

# **Benefits** | Job Aid

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All Life Event changes must be completed within 30 days after the date the event occurred. Examples of Significant Life Events include (but are not limited to):

- Marriage
- Birth/Adoption of a child
- Divorce
- Loss of primary healthcare coverage

Life Events are completed through Workday.

Questions? benefits@oakgov.com Benefits website: OakGov.com/benefits

#### LOG IN TO WORKDAY - CLICK HERE

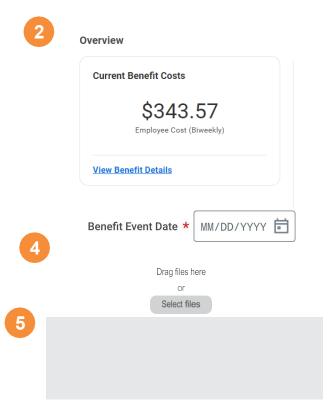
Go to <a href="https://myapps.oakgov.com">https://myapps.oakgov.com</a> from an Internet connected computer. For difficulty signing into Workday (Workday mobile) or MFA/OKTA, please contact IT Self-Service or 248-858-8812.

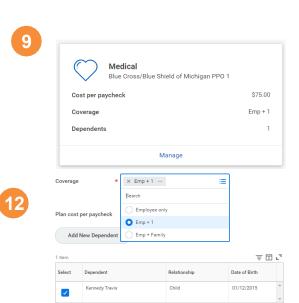


#### **MARRIAGE**

#### Must be completed within 30 days of event

- 1. From your Workday Dashboard, click Menu, and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the  $\bigoplus$  sign to add the app and navigate back to the Menu.
- 2. Under the Overview section, click View Benefit Details
- 3. At the top of page, click on Change Benefits
- 4. Select Marriage & enter your marriage date as your Benefit Event Date
- Under Attachments, upload your Marriage certificate REQUIRED Note: A marriage license will not be accepted
- 6. Click Submit
- 7. A pop-up will appear, click Open
- Click Let's Get Started
- Under Medical, click Manage
- 10. Keep your current plan selected, select a new plan, or elect no coverage
- 11. Click Confirm and Continue
- 12. Select the appropriate coverage level
- 13. Click Add New Dependent
- Choose to Use an Existing Beneficiary or Emergency Contact or Create Dependent
- 15. Click Ok
- Enter your spouse's Name and Personal Information (required fields marked with red asterisk\*)
- 17. Under National ID, click Add
- Enter your spouse's SSN and click Save
- 19. Your newly added spouse will appear as a new dependent
- 20. If you have a stepchild/stepchildren to add, follow the same process Note: A birth certificate is required to add stepchildren to your benefits
- 21. Click Save
- 22. An alert will notify you that your spouse has been added to each healthcare plan that you are currently enrolled in
- For each plan you can keep your current plans selected, select new plans, or waive coverage if necessary
- If you would like to add your new spouse as a Life Insurance beneficiary, click Manage under Life Insurance
- 25. Click Confirm and Continue
- 26. Update primary and secondary beneficiaries (if applicable). Life insurance beneficiaries are also AD&D beneficiaries.
- 27. Click Save





- 28. Click Review and Sign
- Review a summary of your benefits, click "Cancel" if any changes need to be made. Click Submit to finalize.
- 30. Click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned). Click Done
- This process is complete! The Benefits team will approve the addition of your dependent(s) or reach out if any additional information is needed

#### BIRTH/ADOPTION/GUARDIANSHIP OF CHILD

Must be completed within 30 days of event, coverage will be effective as of the date of the event

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the ⊕ sign to add the app and navigate back to the Menu.
- 2. Under the Overview section, click View Benefit Details
- 3. At the top of page, click on Change Benefits
- Select Birth/Adoption/Guardianship of Child & enter your child's date of birth as the Benefit Event Date
- 5. Under Attachments, upload your Verification of Birth- REQUIRED
- Click Submit
- 7. A pop-up will appear, click Open
- Click Let's Get Started
- 9. Under Medical, click Manage
- 10. Keep your current plan selected, select a new plan, or elect no coverage
- 11. Click Confirm and Continue
- 12. Select the appropriate coverage level
- 13. Click Add New Dependent
- Check the box if you wish to use this dependent as a beneficiary to your life insurance
- 15. Click Ok
- Enter your child's Name and Personal Information (required fields marked with red asterisk\*) and click Save.
- 17. Enter your child's SSN or select Reason SSN is Not Available
- Click Save
- 19. Your newly added child will appear as a new dependent
- 20. Click Save
- 21. An alert will notify you that your child has been added to each healthcare plan that you are currently enrolled in.

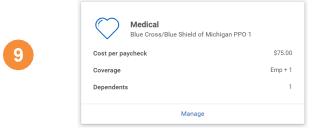


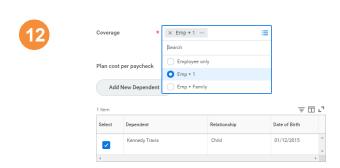












- For each plan you can keep your current plans selected, select new plans, or waive coverage if necessary.
- If you would like to add your new child as a Life Insurance beneficiary, click Manage under Life Insurance
- 24. Click Confirm and Continue
- 25. Update primary and secondary beneficiaries (if applicable). Life insurance beneficiaries are also AD&D beneficiaries.
- 26. Click Save
- 27. Click Review and Sign
- 28. Review a summary of your benefits, click "Cancel" if any changes need to be made. Click Submit to finalize.
- 29. Click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned). Click Done
- Email a copy of the birth certificate and the child's social security number to benefits@oakgov.com within 45 days of birth or your dependent may be removed from coverage.
- 31. This process is complete!

# **DIVORCE**

#### Must be completed as soon as divorce is finalized

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the ⊕ sign to add the app and navigate back to the Menu.
- 2. Under the Overview section, select View Benefits Details
- 3. At the top of the screen, select Change Benefits
- Select Divorce & enter the finalized divorce date as the Benefit Event Date.
- 5. Under Attachments, upload your divorce decree REQUIRED
- 6. Click Submit
- 7. Benefits will approve the event within 24 hours. During this time, please monitor your Workday inbox for additional steps
- 8. In your Workday inbox, you will receive a task to submit the address of your ex-spouse. This is used for a COBRA notice.
- 9. Click Submit
- 10. A pop-up will appear, click Open
- Click Let's Get Started
- 12. Click manage under Medical and select or waive new plan.
- 13. Click Confirm and Continue
- 14. Select the appropriate coverage level
- 15. Uncheck the box next to your ex-spouse.

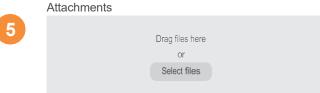
2 Overview



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Change Reason *		Birth/Adoption/Guardianship of Child
Change Reason	0	
	0	Change Beneficiaries
	0	Death of Spouse/Dependent
	0	Divorce
	0	FSA - Dependent Care Mid-Year Election
	0	HSA - Mid Year Election
	0	Loss/Gain of Other Coverage (Employee or Dependent
	0	Marriage
Renefit Even	t Da	te * MM/DD/VVVV 🖨









- 16. Click Save
- 17. An alert will notify you that your ex-spouse has been removed from each healthcare plan that you are currently enrolled in.
- 18. For each plan you can keep your current plans selected, select new plans, or waive coverage if necessary
- 19. To remove your spouse as a beneficiary to your life insurance, click Manage under Life Insurance
- 20. Click Confirm and Continue
- 21. Update primary and secondary beneficiaries (if applicable). Beneficiary changes to life insurance also apply to AD&D.
- 22. Enter your beneficiary's information (required fields marked with red asterisk\*)
- 23. Click Save
- 24. Click Review and Sign
- 25. Review a summary of your benefits, click "Cancel" if any changes need to be made. Click Submit to finalize.
- 26. Click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned). Click Done
- 27. This process is complete!

# LOSS/GAIN OF OTHER COVERAGE

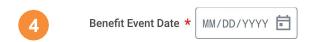
#### (EMPLOYEE OR DEPENDENT)

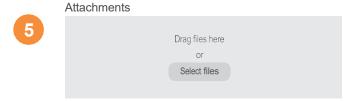
#### Must be completed within 30 days of event

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the 🕀 sign to add the app and navigate back to the Menu.
- 2. Under the Overview secetion, select View Benefit Details
- 3. At the top of the screen, click Change Benefits
- Select Loss/Gain of Other Coverage (Employee or Dependent) & enter the date of your loss of coverage or gain of other coverage as the Benefit Event Date
- 5. Under Attachments, upload Proof of Loss/Gain of Coverage (contact benefits at benefits@oakgov.com for specific details, if needed) **REQUIRED**
- 6. Enter the name of individual losing or gaining coverage in the comments section
- 7. Click Submit
- 8. Benefits will approve the event within 24 hours. During this time, please monitor your Workday inbox for additional steps
- 9. In your Workday inbox, click Let's Get Started
- 10. Under Medical, click Manage
- 11. Keep your current plan selected, select a new plan, or elect no coverage
- 12. Click Confirm and Continue
- 13. Select the appropriate coverage level
- 14. TO REMOVE A DEPENDENT:
- Under Select, uncheck the box next to your dependent that gained other coverage
- 16. Click Save
- 17. TO ADD A DEPENDENT:
- 18. Click Add New Dependent
- 19. Choose to Use an Existing Beneficiary or Emergency Contact or Create Dependent.
- 20. Click Ok
- Enter your dependent's Name and Personal Information (required fields marked with red asterisk\*)
- 22. Under National ID, click Add
- 23. Enter your dependent's SSN
- 24. Click Save
- An alert will notify you that the change you made has been applied to each healthcare plan that you are currently enrolled in.













- 26. For each plan you can keep your current plans selected, select new plans, or waive coverage if necessary
- 27. Click Save
- 28. To make changes to your Life Insurance beneficiaries, click Manage under Life Insurance
- 29. Click Confirm and Continue
- 30. Update primary and secondary beneficiaries (if applicable). Beneficiary changes to life insurance also apply to AD&D.
- 31. Click Save
- 32. Click Review and Sign
- Review a summary of your benefits, click "Cancel" if any changes need to be made. Click Submit to finalize.
- 34. Click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned)
- 35. This process is complete!

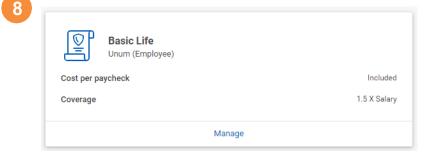
## **CHANGE BENEFICIARIES:**

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the 🕀 sign to add the app and navigate back to the Menu.
- 2. Under the Overview section, select View Benefit Details
- 3. At the top of the screen, click Change Benefits
- 4. Select Change Beneficiaries & enter today's date as the Benefit Event Date
- Click Submit
- 6. Click Open
- 7. Click Let's Get Started
- 8. Click Manage under the Basic Life Plan
- Click Confirm and Continue
- Update primary and secondary beneficiaries (if applicable). Beneficiary changes to life insurance also apply to AD&D.
- 11. Enter your beneficiary's information (required fields marked with red asterisk\*)
- 12. Click Save
- 13. Click Review and Sign
- 14. Review a summary of your benefits, click "Cancel" if any changes need to be made or click Submit to finalize.
- 15. Click Done or click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned)
- 16. This process is complete! The Benefits team will approve this change.

2 Overview







\*Primary Beneficiaries 2 items \= \textstyle \textstyle

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## FSA - DEPENDENT CARE MID-YEAR ELECTION:

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the 🕀 sign to add the app and navigate back to the Menu.
- 2. Under the Overview section, select View Benefit Details
- 3. At the top of the screen, click Change Benefits
- 4. Select FSA Dependent Care Mid-Year Election & enter today's date as the event date
- 5. Click Submit
- 6. Click Open
- 7. Click Let's Get Started
- 8. Click Enroll/Manage under Dependent Care FSA
- 9. Click Select

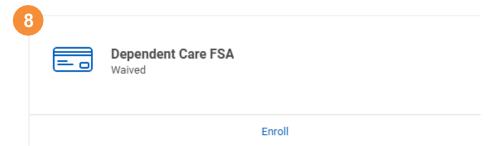
Enter Per Paycheck or Annual amount

Note: Household Contribution Limit \$5,000 annually

- 10. Click Save
- 11. Click Review and Sign
- 12. Review a summary of your benefits, click "Cancel" if any changes need to be made. Click Submit to finalize.
- 13. Click Submit
- 14. Click Done or click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned)
- 15. This process is complete!







#### **HSA - MID YEAR ELECTION:**

You must be enrolled in the High Deductible Health Plan to qualify for a Health Savings Account

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the sign to add the app and navigate back to the Menu.
- 2. Under the Overview secetion, select View Benefit Details
- 3. At the top of the screen, click Change Benefits
- Select HSA Mid Year Election & enter today's date as the event date
- 5. Click Submit (no documentation is required)
- 6. Click Open
- Click Let's Get Started
- 8. Click Enroll/Manage under Health Savings Account HSA
- 9. Click Select
- 10. Click "Confirm and Continue"
- 11. Enter Per Paycheck or Annual amount

  Individual Contribution Limit \$4,300 (including County contribution)

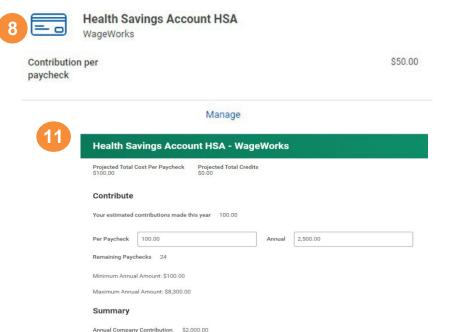
  Family Contribution Limit \$8,550 (including County contribution)
- 12. Click Save
- 13. Click Review and Sign (no documentation is required)
- 14. Review a summary of your benefits, click "Cancel" if any changes need to be made. Click Submit to finalize.
- 15. Click Submit
- Click Done or click View Benefit Statement to print or save your confirmation (Benefits does not need a signed copy returned)
- 17. The process is complete!



\$343.57
Employee Cost (Biweekly)

View Benefit Details





Total Annual HSA Contribution \$4.500.00

## **VIEW BENEFIT ELECTIONS:**

- 1. From your Workday Dashboard, click Menu and then click on the Benefits and Pay Application. If you don't have this application, click "Add Apps" at the bottom of the Menu bar, search "Benefits and Pay," click the sign to add the app and navigate back to the Menu.
- 2. Under the Overview section, select View Benefit Details
- 3. At the top of the screen click "View As Grid"
- 4. To print, click on to export to Adobe or to export to Excel.

# 2

#### Overview

**Current Benefit Costs** 

\$343.57

Employee Cost (Biweekly)

**View Benefit Details**