
Coverage	Employee + Spouse
Dependents	1
Manage	

- You will next see the County’s prescription plans. Select **Confirm and Continue**.
- Remove the dependent by unchecking the select box to the left of the dependent’s name.
- Click **Save**.
- You will see a notification box appear that states your Prescription changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

- Next click **Manage** under the **Medical/Hospital** coverage.
- Select **Confirm and Continue**.
- Remove the dependent by unchecking the select box to the left of the dependent’s name. Then click **Save**.
- You will see a notification box appear that states your Medical/Hospital changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

- Next click **Manage** under the **Mental Health/Substance Use Disorder** coverage.
- Select **Confirm and Continue**.
- Remove the dependent by unchecking the select box to the left of the dependent’s name. Then click **Save**.
- You will see a notification box appear that states your Mental Health/Substance Use Disorder changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.



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- When you have completed removing your dependent from all three sections of the Health Benefits coverage, click **Review and Sign**.
- You should now see a summary of your health benefits coverage.
- Verify your dependent is no longer listed on all sections of the Health Benefits coverage.
- Read the electronic signature legal notice, then select the **I accept** checkbox to provide an electronic signature, confirming your changes.
- Click **Submit**.
- You may select **View 2021 Benefits Statement** to see a summary of your new benefit changes.

Note: Employee Benefits will review your submitted information. If additional information is required, you will be notified by Employee Benefits.

- Click **Done**.

Note: You must complete these additional steps: Update Marital Status and update W2 Withholdings

Update Marital Status

- From your Workday Homepage, click on your inbox.
- Select the message **Update Marital Status: Benefit Change – Divorce/Dissolution of Domestic Partnership: [Employee Name]**

Note: This message serves as a reminder that you must update your marital information.

- Go to your Workday homepage.
- Click **Done**.
- Under the **Change** section, click **Personal Information**.
- You are now on the Change Personal information page. Click the **Edit** button (pencil icon) to the right of **Marital Status** to change your Marital Status.
- Enter the **Marital Status** and **Marital Status Date**.
- Click **Submit** at the bottom of the page.
- Click **Done**.



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Update W2 Withholdings

Note: See [Job Aid SC-CM-TRN-005 Job Aid – View-Change Personal Information Section 13 View/Edit/Print Tax Information](#) to view additional information on how to update your tax information.

- Once your W2 Withholdings are updated, go back to this inbox message and click **Submit**. You may enter a comment including the date you completed this task.
- Click **Done**.

3. **Removing Dependents from your Health Benefits Coverage (death):**

Enter the benefit event:

- From your Workday homepage, click on the **Benefits** application.
- Under the **Change** menu, select **Benefits**.
- Select the Benefit Event Type under **Change Reason**.

Note: Any reason to **change benefits** will be listed under the Change Reason. Read the instructions on the right side of the page carefully to understand what documents you must have available at the time of changing benefit elections. Also, use the [Benefit Event Documents chart](#) for reference.

- Enter the **Benefit Event Date**.

Note: The date of the benefit event is the date that the life event occurred. For example, a dependent passed away on November 21, 2020. The benefit event date is November 21, 2020.

- Attach required documents, if applicable.



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Note: If you are unable to attach documents or do not have them accessible, you must submit them to the Employee Benefits Unit directly. Most benefit election changes must be submitted with the required documentation. [See the Benefit Event Documents chart.](#)


- Click **Submit**. You will see a notification box appear that states you have submitted this task. You can click **View Details** to view additional information regarding your submitted task or you can click **Open** to begin changing your benefit elections. If you close out the message, you can begin changing your benefit elections by finding the task in your inbox (a task will route to your inbox to **change benefits elections**).

Change your benefits:

- Select **Let's Get Started**.
- Remove your dependent from all three sections of the Health benefits coverage:

Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder coverage

All three portions are under the same Suffolk County Employee Medical Health Plan (EMHP). Begin by clicking **Manage** under the **Prescription** coverage.



Prescription
WellDyne EMHP

Cost per paycheck	Included
Coverage	Employee + Spouse
Dependents	1

Manage



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- You will next see the County's prescription plans. Select **Confirm and Continue**.
- Remove the dependent by unchecking the select box to the left of the dependent's name.
- Click **Save**.
- You will see a notification box appear that states your Prescription changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

- Next click **Manage** under the **Medical/Hospital** coverage.
- Select **Confirm and Continue**.
- Remove the dependent by unchecking the select box to the left of the dependent's name. Then click **Save**.
- You will see a notification box appear that states your Medical/Hospital changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.
- Next click **Manage** under the **Mental Health/Substance Use Disorder** coverage.
- Select **Confirm and Continue**.
- Remove the dependent by unchecking the select box to the left of the dependent's name. Then click **Save**.
- You will see a notification box appear that states your Mental Health/Substance Use Disorder changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.
- When you have completed removing your dependent from all three sections of the Health Benefits coverage, click **Review and Sign**.
- You should now see a summary of your health benefits coverage.
- Verify your dependent is no longer listed on all sections of the health benefits coverage.
- Read the electronic signature legal notice, then select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
- Click **Submit**.
- You may select **View 2021 Benefits Statement** to see a summary of your new benefit changes.

Note: Employee Benefits will review your submitted information. If additional information is required, you will be notified by Employee Benefits.

- Click **Done**.

Note: You must complete these additional steps: Update Marital Status and update W2 Withholdings.



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Update Marital Status

- Go to your Workday homepage.
- Click the **Personal Information** application.
- Under the **Change** section, click **Personal Information**.
- You are now on the Change Personal information page. Click the **Edit** button (pencil icon) to the right of **Marital Status** to change your Marital Status.
- Enter the **Marital Status** and **Marital Status Date**.
- Click **Submit** at the bottom of the page.
- Click **Done**.

Update W2 Withholdings

Note: See [Job Aid SC-CM-TRN-005 Job Aid – View-Change Personal Information Section 13 View/Edit/Print Tax Information](#) to view additional information on how to update your tax information.

- Once your W2 Withholdings are updated, go back to this inbox message and click **Submit**. You may enter a comment including the date you completed this task.
- Click **Done**.

4. **Dependent Gains/Loses Other Coverage:**

Enter the benefit event:

- From your Workday homepage, click on the **Benefits** application.
- Under the **Change** menu, click **Benefits**.
- Select the Benefit Event Type under **Change Reason**.

Note: Any reason to **change benefits** will be listed under the Change Reason. Read the instructions on the right side of the page carefully to understand what documents you must have available at the time of changing benefit elections. Also, use the [Benefit Event Documents chart](#) for reference.

- Enter the **Benefit Event Date**.

Note: The date of the benefit event is the date that the life event occurred.



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- Attach required documents, if applicable.

Note: If you are unable to attach documents or do not have them accessible, you must submit them to the Employee Benefits Unit directly. Most benefit election changes must be submitted with the required documentation. [See the Benefit Event Documents chart.](#)

- Click **Submit**. You will see a notification box appear that states you have submitted this task. You can click **View Details** to view additional information regarding your submitted task or you can click **Open** to begin changing your benefit elections. If you close out the message, you can begin changing your benefit elections by finding the task in your inbox (a task will route to your inbox to **change benefits elections**).

Change your benefits.

- Select **Let's Get Started**.
- Add/remove your dependent to/from all three sections of the Health Benefits coverage:

Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder coverage


All three portions are under the same Suffolk County Employee Medical Health Plan (EMHP). Begin by clicking **Manage** under the **Prescription** coverage.



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	Prescription WellDyne EMHP
Cost per paycheck	Included
Coverage	Employee + Spouse
Dependents	1
Manage	

- You will next see the County’s prescription plans. Select **Confirm and Continue**.
- Add/remove the dependent by checking the select box to the left of the dependent’s name. If adding the dependent, enter the dependent’s social security number if available. If the dependent’s social security number is not available, enter a reason.

Note: If you did not add the dependent before starting the **Change Benefits** process, you must add the dependent by selecting the **Add Dependent** button, filling in the required fields, and then clicking **Save**. You must then select the box to the left of the dependent’s name as described above and enter the social security number if available.

- Click **Save**.
- You will see a notification box appear that states your Prescription changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.
- Next click **Manage** under the **Medical/Hospital** coverage.
- Select **Confirm and Continue**.
- Add/remove the dependent by checking/unchecking the select box to the left of the dependent’s name. Then click **Save**.
- You will see a notification box appear that states your Medical/Hospital changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.



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- Next click **Manage** under the **Mental Health/Substance Use Disorder** coverage.
- Select **Confirm and Continue**.
- Add/remove the dependent by checking/unchecking the select box to the left of the dependent's name. Then click **Save**.
- You will see a notification box appear that states your Mental Health/Substance Use Disorder changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

- When you have completed making the dependent changes in all three sections of the Health Benefits coverage, click **Review and Sign**.
- You should now see a summary of your health benefits coverage.
- Verify your dependent changes are reflective on all sections of the health benefits coverage.
- Read the electronic signature legal notice, then select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
- Click **Submit**.
- You may select **View 2021 Benefits Statement** to see a summary of your new benefit changes.

Note: Employee Benefits will review your submitted information. If additional information is required, you will be notified by Employee Benefits.

- Click **Done**.

For Benefits Partners:

A Benefits Partner reviews an employee's benefit elections whenever there is a change in benefits due to a life event (see [Review and Approve Elections](#)).



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7. Make Open Enrollment Elections (Employees)

During the open enrollment period, you will receive a task in your inbox to complete your benefits enrollment. If you take no action during the open enrollment, your current elections for Health Benefits coverage will remain in effect for you and your selected dependents for the next year. Flexible Spending Account elections will not be renewed, so you must elect those coverages annually.

1. From your Workday Homepage, go to your inbox.
2. From the Actions tab, select the message **Open Enrollment Change: [Employee Name]**. Your current benefit election form will be displayed within the message.
 - The top section of each screen will indicate the total number of steps needed to complete your benefit elections. It will also show the step you are currently completing.
 - Using the Elect/Waive column, choose the coverage you would like to elect. If you will be electing to cover your dependents, they will need to be added as a dependent in Workday before you will be able to attach them to the benefit election process. Please refer to the [View/Add Dependents](#) section of this job aid.

Note: Your current elections are displayed.

- Select the dependents you wish to have added to your coverage, checking the box next to each dependent you will be adding. If your dependent does not appear on the drop-down list, you will need to click **Save for Later** at the bottom of the screen and follow the add dependents process.
- Select **Continue**.
- View the summary for your selected benefits.
- Click the box next to **I accept** below the Electronic Signature, then click **Submit**.
- You may click **Print** to print or save your benefit elections to a PDF. You will always have access to view your benefit elections at any time through the **Benefits** application (see [View Current Elections](#)).
- Click **Done**.

Note: If you submit your Open Enrollment elections and change your mind before the open enrollment period ends, you have the opportunity to amend your benefit elections. Click the **Benefits** application on your Workday Homepage. Under the **Current Cost** section, click **Change Open Enrollment** to view or edit your submitted enrollment elections. Follow the instructions above to complete the appropriate fields.



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8. Change Medicare Data (Medicare Eligible Retirees, Medicare-eligible Retiree's Dependents, Employees with End-Stage Renal Disease)

[Note: Benefit Partners may also perform this function on behalf of an employee.](#)

For Medicare Eligible Retirees, Medicare-eligible Retiree's dependents and employees with end-stage renal disease:

1. From your Workday Homepage, select the **Benefits** application.
2. Under the Change section, select **Medicare Information**.
3. You are now on the **Manage My Medicare Information** page. Read the instructions listed.
4. Select the name of the individual.

Note: Please be sure to select the correct individual who is Medicare eligible.

5. Click **Ok**.
6. Enter the **Event Date** (the effective date listed on Medicare Card for both Medicare Part A and Medicare part B).
7. Enter the **Reporting Reason**.
8. Enter your **Medicare ID** (listed on your Medicare Card) and **Medicare Reason** (Aged (65+, Disabled, or ESRD).
9. Click **Add** under **Part A – Hospital** and enter the **Effective Date**. Also, click **Add** under **Part B – Medical** and enter the **Effective Date** (the effective date is the effective date listed on your Medicare Card).
10. Attach a copy of your Medicare card showing Part A and Part B.



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Note: If you have not yet received your Medicare Card showing all parts that are active, you must send a copy of the card to Employee Benefits when you receive it.

11. Click **Submit**.

Note: You may also access the Change Medicare Data task by searching on the search bar 'Manage My Medicare Information.' Once you have selected the search result, begin with step 3 to continue the process.

Note: If you have End-Stage Renal Disease, you must select **Add** under **End-Stage Renal Disease** and fill out the required fields.

Once the employee completes the Manage Medicare information task, the Benefits Partner must review and approve this change. The Benefits Partner will receive a task in their inbox to review the Manage Medicare information task for the employee.



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A Benefits Partner can perform this task on behalf of an employee/retiree/eligible dependents:

1. Search for the **Manage Medicare information** task within the search bar at the top of the page and select this task within the search results.
2. Under **Name**, select the name of the employee or dependent, then click **Ok**.

Note: Please be sure to select the correct employee, retiree, or dependent.

- Enter the **event date** (the effective date listed on Medicare Card for both Medicare Part A and Medicare part B).
- Enter the **reporting reason**.
- Enter the **Medicare ID** and **Medicare Reason**.
- Click **Add** under Part A – Hospital and enter the **Effective Date**. Also, click **Add** under **Part B – Medical** and enter the **Effective Date** (the effective date is the effective date listed on your Medicare Card).
- Attach a copy of the Medicare Card showing Part A and Part B.
- Click **Submit**.

Note: Once the employee completes the Manage Medicare information task, the Benefits Partner must review and approve this change. The Benefits Partner will receive a task in their inbox to review the Manage Medicare information task for the employee.



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9. Change Medicare Part D Data (Benefits Partner)

Only the Benefits Partner may change Medicare Part D Data.

1. Search for “Change Medicare Part D EGWP Data” within the search bar at the top of the page and select this task from the search results.
2. Within **EGWP Data for Person**, select the name of the retiree or dependent, then click **Ok**.
3. Enter the **Subscriber Number**.
4. Enter the **Enrollment Status**.

Note: Be sure to enter the correct enrollment status: See the list of codes:

03- Submitted to CMS

05- CMS Denied; Member Never Enrolled; Invalid HICN

08- CMS Approved; Eligibility Added; PBP Change

09- CMS Error

12- Retroactive Enrollment in Process

13- Retroactive Disenrollment in Process

16- CMS Approved Disenrollment; deceased Member

5. You may enter an **Enrollment Date** or **Disenrollment Date** depending on the change in Medicare Part D Data.
6. If this is a disenrollment, you may select a **Disenrollment Reason** and **Reason/Reject Code**.
7. Click **Ok**.



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10. Review and Approve Elections (Benefit Partners)

Whenever a dependent change or benefit election change is made, the change will route to the Benefit Partner's inbox. The Benefit Partner will review the documentation to ensure it is valid. Also, the Benefit Partner must ensure the benefit election change is also valid.

1. Benefit Partners must review and approve a dependent change.

Note: The employee will not be able to change benefit elections to add a new dependent onto the health benefits coverage until the Benefits Partner approves the dependent event.

- From the Workday Homepage, go to your inbox and select from the Action messages **Dependent Event: [Employee Name]**.
 - Review the changes and any attached documentation. You can click the **View Details** button to view detailed information regarding the dependent change. If you wish for the employee to revise the changes, click **Send Back** at the bottom of the screen. Once reviewed, click **Approve**.
2. Benefit Partners must review and approve the benefit election change of adding a new dependent child.
 - From the Workday Homepage, go to your inbox and select from the Action messages **Benefit Change – Birth/Adoption of Child: [Employee Name]**.
 - Review the changes and attached documentation. Make sure that if the employee added a new dependent within Workday, the employee also added the dependent onto the health benefits. If you wish for the employee to revise the changes, click **Send Back** at the bottom of the screen. Verify the new dependent is added to all 3 portions of Suffolk County EMHP (Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder). Once verified, click **Approve**.



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3. Benefit Partners must review and approve the benefit election change of adding a dependent spouse/domestic partner.
 - From the Workday Homepage, go to your inbox and select from the Action messages **Benefit Change – Marriage/Domestic Partnership: [Employee Name]**.
 - Review the changes and attached documentation. Make sure that if the employee added a new dependent within Workday, the employee also added the dependent onto the health benefits. If you wish for the employee to revise the changes, click **Send Back** at the bottom of the screen. Verify the new dependent is added to all 3 portions of Suffolk County EMHP (Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder). Once verified, click **Approve**.

Note: When a domestic partner marries a member, the domestic partner's children will be changed from domestic partner children to stepchildren.

4. Benefit Partners must review and approve the benefit election change of divorce/dissolution of a domestic partnership and then determine COBRA eligibility for the removed dependent.
 - From the Workday Homepage, go to your inbox and select from the Action messages **Benefit Change – Divorce/Dissolution of Domestic Partnership: [Employee Name]**.
 - Review the changes and attached documentation. If you wish for the employee to revise the changes, click **Send Back** at the bottom of the screen. Verify the new dependent is added to all 3 portions of Suffolk County EMHP (Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder). Once verified, click **Approve**.
 - Click **Done**.
 - Go back to your Workday inbox, and select the message **[Employee Name]: Eligible for COBRA**.



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Note: You must review COBRA Eligibility for the removed dependent for all sections of the Health Benefits coverage (Medical/Hospital, Mental Health/Substance Use Disorder, and Prescription).

- Under the **Review COBRA Eligibility** drop-down menu, select the employee's removed dependent's name under **COBRA Participant**.
 - Select the **COBRA Eligibility Reason**.
 - Select the Medical/Hospital Health Benefits coverage related to the employee (HIP or EMHP) under **Benefit Plan**
 - Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
 - Add another column to the drop-down menu by selecting the + symbol on the top left of the chart.
 - Select the removed dependent's name under **COBRA Participant**.
 - Select the **COBRA Eligibility Reason**.
 - Select the Mental Health/Substance Use Disorder coverage-EMHP under **Benefit Plan**
 - Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
 - Add another column to the drop-down menu by selecting the + symbol on the top left of the chart.
 - Select the removed dependent's name under **COBRA Participant**.
 - Select the **COBRA Eligibility Reason**.
 - Select the Prescription coverage under **Benefit Plan**
 - Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
 - Select **Complete** at the bottom of the page.
5. Benefit Partners review or approve the benefit election change when an employee submits a benefit change for the death of a dependent.



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6. Benefit Partners must review and approve the benefit election change of adding/removing a dependent due to loss/gain of other coverage.
 - From the Workday Homepage, go to your inbox and select from the Action messages **Benefit Change – Employee or Dependent Gains/Loses Other Coverage: [Employee Name]**.
 - Review the changes and attached documentation. If you wish for the employee to revise the changes, click **Send Back** at the bottom of the screen. Verify the dependent changes are reflective of all three portions of Suffolk County EMHP (Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder). Once verified, click **Approve**.

Note: If a dependent was removed, you must review the dependent’s COBRA eligibility. Follow the below instructions. If a dependent was added, there are no further required steps.

- Go back to your Workday inbox, and select the message **[Employee Name]: Eligible for COBRA**.

Note: You must review COBRA Eligibility for the removed dependent for all sections of the Health Benefits coverage (Medical/Hospital, Mental Health/Substance Use Disorder, and Prescription).

- Under the **Review COBRA Eligibility** drop-down menu, select the employee’s removed dependent’s name under **COBRA Participant**.
- Select the **COBRA Eligibility Reason**.
- Select the Medical/Hospital coverage related to the employee (HIP or EMHP) under **Benefit Plan**
- Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
- Add another column to the drop-down menu by selecting the + symbol on the top left of the chart.
- Select the removed dependent’s name under **COBRA Participant**.
- Select the **COBRA Eligibility Reason**.
- Select the Mental Health/Substance Use Disorder coverage-EMHP under **Benefit Plan**.
- Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
- Add another column to the drop-down menu by selecting the + symbol on the top left of the chart.
- Select the removed dependent’s name under **COBRA Participant**.



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- Select the **COBRA Eligibility Reason**.
- Select the Prescription coverage under **Benefit Plan**
- Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
- Select **Complete** at the bottom of the page.

7. Benefit Partners must review COBRA eligibility when a dependent child ages out:

- Go to your Workday inbox, and select the message **[Employee Name]: Eligible for COBRA**.

Note: You must review COBRA Eligibility for the removed dependent for all sections of the Health Benefits coverage (Medical/Hospital, Mental Health/Substance Use Disorder, and Prescription).

- Under the **Review COBRA Eligibility** drop-down menu, select the employee's removed dependent's name under **COBRA Participant**.
- Select the **COBRA Eligibility Reason**.
- Select the Medical/Hospital coverage related to the employee (HIP or EMHP) under **Benefit Plan**
- Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
- Add another column to the drop-down menu by selecting the + symbol on the top left of the chart.
- Select the removed dependent's name under **COBRA Participant**.
- Select the **COBRA Eligibility Reason**.
- Select the Mental Health/Substance Use Disorder coverage-EMHP under **Benefit Plan**
- Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
- Add another column to the drop-down menu by selecting the + symbol on the top left of the chart.
- Select the removed dependent's name under **COBRA Participant**.
- Select the **COBRA Eligibility Reason**.
- Select the Prescription coverage under **Benefit Plan**
- Select the **COBRA Eligible Date, Qualifying Event Date, and COBRA Coverage End Date**.
- Select **Complete** at the bottom of the page.



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8. A Benefits Partner can add dependents on behalf of an employee:
 - Search for the employee's name within the search bar at the top of the page.
 - Select the related actions button to the right of the employee's name (three dots), then select **Benefits > View Dependents**.
 - Select the **Add** button.
 - Add the new dependent by filling in the required fields. If you have documentation from the employee, you may upload it into Workday.

9. A Benefits Partner can make a benefits change on behalf of an employee regarding a change benefits for life event:
 - Search for the employee's name within the search bar at the top of the page.
 - Select the related actions button to the right of the employee's name (three dots), then select **Benefits > Change Benefits**.
 - Select the **Change Reason**. Depending on the change reason, follow the instructions listed above to complete the employee's benefits election change.

10. A Benefits Partner can view an employee's benefits eligibility, current benefits elections, view dependents, view benefit election history, and view ACA forms among other benefits functions:
 - Search for the employee's name within the search bar at the top of the page.
 - Select the related actions button to the right of the employee's name (three dots), then select **Benefits**.
 - Choose among the benefits functions to perform the desired task.

11. A Benefits Partner must calculate buybacks:
 - Search for "DV_Benefits Buy Back" within the search bar at the top of the page and select this task from the search results.
 - You are now viewing the **DV-Benefits Buy Back** custom report.
 - The report displays the transaction date, the value, and the number of months. The report pulls information for the "buy back employees" in an aggregate view of all the buyback information.



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Note: To view and calculate each of the select employee's buyback information, follow the below steps:

- Search for the employee within the search bar at the top of the page and select their name from the search results. You should now be viewing their Workday profile.
- From the blue bar on the left of the screen, select **Job**.
- From the tabs that appear on the top of the page, select **More > Additional Data**.
- Scroll down to find the **Benefits Buy Back** information.
- Select the **Edit** button.
- Here you can enter the employee's buyback details. To add a new payment period, select the add symbol (+ sign) at the top of the page. Under **Key**, list the number of the transaction. Select the **Transaction Date, Monthly Amount Due, and Currency**. Select the number of months. You must calculate the **Total Amount Due** by multiplying the monthly amount due by the number of months.

Note: If an employee who has been grandfathered into the HIP HMO requests to be enrolled into EMHP, the Benefits Partner must move the individual into EMHP. A HIP Disenrollment Form must be filled out for HIP.



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11. Open Enrollment (Benefits Administrator, Benefits Partner)

Benefits Administrator and Benefits Partner:

1. The Benefits Administrator will initiate an open enrollment event. Please be advised that only the Benefits Administrator completes this step, not any Benefits Partners. Benefits Partners can review open enrollment status.
 - Search for **Initiate Open Enrollment** and select the search result **Initiate Open Enrollment**.
 - Enter the **Benefit Groups, Event Type, Open Until date,** and **Event Date**.
 - Click **Ok**.

This creates an open enrollment event for all employees selected within the Benefits Group. These employees will receive a task in their inbox to complete open enrollment.
2. Benefit Partners can run an **Open Enrollment Status Report**.
 - Search for **Open Enrollment Status Report**.
 - This report allows you to view detailed information about active and closed open enrollment events. Details for active events include the start and end dates, and the number of participants in each status within the process.
 - Select the employee's name.
 - You are now viewing the employee's Workday profile. Select the **Actions** button under the employee name.
3. Benefits Partners can select Open Enrollment Elections for an employee:
 - From the Workday Homepage, search for the employee's name from the search bar at the top of the screen.
 - Select the employee's name.
 - You are now viewing the employee's Workday profile. Select the **Actions** button under the employee name.
 - Select **View Worker History**.
 - Click on the related actions button (three dots) for the **Open Enrollment Change** task and select **Benefits > Enroll in Benefits**.
 - You are now in Step 1 of Open Enrollment. You can now enter the information provided to you by the employee. Follow the employee instructions for an open enrollment event to complete the open enrollment for the employee ([Make Open Enrollment Elections \(Employees\)](#)).



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4. Edit Open Enrollment Election for an employee:

- From the Workday Homepage, search for the employee's name from the search bar at the top of the screen.
- Select the employee's name.
- You are now viewing the employee's Workday profile. Select the **Actions** button under the employee name.
- Select **View Worker History**.
- Click on the related actions button (three dots) for the **Open Enrollment Change** task and select **Benefits > Edit Benefit Elections**.
- Click **Ok**.
- Edit the benefit elections as necessary. Refer to the [Make Open Enrollment Elections \(Employees\)](#) section of this job aid for specific instructions on completing open enrollment elections. Be sure to click **Done** when changes are complete.



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12. Finalize Open Benefit Events (Benefits Partner)

The **Finalize Open benefit Events** report allows you to see all the open benefit events that exist. If a new hire event, open enrollment event, or job change event begins, but an employee does not make an election, the Benefits Partner can use this report to finalize the open benefit events once the event reaches its 'submit by' date (finalize the current default elections). Please be advised, for life change events (birth, marriage, divorce, etc.), use the Benefit Events Status Report to cancel benefit events ([see Run Benefits Event Status Report – Benefit Partner \(Cancel Open events Past Due Date\)](#)).

1. From your Workday Homepage, go to the search bar and enter "Finalize Open Benefit Events."
2. Select the **Finalize Open Benefit Events** link in the search results.
3. Select the **Run Frequency**. Then click **Ok**. If you select **Run Now:**
4. Enter the **Benefit Groups** and select the **Enrollment Statuses**.
5. Click **Ok**.
6. You are now viewing the **Finalize Open Benefit Events** report. This allows you to mass finalize events so that they are completed.



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13. Run Benefits Event Status Report - Benefit Partner (Cancel Open events Past Due Date)

The **Benefit Events Status Report** allows you to cancel or change benefit events in progress. This report enables you to manage change benefits life events that were not submitted on time. Please be advised, for job change events and open enrollment events, you would finalize the benefits through the **Finalize open benefit Events report** ([see Finalize Open Benefit Events \(Benefits Partner\)](#)).

1. To run a Benefit Events Status Report, go to the search bar and type 'Benefit Events Status Report.'
2. Click the Search Result **Benefit Events Status Report**.
3. Choose which Enrollment Statuses you wish to include in the report.
4. You may filter your search to include specific Benefit Event Types.
5. Click **Ok**.
6. You are now viewing the Benefit Events Status Report. The Benefit Events Status Report enables you to view all Benefit Events currently within a particular status. You can either cancel enrollment or change benefit elections depending on the **Submit By** date and **Status**.

Note: You will most often use the **Cancel Enrollment** button when running the Benefit Events Status Report. You may use the **Change Benefits** button if perhaps an employee needs assistance in completing the benefits change task for a life event.



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Canceling/rescinding individual events for a specific employee:

- To cancel an event- allows the Benefits Partner to cancel an event that is 'in progress'
- To rescind an event- allows the benefits partner to rescind an event that has been 'successfully completed'

Note: When canceling/rescinding events, do so in chronological order, from oldest to newest.

To cancel a Benefit Event as a Benefits Partner:

- Find the event in progress in the employee's Worker History.
- Click the related actions button next to the Business Process Name (Birth, Marriage, etc.).
- Under Actions, hover over **Business Process** and click **Cancel**.

To rescind a Benefit Event as a Benefits Partner:

- Find the completed event in the employee's Worker History.
- Click the related actions button next to the Business Process Name (Birth, Marriage, etc.).
- Under Actions, hover over **Business Process** and click **Rescind**.



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14. Make Benefit Election (from Subprocesses Hire, Job Change, Leave, Termination)

1. Employee is hired:

Employee:

When you are first hired, you will get a “New Hire” task in their Workday Inbox to complete initial benefit elections. You have thirty days to make a benefit election, otherwise Workday will default to elect you in the health benefits.

Note: If you wish to waive the health benefits, you must skip the below steps and instead waive all benefits within the “New Hire” task in your Workday Inbox. Please be advised, if you do nothing, Workday will enroll you in the health benefits.

- As a new employee, you must first begin your enrollment by adding dependents into Workday: follow the [Add dependents](#) section of this job aid for instructions on how to complete this procedure.
- Make your Health Benefit elections from your Workday inbox through the “Elect your benefits” event.
 - a. Select **Let’s Get Started**.
 - b. Add your newly added dependent(s) to all three sections of the Health Benefits coverage:

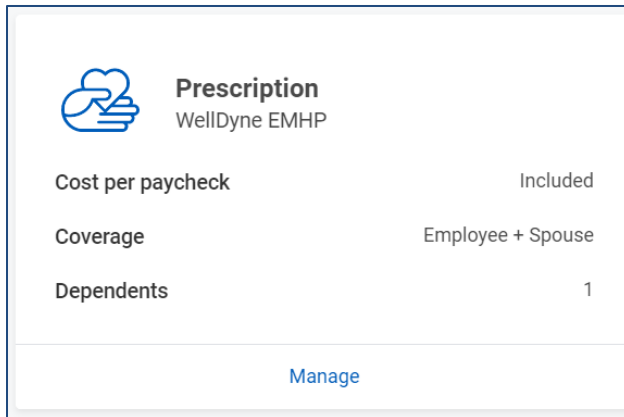
Medical/Hospital, Prescription, and Mental Health/Substance Use Disorder


All three portions are under the same Suffolk County Employee Medical Health Plan (EMHP). Begin by clicking **Manage** under the **Prescription** coverage.



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	Prescription WellDyne EMHP
Cost per paycheck	Included
Coverage	Employee + Spouse
Dependents	1
Manage	

- c. You will next see the County's prescription plans. Select **Confirm and Continue**.
- d. Add the dependent by checking the select box to the left of the dependent's name. Enter the dependent's social security number if available. If the dependent's social security number is not available, enter a reason.

Note: If you did not add the dependent before starting the **Change Benefits** process, you must add the dependent by selecting the **Add Dependent** button, filling in the required fields then clicking **Save**. You must then select the box to the left of the dependent's name as described above and enter the social security number if available.

- e. Click **Save**.
- f. You will see a notification box appear that states your Prescription changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.
- g. Next click **Manage** under the **Medical/Hospital** coverage.
- h. Select **Confirm and Continue**.
- i. Add the dependent by checking the select box to the left of the dependent's name. Then click **Save**.
- j. You will see a notification box appear that states your Medical/Hospital changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.
- k. Next click **Manage** under the **Mental Health/Substance Use Disorder** coverage.
- l. Select **Confirm and Continue**.
- m. Add the dependent by checking the select box to the left of the dependent's name. Then click **Save**.



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- n. You will see a notification box appear that states your Mental Health/Substance Use Disorder changes have been updated but not submitted. It also alerts you to update another plan, or click Review and Sign once you are ready to submit the changes.

Note: If you wish to enroll the employee in the FSA Dependent Care plan (if applicable to the newly added dependents), click **Enroll** under FSA Dependent Care.

- o. When you have completed enrollment of the dependent in all three sections of the Health Benefits coverage, click **Review and Sign**.
- p. You should now see a summary of your health benefits coverage.
- q. Verify the newly added dependent is listed on all sections of the Health Benefits coverage.
- r. Read the electronic signature legal notice, then select the **I Accept** checkbox to provide an electronic signature, confirming your changes.
- s. Click **Submit**.
- t. You may select **View 2021 Benefits Statement** to see a summary of your new benefit changes.

Benefits Partner:

When a new hire enrolls in health benefits upon onboarding, it will automatically be approved. Documentation will be submitted to Payroll upon onboarding.

The Benefits Partner may select benefit elections on behalf of the new employee:

- The Benefits Partner may select benefit elections for the new employee. The Benefits Partner includes the verification of proper documentation submitted to Payroll.
- Search for the employee within the search bar at the top of the page.
- Click the related actions button to the right of the employee's name (three dots). In the menu, select **Worker History > View Worker History**.
- Find the **Benefit Change: New Hire (or Benefit Change: Job Change)** event in the Worker History for the employee.
- Click on the related actions button. In the menu, select **Benefits > Enroll in benefits**.

Note: Refer to the [Review and Approve Elections](#) section of this job aid for instructions on how to review and approve elections for the employee.



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2. Employee is terminated

Within the termination business process, a Benefits partner may change benefit elections and/or add retiree status, depending on how the employee is leaving the county.

Benefits Partner:

- Termination includes employees who will no longer work for the county and are not eligible for health benefits.
 - a. The Benefits Partner will be prompted to change the benefit elections for an employee who is no longer eligible for health benefits due to termination.
 - b. If an employee leaves the county on the first day of the month, the benefits extend to the end of the month. If the employee leaves the county on any other day besides the first day of the month, the employee's benefits extend to the last day of the following month (exception: if the employee is on medical leave for a year, benefits end on the date of the one year of leave). To have the employee's benefits extended, you must run the following report: **Extended Benefits for Terminated Employees-CR.**
- Termination also includes employees who can retire with health benefits.
 - a. The Benefits Partner will "add retiree status" by placing a retired employee in a retiree organization.
 - Search "add retiree status" within the search bar at the top of the page (if the termination business process was initiated within Workday, you may also find this task within your Workday inbox).
 - Within **Employee**, enter the name of the retired employee.
 - Click **Ok** at the bottom of the screen.
 - Enter the **Effective Date** (retirement date).
 - Enter the **Reason (Add Retiree Status > Add to Retiree Organization)**.
 - Enter the **Retiree Organization** (select either **College Retiree, County Retiree, or Disability Police Retirement**). As a Benefits Partner, please be careful to choose the correct **Retiree Organization**.
 - b. You may enter a comment and attach relevant documentation by clicking the **Select files** button and browsing your computer for the files.
 - c. Click **Submit** at the bottom of the page.
 - d. The retiree organization gets placed in a retiree benefit group- this provides the retiree with the retiree health benefits.



Human Resource Management System

Workday Job Aid Benefits



3. Employee changes jobs:

Benefits Partner:

- If an employee changes jobs which affects benefits (full-time employee to seasonal employee), Workday will alert the employee of the change in benefits.
- The Benefits Partner must review and approve Change Benefit Elections.
- If the employee does not make any benefit elections, the Benefits Partner needs to finalize the benefit election event by running the [Finalize Open Benefit Events report](#).

4. An employee takes a leave of absence:

Benefits Partner:

- From the Workday Homepage, go to your inbox and select the Actions tab.
- Find the pending action message **Benefit Change - Begin/Return from Leave of Absence : [Employee Name]**
- Complete the **To DO** which instructs you to review the employee's coverage end date and manually extend benefits if needed.
- Once the **To-Do** is completed, click **Submit**.
- You will receive a notification that the event was approved. You can close out this message or click the **View Details** hyperlink to see additional information regarding the leave of absence process.

Note: Depending on the type of leave requested and duration of time, the Benefits Partner may also be required to review COBRA eligibility.

5. Employee returns from a leave of absence:

Benefits Partner:

- From the Workday Homepage, go to your inbox and select the Actions tab.
- Find the pending action message **Extend Benefits: Benefit Change – Begin/Return from Leave of Absence**.
- Complete the **To DO** which instructs you to review the employee's coverage end date and manually extend benefits if needed.
- Once the **To-Do** is completed, click **Submit**.
- You will receive a notification that the event was approved. You can close out this message or click the **View Details** hyperlink to see additional information regarding the leave of absence process.



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6. For employees whose dependents age out of the health benefits coverage:

Benefits Partner:

The Benefits Partner is responsible for notifying the employee of the dependent's loss in coverage. The employee should be notified the month before the dependent ages out.

- Benefits Partners should run the **Dependents Report V1-CR**. This is a custom report that displays dependents who will be turning 26. Simply search for this report in the search bar and select it from the search results.

7. For retirees and their dependents who turn 65:

Benefits Partner:

The Benefits Partner is responsible for notifying the retiree of the retiree/dependent's change in coverage. The employee should be notified three months before the retiree or their dependent turns 65.

- Benefits Partners should run the **Employees and Dependents Turning 65-CR**. This is a custom report that will display those individuals who are turning 65. Simply search for this report in the search bar and select it from the search results.

8. For determining COBRA eligible individuals:

Benefits Partner:

Benefits Partners should run the **COBRA Report** at a set frequency-based schedule to determine who is eligible for COBRA. Once an event such as termination, child ages out, or a divorce occurs, the **COBRA Report** will display those who are eligible.



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9. If a member wants to enroll in the Pre-Tax “adoption assistance” program- After the employee reaches out to Pullano and Company or the Employee Benefits Unit regarding this program:

Benefits Partner:

Once the “adoption assistance” program has been approved, the Benefits Partners must enroll the employee into the plan within Workday. This must be performed by the following: search for the employee name from the search bar at the top of the page. From the employee’s name within the search results, click the related actions button to the left of their name (three yellow dots). From the menu that appears, select **Benefits > Change Benefits**. Within the **Change Benefits** page, select the **Change Reason** drop-down and choose **Administrative Correction** from the list.

10. If a member wants to become a vested retiree (before age 55):

The employee is terminated as an employee within Workday and hired back into Workday as a vested retiree type.

Benefits Partner:

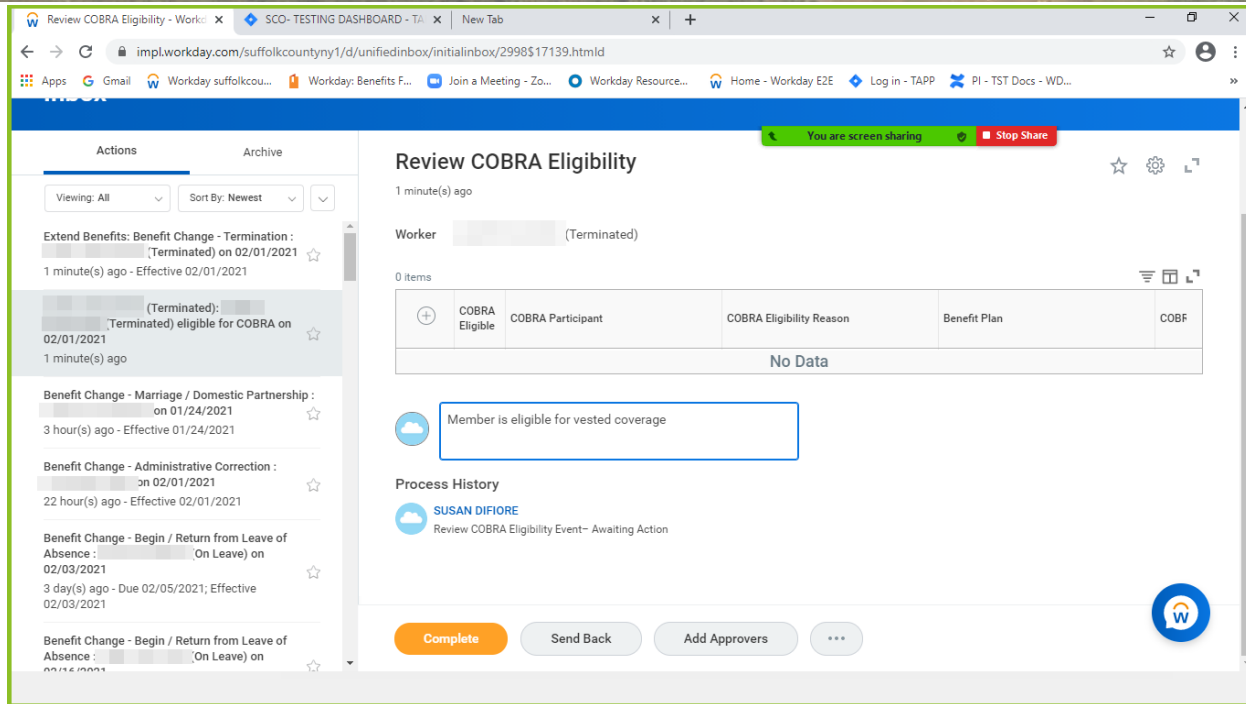
If an employee will go on “vested,” you will receive a step to **Review COBRA Eligibility** for the employee. Choose the relevant message within your inbox. Simply remove the employee from the COBRA table within this step and write in the comments of this step “Member is eligible for vested coverage.” Then click **Complete** at the bottom of the page.



Human Resource Management System

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Benefits



11. If a member wishes to pay for benefits (whether this is for buying into the insurance coverage early or perhaps the member is making a payment for their health insurance because they are on a leave without pay, etc.):

You must record this payment within Workday.

Benefits Partner:

You must locate and record the payment within the Workday custom report **Benefits Payment Information**. Search for the employee within the search bar at the top of the page. Within the search results, click on the related actions button to the right of the employee's name (three yellow dots). From the menu that appears, go to **Additional Data > View All**. Locate the **Benefits Payment Information** report and click the **Edit** button directly underneath this report. Follow the instructions at the top of the page to correctly record and calculate the payment. When you have finished, click **Ok** at the bottom of the page.



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15. QMCSO Benefit Event (Benefit Partner)

Benefit Partner:

1. The term “QMCSO” refers to a Qualified Medical Child Support Order. The Benefit Partner goes into an employee’s benefits and covers the dependent for the health benefits coverage until a specific end date (usually established in a court order, such as until age 18, etc.). This adds the benefits so that employees cannot drop the dependent.
2. If an employee is not already covering a dependent, the Benefit Partner will run a QMCSO Benefit Event to put the dependent on the coverage- establishing the date of coverage as the date of the court order.
3. To run a QMCSO Benefit Event, the benefits partner will complete the following:
 - From your Workday Homepage, search for an employee’s name in the search bar.
 - Click on the employee’s name to go into their Workday profile.
 - From the profile, select **Job** from the blue bar on the left.
 - Next select **Additional Data** from the tab on the top right.
 - Select the custom object for custodial parents information



Human Resource Management System

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Benefits



Photos - 1.PNG

See all photos + Add to

Edit & Create Share

Edit Additional Data

Custom Object Custodial Parents Information

Custodial Parents Information

1 item

*Enrollee ID	*Dependent ID	*Relationship to Child	* Court Order Date Effective	Name of Dependent (First, Middle, Last)	Name of Custodial Parent/Governmental Agency	Phone Number for Custodial Parent/Governmental Agency	Address for Custodial Parent/Governmental Agency (Address, City, State and Zip code)
<input type="text"/>	<input type="text"/>	<input type="text"/>	MM/DD/YYYY	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

teams.microsoft.com is sharing your screen. Stop sharing Hide

4. Run **Active Court Orders** report: This allows the Benefits Partner to view a list of court-ordered benefits.



Human Resource Management System

Workday Job Aid Benefits



16. Deferred Compensation 457(b) Plan

Within Workday, you can view your Suffolk County Deferred Compensation 457(b) Plan elections, apply to participate in Retirement Catch Up, and apply to defer from your final accrual (SCAT) check. We recommend you meet with your Board Representative before applying for Retirement Catch Up or if you plan to leave County service, to discuss all of the options available to you. [Click here](#) to view your Board Representative's contact information.

To Join the Plan

To enroll in the Suffolk County Deferred Compensation 457(b) Plan, please visit www.scdeferredcomp.org. You may also obtain a paper enrollment form on that site or by calling 1-888-457-5770.

Here are the steps required for an employee to view their Deferred Compensation Elections using Workday.

1. Click the Benefits application on your Workday Home Page.
2. Under the View section, click **Benefit Elections**.
3. Your current Benefit Elections will display.

To Change Your Base Pay, Special Pay, or Longevity Pay Elections

To change any of these elections you must either log into your account at www.rps.troweprice.com or on the T. Rowe Price Personal Mobile App, or contact T. Rowe Price at 1-888-457-5770.

Note: Changes made to your elections at T. Rowe Price will take one to two pay periods before being implemented by the County or appearing in Workday. This is due to IRS timing regulations.



Human Resource Management System

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To Apply for Retirement Catch Up

By applying for Retirement Catch Up an employee can increase their IRS contribution limit for up to three consecutive calendar years or their final accrual SCAT check.

Here are the steps required for an employee to create the request to apply for retirement catch-up using Workday.

1. In the Workday Search bar enter "cre req".
2. Click on the task **Create Request** in the results returned.
3. In the **Request Type** drop-down select "**Apply for Deferred Compensation 457(b) Catch Up**"
4. Click the **OK** button.

Note: Review the eligibility displayed in Workday to determine if you are eligible to participate in Retirement Catch Up at this time. If eligible, you will need to upload your New York State and Local Retirement System Member Annual Statement, showing your Tier and your years of Total Credited Service. This statement is **required** unless you are not currently enrolled in the pension system or were just approved for Disability Retirement.

5. Fill in the appropriate fields (* indicates a required field).
6. Upload a copy of your New York State and Local Retirement System Member Annual Statement.
7. Click **Submit**.

Note: Once approved, the employee will receive a notification in Workday.

To view the status of your request

Here are the steps required for an employee to view the status of their request to apply for retirement catch-up using Workday.

8. In the Workday Search bar enter "my req".
9. Click on the task **My Request** in the results returned.
10. View the information displayed on the page.



Human Resource Management System

Workday Job Aid Benefits



To Elect to Defer from your Final Accrual (SCAT) Check

An employee can request to have a portion or their entire SCAT Accrual Check deferred into their Deferred Comp 457(b) plan.

Here are the steps required for an employee to request their SCAT Accrual check to be applied to their Deferred Comp 457(b) plan using Workday.

1. In the Workday Search bar enter "cha ben".
2. Click on the task **Change Benefits** in the results returned.
Note: It is important that you read and understand the instructions listed on the right side of the screen before moving forward.
3. Select the Change Reason Option of "**Elect to Defer your SCAT Accrual Check into Deferred Comp (457(b))**".
4. Enter Today's date as the **Benefit Event Date**.
5. Click **Submit**.
6. On the popup window click the **Open** button.
7. On the Change Benefits Election page click the **Let's Get Started** button.
8. Click the **Enroll** button.
Note: Review the General Instructions that appear in Workday to determine if you are eligible to defer from your final accrual (SCAT) check at this time and review the rules that apply once you separate from service.
9. In the **Plans Available** grid choose the **Select** option.
10. Click **Confirm and Continue**



Human Resource Management System

Workday Job Aid Benefits



- 11.** Select the **Contribution Type** (Amount, Percentage).
- 12.** Enter the **Contribution** value(Amount or Percentage).
Note: If you would like to defer the maximum enter 100%.
- 13.** Click **Save**.
- 14.** Click **Review and Sign**.
- 15.** Review your election to confirm that it is correct.
- 16.** Check off the "I Accept" box under the **Electronic Signature** section at the bottom of the page.
- 17.** Click **Submit**.
- 18.** Click **Done**.

Note: To review your election(s) and ensure that you are enrolled in 457(b) Separation for your final accrual (SCAT) check, view the **Benefit Elections** report.



