

Change Benefits - Employee Going from Temporary to Permanent

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PURPOSE

Use this event only when a temporary employee was eligible for benefits, then became a permanent employee.

NOTES

This event will not go to the employee to complete; it is to be completed by the HR Partner. Before the event is launched, the HR Partner should either have the employee complete paper forms for the elections for which she/he is newly eligible or plan to have the employee sit with the HR Partner when the enrollment part of the event is completed.

You will have a To Do: Transfer Employee - Benefit Change in your Inbox if you transferred an employee from Temporary to Permanent. This will appear after the approval from State Personnel and State Budget (if required) are completed.

The Job Change event to make the employee Permanent must be completed prior to initiating Temp to Perm Benefit Event.

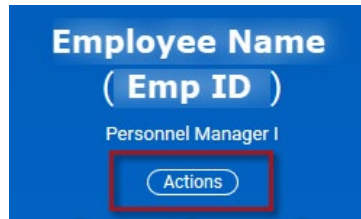
LOG IN TO WORKDAY

1. Log in to Workday from this page, <http://link.nebraska.gov/>.
 - a. **If you have an @nebraska.gov email**, click the first link that says, "Log in with your @nebraska.gov email." On the next screen, type your email address and your email address password.
 - b. **If you do NOT have an @nebraska.gov email**, click the second link that says, "Log in with your User Name / Workday password." On the next screen, type your User Name and Workday password.
2. Click Sign In (or press Enter).

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CHANGE BENEFITS - EMPLOYEE GOING FROM TEMPORARY TO PERMANENT

1. Search for and click the record for the specific employee, using her/his name or her/his Employee ID.
2. Click **Actions** beneath the employee's name, then hover over **Benefits** and click **Change Benefits**.



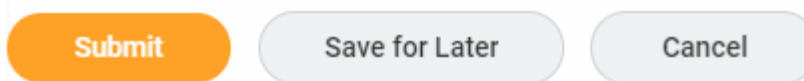
4. In **Change Reason**, click the drop-down arrow, scroll to and click **Temporary to Permanent Employment**.

Change Reason * Temporary to Permanent Employment ▼

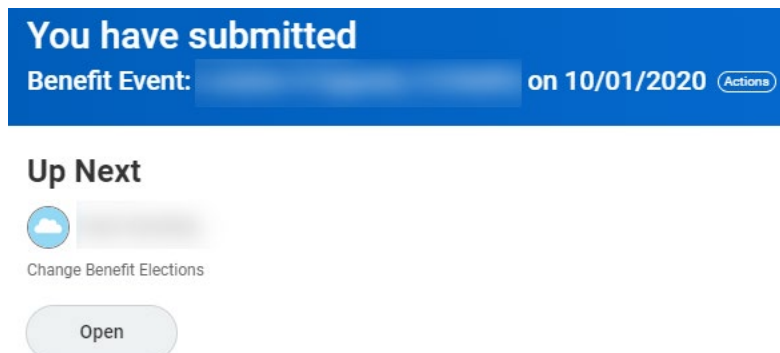
Benefit Event Date * 10/12/2020 

Submit Elections By * 11/10/2020 

3. In the **Benefit Event Date** field, enter the effective date of the Job Change event. The Benefit Event Date for the Temporary to Permanent event will always be the date the employee became permanent with your agency.
4. DO NOT enter a date in the **Submit Elections By** date field ... the date will automatically populate with the last day the employee can open the event.
5. Click **Submit**.



6. Once you submit the event, the following window will open for the HR Partner. Click Open to complete event.



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7. On the next screen, click Let's Get Started.

Change Benefit Elections

Initiated On 10/09/2020

Submit Elections By 10/10/2020

Let's Get Started

SELECTING THE BENEFIT ELECTIONS FOR THE EMPLOYEE

When proceeding through the event, click each of the tiles that the employee wants to change. These will each default to the enrollment that the temporary employee had prior to becoming permanent, IF she/he had prior enrollments.

NOTES

- If the Temporary employee was eligible for the LTD, STD, and Dependent Care Flexible Spending Plan and did not elect them while a temporary employee, she/he cannot elect them at the time of becoming permanent.
- The Medical, Dental, LTD, STD, Health Savings Account and Dependent Care Flex plans will default to the current enrollments.
- The enrollment eligibility for the benefit start date has already been written into the event rules.
- All enrollments (if any) for Medical, Dental, LTD, STD, Health Savings Account, and Dependent Care Flex plans will start the first of the month following the event.
- All enrollments for Vision, Medical Flexible Spending, and Life Insurance will follow the new hire rule of starting the first of the month following 30 days of permanent employment.
- After clicking Confirm and Continue in each tile, you may be asked to pick a level of coverage, or assign a Beneficiary or Dependent.

MEDICAL, DENTAL, VISION

The employee can newly-elect the Vision coverage. Medical and Dental coverage levels can be newly elected or increased. This includes the following Elections (see screenshot next page).

- Medical
- Dental
- Vision
- HSA
 - To be eligible to elect the HSA, you must first elect the Consumer-Focused Health Plan.
 - **You may not elect both an HSA account and the Medical FSA account.**

1. Click Enroll on any tile and make any changes.

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2. Click Confirm and Continue.

Temporary to Permanent Employment
Temporary to Permanent Employment for [Employee Name]

Projected Total Cost (Semi-monthly)
\$93.15

Health Care and Accounts

Medical
United Health Care Regular Plan

Cost (Semi-monthly)
Coverage

Manage

Additional Benefits

W-2 Elections
State of Nebraska W-2 Election

Coverage

Manage

Enroll

DEPENDENT AND MEDICAL FLEX

The employee can only newly elect Medical Flex. Dependent Flex will continue with the previous enrollment. Click Enroll on the Medical Flex tile, make any changes, and then click **Confirm and Continue**.

1. Type an amount either in the Per Paycheck field or in the Annual field. (The other one will populate with the correct amount.)
2. Click **Save**.

INSURANCE PLANS

The employee is newly eligible for all life plans and can make any election. This includes any of the following Elections.

- Optional Supplemental Life
- Dependent Life

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- Accidental Death and Dismemberment (AD&D)
 - If you select any of the above, you will need to designate the Coverage and/or designate the Beneficiaries after you click **Confirm and Continue**. For all insurance plans elected, the coverage and the Basic Life Beneficiaries must be assigned.
 - The HR partner can create the Beneficiaries at this time or have the employee complete that step prior to doing the enrollment event.
 - All percentages for Primary and Contingent Beneficiaries must equal 100%.
- 1. Click Enroll on any Insurance tile.
- 2. Click Select and then click **Confirm and Continue**.
- 3. Select Coverage, when applicable.
- 4. When done with the Election, click **Save**.

W-2 ELECTIONS

The employee must designate if she/he wants to receive their W-2 electronically or via regular mail.

1. Click Manage on the W-2 Elections tile, click Select, and then click Confirm and Continue.
2. On the next screen,
 - a. Select No to elect to have a paper W-2 mailed to you, OR
 - b. Select Yes for an electronic copy.
3. Click **Save**.

BENEFIT ELECTIONS REVIEW

1. When you are done making Elections, click **Review and Sign**.
 - a. Review the list to make sure everything is selected, as appropriate.
2. If Yes, click **I Agree** at the bottom of the Electronic Signature page.
3. Click **Submit** to submit your enrollment elections for the newly permanent employee, or:
 - a. **Save for Later** – Save the process and submit later.
 - b. **Go Back** – Go back to the previous pages in the event.
 - a. **Cancel** – Cancel anything entered on the current page. The event will go back to the tiles page with the recent changes saved.

NOTES

- If you click Save for Later, you will have to go back into the event, and **Review and Sign** to finalize the event.
- When the process has been submitted successfully, you will see this message, **Success, You're Enrolled**.
- Click the **View 2020 Benefits Statement** to review the changes and/or print a copy.

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ADDITIONAL STEPS

1. The submitted event will be sent to the Benefits Team to review and approve.
 - a. If the Benefits Partner does not have all the correct documentation, she/he will send the process back to the HR Partner and reach out to the HR Partner to coordinate making the necessary corrections.
 - b. If the dates of the process are incorrect, the request will be cancelled and will need to be re-done with the correct date. The Benefits Partner will coordinate with the HR Partner about the corrections.
 - c. The HR Partner will make the necessary changes and add required attachments or comments.
2. The Benefits Partner will receive the event to review again. If everything is in order, the Benefits Partner approves the event. The benefit changes will update for the employee according to the submitted elections and the set event date.
3. Once approved, the HR Partner will receive a **To Do: Review for Retro Adjustments** in her/his Workday Inbox.
 - a. The To Do is a reminder for the HR Partner to validate whether any retro adjustments need to be made to the employee's benefit deductions in E1.
 - b. FYI, we now have a Quick Reference Guide to help you with the Review for Retro Adjustments process.
4. Click the **To Do**.
5. Click **Submit**.

The Life Event enrollment is complete.

LINK HELP DESK CONTACT INFORMATION

1. The LINK Help Desk supports Workday. Email: as.linkhelp@nebraska.gov; Phone: 402.471.6234.