

Benefits: Add/Remove/Change Dependent Staff & Team Member ●

Life events do not always line up with the open enrollment period. You will update your dependent, then asked to Change Benefits, and finally submit an inbox task. If you need to change a dependent, follow these steps.

Tasks

- [Before You Begin](#)
- [Add Dependent](#)
- [Edit Dependent](#)
- [Remove Dependent](#)

Before You Begin

If the following applies, please notify your respective HR office:

- If during your Qualifying Life Event, you are trying to enroll in a benefit that was previously waived for the first time.
- If your Qualifying Life Event is due to the death of a dependent.

UVA employees, please notify AskHR@virginia.edu, or 434-243-3344.

UPG employees, please notify rbenefits@hscmail.mcc.virginia.edu or 434-980-6101.

In the event of the addition or loss of a dependent, you will need to follow either the “Add Dependent” or “Remove Dependent” process below. If the required change is the result of a qualifying life event, you may either add, drop, or edit the effected dependent. If your qualifying life event change has occurred during an open enrollment period, AND you have already submitted your benefit elections, you should be aware that you may be required to resubmit your initial benefit choices.

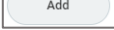
For a Divorce, you must use the Remove Dependent section of this job aid to change your spouse to an ex-spouse.


Add Dependent

1. From the Workday search feature, enter ‘Dependents’ and select the **Dependents** report.

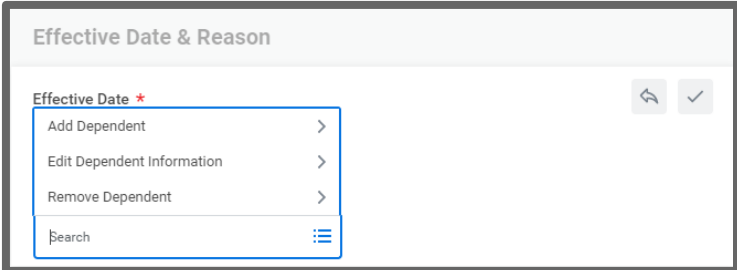


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2. Click the **Add** button  if you would like to add a new dependent.

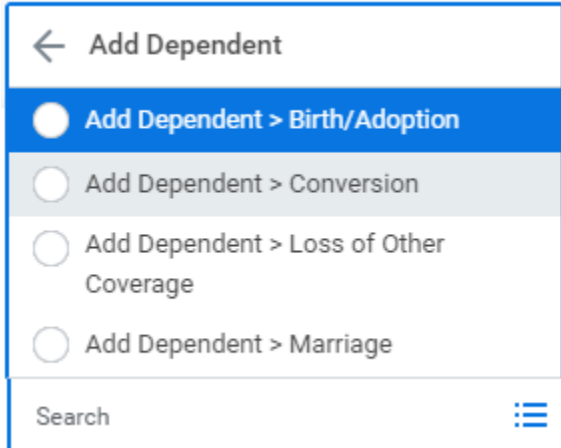
3. Click the pencil editor  under **Effective Date & Reason**.

4. Select the current or future date for which you want to have this change be effective.



Important Note: If you're adding a new birth/child, the effective date must be the birthdate of the new birth/child.

5. Select the reason (click the menu icon, then Add Dependent, then choose the reason for which you are adding a dependent.

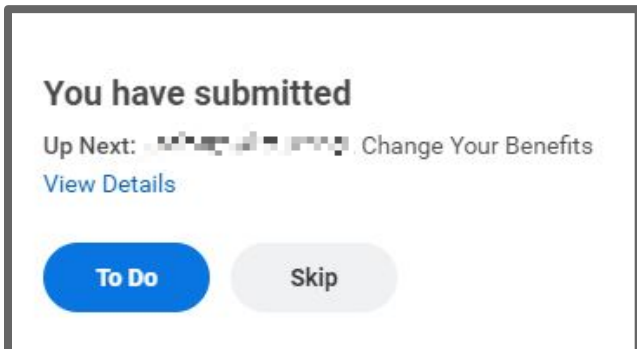


Fill out all required fields:

<ul style="list-style-type: none">• Full Legal Name• Gender• Date of birth	<ul style="list-style-type: none">• Relationship• Contact information (must enter at least one)• National ID (Social Security Number)
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6. Click **Submit**.

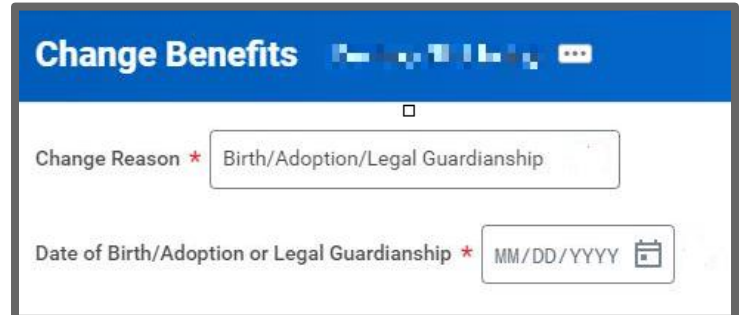
7. You will see a 'You have submitted' confirmation with a **To Do** link. Click on the **To Do** link.



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Change Benefits

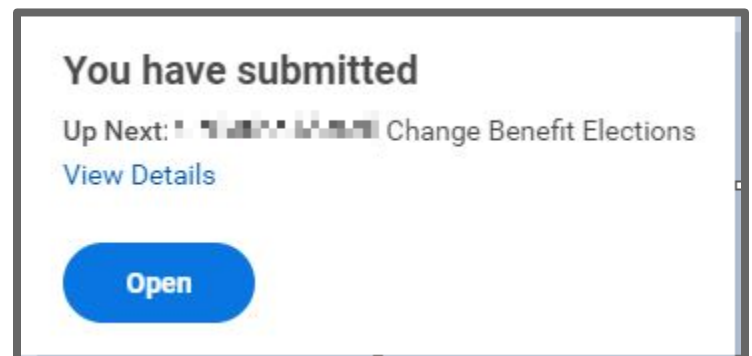
8. Click the **Change Benefits** button.
9. Select the drop-down in the **Change Reason** field to select the reason you're adding a dependent. Reasons could be Birth/Adoption/Legal Guardianship, or Marriage.
10. Enter the **Benefit Event Date**.



11. Upload the appropriate documentation under attachments. If you are still waiting for documents to be available, you will have another opportunity to load them at the end of the event before you submit your benefit change request. More details about required documents are also provided inside the event in Workday.

12. Click **Submit**.

13. You will receive a 'You have submitted' confirmation with an Open button. Click the **Open** button.



Let's Get Started




14. Click the **Let's Get Started** button.
15. Please view and confirm your desired changes are updated in each tile for health, dental and vision. On the **Plans Available** page, you will see your available options or existing election. Then click **Confirm and Continue** button to go to the Dependent page. On the Dependent page, you can review or change your dependent(s) information or coverage.

Note: Some tiles may be informational only. Read the instructions in each tile's help text for more details based on each type of benefit plan.

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MC Example

Health Care and Accounts

<div style="text-align: center;">Medical Aetna POS - Basic Health</div> <table style="width: 100%;"><tr><td>Cost (Biweekly (Benefits))</td><td style="text-align: right;">\$12.63</td></tr><tr><td>Coverage</td><td style="text-align: right;">Employee + Child(ren)</td></tr><tr><td>Dependents</td><td style="text-align: right;">1</td></tr></table> <div style="text-align: center; margin-top: 10px;">Manage</div>	Cost (Biweekly (Benefits))	\$12.63	Coverage	Employee + Child(ren)	Dependents	1	<div style="text-align: center;">Dental United Concordia DPO - Basic</div> <table style="width: 100%;"><tr><td>Cost (Biweekly (Benefits))</td><td style="text-align: right;">\$0.50</td></tr><tr><td>Coverage</td><td style="text-align: right;">Employee Only</td></tr></table> <div style="text-align: center; margin-top: 10px;">Manage</div>	Cost (Biweekly (Benefits))	\$0.50	Coverage	Employee Only	<div style="text-align: center;">Vision Waived</div> <div style="text-align: center; margin-top: 10px;">Enroll</div>
Cost (Biweekly (Benefits))	\$12.63											
Coverage	Employee + Child(ren)											
Dependents	1											
Cost (Biweekly (Benefits))	\$0.50											
Coverage	Employee Only											

UPG Example

Health Care and Accounts


<div style="text-align: center;">Medical - UPG Anthem PPO - Healthkeepers</div> <table style="width: 100%;"><tr><td>Cost per paycheck</td><td style="text-align: right;">\$235.02</td></tr><tr><td>Coverage</td><td style="text-align: right;">Family</td></tr><tr><td>Dependents</td><td style="text-align: right;">2</td></tr></table> <div style="text-align: center; margin-top: 10px;">Manage</div>	Cost per paycheck	\$235.02	Coverage	Family	Dependents	2	<div style="text-align: center;">Dental - UPG United Concordia DPO - Core</div> <table style="width: 100%;"><tr><td>Cost per paycheck</td><td style="text-align: right;">\$45.15</td></tr><tr><td>Coverage</td><td style="text-align: right;">Family</td></tr><tr><td>Dependents</td><td style="text-align: right;">2</td></tr></table> <div style="text-align: center; margin-top: 10px;">Manage</div>	Cost per paycheck	\$45.15	Coverage	Family	Dependents	2	<div style="text-align: center;">Vision - UPG Anthem Uniview Vision VIS</div> <table style="width: 100%;"><tr><td>Cost per paycheck</td><td style="text-align: right;">\$7.98</td></tr><tr><td>Coverage</td><td style="text-align: right;">Family</td></tr><tr><td>Dependents</td><td style="text-align: right;">2</td></tr></table> <div style="text-align: center; margin-top: 10px;">Manage</div>	Cost per paycheck	\$7.98	Coverage	Family	Dependents	2
Cost per paycheck	\$235.02																			
Coverage	Family																			
Dependents	2																			
Cost per paycheck	\$45.15																			
Coverage	Family																			
Dependents	2																			
Cost per paycheck	\$7.98																			
Coverage	Family																			
Dependents	2																			

If you have more benefit changes to make, click the **Home** button to add additional changes.

16. Click **Confirm and Continue**.

17. Your new dependent will display in the Dependent column.

18. Click the checkbox in front of the new Dependent. The system will change your **Coverage** type according to how many dependents are in your list.



Human Resources

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19. If this is a new birth, you will be required to add a **Social Security Number (SSN)** or give a **Reason SSN is Not Available**.

20. Click **Save**.

The screenshot displays a web interface for managing dependents. At the top, it shows 'Coverage * Employee + Child(ren)' and 'Plan cost per paycheck \$25.25'. A button labeled 'Add New Dependent' is visible. Below this is a table with 2 items, showing a list of dependents with columns for 'Select', 'Dependent', 'Relationship', and 'Date of Birth'. The first row shows a spouse with a date of birth of 08/06/1988. The second row shows a child with a date of birth of 07/01/2021, and the 'Select' checkbox is checked. Below the table, a message states: '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.' Underneath is a section titled 'Dependent Social Security Numbers 1 item' with a table for 'Ava Anna Irving'. It offers two radio button options: 'Social Security Number (SSN)' and 'Reason SSN is Not Available'. The second option is selected, and a text box contains the text 'This is a newborn'.

21. You will receive a Save confirmation. If you'd like to add your dependent to other plans, repeat steps 16-21. If you do not wish to add your dependent to additional plans, or you do not have other Benefit changes, go to the next step.



Your Medical changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

22. Click the **Review and Sign** button to scroll through the **View Summary** of your proposed change.

23. If you are happy with the change, scroll down to the **Electronic Signature** section and click the '**Accept**' checkbox.

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24. Click **Submit**.

25. You will receive a submit confirmation with a link to a **View 2021 Benefits Statement**, which shows this change only.

Note: This button gives you the option to print this change request only.

26. Click the **View 2021 Benefits Statement** button.

27. Click the **Print** button.

28. Click the **Download** button.

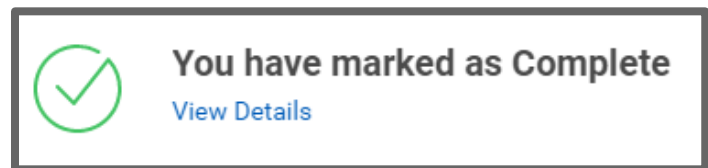
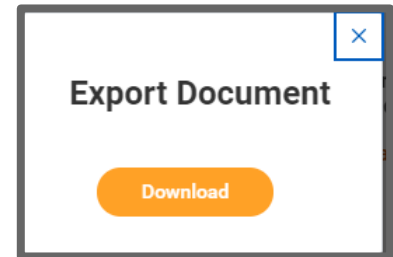
29. Your document displays, which allows you to **Open** and **Print**.

30. To process the **To Do** that is still in your inbox, click your inbox icon.

31. Click on the inbox task that starts with '**Change Your Benefits: Dependent Event.**'

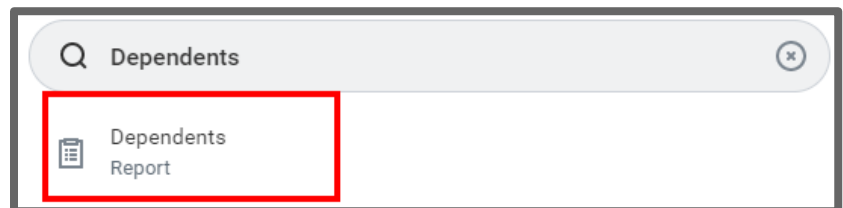
32. Click **Submit**.

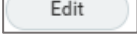
33. You will receive a confirmation.



Edit Dependent

1. From the Workday search feature, enter 'Dependents' and select the **Dependents** report.

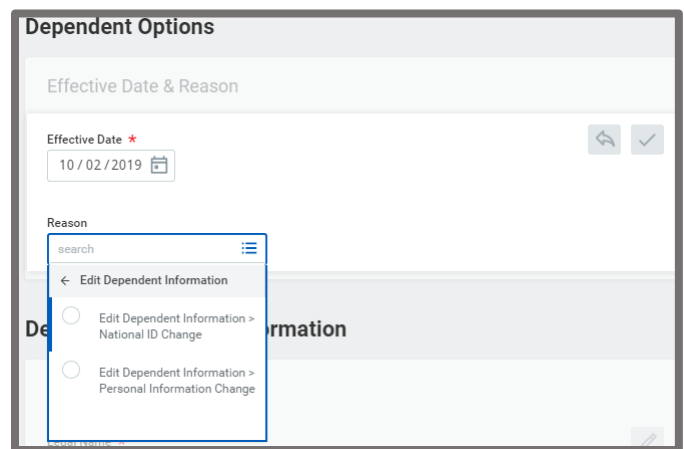


2. Click the **Edit** button  next to the applicable dependent to edit or remove an existing dependent.

3. Under **Effective Date & Reason**, select the date when it should be effective, then select the reason for the change.

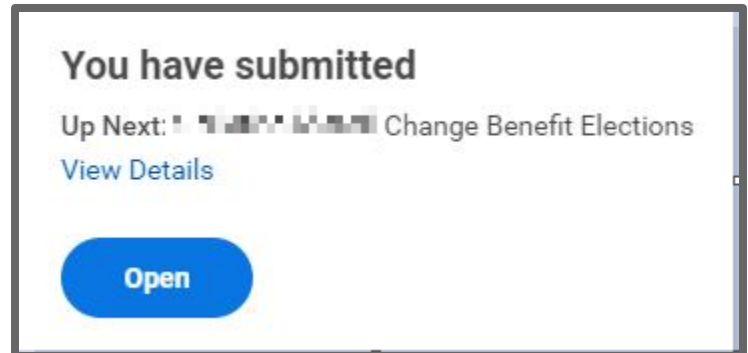
4. Fill out all required fields:

- Full Legal Name
- Gender
- Date of birth
- Relationship
- Contact information (must enter at least one)
- National ID (Social Security Number)



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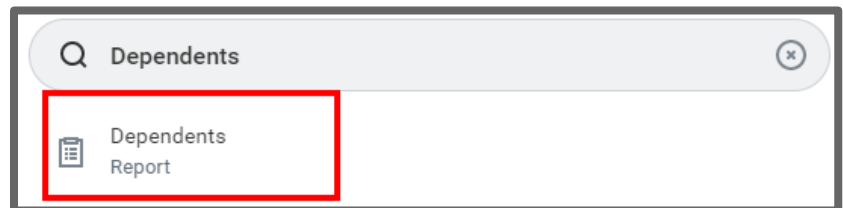
5. Upload any relevant documentation (new Social Security identification, or other National ID, marriage license, divorce decree, etc.)
6. Click **Submit**.
7. You will receive a 'You have submitted' confirmation with an Open button. Click the **Open** button.



8. Follow steps 9-35 in the Add Dependent section or steps 7-26 in the Remove Dependent section.

Remove Dependent

1. From the Workday search feature, enter 'Dependents' and select the **Dependents** report.



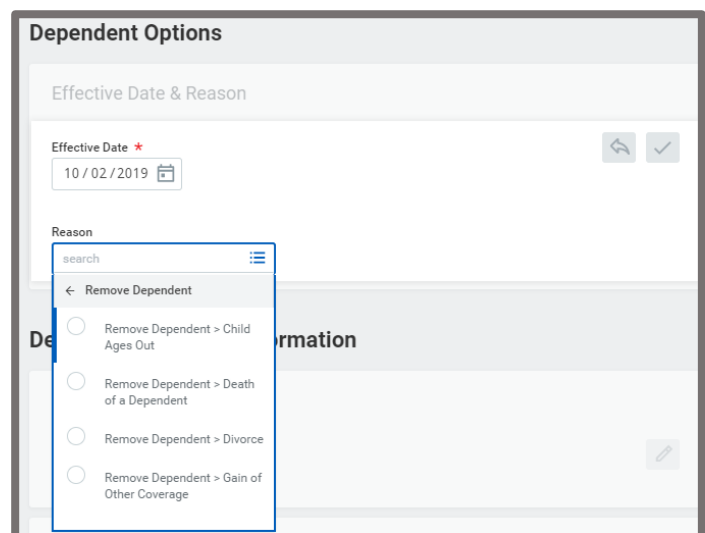
2. Click the **Edit** button next to the applicable dependent to edit or remove an existing dependent.

3. Under **Effective Date & Reason**, select the date when it should be effective, then select the reason for the change:

- Child Ages Out
- Death of Dependent-If you qualifying event is due to death of a dependent, please notify your respective HR office. UVA employees, please notify AskHR@virginia.edu, or 434-243-3344.

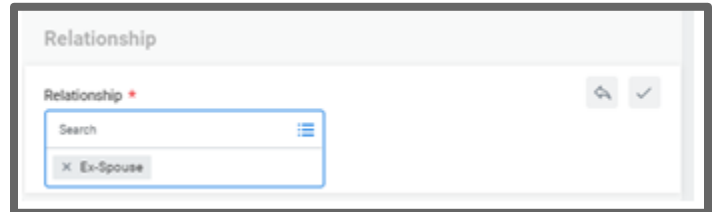
UPG employees, please notify rbenefits@hscmail.mcc.virginia.edu or 434-980-6101

- Divorce



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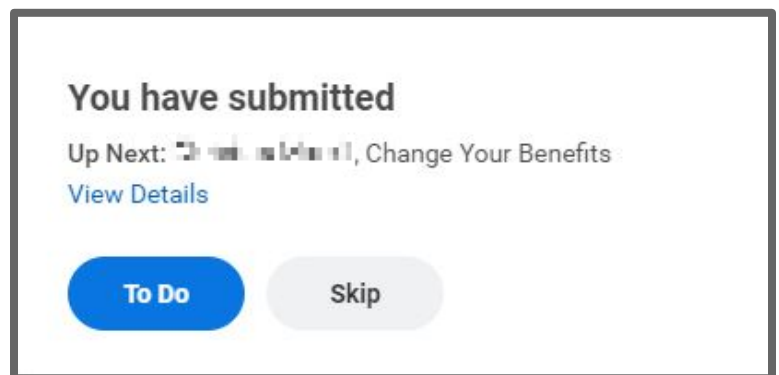
- Gain of Other Coverage
- If you are planning to update your benefits due to Divorce and are trying to remove a former spouse, you must change their relations here to Ex-Spouse.



A screenshot of a web form titled "Relationship". It features a search box with a magnifying glass icon and a checkmark icon to its right. Below the search box, a dropdown menu is open, showing a single option: "X Ex-Spouse".

Important Note: Once you update your dependents here you must also submit a benefit event to remove them from the benefit plans! Once you edit your dependent(s) here you will receive an important notification to your Workday inbox called **Further Instructions for Completing Your Benefit Event**. It will give you instructions on how to complete the benefit event to remove dependent(s) from your benefit plans.

- Click **Submit**
- You will now receive a 'You have submitted' confirmation with a To Do button. Click the **To Do** button. Your benefits **are not changed** until this step is done.

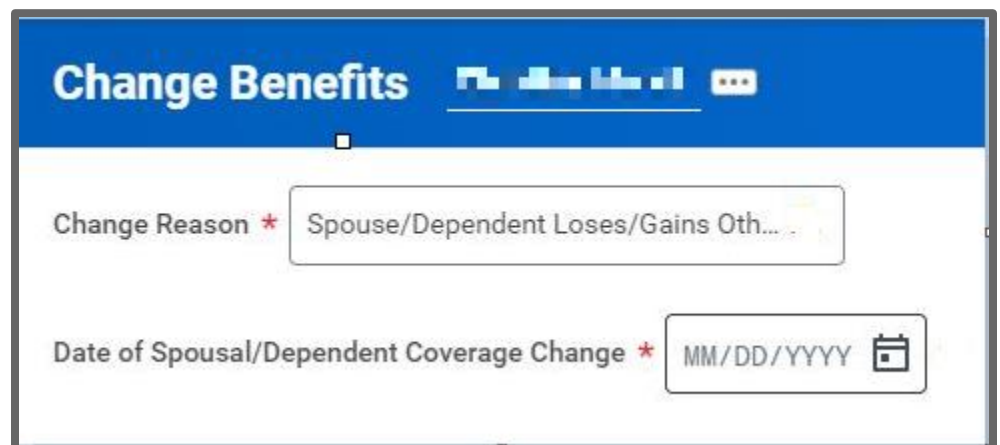


A screenshot of a confirmation screen titled "You have submitted". Below the title, it says "Up Next: [calendar icon] Change Your Benefits" and a blue link "View Details". At the bottom, there are two buttons: a blue "To Do" button and a grey "Skip" button.

- Click the **Change Benefits** button.
- Select the drop-down in the **Change Reason** field to select Spouse/Dependent Loses/Gains Other Coverage or Divorce if this is the reason, you're dropping a dependent.

Note: The spouse must be changed to ex-spouse first, in the event of a divorce.

- Enter the **Date of Spousal/Dependent Coverage Change or Date of Divorce**.



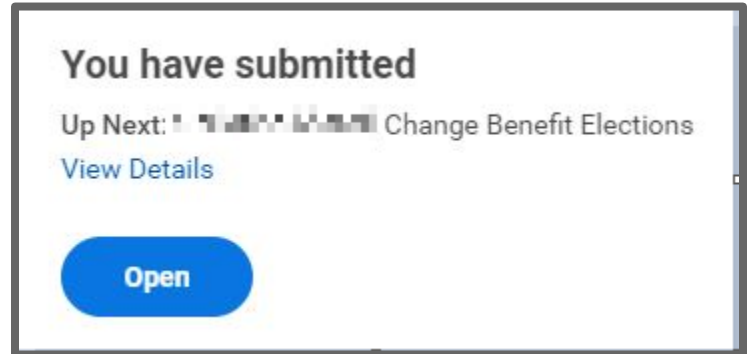
A screenshot of a web form titled "Change Benefits". The form has a blue header with the title and navigation icons. Below the header, there are two main fields: "Change Reason *" with a dropdown menu showing "Spouse/Dependent Loses/Gains Oth..." and "Date of Spousal/Dependent Coverage Change *" with a date input field showing "MM/DD/YYYY" and a calendar icon.

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10. Upload the appropriate documentation under attachments. If you are still waiting for documents to be available, you will have another opportunity to load them at the end of the event before you submit your benefit change request. More details about required documents are also provided inside the event in Workday.

11. Click **Submit**.

12. You will receive a 'You have submitted' confirmation with an Open button. Click the **Open** button.



Let's Get Started

13. Click the **Let's Get Started** button.

14. Your choices for the option you selected will display. Click on the appropriate tile for the plan you'd like to enroll, edit, or waive. If you're already enrolled in a plan, the button at the bottom of the tile will display as Manage. Otherwise, the button will display as Enroll. Click each tile you'd like to enroll, edit, or waive. The system will automatically change your Coverage type based on your choice to drop a dependent or spouse.

A screenshot of the "Health Care and Accounts" section. It displays three benefit tiles: Medical (Aetna POS - Basic Health), Dental (United Concordia DPO - Basic), and Vision (Waived).

Benefit Type	Plan Name	Cost (Biweekly Benefits)	Coverage	Dependents	Action
Medical	Aetna POS - Basic Health	\$12.63	Employee + Child(ren)	1	Manage
Dental	United Concordia DPO - Basic	\$0.50	Employee Only		Manage
Vision	Waived				Enroll

If you have more benefit changes to make, click the **Home** button to make additional changes.

15. Click the **Review and Sign** button to scroll through the **View Summary** of your proposed change.

16. If you are happy with the change, scroll down to the **Electronic Signature** section and click the 'I **Accept**' checkbox.

17. Click **Submit**.

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18. You will receive a submit confirmation with a link to a **View 2021 Benefits Statement**, which shows this change only.

Note: This button gives you the option to print your change request.

19. Click the **View 2021 Benefits Statement** button.

20. Click the **Print** button.

21. Click the **Download** button.

22. Your document displays, which allows you to **Open** and **Print**.

23. To process the To Do that is still in your inbox, click your inbox icon.

24. Click on the inbox task that starts with '**Change Your Benefits: Dependent Event.**'

25. Click **Submit**.

26. You will receive a confirmation.

