EMPLOYEE JOB AID
ENROLL IN OR CHANGE BENEFITS

Employees can use this guide when they need to enroll in benefits as a New Hire, during the firm’s annual Open Enrollment, or if they need to change their benefits due to a qualifying life event. Qualifying Life Events include:

- Birth/Adoption of a Child
- Employee or Dependent Gained Coverage Elsewhere
- Employee or Dependent Lost Coverage Elsewhere
- Legal Marriage Status Change – Divorce
- Legal Marriage Status Change – Marriage
- Health Savings Account (HSA) Election Change
- Dependent Care Flexible Spending Account (FSA) Election Change
- Dependent Life Election Change
- Supplemental AD&D Election Change

NOTE: For New Hires, once enrollment has been successfully completed, you will not be able to make additional changes to your benefit elections via Workday. If you need to make additional changes within your 31-day new hire window, you will need to contact the Help Desk.

NOTE: For more information, please refer to totalrewards.bah.com or visit Alex, our online Benefit Advisor Tool, for additional details on the firm’s benefit offerings including plan overview documents and instructions on finding in-network providers.

1. During New Hire Onboarding or during Open Enrollment, you will receive an Inbox Action to complete your Benefits Elections.
2. If you need to make changes due to a life event outside of your New Hire event or the annual Open Enrollment, click on the Benefits worklet.

3. Under Change, you have the option to select and make changes to your Benefits, Dependents, or Beneficiaries. Click on Benefits.

4. Select the appropriate Benefit Event Type from the menu.
   NOTE: You will need to upload supporting documentation before proceeding if you are losing or gaining outside coverage due to a life event.

5. Select the Benefit Event Date. The Submit Elections By date and the Enrollment Offering Types fields will auto-populate.
6. When you are ready, click **Submit** to create the event.

7. Next, you receive an **Inbox Action** to **Change Benefit Elections**.

![Inbox Action](image)

8. Make your enrollment elections by selecting **Elect** and choosing the appropriate **coverage level** from the dropdown menu to the right of the listed benefit. Once the coverage level has been selected, you can add the dependents that you wish to cover.

![Change Benefit Elections](image)

9. **NOTE:** Only certain benefits will be open for changes depending on the type of life event you experience. You will only be able to make changes to benefit options that are open for edits.

**NOTE:** ‘DP’ stands for Domestic Partner.

10. After making your elections and entering dependents, scroll to the bottom right of the window to view your updated total.

11. You can click **Continue** or **Save for Later**.

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NOTE: If you added a dependent as part of a benefits change, you will be asked if you want to add them as a beneficiary. If yes, enter their information on the next page and click Ok.

NOTE: If you are adding a new dependent, you must enter their Social Security Number or choose Not Available if you do not have access to their SSN at this time. You must then follow up with the Benefits Department to update this missing information once it is available.

12. Review your Health Care Elections and click Continue.

13. Follow the prompts on the screen to complete the process. If you are eligible, you will have the ability to make updates to other elements of your benefits:
   - Health Savings Account (HSA)
   - Healthcare and/or Dependent Care Flexible Spending Account (FSA)
   - Life and Basic Accidental Death and Dismemberment (AD&D) Insurance
   - Short and Long Term Disability
   - Beneficiary Designations
   - Legal Benefits

   NOTE: Please contact the vendors directly for enrollment in the following plans: Pet Insurance, Commuter, Home and Auto, Supplemental Disability (available to Vice Presidents and Officers), College Savings, and Long Term Care.

14. Review the summary of your Elected Coverages. If the coverage is correct, complete the Electronic Signature by checking I Agree.

15. Click Submit to complete this process.

   NOTE: You can print a PDF of your benefit elections from this final screen.