

Before You Begin

You may request a change to your health, dental, or vision elections midyear if you experience a qualified life event such as a birth/adoption, divorce, marriage, or dependent gain/loss of coverage and your request is consistent with the life event. Documentation that confirms the occurrence of the qualified life event is required. If you add others to your benefits due to the qualified life event, additional documentation confirming their relationship to you is also required. See the [Qualified Life Events and Required Documentation resource](#) for a listing of the qualified life events and their required documentation.

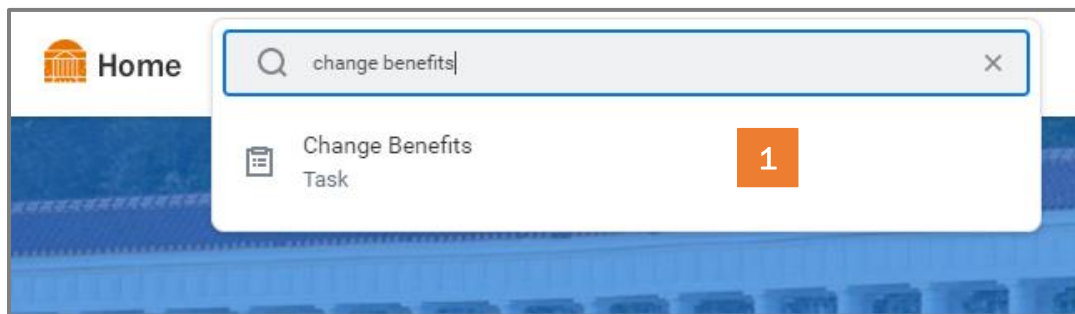
DO NOT BEGIN entering your change request until you have all the necessary information and documentation.

If you have any questions or aren't sure if you're ready to begin the process in Workday, contact AskHR@Virginia.edu to consult an HR professional.

Change Benefits

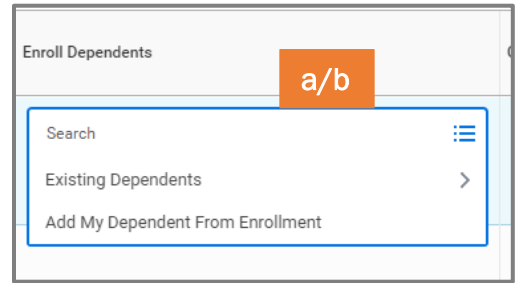
Before getting started, you should have the required documentation (e.g. a document verifying the event) and, if you're adding someone to your coverage, a document verifying their relationship to you.

1. Type 'Change Benefits' in the Workday search bar and select the task that appears below.



2. On the **Change Benefits** page, select the appropriate **Change Reason** from the list (e.g. Birth/Adoption/Legal Guardianship, Divorce, Marriage, Spouse/Dependent Loses/Gains Other Coverage).
3. After you've selected the Change Reason, enter the Benefit Event Date
 - A. Note that Workday will indicate when you'll need to submit your Elections by once you enter the Event Date. This includes all required documentation.
4. After entering the Benefit Event Date, attach your required documentation (e.g. documentation confirming the event and, if you're adding a spouse/dependent to your coverage, the document confirming their relationship to you). See the [QLE Resource](#) for details.
 - A. Use the 'Upload' button that appears to continue to attach additional documents, as needed.
5. After selecting the Reason, entering the Event Date, and Attaching Documents, click **SUBMIT**.

6. On the page that follows ('You have submitted'), click the 'Open' button.
7. On the first Change Benefit Elections page, you're presented with the option of adjusting your Health Care Elections.
 - A. Under the Enroll Dependents column, use the prompt to add/remove dependents from your various Benefit Plans (e.g. Medical, Dental, and/or Vision).
 - B. If this is the first time you're adding a person as a dependent, you'll use the 'Add My Dependent From Enrollment' option; otherwise, you can select the Existing Dependents from the Existing Dependents option.



If you need to add a dependent from enrollment, see Step 8-10; if you're adding an existing dependent, skip to step 11.

8. When adding a dependent from enrollment, after selecting the option from step 7B, you'll be presented with a view of Existing Dependents, if any. Unless you see that you already have the dependent added (in which case you'll click Cancel and use the 'Existing Dependents' option to add the dependent), go ahead and click OK.
9. On the Add My Dependent From Enrollment entry screen:

- A. Fill in the required details regarding the dependent (First/Last Name, Relationship, Date of Birth, and gender are required).
- B. If you have a Social Security Number, Under National ID's click 'ADD', select USA as Country, Social Security Number as ID type, and enter the SSN (if you don't yet have the SSN, e.g. for a newborn, you can skip this for now but you must provide the SSN as soon as you have the number available).
- C. After entering the SSN, or if you don't yet have a SSN (e.g. for a newborn child), review the Address information at the bottom of the page, make changes if necessary, and then click OK.

10. After adding your Dependent from Enrollment, you'll return to the Health Care Elections screen and you'll see your new dependent added to the Benefit Plan.

11. As needed, add the existing dependent (from the 'Existing Dependent's category) to any of the Benefit Plans in which you may be enrolled (e.g. Medical, Dental, and/or Vision).



12. Once you've completed your adjustments, click **CONTINUE**.

13. If you added a new dependent but do not yet have the SSN, you'll see a page requesting the SSN or the best reason as to why you do not have one (e.g. newborn). Enter a response and click **CONTINUE**.

A. If you missed entering previously, go ahead and enter it now.

A screenshot of a form titled "*Identifier ID Entered / Reason ID is Not Available" with a highlighted number "13" in an orange box. The form has two radio button options: "Identifier ID Entered" with an input field containing "--" and "Reason ID is Not Available" with an empty input field.

14. Those enrolled in **Basic Health** will see the Health Savings Account Election page. **Make no changes** and click **CONTINUE**.

15. All will see the **Spending Account Elections**, but limitations apply depending on plan and Qualified Life Event. **You are able to make changes but they must be consistent with the QLE**; see the [QLE Resource](#) for guidance on which Qualified Life Events permit what changes to Spending Accounts. You should not change an FSA or HSA to an amount that is less than the amount that has already been spent and/or contributed. After making appropriate changes as needed, click **SUBMIT**.

