Hexcel's Workday User Manual

Chapter 4-02

CHANGING BENEFITS MID-YEAR

Each year there is an annual open enrollment when you can make election changes effective January 1st of the next calendar year. Outside of that, there are two categories of mid-year benefit changes: A Qualifying Event Change or Other Benefit Change.

1. **Qualifying Event:** Election changes during the calendar year can only be made if you experience a life event or change in circumstance. Examples of such a change are marriage, birth, divorce, change of a dependents eligibility, etc. See list below.   Appropriate documentation will be required. (Marriage certificate, divorce degree, etc.)

2. **Other Benefit Changes:** Changes in the amount you contribute to the Health Savings Account, Commuter/Parking benefit, updating a beneficiary and updating the spousal surcharge in the event your spouse gains or loses medical coverage with their employer.

Qualifying Life Event Reasons Include:

- Birth of a child/adoption
- Death of a dependent
- Divorce
- Legal Separation
- Employment ends for spouse/dependent child
- Marriage
- Qualifying for coverage under Medicaid or an S-Chip plan ends

Note: Documentation is required for this type of change.

Other Benefit Changes Allowed

- HSA Savings
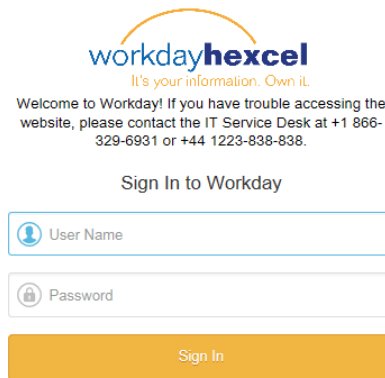- Commuter/Parking
- Update Spouse Surcharge
- Update Beneficiaries

Note: These changes can be completed at any point during the year.

Complete the steps on the following pages to make a Benefits Change:
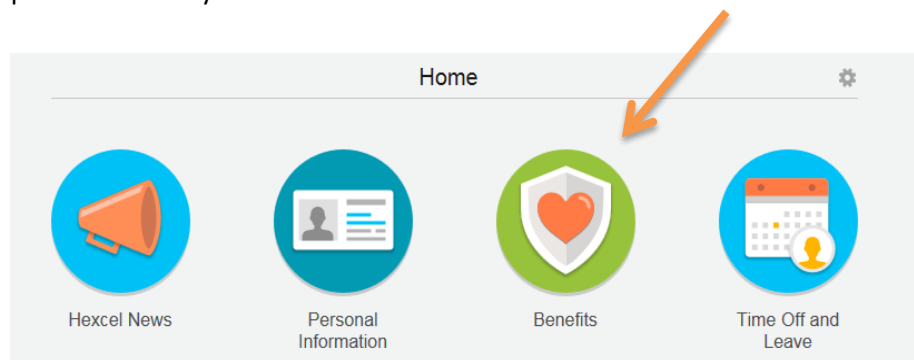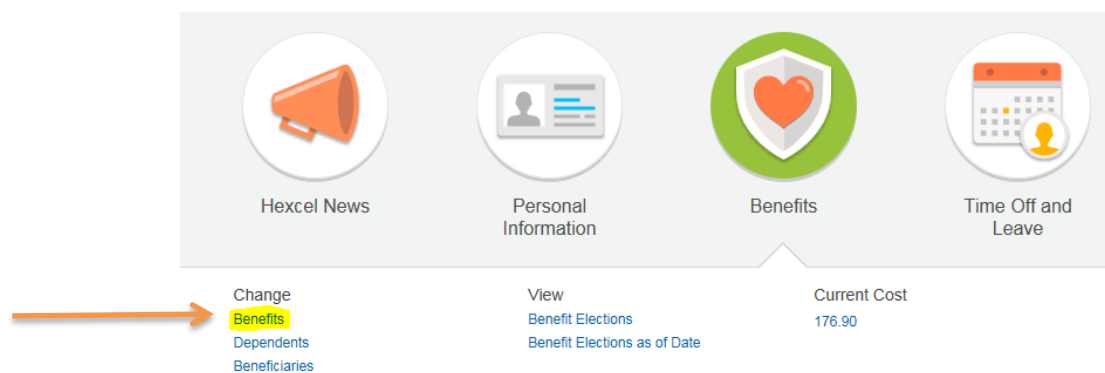
1. Sign in to Workday

2. Click the **Benefits** worklet

   Note: The home page configuration may differ from the one shown depending on the requestor's security access.

3. Click the **Change Benefits**

4. Click the **Benefit Event Type** and enter the **Benefit Event Date**

5. For a **Qualifying Event**, documentation is required to make a change. In this example, the Event Type is Divorce. Click the grey "attach' button to pull up a window to browse files saved on your computer. Select the file and click **Ok**. Click ⊕ to add additional rows for multiple documents. You may add a comment (optional) and then click **Submit**

6. This next screen confirms that you have submitted your **Benefit Event**. If you click **Open** on this page, you will land on the first step of the Benefit Enrollment Process where you will remove the spouse from benefits.
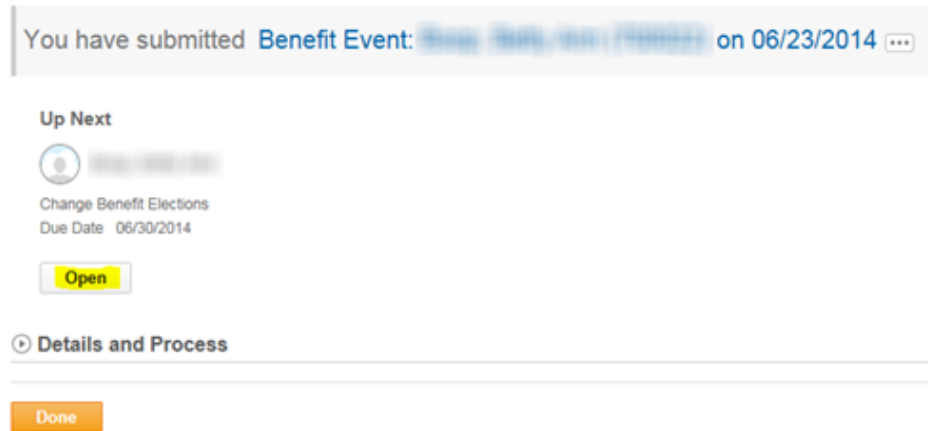
Note: To complete the task of removing the spouse at a later date, click [Done]. The task will be saved and the employee will have an action item in their mail box the next time they sign in.
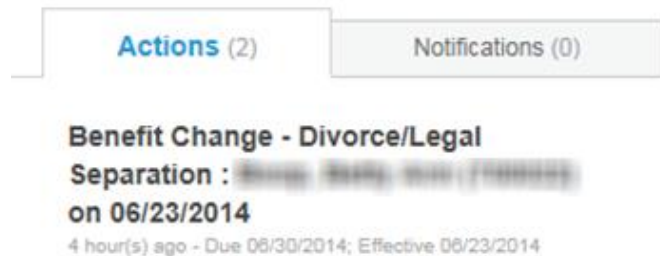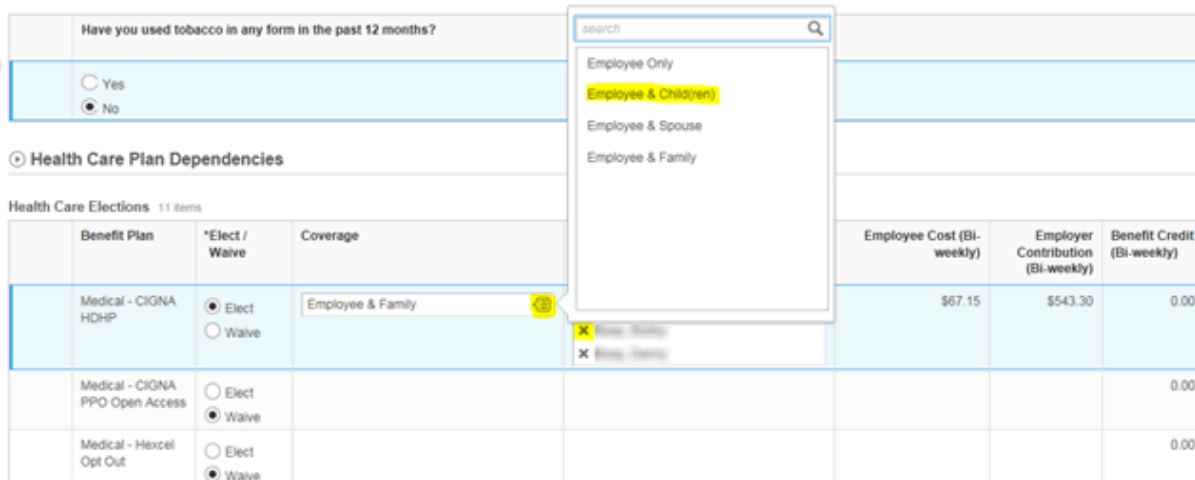

7. Once on the Benefit Enrollment page, you'll be allowed to remove the spouse from the Hexcel benefit plans and update the coverage tier
   - In this example, moving from Family Coverage to EE + Child(ren).   If the qualifying event is a birth or adoption, you would add the dependent and update the coverage tier if needed.

8. To remove the spouse, click on the **X** next to the name so it disappears.

9. Then click [icon] under 'Coverage' to change the tier from Employee + Family to Employee + Child(ren).

10. Click through all the benefit enrollment steps and make the needed changes. This process includes adjusting the HSA contributions and beneficiary designation. At the final screen titled **Submit Elections Confirmation**, click [Submit] on the bottom left hand corner to submit the benefit changes. The request will now be routed to the Benefit Partner for approval.

11. Either print for your records or hit [Done] to proceed to the home screen.

Approval Step – Benefit Partner

1. Until the **Benefit Partner** approves the employee's benefit change, the change(s) are not effective. The Benefit Partner will be notified via an action item in their email box.
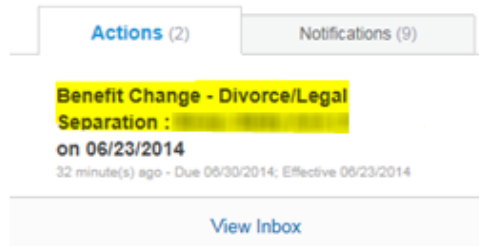
2. Click on the Action Item and review the attached documentation. Then, confirm that the employee did in fact remove the spouse from all the plans he was enrolled in.

3. If the information is complete, click **Approve**

Note for Benefit Partner: If the request was not satisfactorily completed or the documentation provided was not sufficient, **do not** click Cancel as it will wipe out all changes and require the requesting employee to start from the beginning. Instead, use the **Send Back** option and include a comment.

- *Example*: *A divorce decree is required to process the change and remove your spouse from coverage.*

4. You'll see a notification that the benefit change event was successful.

Date	Chapter Modified
14 April 2015	*Updated screen snips to reflect new sign in graphic and blurred out Employee and Dependent names…DLB*