# Quick Start Guide: Manage Your Benefits

Within Workday, you can manage your benefits by reporting coverage change events and viewing and editing your benefit elections. This quick start guide covers various events. Please contact benefits@proofpoint.com if you have further questions.

CHANGING YOUR BENEFIT ELECTIONS OUTSIDE OF OPEN ENROLLMENT

Life events do not always line up with enrollment periods. If you need to change your coverage because of a birth, death, marriage, divorce, or similar life event, you may be eligible to change your benefits to better fit your needs.

Find the Benefits application on your welcome page in Workday. Please note: Your list of applications may be different based on your role.
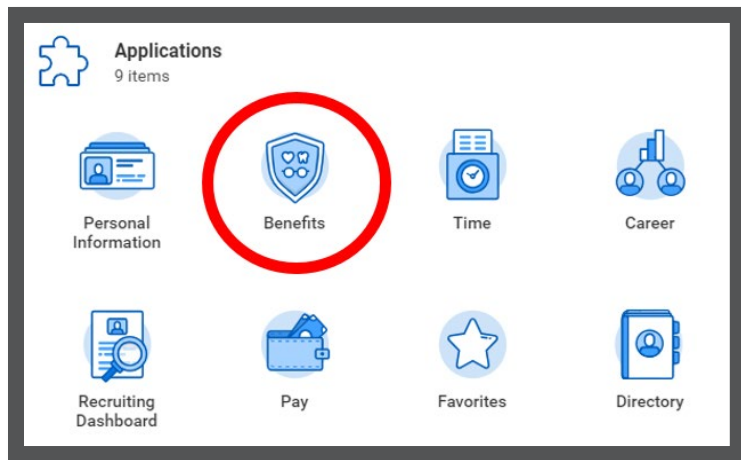
From the Benefits application:

1. Click the **Benefits** button under Change.

2. Select the **Benefit Event Type**.

3. Click the **Calendar** icon to enter the date of the Benefit event.

4. Attach required documents, if applicable.

5. Click **Submit**, then click **Done**.

Note: Your submission will go to the Benefits Partner for approval. Once approved, you will continue to the next steps.

6. Navigate to your **Inbox**.

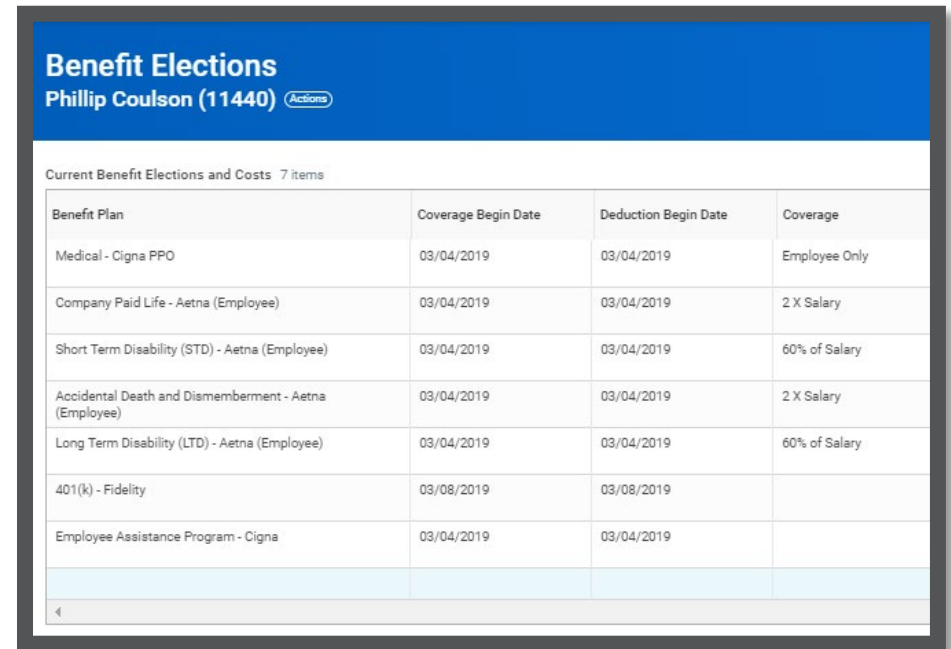**7.** Click the **Benefit Event** task.

8. Complete and continue through all required screens. Check the **I Agree** checkbox to provide an electronic signature, confirming your enrollment changes and/or cost changes (if applicable).

9. Click **Submit**. Click **Print** to launch a printable version of the summary for your records. Click **Done**

VIEW AND EDIT BENEFIT ELECTIONS

From the Benefits application:

1. Click the **Benefit Elections** button under View.

2. Review your benefit elections and costs.

Benefit Elections
Phillip Coulson (11440) (Actions)

Current Benefit Elections and Costs 7 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage
Medical - Cigna PPO	03/04/2019	03/04/2019	Employee Only
Company Paid Life - Aetna (Employee)	03/04/2019	03/04/2019	2 X Salary
Short Term Disability (STD) - Aetna (Employee)	03/04/2019	03/04/2019	60% of Salary
Accidental Death and Dismemberment - Aetna (Employee)	03/04/2019	03/04/2019	2 X Salary
Long Term Disability (LTD) - Aetna (Employee)	03/04/2019	03/04/2019	60% of Salary
401(k) - Fidelity	03/08/2019	03/08/2019	
Employee Assistance Program - Cigna	03/04/2019	03/04/2019	

3. Click your **Related Actions** button. (Actions)

4. Select **Benefits** > **Change Benefits**.

5. Enter all required information, denoted by asterisks, and make any permitted changes. Click **Submit**.
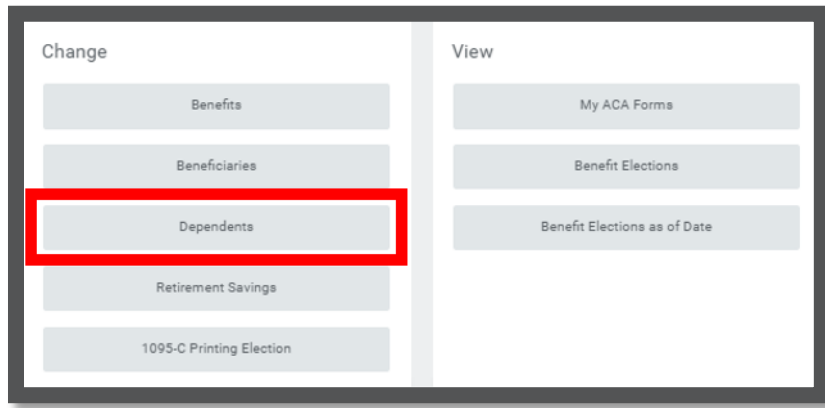
ADD DEPENDENTS

You may enroll your same or opposite sex spouse or domestic partner, as well as your children under the age of 26 to your medical, dental, and vision plans.

From the Benefits application:

1. Click the **Dependents** button under Change.

2. Click **Add**.

3. Click the **Edit** icon ✏ or click in the field to modify. Asterisks denote required fields.

> Note: Please add at least one form of ID when adding your dependents.

4. Click **Submit**.

VIEW DEPENDENTS' BENEFIT ELECTIONS

From the Benefits application:

1. Click the **Dependents** button under Change.

2. Review your existing dependents and their benefit plan coverage.

MANAGE BENEFICIARIES

A beneficiary is a designated individual who would receive your benefits if something were to happen to you. You can change, edit, and add beneficiaries from the Benefits application.

> Note: If you add an additional beneficiary, you may need to update your Benefit elections. Be sure to review your beneficiary designations on your life, AD&D, 401(k), and Equity plans.

From the Benefits application:

1. Click the **Beneficiaries** button under **Change**.

2. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking **Edit**.
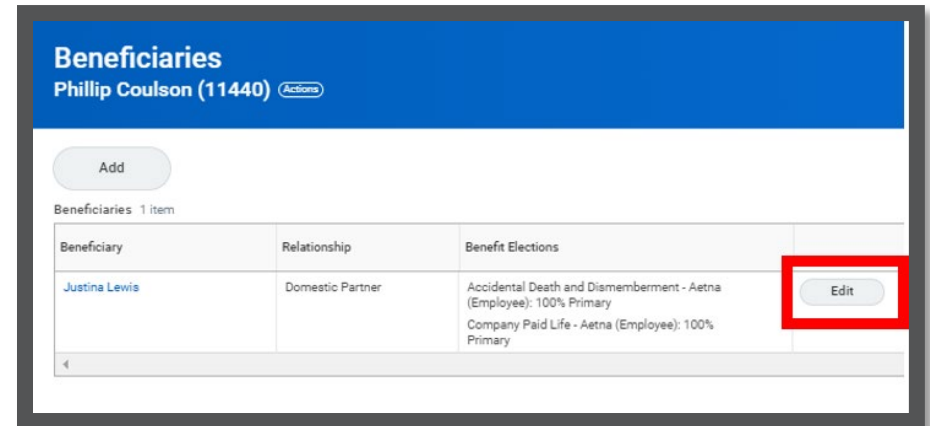
3. Click **Add** to add a new beneficiary. The **Add Beneficiary** page displays.

4. Select **Existing Dependent or Emergency Contact**, **New Person as Beneficiary**, or **New Trust as Beneficiary**. Click **OK**.

5. Enter all required information, denoted by an asterisk. Click **Submit**.
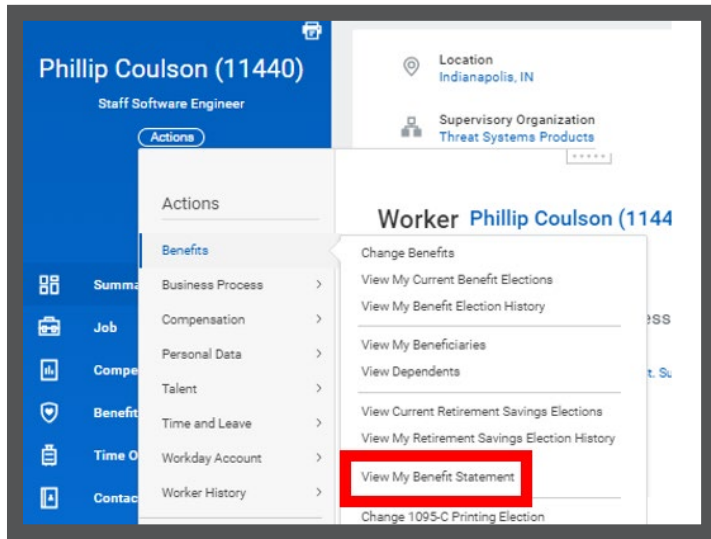
PRINT BENEFITS STATEMENT

Navigate to your Profile Icon. Your Profile Icon can be found at the top right corner of the welcome page in Workday. Your icon will be your profile picture or a cloud icon, if your profile picture is not available.

1. Click the **Profile** icon > **View Profile**.

2. Click the **Actions** button. Actions Select **Benefits** > **View My Benefit Statement**.

3. Click the **prompt** in the Benefit Event field.

4. Select the desired Benefit Event you would like to view and print.

5. Click **OK**. Click the **Print** icon. The selected Benefit Event will open as a PDF document, which can be saved and printed.