Workday
Reference Guide
Table of Contents

Introduction........................................................................................................................................... 3
Obtaining Your Workday ID.................................................................................................................. 3
Logging In................................................................................................................................................ 3
Viewing Your Benefits............................................................................................................................. 4
Completing your Open Enrollment.......................................................................................................... 5
Support .................................................................................................................................................. 9
Initiating a Life Event and Changing Benefits .................................................................................... 9
Electing or Changing Benefits.............................................................................................................. 11
Adding a Dependent............................................................................................................................. 12
Appendix: Supporting Documentation for Qualifying Life Events.................................................. 13
Appendix: Using the Workday Mobile App.......................................................................................... 14
Introduction

Workday is a cloud-based application that is part of the Statewide Personnel System (SPS) used by the State of Maryland and Towson University that enables TU faculty and staff to manage their employee benefits online. Currently, you can view your enrolled benefits and your dependent information in Workday. Changes or new election of benefits can be made if you are a new hire, have a qualifying life event, or during the annual Open Enrollment period.

This reference manual will step you through the process of logging into Workday, navigating around the environment and managing your benefit package including viewing your current benefit choices and monthly costs, enrolling for the first time, or making changes due to a qualifying life event.

Obtaining Your Workday ID

1. Open your preferred web browser and navigate to inside.towson.edu.
2. Select PeopleSoft HCM from the top links.

3. Login with your NetID and Password. You will have to authenticate via Duo to be granted access to the system.
4. Once logged in, you will see your Personal Data Summary. Locate your Benefits ID. This is your Workday Benefits ID. You will need to remember this for all login attempts.

Logging In

1. From your favorite browser, type towson.edu/workday.
2. Under Manage Benefits in Workday, click the login to Workday link. The Workday login screen will appear.

Note: You can also bookmark the exact website: https://wd5.myworkday.com/wday/authgwy/stateofmaryland/login.html
3. Enter your **Workday Benefits ID** in the **Username** field.

![Workday Login Screen](image)

**Figure 3**

4. Enter the temporary **Password** required for the first login which is as follows:
   a. Capital first letter of first name
   b. Lower case first letter of last name
   c. 4-digit birth year
   d. Last 4 digits of social security number
   e. $ [the special character above the 4 on your keyboard]

   **Note:** New Hires, you will receive an email with your temporary password within three weeks of starting at TU. For all current staff:

5. You will be required to change your password. Enter the old password and your new password in the fields and click **Submit**.

6. You will then be asked to enter security questions. Choose questions from the dropdown fields and provide your own answer in each field. When finished, click **Submit**.

### Viewing Your Benefits

7. After logging in, click on the **Benefits** worklet in the **Applications** section.

![Applications Section](image)

**Figure 4**

8. In the **View** section, select **Benefits**.

9. A list of all of your benefit elections and dependents, along with associated monthly costs will appear.

   **Note:** You cannot make any changes to Personal Information in this system.
Completing your Open Enrollment

All State of Maryland Employees/Retirees will have access to online Open Enrollment. Open Enrollment begins October 15, 2019. If you are not making any changes, your current coverage will rollover to 2020, EXCEPT for Flexible Spending Accounts. You must re-enroll in FSA each year.

1. After logging in, click on Benefits Open Enrollment in the Announcements section on the Welcome page. If you do not have a Benefits Open Enrollment link, please email openenrollment.edu.

![Figure 5](image)

2. Click the Continue button to go to the Health Care and Accounts screen to enroll or change your elections.

![Figure 6](image)
3. The benefit elections are listed by category: Medical, Prescription, Dental, Healthcare FSA, Dependent Care FSA, Life Ins, etc. All elections from the previous plan year will populate EXCEPT the FSA. You can select the **Manage** or **Enroll** buttons to enroll or make changes to current elections.

![Image of Open Enrollment screen]

**Figure 7**

4. In this example, we will click the **Manage** button in the **Medical** section.

5. Click the **Select** button for the plan which you want to elect.

![Image of Medical Plans selection screen]

**Figure 8**

**Note:** You will only be able to select one of the plans. If you want to drop/remove coverage, click the **Waive** button. Then click the **Confirm and Continue** button to continue to select the dependents to be added to the plan, if applicable. You will not see the Dependents page if you selected to Waive coverage.
6. On the **Dependents** screen, check or uncheck the box beside each dependent you want to add or remove from the plan and then click the **Save** button.

![Dependents Screen](image)

**Figure 9**

7. If you want to add a new dependent, click the **Add** button. On the **Add my Dependent from Enrollment** page, you will see the REQUIRED supporting documentation for each dependent type. After clicking **OK**, proceed to enter all of the information for the new dependent including the SSN or ITIN, if the dependent has one. Then click **SAVE**. You will be returned to the **Dependents** page and will see your newly added dependent now displays and has been selected for coverage.

8. Add/attach the REQUIRED supporting documentation in the **Attachments** section of the Open Enrollment event.

**Note**: If you see a data issue with one of your current or newly added dependents (i.e., Typo in Name or Date of Birth, Relationship, etc), DO NOT add a new dependent. Proceed with elections with the current dependent and email openenrollment.edu with the dependent data issues; HR/Benefits will assist with the correction.

![Confirmation Message](image)

**Figure 10**

9. You will get a message that the changes have been updated but not submitted. Next, proceed to update the other plans as desired and then click the **Review and Sign** button once you are ready to submit your changes.

**Note**: You can also click the **Save for Later** button if you want to return at a later time to finish the elections.

**Disclaimer**: If you do not finalize (Review and Sign and Submit) your open enrollment changes before the end of Open Enrollment, your elections/changes will not go into effect January 1, 2020. Your elections by default will remain the same as your 2019 elections EXCEPT for FSA.
10. On the **View Summary** page, you can do a final review of the Selected and Waived benefits. The total monthly cost displays at the top right of the screen and the plan monthly cost next to each plan.

![View Summary Image](image)

**Figure 11**

11. In the **Attachments** sections, you MUST attach required supporting documentation if you have added a new dependent(s). If you have not added any new dependent(s), no attachment/documentation is required. To attach a document(s), click the **Select files** button and then browse to find the files that need to be uploaded, select and attach.

**Note:** LEGIBLE photos of documents are acceptable. Use the **Upload** button to attach more than one document.

12. In the **Electronic Signature** section, click the checkbox beside **I Accept** to certify your elections.

![Electronic Signature Image](image)

**Figure 12**

13. Click the **Submit** button to submit your Open Enrollment elections.

14. You will get a message that you have enrolled in benefit elections. Click the **View 2020 Benefits Statement** button to view and print your benefits statement or click the **Done** button to finish.

**Note:** With changes to online open enrollment, you will no longer receive a printed Confirmation Statement from DBM EBD. After printing, click the **Home** icon in the upper left-hand corner of the page to return to the **SPS Welcome page**.
**Note:** You can make changes to your Open Enrollment elections anytime during the Open Enrollment period. Open Enrollment will close for election changes at 11:59pm on November 14, 2019. To make election changes, return to the **Announcements** section on the **SPS Welcome page** and click the **Benefits Open Enrollment** link OR proceed to your **Benefits self-service** icon and click the **Change Open Enrollment** button at the bottom of the page in the **Current Cost** box.

Once Open Enrollment is closed at 11:59pm on November 14, 2019, no more changes can be made to elections for January 1, 2020. If a new dependent has been added, the required supporting documentation MUST be submitted/attached to your open enrollment event. **Any new dependent added with no or the incorrect documentation attached will be removed from coverage for January 1, 2020.** If you have any questions on the correct/required documentation, please review the **New Dependent Required Supporting Documentation** link on the **SPS Welcome** page in the **Announcements** section or email openenrollment@towson.edu for assistance prior to submitting your open enrollment elections.

The Workday Mobile can be used to view your benefits, but cannot be used for Open Enrollment.

**Support**

For technical assistance about your password or login issues, email TU_HRIS@towson.edu. For other questions, contact Yore Awodipe, Sr. Benefits Specialist at 410-704-6325 or via email.

**Initiating a Life Event and Changing Benefits**

You can only make a change to benefits outside of the Open Enrollment period if you have a qualifying life event. A qualifying life event includes, but is not limited to, the following: Birth/Adoption, Change in Dependent Status, Death, Divorce, Marriage, etc. The benefits Open Enrollment period takes place during the Fall of every year.

1. After logging in, click **Benefits** in the **Change** section.
2. From the **Benefit Event Type** dropdown, select a **Qualifying Event**.

![Figure 14](image)

3. Enter a date in the **Benefit Event Date** field. **Note:** Changes must be made within 60 days of a qualifying event. You will see this date appear in the **Submit Elections By** section once you have entered a **Benefit Event Date**.

![Figure 15](image)

4. Drop files or add attachments as supporting documents in the **Attachments** section. For a list of appropriate documentation, please see the table in the appendix to this guide.

![Figure 16](image)
5. Add any supporting comments in the **enter your comment** field and click **Submit**.

![Figure 17](image)

Once you submit the qualifying life event and the supporting documentation, the information will be reviewed and approved by the Employee Benefits Division of the State of Maryland System. You can expect to receive task in your Workday Inbox within 48 hours, confirming that you can change your benefit elections, or that additional information is needed.

## Electing or Changing Benefits

**DISCLAIMER:** The following steps were retrieved from the Job Aid provided by the Department of Budget and Management for the State of Maryland. We currently do not have access to the system to properly document the procedure. Your steps or process may be different. If you have any problems, please contact the Total Rewards Unit in the Office of Human Resources.

1. Once an employee’s event has been approved, a task will appear in the Workday portal (along with a notification via email).
2. Click the **Inbox** Icon to see the **Enroll** or **Change** task available to you.
3. Click **Continue**. You will be brought to the **Health Care Elections** page.
4. In the **Elect/Waive** column choose the Elect radio button for each of the benefit elections you desire.
5. When complete, click **Continue**.
6. The **Spending Account Elections** will now appear. **Note:** If you are temporary or contractual, this screen will not appear.
7. In the **Contributions** column, choose the amounts that you wish to elect. The **Supporting Information** column will give you Minimum and Maximum contributions allowed.
8. Click **Continue**. The **Insurance Elections** Page will appear.
9. In the **Elect/Waive** column, choose which Insurance plan you desire by selection the **Elect** radio button for each selection.
10. In the Coverage Level column, enter the amounts you desire for each insurance plan. The **Supporting Information** column will give you guidance toward the contributions allowed.
11. If elected, enter the names of dependents in the **Covers Dependents** column.
12. Click Continue.
13. On the **Benefit Elections Review** page, review your benefit elections and the total monthly cost for your benefit elections.
14. Click **Continue**. If you are a new hire, attach supporting - documentation for each dependent.
15. In the **Electronic Signature/Legal Notice/Dependent Attestation** screen, check the **I Agree** box, enter any comments.
16. When finished, click **Submit**.
17. On the next screen, click the **Print** button to print a summary of your benefit elections. Note: if you do not do this now, you will not be able to print anything until benefit elections have been confirmed by the State of Maryland.

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## Adding a Dependent

Use this procedure to add a dependent for benefits. Dependents can only be added to benefits when an enrollment event (i.e., New Hire Enrollment, Open Enrollment, Life Event Change) is being completed.

On the **Health Care Elections** page of **Change Benefits Elections**, select the item(s) to elect under health care elections.

Use the prompt icon in the **Enroll Dependents** field to enroll dependents for benefits.

To add a new dependent, select the **Add My Dependent From Enrollment** menu item.

In the **Add My Dependent From Enrollment** screen choose the **No** radio button for each selection. Note: These options exist for employees outside of the University System.

Click **OK**.

Complete each of the fields for your new dependent.

In the **National ID’s** section click the **Add** button

Choose the **Country of Nationality** and then select the **National ID Type** (Social Security Number or Tax Identification Number)

In the **Identification#** field, enter the number assigned to the dependent. **Note:** Most newborn dependents will not have a Social Security Number assigned. You will not need to enter a number in this field, but you will be prompted for a reason on a later screen.

When all fields are complete, click **OK**.
# Appendix: Supporting Documentation for Qualifying Life Events

When making changes to benefits due to a qualifying life event, supporting documentation must be scanned and uploaded in the Workday system. The required documents for the most typical life events, and the file naming conventions are shown below.

Information on supporting documentation for adding other legal dependents can be found in the State of Maryland Benefits Guide.

<table>
<thead>
<tr>
<th>Life Event</th>
<th>Supporting Documentation</th>
<th>File Naming</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth of a child</td>
<td>Birth Certificate*</td>
<td>W#BC&lt;Child’s first name&gt;</td>
<td>Temporary proof of birth for newborns is acceptable, e.g. a crib card, discharge papers, letter from hospital. Once issued, the birth certificate must be uploaded to Workday.</td>
</tr>
<tr>
<td>Marriage</td>
<td>Official State Marriage Certificate</td>
<td>W#MC&lt;Spouse’s first name&gt;</td>
<td></td>
</tr>
<tr>
<td>Loss of Coverage</td>
<td>Letter or notice from other employer, including date coverage ended or will end, covered dependents, and the benefit plans lost</td>
<td>W#Eform</td>
<td>When uploading in Workday, put a note in the comment section identifying the Life Event.</td>
</tr>
<tr>
<td>Gain of Coverage</td>
<td>Job offer or letter from other employer, including date coverage began or will begin, covered dependents, and the benefit plans gained</td>
<td>W#Eform</td>
<td></td>
</tr>
<tr>
<td>Divorce</td>
<td>Legal divorce -decree</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Death of dependent</td>
<td>Death Certificate</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please direct questions about life events, to the Total Rewards Unit in the Office of Human Resources at 410-704-2162.
Appendix: Using the Workday Mobile App

1. From the App Store on your mobile device, search for **Workday**.

![Figure 18](image)

2. Download the App and launch it.

3. Accept the Terms and Conditions.

![Figure 19](image)
1. On the screen asking for the name of the company you work for, select the gear icon in the top left corner of the screen. The settings screen will appear.

2. On the settings screen enter stateofmaryland in the Tenant field and change the web address to https://wd5.myworkday.com

3. Tap Save. You will be brought to the sign in screen.
4. Log in with your **Workday Benefits ID** and password.

5. You will be prompted to enter a six-digit pin code to make the login process easier. When complete, you will be brought to the main dashboard.

![Create a PIN for a fast alternative way to log in](image)

*Figure 22*