

Workday Curriculum Guide – Benefits

This guide presents instructional materials pertaining to Benefits. These topics cover benefits, retirement, dependents, and more. Each topic is hyperlinked to its webpage on Workday Help. Materials are presented in one of these formats:

- **Webinars** are recordings of live seminar sessions presented by Workday Services.
- **Job Aids** are step-by-step instructions for a specific process.
- **Reference Guides** contain useful information and data on a topic.

Topics are organized into three separate tables. Reference each according to your needs.

- **Priority for New Hire** covers topics related to new hires.
- **Priority during Summer** lists topics relevant during the summer season.
- **Reference as Needed** covers other various topics.

For each table, we recommend that you view the materials in the order they are presented allowing that you are the Target Audience. This way you will not skip over important information in a previous topic.

Priority for New Hire

Workday Topics	Format	Target Audience	Description
<u>Benefit Events and Explanations</u>	Reference Guide	Benefits Partner, Retiree Partner	This reference guide provides information on various benefit events, the coverage types associated, waiting periods and important dates.
<u>Custom Other IDs</u>	Reference Guide	Benefits Partner, Retiree Partner	This reference guide explains the Custom Other IDs that are used for Benefits, Payroll, Staffing, and Time/Absence, their possible values, and how the IDs are used.
<u>Change Benefits (Beneficiary Change Only)</u>	Job Aid	Employee	This job aid outlines the process for an Employee to add or edit a Beneficiary and make changes to coverage eligible for change outside of a qualifying life event or Open Enrollment.
<u>Change Benefits (Life Event)</u>	Job Aid	Employee	This job aid outlines the activities for an Employee to change benefits for a life event such as marriage, a birth or adoption, divorce, tobacco usage, etc.
<u>Change Benefits (TDA Plan Change)</u>	Job Aid	Employee	This job aid outlines the activities for an Employee to set up a Tax Deferred Account (TDA) Plan in Workday.
<u>Set up Benefits to Begin Prior to SGIP</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the process Benefits Partners must follow in order to set up benefits for employees who would like to start benefits prior to their SGIP start date. This process applies to employees who are new hires to the A&M System and to current

Workday Topics	Format	Target Audience	Description
			employees in a non-benefits eligible position who have received a Job Change that is benefits eligible.
<u>Review and Certify Dependents</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for Benefits and Retiree Partners to review and certify Dependents, including grandchildren for the purpose of adding Benefits coverage.
<u>Ready to Retire</u>	Job Aid	Benefits Partner	This job aid outlines the activities for a Benefits Partner to prepare an Employee's record in Workday in preparation for their upcoming retirement.
<u>ORP Newly Eligible on Date of Hire (Benefits Partner)</u>	Job Aid	Benefits Partner	This job aid outlines the activities for a Benefits Partner to initiate an ORP benefit event for a newly hired Employee who is eligible for ORP on the date of hire.
<u>Review ORP Eligibility Document</u>	Job Aid	Benefits Partner	This job aid details the activities for a Benefits Partner to provide the ORP Information Acknowledgement Statement to an ORP eligible worker during the Hire or Change Job business process.
<u>Additional Data Custom Objects</u>	Reference Guide	Benefits Partner, Retiree Partner	This reference guide provides information on various Custom Objects: Insurance Billing, Preservation Hold Custodian, Retiree Electronic Communication, etc.
<u>Complying with Affordable Care Act</u>	Webinar	Benefits Partner, HR Support Staff	Learn all the basics of ACA compliance, including applicable Federal mandates, System Benefits policies, Workday reports to run, and Benefit Partner actions.
<u>Leave of Absence</u>	Reference Guide	Benefits Partner	This reference guide explains when the Benefit Partner will need to take action on events triggered by the Request Leave of Absence business process and provides information on benefit coverage, SGIP, handling arrears, summer billing, and military leave dependents.
<u>Finalize ORP and Enter ORP Waived Custom ID</u>	Job Aid	Benefits Partner	This job aid outlines the activities for a Benefits Partner to finalize an ORP event if the Employee has not enrolled by the due date.
<u>Manage Evidence of Insurability for Your Employee (Benefits or Retiree Partner)</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefits Partner or Retiree Partner to Manage Evidence of Insurability (EOI) for an Employee when EOI is not required (e.g., switching out of a grandfathered life plan).

Workday Topics	Format	Target Audience	Description
<u>Managing Medicare Information for your Employee</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the process for a Benefits Partner or Retiree Partner to add Medicare information such as the Medicare Beneficiary Identifier (MBI) number and enrollment dates.
<u>Update Benefits Annual Rates (BARs) for an Employee (Benefits or Retiree Partner)</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid details the steps for a Benefits Partner or Retiree Partner to update Benefits Annual Rates (BARs) for an Employee, former Employee returning to retire, or a Retiree.

Priority during Summer

Workday Topics	Format	Target Audience	Description
<u>Complete Alternate Open Enrollment</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefits or Retiree Partner to cancel Open Enrollment Benefits elections for an individual who is adding, dropping, or changing medical coverage and launch the Alternate Open Enrollment business process, during the Open Enrollment period.
<u>Complete Open Enrollment for Your Employee</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefits/Retiree Partner to complete or change Open Enrollment Benefits elections during the Open Enrollment time period on behalf of the Employee
<u>Relaunching Open Enrollment</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefits/Retiree Partner to cancel, rescind, and relaunch the Open Enrollment event for the reasons of updating an Employee's Additional Data questions, a change in benefit group, or a job change with a change in status for the Employee.
<u>Summer Appointments (Faculty and Graduate Assistants)</u>	Reference Guide	Benefits Partner, HR Support Staff	This reference guide explains best practice guidance for when making an additional appointment for Faculty and Graduate Assistants during the summer months to avoid a disruption to benefits for the Employee.
<u>Open Enrollment 2021 - Staffing Changes</u>	Webinar	Benefits Partner, Retiree Partner, HR Support Staff	Summer staffing events with effective dates on or before September 1 can impact an Employee's benefit plan. If you are adding an additional job, changing the pay frequency from biweekly to monthly, increasing or decreasing scheduled hours, or changing from 12-month to 9-month terms, this is the webinar for you. In this webinar, you will learn best practices and actions that are necessary when

employment changes are effective the beginning of the fiscal year.

Reference as Needed

Workday Topics	Format	Target Audience	Description
<u>Add a Graduate Fellow</u>	Job Aid	Benefits Partner	This job aid outlines the activities for the Benefits Partner or Retiree Partner to add a Graduate Fellow in Workday, as well as the tasks the Graduate Fellow will need to complete such as editing personal and contact information and Government IDs.
<u>Add a Surviving Dependent</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefits Partner or Retiree Partner to add a Surviving Dependent in Workday using the Hire and Onboarding business processes.
<u>Death of Dependent</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefits or Retiree Partner to update an Employee or Retiree's health coverages due to the death of a Dependent.
<u>Death of Retiree</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the process for the Retiree Partner to complete a change benefit event business process for a Retiree with the reason of death.
<u>Cancel or Rescind a Benefit Event</u>	Job Aid	Benefits Partner, Retiree Partner	This job aid outlines the activities for a Benefit Partner to edit a Benefit Event by using the Cancel or Rescind business process.