As a new hire, one of your first tasks is to complete your I-9, and to select or waive your benefits. You will receive a series of inbox tasks to start the process. You may or may not be eligible for all things listed in this job aid, depending on your organization.

**Tasks**

- **Before You Begin**
- **Getting Started**
- **Maintain Worker Documents for I-9**
- **Complete Benefit Tasks**
- **Add Dependent to Health, Dental, Vision and Adding Dependents**
- **Flexible Spending Accounts (FSA)/Health Savings Account Plan Elections**
- **Mandatory Retirement**
- **View Summary**
- **HSA and Spousal Affidavit**
- **VRS-65 DocuSign Form**
- **Insurance and Supplemental Retirement**
- **Mandatory Retirement Information**
- **View Elections and Proof of Coverage**

**Before You Begin**

Once you make your benefit elections, for most benefits, you will not be able to make any changes for the remainder of the calendar year without a qualified life event, or during open enrollment.

Some benefits like the Mandatory Retirement plan are not eligible to change for the duration of your employment. So be sure you have asked any questions about your available options prior to making benefit selections.

Have your dependent(s) information ready before you begin your benefit enrollments, such as dependent(s) date(s) of birth, SSN or visa information, and home mailing address information if different from your own. Documentation requirements will be listed inside the event, and an opportunity to attach documentation will be on the Attachments section at the end of your New Hire enrollment event.
Getting Started

Scroll down to your Workday inbox (near the bottom of your Workday homepage) where you will receive multiple Workday inbox to-do steps as a new hire.

You must complete all steps in your Workday inbox to avoid receiving waived benefits and/or default enrollments.

1. From the Workday homepage, go to your Workday Inbox. Click on the item titled Read Carefully and Click Submit to Begin Your Onboarding.

2. Read the Complete To Do information provided and click Submit.

3. Complete the Personal Information Change item and click Submit.
4. The next task is **Complete Form I-9**. Click on it, and make sure to include your Social Security number entered in the ‘US Social Security Number’ field.

Exception: If you are in the process of requesting a Social Security Number.

5. Click **Submit**. In the next section, you will upload documents to finish your I-9.

### Maintain Worker Documents for I-9

Scan or take a picture of your acceptable I-9 documents and save them to your computer. Follow the below instructions to upload them under Maintain My Worker Documents.

1. From the **Workday search bar** enter ‘**Maintain My Worker Documents**’ and select the report that appears below.

2. Click the **ADD** button.
3. Either Drag and Drop your document into the ‘Drop files here’ box or use the ‘Select files’ button to locate the document on your computer.

4. After you’ve selected your document, choose the best Document Category (required) and add a Comment (optional).
   
   a. If you want to upload additional documents, click the UPLOAD button, and repeat steps 3-4 until you’ve added all documents you intend to upload.

5. Once you’ve added all the documents you wish to add at this time, click OK.

6. Your document has now been added to your Worker Documents! Click DONE to exit.

Complete Benefit Tasks

1. From the Workday homepage, go to your Workday Inbox. Click on the item titled Change Benefits for Life Event.

Note: This may be labeled New Hire Event, Employment Status Change Event or Insurance & Supplemental Retirement Event.
2. Click the **Let’s Get Started** button.

3. This benefit election will include (dependent on eligibility) medical, dental, vision, HSA, FSA, mandatory retirement.

4. Click on every tile in your event to enroll, waive (where applicable), and view all of your options. Note that most tiles will have 2 pages of information to click through. Medical benefits, like Health, Dental, and Vision benefits will have your available options on the Plans Available Page. And Dependent(s) will be updated on the second page of the tile. Benefits like FSA, and Retirement benefits will have your vendor plan option(s) on the Plans Available Page, and the Contribution amount will be on the second page of the tile.
5. Once you select an enrollment plan, click **Confirm and Continue** on your enrollment elections. If you have not yet entered dependents, **add them now**. You will not be able to go back and add them later without a Qualifying Life Event.

### Add Dependent to Health, Dental, Vision and Adding Dependents

Eligible Dependents may be added to your medical, dental, and/or vision insurance. Spouses are eligible for dental and vision insurance but must be eligible for medical based on the working spouse rule. See the eligible dependent and spouse eligibility links in your medical, dental, and vision enrollment tiles for the current health, dental, and vision eligibility rules.

1. To add a dependent, click on the **Add New Dependent** button.
2. Click **OK**.

**Note:** If you are a rehire (previously employed at UVA), previous dependents show at the bottom. If you wish to add them, check the checkbox in front of the names of the dependents you wish to add. If no dependents display, you must add them using the following steps.

3. 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)

4. Click **Save**.

5. If you did not submit the **Social Security Number (SSN)** on the previous screen, enter it now. If your new dependent is a newborn, enter ‘this is a newborn’ in the **Reason SSN is Not Available** field.

6. Click **Save**.

7. You will receive a save confirmation.
   - You will be returned to the Health Care and Accounts page multiple times. Click on each tile you wish to enroll yourself and your dependents by clicking the **Select** radio button, **Confirm and Continue**.

8. Continue with your elections, checking the checkbox in front of your dependents you wish to add to each plan and **Save**.

**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.
Flexible Spending Accounts (FSA)/Health Savings Account Plan

Elections

To learn more about Flexible Spending Accounts (FSA), or Health Savings Accounts, review the General Instructions help text on the right side of each FSA and HSA tile. Benefit tiles displayed in your new hire enrollment events will vary based on your benefits eligibility.

1. Click the Select or Waive radio button to begin.

2. Click Confirm and Continue.

3. You will define how much you want to contribute for the year (Annual) OR per paycheck. The other box will auto populate.

   **If you elected the Basic Health Plan, you must elect the HSA even if you are not contributing.

4. If you Waive coverage, you don’t need to do anything else.

   Note: Basic Health members must elect the HSA.

5. Click Save.
6. You will see a save confirmation.

---

**Mandatory Retirement**

If your position is eligible for Mandatory Retirement, this tile will be displayed as waived. Note: Your new hire enrollment events will vary based on your benefits eligibility.

1. On this tile you will see options related to your Mandatory Retirement plan. You must select this enrollment. If you have more than one option in this tile, be sure to carefully make your selection. **This enrollment is an irrevocable decision.** Depending on your mandatory retirement plan eligibility, you may be required to complete additional form(s). If required to complete form(s), you will be notified in your benefit event and with a follow-up task sent to your Workday inbox after your benefits are submitted.

2. In your Retirement tile, on the Plans Available page, you will see a list of your available plan(s) and vendor(s). Click **Confirm and Continue** button to go to the Contribute page.
3. On the Contribute page, if there is a Contribution (%) field here, then enter the number 5 for your mandatory employee contribution percentage amount. If there is no fill-able field, then the set contribution percentage amount will automatically display.

4. Click Save.

5. You will receive a save confirmation.

![Your Retirement Plan 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.

---

### View Summary

Your elections are not yet complete until you review your elections and click the Review and Sign button. Review all the choices you elected. Once you click Submit, you may not make changes.

- Scroll through the View Summary page to review everything and read the authorization.
- On the View Summary page, use the Attachments section to upload documentation for your dependent(s).
- If you are happy with the change, scroll down to the Electronic Signature and click I Accept checkbox.
- Click Submit.

6. You will receive ‘Success, You’re Enrolled’ 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. It is a good idea to print a copy of the Elections Confirmation, to keep for your records.

7. Click the View 2021 Benefits Statement button.

8. Click the Print button.

9. Click the Download button.

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

11. Click the Home button.

12. Print a copy for your records by clicking Print. This will open a PDF of the page that you can either save or print.

13. Click Done.

HSA and Spousal Affidavit

If you entered a spouse as a dependent or elected an HSA, you need to complete an affidavit for each form. These tasks will come as a separate inbox item after you submit your benefit elections. Refresh your screen to receive this task if you do not see it.

Review the affidavit PDF by clicking on the link that will come to your Workday Inbox.

By clicking “I agree”, you are verifying that your spouse is NOT eligible for Health Benefits from his/her employer that provides minimum value, as defined by the Affordable Care Act (for spousal affidavit) and/or your confirmation of eligibility for an HSA.

If you cannot agree to this statement, please contact the Solution Center at AskHR@virginia.edu or call 434-243-3344.
Based on your retirement plan eligibility, you may need to complete the VRS65 form. If you are eligible, you'll receive the VRS65 DocuSign link as a to-do step in your workday inbox.
A Benefit Change-Insurance and Supplemental Retirement inbox task appears in your Workday inbox.

1. Click on the inbox task titled Benefit Change-Insurance and Supplemental Retirement.

2. Click the **Let’s Get Started** button.
3. Click on each tile in the benefit event. In each tile you will enroll, waive (where applicable), or view all of your options. Note that most tiles will have 2 pages of information to click through. Insurance benefits like life insurance and disability will show your vendor and/or options on the Plans Available page.

4. If any of your benefits allow beneficiaries to be named in the system, that will be on page 2 of the tile. If beneficiaries are named outside of the system, look for links to those instructions inside of that benefit tile.

5. Tiles with benefits like supplemental 403(b) retirement will have your vendor and plan option(s) on the Plans Available Page, and the Contribution amount will be on the second page of the tile.

6. Click Confirm and Continue.

7. Depending on which tile you select, additional selections may be necessary.

8. Click Save.

9. You will receive a save confirmation.

10. When all changes are added, click the Review and Sign button.

11. If you are happy with the change, scroll down to the Electronic Signature and click I Accept checkbox.

12. Click Submit.
13. You will receive ‘Success, You’re Enrolled’ confirmation with a link to a View 2021 Benefits Statement, which shows change only.

Mandatory Retirement Information

If you are eligible and have enrolled in any Mandatory Retirement benefit (ORP, MCRP, or VRS) you will receive an important informational to-do step in your Workday inbox.

1. Click the links to read more about your Mandatory Retirement plan, receive any required form(s), and learn more about additional optional benefits.

2. To clear the informational notice from your inbox, click Submit.

View Elections and Proof of Coverage

To view your elections, follow these steps.

1. From the Benefits Application, click on Benefit Elections as of Date (under View).

2. Enter the first date of your eligibility (typically the first of the month following your start date). Click OK.

Print the new confirmation of benefit elections.