

# Change Benefits for a Qualifying Life Event

*This job aid provides instructions on how to change benefits for a life event in Workday.*



## Key Concept: Change Benefits for a Qualifying Life Event

A qualifying life event is a specific IRS-recognized life change that allows you to make certain changes to your health coverage or benefits outside of the regular open enrollment period.

- **Birth/Adoption**
- **Change Beneficiary**
- **Death of a Dependent**
- **Dependent Gains Alternate Coverage**
- **Dependent Loss of Alternate Coverage**
- **Divorce/Termination of a Domestic Partnership**
- **Employee Gains Alternate Coverage**
- **Employee Loss of Alternate Coverage**
- **Loss of Legal Guardianship**
- **Marriage/Domestic Partnership**
- **Optional Delete of Dependent**

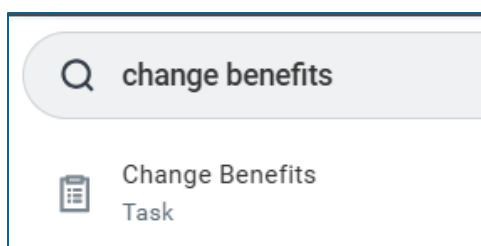
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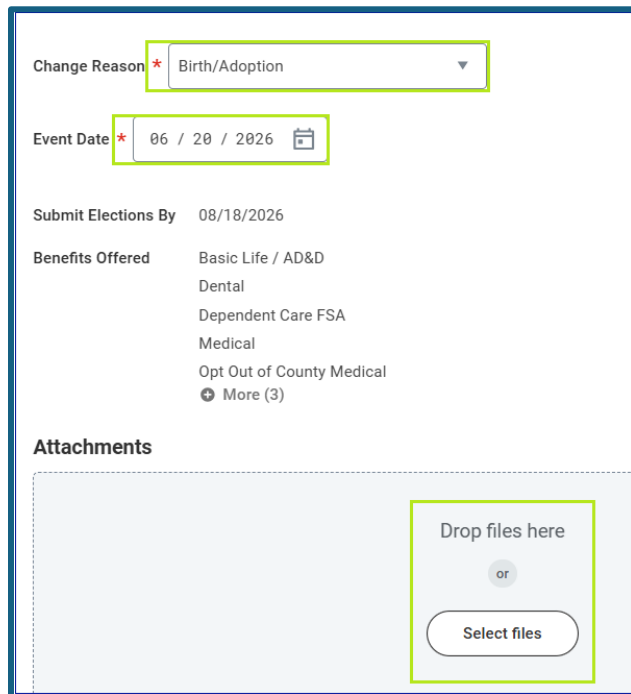
## Task: Change Benefits

*Change benefits for a qualifying life event using the Benefits and Pay application.*

1. From the Workday Home Page, in the Search Bar enter **Change Benefits** and select the task.



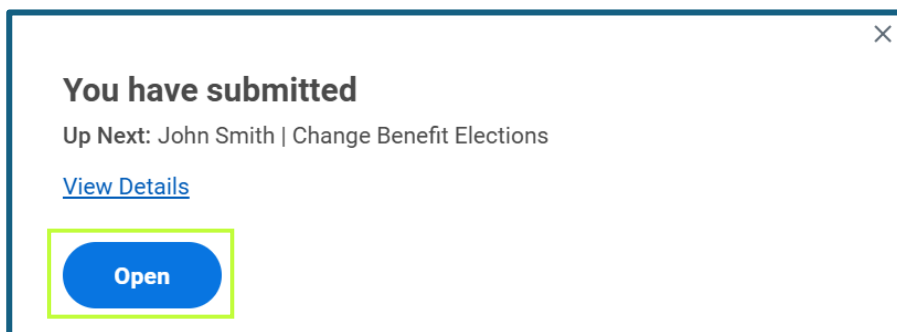
2. Select the **Change Reason** from the drop-down list. Refer to the **Instructions** section for requirements for your change request in Workday.
3. Enter the **Event Date**. This will open a field to attach the appropriate **Attachment** (if required). In this example, the qualifying life event is the birth of a child.



The screenshot shows a form with the following fields and options:

- Change Reason**: A dropdown menu with "Birth/Adoption" selected.
- Event Date**: A date field with "06 / 20 / 2026" entered and a calendar icon.
- Submit Elections By**: "08/18/2026"
- Benefits Offered**: A list of options including "Basic Life / AD&D", "Dental", "Dependent Care FSA", "Medical", "Opt Out of County Medical", and "More (3)".
- Attachments**: A section with a "Drop files here" area, an "or" option, and a "Select files" button.

4. Click **Submit**.
5. A pop-up window opens after you submit with the option to Open. Click **Open**. If you do not click **Open**, you will find a new button on the **Benefits and Pay** application under the heading **Needs Attention**.



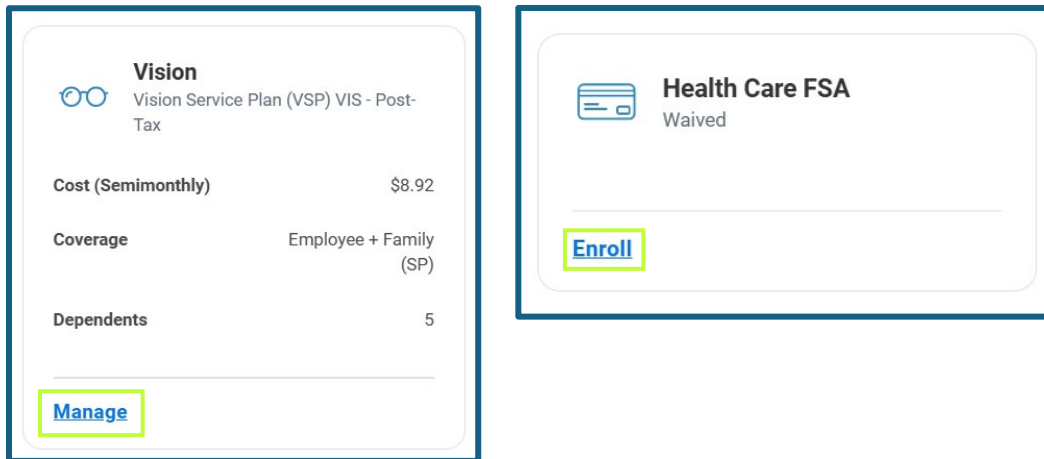
The pop-up window contains the following text and elements:

- You have submitted**
- Up Next: John Smith | Change Benefit Elections
- [View Details](#)
- Open** button

6. Click **Let's Get Started**.

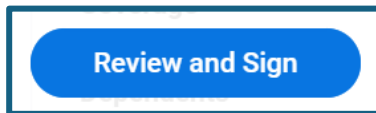


- This will bring you to a screen displaying each type of available benefits you can choose to enroll in. For each that requires enrollment or update, click **Manage** to make changes to existing benefits, or **Enroll** to add new benefits which you had not previously enrolled in (if applicable). Click **Confirm and Continue** to proceed with any required fields as appropriate.



The screenshot displays two benefit cards. The first card, titled 'Vision', shows 'Vision Service Plan (VSP) VIS - Post-Tax' with a cost of \$8.92 (Semimonthly), coverage for 'Employee + Family (SP)', and 5 dependents. A 'Manage' button is highlighted with a green box. The second card, titled 'Health Care FSA', shows 'Waived' and an 'Enroll' button highlighted with a green box.

- Once complete, click **Review and Sign** and proceed to complete enrollment.



- Scroll the page to review your **Selected Benefits**, **Waived Benefits**, and **Total Benefits Cost**. Add any additional **Attachments**, if applicable. Click **I Accept** under the Electronic Signature section. Then, click **Submit**.

