

# *Workday: Changing Your Coverage Mid-Year*

# Table of Contents

Qualifying Life Events .....	3
How to Submit a Request .....	4
<i>Step by Step Instructions</i> .....	5 – 21

# What Is a Qualifying Life Event?

Associates are eligible to make changes to their benefits once a year during annual open enrollment. However, if you experience a qualifying life event that changes your life circumstances, you may request to make changes to your benefits in Workday. There is a 30-day eligibility window to submit the request in Workday.

## **Qualifying life events include:**

- Change in legal marital status, including marriage, divorce, legal separation, annulment, and death of a spouse
- Change in number of dependents, including birth, adoption, placement for adoption, or death of a dependent child
- Change in a child's dependent status, either newly satisfying the requirements as a dependent child status or ceasing to satisfy them
- Change in place of residence or worksite that affects the eligibility for coverage or accessibility of network providers
- Change in your health coverage or your spouse's/domestic partner's coverage attributable to your spouse's/domestic partner's employment
- Change in an individual's eligibility for Medicare or Medicaid
- A court order requiring health coverage for your child
- Changes in your coverage impacted by your spouse's/domestic partner's employer or employment status
- Change in work schedule or employment status such as an increase or decrease in hours or a switch between a Part Time non-benefit eligible position to a benefit eligible position

## How to Submit a Request in Workday



# Step 1: Click on “View All Apps” from the Home Page in Workday

The screenshot shows the Workday home page for a user at CHOC. At the top left, there is a 'MENU' icon and the 'CHOC' logo. A search bar is located at the top center. On the top right, there are icons for notifications (with a red '1'), messages, and a user profile. Below the header is a large banner image showing two hands reaching towards each other. The main content area is divided into several sections: 'Hello There' with a greeting and date; 'Awaiting Your Action' with a message about inbox items; 'Timely Suggestions' containing two cards for updating contact information; 'Quick Tasks' with buttons for 'My Payslips', 'Time Off Balance', and 'My Goals'; and 'Announcements' with two items. A red arrow points to the 'View All Apps' link in the Quick Tasks section.

**CHOC**

Q Search

It's Wednesday, February 22, 2023

**Hello There**

**Awaiting Your Action** ...

You're all caught up on your inbox items.

**Timely Suggestions**

**Keep Your Work Contact Information Updated**  
We would like you to review your Contact Information and ensure it's up to date [Update Contact Info](#)

**Keep Your Emergency Contacts Updated**  
We would like you to review your Emergency Contact Information and ensure it's up to date [Update Contacts](#)

**Quick Tasks**

My Payslips

Time Off Balance

My Goals

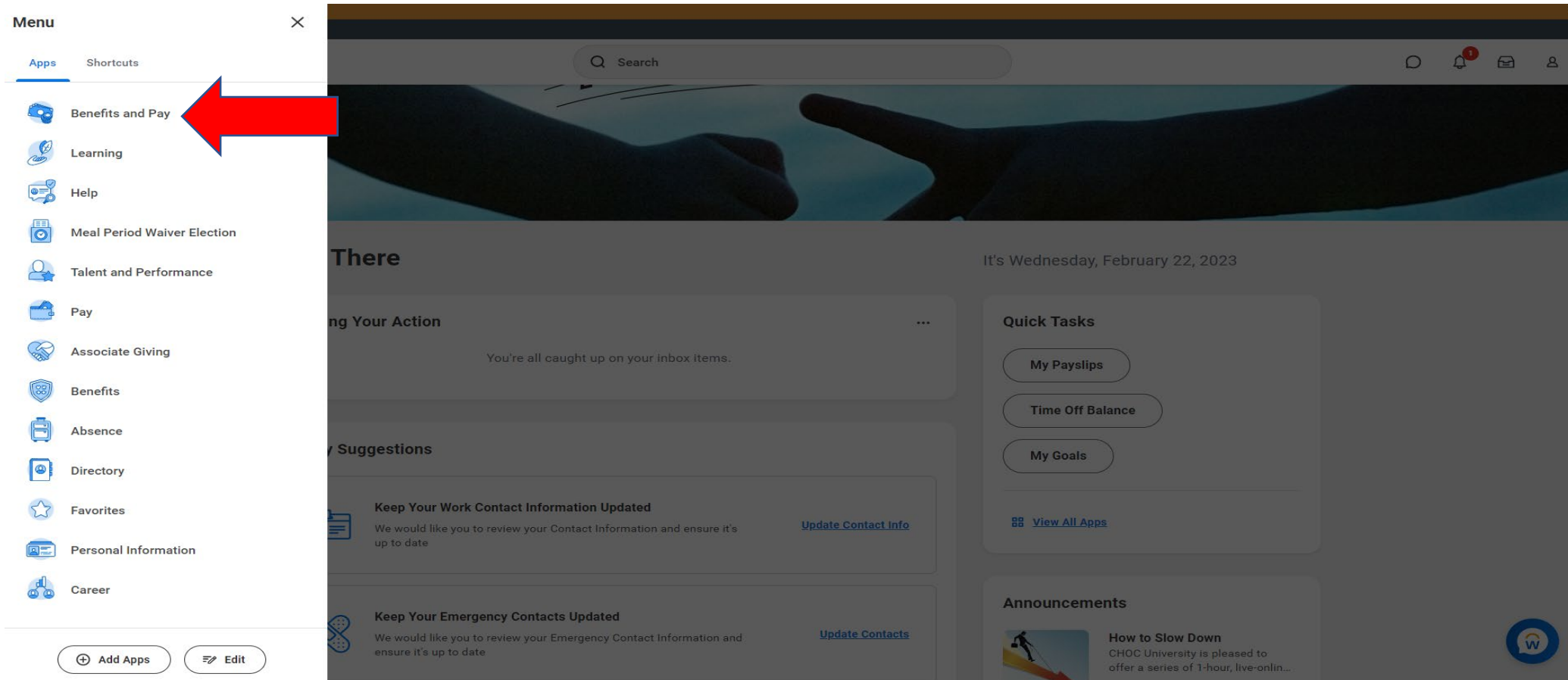
[View All Apps](#)

**Announcements**

**How to Slow Down**  
CHOC University is pleased to offer a series of 1-hour, live-onlin...

**Understand and Embrace Diversity**

## Step 2: Click on the “Benefits and Pay” icon



The image shows a screenshot of a web application interface. On the left, a 'Menu' sidebar is open, displaying a list of application categories. A red arrow points to the 'Benefits and Pay' icon, which is the first item in the list. The main content area of the application is dimmed, showing a search bar at the top, a date 'It's Wednesday, February 22, 2023', and several sections including 'Quick Tasks' (My Payslips, Time Off Balance, My Goals), 'Suggestions' (Keep Your Work Contact Information Updated, Keep Your Emergency Contacts Updated), and 'Announcements' (How to Slow Down).

**Menu**

- Apps
- Shortcuts
- Benefits and Pay
- Learning
- Help
- Meal Period Waiver Election
- Talent and Performance
- Pay
- Associate Giving
- Benefits
- Absence
- Directory
- Favorites
- Personal Information
- Career

[Add Apps](#) [Edit](#)

# Step 3: Click on “Change Benefits”

The screenshot displays the CHOC employee portal interface. On the left is a navigation menu with categories: Benefits and Pay, Overview, Benefits, Pay, Compensation, and Suggested Links. The main content area is titled 'Overview' and contains several summary cards: 'Most Recent Pay' showing a gross pay of \$3,041.42 (Take Home Pay) and a gross pay of \$4,333.10; 'Deductions' showing a total of \$1,291.68 with a breakdown of Federal Withholding, OASDI, State Tax, and 403(b) Employee contributions; 'Current Benefit Costs' showing an employee cost of \$120.64 (Biweekly); 'Annual Total Rewards Package' showing a total compensation of \$17,188.84 with sub-categories for Wages, Incentive Pay, and Paid Time Off; and 'Compensation History' showing a market adjustment of 4.62 USD Hourly effective 11/28/2021. A 'Bonus & One-Time Payments' section lists several scheduled bonuses. A red arrow points to the 'Change Benefits' button at the top of the main content area.

**Change Benefits**   **My Tax Documents**

### Overview

#### Most Recent Pay

Your next pay day is February 23, 2023.

**\$3,041.42**  
Take Home Pay

Gross Pay \$4,333.10

[View Most Recent Pay](#)

#### Deductions

Taxes and deductions from your most recent payslip.

**\$1,291.68**  
Total

Federal Withholding (Federal)	\$337.75
OASDI (Federal)	\$262.73
State Tax (California)	\$253.53
403(b) Employee	\$216.66

[More \(6\)](#)

#### Current Benefit Costs

**\$120.64**  
Employee Cost (Biweekly)

[View Benefit Details](#)

#### Annual Total Rewards Package

The details of your annual total rewards package.

**\$17,188.84**  
Total Compensation

**Wages**  
\$12,748.58

**Incentive Pay**  
\$1,000.00

**Paid Time Off**  
\$1,343.71

#### Compensation History

Summary of your compensation changes over time.

**EFFECTIVE: 11/28/2021**  
**4.62 USD Hourly**  
Market Adjustment

#### Bonus & One-Time Payments

<b>SCHEDULED: 01/08/2023</b> Shift Incentive Bonus(Non-Exempt) Shift Incentive Bonus	\$1,000.00
<b>SCHEDULED: 11/27/2022</b> Discretionary Bonus Discretionary	\$500.00
<b>SCHEDULED: 10/30/2022</b> Shift Incentive Bonus(Non-Exempt) Shift Incentive Bonus	\$1,000.00
<b>SCHEDULED: 10/30/2022</b> Shift Incentive Bonus(Non-Exempt) Shift Incentive Bonus	\$1,000.00

# Step 4:

**Change Benefits** Choco Bear (112233) ⋮

Change Reason \* Birth/Adoption ▼

Benefit Event Date \* 02/22/2023 📅

Submit Elections By 03/24/2023

Benefits Offered

- Accident
- Basic AD&D
- Basic Life
- Critical Illness
- Dental
- More (13)

**Attachments**

Drop files here

or

Select files

enter your comment

Click the drop down in the Change Reason cell and select the life event that is the most applicable.

Attach proof of the life event.

Submit Save for Later Cancel





# Step 5: Click “Open”

The screenshot shows the CHOC employee portal interface. At the top, there is a navigation bar with a 'MENU' icon, the CHOC logo, a search bar, and notification icons. The left sidebar contains a 'Benefits and Pay' section with sub-links for Overview, Benefits, Pay, and Compensation, along with suggested links to the CHOC Benefits Website and CHOC Fit Enrollment. The main content area features a 'Needs Attention' notification for a 'Benefit Event' (Birth/Adoption) with a deadline of March 24, 2023. A modal window titled 'You have submitted' is overlaid on the notification, with a red arrow pointing to the 'Open' button. Below the notification is an 'Overview' section with three summary cards: 'Most Recent Pay' showing a take-home pay of \$3,041.42, 'Deductions' showing a total of \$1,291.68, and 'Current Benefit Costs' showing an employee cost of \$120.64. A 'Bonus & One-Time Payments' section is also visible at the bottom right.

Category	Amount
Most Recent Pay (Take Home Pay)	\$3,041.42
Gross Pay	\$4,333.10
Deductions (Total)	\$1,291.68
Federal Withholding (Federal)	\$337.75
OASDI (Federal)	\$262.73
State Tax (California)	\$253.53
403(b) Employee	\$216.66
Current Benefit Costs (Employee Cost Biweekly)	\$120.64
Bonus & One-Time Payments (Shift Incentive Bonus)	\$1,000.00

# Step 6: Click “Let’s Get Started”

Navigation bar: MENU | CHOC | Search | [Icons: Chat, Notifications, Mail, Profile]

---

**Change Benefit Elections** [Icons: Grid, PDF]

Initiated On 02/22/2023

Submit Elections By 03/24/2023

[Let's Get Started](#) ←



# Step 7: Click “Manage”










## Birth/Adoption



Projected Total Cost Per Paycheck  
\$124.67


Projected Total Credits  
\$0.00

### Health Care and Accounts

 <b>Medical</b> Cigna HMO Full Network Cost per paycheck \$93.93 Coverage Employee Only <a href="#">Manage</a>	 <b>Dental</b> Delta Dental PPO Cost per paycheck \$28.16 Coverage Employee + 1 Dependents 1 <a href="#">Manage</a>	 <b>Vision</b> VSP Standard Cost per paycheck \$2.58 Coverage Employee Only <a href="#">Manage</a>
 <b>Accident</b> Waived <a href="#">Enroll</a>	 <b>Hospital Indemnity</b> Waived <a href="#">Enroll</a>	 <b>Critical Illness</b> Waived <a href="#">Enroll</a>
 <b>Surcharge</b> CHOC Spouse Cost per paycheck Included <a href="#">Review and Sign</a> <a href="#">Save for Later</a> <small>Spouse/DF is not a dependent.</small>	 <b>Health Savings Account</b> Waived <a href="#">Enroll</a>	 <b>FSA Medical</b> Waived <a href="#">Enroll</a>



# Step 8: Click “Confirm and Continue”

 Search

---

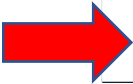
### Medical

Projected Total Cost Per Paycheck \$200.00      Projected Total Credits \$0.00

**Plans Available**

4 items ☰ ☐ 🔍

*Selection	Benefit Plan	You Pay (Biweekly)	Company Contribution (Biweekly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Cigna HDHP	\$105.30	\$415.62
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Cigna HMO Full Network	\$66.18	\$298.12
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Cigna HMO Select Network	\$23.40	\$272.99
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Cigna PPO	\$135.37	\$552.58

 Confirm and Continue Cancel

# Step 9: Click “Add New Dependent”

## Medical - Cigna HMO Full Network

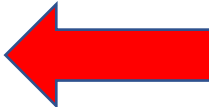
Projected Total Cost Per Paycheck \$124.67      Projected Total Credits \$0.00

### Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage \* Employee Only

Plan cost per paycheck \$93.93



1 item

Select	Dependent	Relationship	Date of Birth
<input type="checkbox"/>	Choco Latte	Spouse	05/31/1992

### Health Care Instructions

#### General Instructions

When you select the Cigna HMO Select, HMO Full or PPO plans, you may also enroll in the Health Care Flexible Spending Account (FSA).  
When you select the Cigna HDHP plan, you may also enroll in the Health Savings Account (HSA) and the Limited Purpose FSA.

#### Definitions:

Health Savings Account (HSA) is a tax-free savings account that works with the Cigna HDHP plan to help you pay for the cost of out-of-pocket health care and prescription expenses.  
Health Care FSA reimburses medical, dental, and vision expenses.  
Limited Purpose FSA reimburses for dental and vision expenses and may only be used with the Cigna HDHP plan.  
Dependent Care FSA reimburses for day/night care expenses for qualifying dependents which include 1) children under the age of 13 who qualify as dependents on your federal tax return or 2) spouse or dependents of any age who are physically or mentally unable to care for themselves and who qualify as dependents on your Federal tax return.

To find information about CHOC Benefits Plans and Programs go to:  
<https://benefits.choc.org/>



# Step 10: Add a Dependent

Click "Create Dependent".



Then, click "Ok".

A screenshot of a web application showing a modal window titled "Add My Dependent From Enrollment" for "Choco Bear (17000)". The modal has a search bar at the top and a close button (X) in the top right. It contains two radio button options: "Use an Existing Beneficiary or Emergency Contact" (unselected) and "Create Dependent" (selected). Below these is a checkbox for "Use as Beneficiary" which is unchecked. At the bottom, there is a link to "http://benefits.choc.org/" and two buttons: "OK" (orange) and "Cancel" (grey). The background of the page is dark grey and partially obscured by the modal.

# Step 11: Enter the required fields marked with an asterisk (\*)



Search

## Add My Dependent From Enrollment

### Name

Country \*  ←

Prefix

First Name \*  ←

Middle Name

Last Name \*  ←

Suffix

Allow Duplicate Name

Check this box only when there is more than one dependent with the same name.

### National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Add

### Personal Information

Relationship \*  ←

Date of Birth \*  ←

Age (empty)

Gender \*  ←

Full-time Student

Student Status Start Date

Student Status End Date

Disabled



# Step 12: Select the dependent you wish to add, add the SSN and click “Save”

## Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage \* Employee + Child(ren)

Plan cost per paycheck \$187.35

Add New Dependent

2 items

Select	Dependent	Relationship	Date of Birth
<input type="checkbox"/>	Choco Latte	Spouse	05/31/1992
<input checked="" type="checkbox"/>	CHOCO Jr. Bear	Child	02/22/2023

You have dependents covered under your health care plan without a Social Security Number. Enter their Social Security Number (SSN) or Reason SSN is Not Available if you don't have access to their number at this time.

Dependent Social Security Numbers 1 item

Dependent	*Social Security Number
CHOCO Jr. Bear	<p><input type="radio"/> Social Security Number (SSN) <input type="text" value="..."/></p> <p><input type="radio"/> Reason SSN is Not Available <input type="text"/></p>

Save

Cancel

Click “Save”

## Health Care Instructions

### General Instructions

When you select the Cigna HMO Select, HMO Full or PPO plans, you may also enroll in the Health Care Flexible Spending Account (FSA). When you select the Cigna HDHP plan, you may also enroll in the Health Savings Account (HSA) and the Limited Purpose FSA.

#### Definitions:

Health Savings Account (HSA) is a tax-free savings account that works with the Cigna HDHP plan to help you pay for the cost of out-of-pocket health care and prescription expenses.

Health Care FSA reimburses medical, dental, and vision expenses.

Limited Purpose FSA reimburses for dental and vision expenses and may only be used with the Cigna HDHP plan.

Dependent Care FSA reimburses for day/night care expenses for qualifying dependents which include 1) children under the age of 13 who qualify as dependents on your federal tax return or 2) spouse or dependents of any age who are physically or mentally unable to care for themselves and who qualify as dependents on your Federal tax return.

To find information about CHOC Benefits Plans and Programs go to:  
<https://benefits.choc.org/>

Select the dependent you wish to enroll

Add the dependent's SSN



# Step 13: Repeat the same process to enroll in other benefits

MENU CHOC Search [Icons]

### Birth/Adoption

Projected Total Cost Per Paycheck: \$218.09 | Projected Total Credits: \$0.00

#### Health Care and Accounts

<b>Medical</b> Cigna HMO Full Network REVIEWED Cost per paycheck: \$187.35 Coverage: Employee + Child(ren) Dependents: 1 Manage	<b>Dental</b> Delta Dental PPO Cost per paycheck: \$28.16 Coverage: Employee + 1 Dependents: 1 Manage	<b>Vision</b> VSP Standard Cost per paycheck: \$2.58 Coverage: Employee Only Manage
<b>Accident</b> Waived Enroll	<b>Hospital Indemnity</b> Waived Enroll	<b>Critical Illness</b> Waived Enroll
<b>Surcharge</b> CHOC Spouse Included Spouse/DP is not a dependent. Review and Sign   Save for Later	<b>Health Savings Account</b> Waived Enroll	<b>FSA Medical</b> Waived Enroll

W

# Step 14: Click "Review and Sign"

## Birth/Adoption



Projected Total Cost Per Paycheck \$218.09      Projected Total Credits \$0.00

### Health Care and Accounts

**REVIEWED**

**Medical**  
Cigna HMO Full Network

Cost per paycheck	\$187.35
Coverage	Employee + Child(ren)
Dependents	1

[Manage](#)

**Dental**  
Delta Dental PPO

Cost per paycheck	\$28.16
Coverage	Employee + 1
Dependents	1

[Manage](#)

**Vision**  
VSP Standard

Cost per paycheck	\$2.58
Coverage	Employee Only

[Manage](#)

**Accident**  
Waived

[Enroll](#)

**Hospital Indemnity**  
Waived

[Enroll](#)

**Critical Illness**  
Waived

[Enroll](#)

**Surcharge**  
CHOC Spouse

Cost per paycheck	Included
Coverage	Spouse/DP is not a dependent.

[Manage](#)

**Health Savings Account**  
Waived

[Enroll](#)

**FSA Medical**  
Waived

[Enroll](#)



[Review and Sign](#)

[Save for Later](#)



# Step 15: Review your elections under View Summary

## View Summary

Projected Total Cost Per Paycheck \$218.09      Projected Total Credits \$0.00

To find information about CHOC Benefits Plans and Programs go to: <http://benefits.choc.org>

Please note, you have not completed your enrollment until you select, "I Agree" and "Submit" at the bottom of this page.

Selected Benefits 6 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Medical Cigna HMO Full Network	03/01/2023	03/01/2023	Employee + Child(ren)	CHOCO Jr. Bear		\$187.35
Dental Delta Dental PPO	03/01/2023	03/01/2023	Employee + 1	Choco Latte		\$28.16
Vision VSP Standard	03/01/2023	03/01/2023	Employee Only			\$2.58
Surcharge CHOC Spouse	01/01/2020	01/01/2020	Spouse/DP is not a dependent.			Included
Basic Life The Hartford (Employee)	06/01/2018	05/20/2018	1 X Salary			Included
Basic AD&D The Hartford (Employee)	06/01/2018	05/20/2018	1 X Salary		Sharon Azzolini	Included

Submit      Save for Later      Cancel



# Step 16: Scroll to the bottom of the page and click “I accept” and “Submit”

Total Benefits Cost 1 item

Company Contribution	Employee Cost	Credits	Net Cost
\$529.11	\$218.09	\$0.00	\$218.09

## Attachments

Drop files here

or

Select files

## Electronic Signature

I acknowledge that I have been given the opportunity to enroll myself and/or eligible dependents in my employer's benefits plans. I hereby authorize CHOC Children's to take any applicable deductions from my salary with regard to these benefits plans, including applying any start, stop, increase, decrease or change in deduction amount.

I Accept

enter your comment

## Process History

Choco Bear (112233)  
Change Benefits for Life Event- Awaiting Action

Submit

Save for Later

Cancel



# Step 17: Congratulations! You have completed the enrollment.

Submitted



You've submitted your elections.

To print a copy of your benefit elections, click on "View Benefits Statement" and select the "Print" button at the bottom of your page.

[View 2023 Benefits Statement](#)

Done



# LONG LIVE CHILDHOOD

Have Questions or Need Help?  
Submit a Workday- Benefit Elections  
Help Case

