

# Workday 2024 R2 Release Impact Analysis

Benefits

2024

# Benefits



# Automatically available features

# Benefits automatic features

Cognizant Consultants have prepared a list of automatic features for the upcoming 2024 R2 Workday release. These features are delivered automatically by Workday and no set up is required from your end.

## Benefits

- Benefit Elections User Experience Redesign
- SOAP Import Web Service for Benefits

# Benefit elections user experience redesign

## What's changing

The Benefit enrollment landing page and Current Elections summary is transitioning to the card framework workers' view of their benefit elections.

The new cards framework provides a quick-glance view of a greater variety of information, offering a more organized experience for your employees as they manage their benefits

## Additional considerations

The worker's experience is improved when managing their benefits with the card framework, which provides a quick-glance view that is consistent throughout Benefits. We update the worker's view of their current benefit elections from the grid to the card format in these locations:

- \* The Benefit Election tab in the Benefits and Pay Hub.
- \* The Benefits tab in the worker's Profile.
- \* The Current Benefit Elections page, when you select Benefits > View My Current Benefit Elections from the related actions menu of worker's Profile.

Workers can click the new View as Grid button to see their elections as a grid and to print or download as a spreadsheet.

## What do i need to do?

Automatically Available

## What happens if i do nothing?

None

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/7390460.html>

# Workday 2024 R2 automatically available features

Prior to 2024R2	Post 2024R2	Impact
<p>View expanded details for a benefit plan from the Benefit Elections page.</p>	<p>We improve the worker's experience of managing their benefits with the card framework, providing a quick-glance view that is consistent throughout Benefits.</p> <p>We update the worker's view of their current benefit elections from the grid to the card format in these locations:</p> <ul style="list-style-type: none"> <li>* The Benefit Election tab in the Benefits and Pay Hub.</li> <li>* The Benefits tab in the worker's Profile.</li> <li>* The Current Benefit Elections page, when you select Benefits &gt; View My Current Benefit Elections from the related actions menu of worker's Profile.</li> </ul> <p>Workers can click the new View as Grid button to see their elections as a grid and to print or download as a spreadsheet.</p>	<p><b>Y/N:</b> No</p> <p><b>Impact description:</b></p> <p>No impact.</p>

**Effort** N/A

Additional description if applicable

**Defect link** N/A

**Community link** <https://doc.workday.com/release-notes/en-us/hrbenenroll/7390460.html>

# Workday 2024R2 automatically available features

## Before release

**Benefit Elections**

Change Benefits    Change Retirement Savings

Current Benefit Elections and Costs 10 Items

Benefit Plan	Coverage Begin Date	Deduction Begin Date
Medical - Kaiser HMO	01/01/2023	12/16/2022
Dental - Delta Dental DPO Delta Dental	01/01/2024	12/16/2023
Healthcare FSA - Sterling Administration	04/01/2024	04/01/2024
Basic Life and AD&D - Prudential (Employee)	01/01/2022	01/01/2022
Supplemental Life - Employee -	01/01/2024	12/16/2023

## After release

**Benefit Elections**

My Semi-monthly Totals

My Cost \$373.50    Employer Cost \$358.45    Credits \$40.00

Change Benefits    Change Retirement Savings    View as Grid

**Health Care and Accounts**

**Medical**  
Blue Cross of Calif. PPO

Cost (Semi-monthly) \$131.00

Coverage EE + Family

Dependents 2

[View Details](#)

**Dental**  
Blue Cross of Calif. PPO

Cost (Semi-monthly) \$15.00

Coverage EE + Family

Dependents 2

[View Details](#)

**Insurance and Retirement**

**Basic Group Life**  
Liberty Mutual (Employee)

**Voluntary Supplemental Life**  
Liberty Mutual (Employee)

# SOAP Import web services for benefits

## What's changing

We deliver new templates for Benefits import web services (SOAP) to improve importance. We change from a 2-tab spreadsheet to a 1-tab spreadsheet that uses the Spreadsheet Key to coordinate the parent and child row information.

## Additional considerations

N/A

## What do i need to do?

Automatically Available

## What happens if i do nothing?

None

Community link

Not Applicable

# Workday 2024 R2 automatically available features

Prior to 2024R2	Post 2024R2	Impact
	<p>We deliver an updated EIB template for the Import Medicare Part D EGWP web service to improve performance and usability.</p> <p>The template now uses the Spreadsheet Key column to coordinate the parent and child row information. Previously, you used 2 tabs and managed the parent and child rows with the Header Key and Line Key columns.</p> <p>With this change, you use:</p> <ul style="list-style-type: none"> <li>• The same Spreadsheet Key value for each parent row as you add information.</li> <li>• The Spreadsheet Key to coordinate multiple child rows that roll up to the same parent row.</li> </ul> <p>Spreadsheet Key Values: Use an incremental value for each row. Example: Use 1 for the first row, 2 for the second row, and 3 for the third row.</p>	<p><b>Y/N:</b> Yes</p> <p><b>Impact description:</b></p> <p>This feature may require additional testing and may impact your training materials.</p>

**Effort** N/A

Additional description if applicable

**Defect link** N/A

**Community link** Not Applicable



# Setup required features

# Benefits setup based features

Cognizant Consultants have prepared a list of set-up based features for the upcoming 2024 R2 Workday release. These features require setup from your end.

## Benefits

- Benefit Credit Offsets for Unused Plan Credits
- Benefit Program Communication - Wallet
- Knowledge Base Articles for Benefit Plans
- Open Enrollment Journey Enhancements
- Worker Wellbeing Profile and Program Cards
- Benefits Messaging
- Cloud Connect for Benefits: Benefits Connector V2

# Benefit credit offsets for unused plan credits

## What's changing

Workday enables you to set up offsets from unused plan credits, which lets employees use leftover plan credits to reduce costs associated with their benefit elections during an enrollment event.

Administrators can easily specify how unused plan credits offset plan costs. Workers can easily see how these unused credits offset the costs of their benefits.

## Additional considerations

You can now specify how to apply unused benefit plan credits to health care, insurance, and additional benefits. Workers can now see how these unused plan credits are applied in the Current Benefit Elections and Costs report available on the Workday desktop app only.

We deliver a new grid, called Source Coverage Type for Unused Plan Credits, on the Benefit Credits tab of the Edit Benefit Group task. You can select coverage types from which you can apply unused credits.

## What do i need to do?

1. Access the **Edit Benefit Group** task. On the **Benefit Credits** tab, select the **Enable Remaining Benefit Credits** check box.
2. Configure the benefit coverage types from which unused plan credits can be sourced in the **Source Coverage Type for Unused Plan Credits** grid.
3. Configure the benefit coverage types in the order in which they're eligible for the unused plan credits to be applied in the **Offset Deductions with Benefit Credits** grid.

## What happens if I do nothing?

Workers won't be able to use unused plan credits to offset the cost of their benefit elections during an enrollment event.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8072666.html>

## Benefit credit offsets for unused plan credits (cont.)

### Additional considerations

You can then select which coverage types to apply the offsets to in the Offset Deductions with Benefit Credits grid. You can specify whether unused plan credits can offset plan costs for health care, insurance, or additional benefits plans. Workday applies offsets from benefit plan credits before benefit group credits.

We enhance these report fields on the Enrollment Event business object so that you can report on unused credit offsets:

- Remaining Credits per Group Frequency: The remaining amount of the credit, after applying it in the enrollment event, adjusted by the frequency of the benefit group.
- Benefit Group Credit per Benefit Group Frequency: The amount by which a benefit group credit reduces the benefit plan cost, adjusted by the frequency of the benefit group.

We add the new column, Net Cost, to the Current Benefit Elections and Costs report on the worker profile.

If you configure the Unused Plan Credits grid with a retroactive effective date, the changes apply to future dates as well.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8072666.html>

# Workday 2024R2 setup based features

Prior to 2024R2	Post 2024R2	Impact
<p>There is no grid called Source Coverage Type for Unused Benefit Plan Credits on the Benefit Credit Tab of the Edit Benefit Group task.</p>	<p>You can now specify how to apply unused benefit plan credits to health care, insurance, and additional benefits. Workers can now see how these unused plan credits are applied in the Current Benefit Elections and Costs report available on the Workday desktop app only.</p> <p>We deliver a new grid, called Source Coverage Type for Unused Plan Credits, on the Benefit Credits tab of the Edit Benefit Group task. You can select coverage types from which you can apply unused credits.</p> <p>You can then select which coverage types to apply the offsets to in the Offset Deductions with Benefit Credits grid. You can specify whether unused plan credits can offset plan costs for health care, insurance, or additional benefits plans. Workday applies offsets from benefit plan credits before benefit group credits.</p> <p>We enhance these report fields on the Enrollment Event business object so that you can report on unused credit offsets:</p> <ul style="list-style-type: none"> <li>• Remaining Credits per Group Frequency: The remaining amount of the credit, after applying it in the enrollment event, adjusted by the frequency of the benefit group.</li> <li>• Benefit Group Credit per Benefit Group Frequency: The amount by which a benefit group credit reduces the benefit plan cost, adjusted by the frequency of the benefit group.</li> </ul> <p>We add the new column, Net Cost, to the Current Benefit Elections and Costs report on the worker profile.</p> <p>If you configure the Unused Plan Credits grid with a retroactive effective date, the changes apply to future dates as well.</p>	<p><b>Y/N:</b> Yes</p> <p><b>Impact description:</b></p> <p>This may impact training materials.</p>

**Effort** 2 Hours

Additional description if applicable

**Defect link** <Hyperlink here if applicable>

**Community link** <https://doc.workday.com/release-notes/en-us/hrbenefenroll/8072666.html>

# Workday 2024R2 setup based features

## Before release

Group Rules   Benefit Plans   Cross Plan Dependencies   **Benefit Credits**   Benefit Plan Mappings

Enable Benefit Credits

Enable Remaining Benefit Credits

Display Benefit Credits in Enrollment

**Benefit Group Credits**

Benefit Group Credits

Earnings Code

Coverage Type Credits 0 Items

+	Coverage Type	Credits if Eligible	Cred
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Offset Deductions with Benefit Credits 0 Items

+	*Coverage Type
---	----------------

**OK** **Cancel**

## After release

Group Rules   Benefit Plans   Cross Plan Dependencies   Benefit Defaults   **Benefit Credits**   Benefit Plan Mappings

Enable Benefit Credits

Enable Remaining Benefit Credits

Display Benefit Credits in Enrollment

**Benefit Plan Credits**

Source Coverage Type for Unused Plan Credits 1 Item

+	*Coverage Type
-	x Medical ...

**Benefit Group Credits**

Benefit Group Credits

Earnings Code

Coverage Type Credits 1 Item

+	Coverage Type	Credits if Eligible	Credits if Elected
-	x Medical ...	x CAN Flex Credits - Add'l Dependents x CAN Flex Credits - Single x CAN Wellness Credit	

**OK** **Cancel**

# Benefit program communication - Wallet

## What's changing

Workday will deliver the ability to target program cards to workers that consolidate benefits information an employee might need on the go. Support for a future feature.

## Additional considerations

We deliver these web services to support the future Wallet section of the Benefits and Pay Hub:

- Get Wallet Opt-In Preference: For future use.
- Put Worker Benefit and Wellbeing Wallet Cards: For future use.

## What do i need to do?

Do Not Use.

## What happens if i do nothing?

Do Not Use.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8130034.html>

# Workday 2024R2 setup based features

Prior to 2024R2	Post 2024R2	Impact
N/A	<p>We deliver these web services to support the future Wallet section of the Benefits and Pay Hub:</p> <ul style="list-style-type: none"> <li>• Get Wallet Opt In Preference: For future use.</li> <li>• Put Worker Benefit and Wellbeing Wallet Cards: For future use.</li> </ul>	<p><b>Y/N:</b> No</p> <p><b>Impact description:</b></p> <p>Support for a future feature.</p>

**Effort** 1 Hours

Additional description if applicable

**Defect link** <Hyperlink here if applicable>

**Community link** <https://doc.workday.com/release-notes/en-us/hrbenenroll/8130034.html>

# Workday 2024R2 setup based features

## Before release

**Data Format**

File Type: Web Service Spreadsheet Template

Web Service Operation \*

Custom Object: No matches found

- Absence Management (Public) >
- Academic Advising (Public) >
- Academic Foundation (Public) >
- ACA Partner Integrations (Public) >
- Admissions (Public) >
- Adoption (Public) >
- Benefits Administration (Public) >

Extend App Ref ID

Extend Model Component

Back Next Close

## After release

**Data Format**

File Type: Web Service Spreadsheet Template

Web Service Operation \*

Custom Object: (empty)

Back Next Close

# Knowledge base articles for benefit plans

## What's changing

You can now link the last published version of an article that you create and publish with the **Create Article** task to a benefit plan.

We add the **Related Articles** field to the **Create Edit Plan**, **Edit Benefit Plan**, and **View Benefit Plan** tasks so that you can link the article to the plan.

**Note:** Workers can't access to the articles from the benefit plan during an enrollment event.

**Prerequisites:** Workday Help SKU.

**Security:** In the Help functional area, the segmented security group for benefits administrator needs:

Manage: Help Articles (Modify)

View: Help Articles

## What do i need to do?

Access **Maintain Article Categories** to create benefits article categories.

Set up security to give benefits administrators the ability to create knowledge base articles and add them to benefit plans. Create a segment-based security group to limit the categories benefits administrators have access to.

1. Access the **Create Security Group** task and select Segment-Based Security Group as the type. Name the new security group.
2. In the **Security Groups** field, select Benefits Administrator.
3. In the **Access to Segments** group, select categories in the **Knowledge Base Article Category** prompt that you want administrators to be able to use for creating and managing articles.
4. Give this security group modify and view permissions for the Manage: Help Articles domain.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8032479.html>

# Knowledge base articles for benefit plans (cont.)

## Additional considerations

See the **What Do I Need To Do?** section to learn about the segmented security group.

## What's Coming Next

We plan to assist benefit administrators by using AI to generate benefit-related articles using information already in Workday.

## What do i need to do?

Create articles and add them to benefit plans:

1. Access the **Create Article** task to author and publish articles.
2. Link an article to a benefit plan by accessing the **Edit Benefit Plan**. Select an article title from the **Related Article** field.

## What happens if i do nothing?

1. Benefits administrators can't organize knowledge base articles by benefit plan.
2. The **Related Article** field is automatically available on benefit plans. Without the Help SKU, you can't attach any articles to the plan.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8032479.html>

# Workday 2024 release 2 setup based features

Prior to 2024R2	Post 2024R2	Impact
N/A	<p>You can now link articles that you create and publish with the Create Article task to a benefit plan.</p> <p>We add the Related Articles field to the Edit Benefit Plan task so that you can link the article.</p> <p>Prerequisites: Workday Help SKU</p> <p>Security: In the Help functional area, the benefits administrator needs:</p> <ul style="list-style-type: none"> <li>• Manage: Help Articles</li> <li>• View: Help Articles.</li> </ul>	<p><b>Y/N:</b> Yes</p> <p><b>Impact description:</b></p> <p>This may impact your training materials.</p>

**Effort** 1.5 Hours

Additional description if applicable

**Defect link** <Hyperlink here if applicable>

**Community link** <https://doc.workday.com/release-notes/en-us/hrbenenroll/8032479.html>

# Workday 2024R2 setup based features

## Before release

The screenshot shows the 'Domain Security Policies for Functional Area' configuration page. The status is 'Suspended'. The description is 'Set up knowledge and case management. Manage articles, case creation from multiple channels, and the case lifecycle'. The allowed security group types are 'Article Version Sharing Security Group Type'. There are 9 securable actions and 11 securable reporting items. The report/task permissions are 0 items. The security groups section is empty. The securable reporting items by integration permissions are 11.

**Domain Security Policies for Functional Area** Help ⓘ 9/10

Description Set up knowledge and case management. Manage articles, case creation from multiple channels, and the case lifecycle.

Status Suspended

Manage: Article Sharing Versions

Domain Security Policy [Manage: Article Sharing Versions](#)

Status Suspended - Functional area not enabled

Allowed Security Group Types [Article Version Sharing Security Group Type](#)

Securable Actions 9

Securable Reporting Items 11

Report/Task Permissions 0 items

Security Groups

Securable Reporting Items by Integration Permissions 11

## After release

The screenshot shows the 'Domain Security Policies for Functional Area' configuration page after release. The status is 'Active'. The description is 'Set up knowledge and case management. Manage articles, case creation from multiple channels, and the case lifecycle'. The allowed security group types are 'Knowledge Base Authors' and 'Unconstrained Groups'. The domain description is 'This domain provides users with create and edit access to Help Articles'. There are 22 securable actions and 40 securable reporting items. The report/task permissions are 2 items. The security groups section contains 'Knowledge Base Content Administrator' and 'ISSG\_Knowledge\_Article'. The securable reporting items by integration permissions are 40. The integration permissions are 1 item. The security groups section is empty.

Implementation Preview - collaborative\_dpt5

MENU W dom sec fun

**Domain Security Policies for Functional Area** Help ⓘ 9/10

Description Set up knowledge and case management. Manage articles, case creation from multiple channels, and the case lifecycle.

Status Active

Help Article REST API

Help Case Data

Help External Records

Manage: Article Sharing Versions

Manage: Case Create About

Manage: Case Create on Behalf Of

Manage: Help Articles

Process: Help Cases

Reports: Help Case Management

Reports: Help Knowledge Managem...

Self-Service: Help Articles

Self-Service: Help Case Management

Set Up: Help Case Management

Set Up: Help Knowledge Management

View: Confidential Help Cases

View: Help Articles

Domain Security Policy [Manage: Help Articles](#)

Status Active

Allowed Security Group Types [Knowledge Base Authors](#)  
[Unconstrained Groups](#)

Domain Description This domain provides users with create and edit access to Help Articles.

Securable Actions 22

Securable Reporting Items 40

Report/Task Permissions 2 items

Security Groups

Knowledge Base Content Administrator

ISSG\_Knowledge\_Article

Securable Reporting Items by Integration Permissions 40

Integration Permissions 1 item

Security Groups

# Open enrollment journey enhancements

## What's changing

We add the task **Employee Benefits Open Enrollment Selection** as a task you can enable as a step in Open Enrollment Journeys. As your employees complete your configured Open Enrollment Journey, they'll now be able to access this task as a part of that Journey.

## Additional considerations

Note: Journeys is a separate product (SKU) that requires a separate license.

## What do i need to do?

- As you configure your Journey using the Open Enrollment template, select the new option **Employee Benefits Open Enrollment Selection** as a task step. To avoid duplicate notifications to users from the Business Process and Journeys, configure the Open Enrollment Business Process to exclude the step from displaying in My Tasks.
- Note: Your employee recipients must have access to Workday Journeys to use this feature.

## What happens if i do nothing?

The Open Enrollment template will function normally, but your employees won't access the **Employee Benefit Open Enrollment Selection** task in their Journey.

Community link

<https://doc.workday.com/release-notes/en-us/hrbencore/8050408.html>

# Workday 2024R2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	We add the task Employee Benefits Open Enrollment Selection as a task you can enable as a step in Open Enrollment Journeys. As your employees complete your configured Open Enrollment Journey, they'll now be able to access this task as a part of that Journey.	<p><b>Y/N:</b> Yes</p> <p><b>Impact description:</b></p> <p>This may impact your training materials.</p>

**Effort** 1 Hours

Additional description if applicable

**Defect link** <Hyperlink here if applicable>

**Community link** <https://doc.workday.com/release-notes/en-us/hrbencore/8050408.html>

# Workday 2024R2 setup based features

## Before release

N/A

## After release

### Tasks and Reports

[Employee Benefits Open Enrollment Selection](#)  
Report

# Worker wellbeing profile and program cards

## What's changing

We transition these Worker Wellbeing options from opt-in to automatically available (with set up required):

- The **Maintain Benefits Wellbeing Interests** task so that you can configure wellbeing categories and interests.
- The Wellbeing Interest Profile so that workers can select and update the wellbeing topics in which they have an interest.
- These report fields on the Benefits Wellbeing Interest Configuration business object: **All Benefits Program Cards - Wellbeing Interest, Enabled Benefits Program Cards - Wellbeing Interest,** and **Workers - Wellbeing Interest.**

## Additional considerations

We also enable benefit administrators to add wellness attributes to benefit program cards from the **Maintain Benefits Program** task.

Administrators can:

- Assign 1 wellness interest attribute to the partner program card.

## What do i need to do?

1. Access the **Configure Profile Summary** task.
2. Select **Worker Profile**.
3. Add a row and select the **Wellbeing Interests** option to add the card to the profile.

Add the **Benefits Wellbeing Interests** card to the **People Experience Workspace**.

1. Access the **People Experience Workspace** report.
2. Select **Cards**.
3. Select **Add Card**.
4. Select the **Benefits Wellbeing Interests** check box and click **Add**.
5. Click the **Unpublished** status prompt in the **Benefit Wellbeing Interests** row.
6. Select the Publish option to add the card to the Home page.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/7765487.html>

# Worker wellbeing profile and program cards (cont.)

## Additional considerations

- Choose the attribute from the delivered wellness interests that you have configured in the task, **Maintain Benefits Wellbeing Interests**.
- Target worker interests. When you assign an interest to a program card, all users who have selected the interest can see it.

We deliver the new report, **Benefits Wellbeing Interest Aggregated Data** (secured to the Set Up: Benefits domain). The report provides analytics that you can use to derive which aspects of wellbeing are most important to your employees. You can also see how many program cards you have related to each interest, giving your insight about which programs to invest in.

## What do i need to do?

Configure the Wellbeing Profile categories and interests from which you want workers to select.

1. Access the **Maintain Benefits Wellbeing Interests** task.
2. On the **Wellbeing Interests** tab, add the categories and corresponding interests.
3. (Optional) Customize the names of the categories and interests to reflect your organizational needs by using the override fields.
4. Select the display locations of the card on the **Display Locations** tab.

## What happens if i do nothing?

Workers can't add wellbeing interests to their profile and administrators can't derive metrics on worker interests.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/7765487.html>

# Workday 2024R2 setup based features

Prior to 2024R2	Post 2024R2	Impact
<p>N/A</p> <hr/> <p><b>Effort</b> 1.5 hours</p> <p>Additional description if applicable</p>	<p>We transition these Worker Wellbeing options from opt-in to automatically available (with set up required):</p> <ul style="list-style-type: none"> <li>• The Maintain Benefits Wellbeing Interests task so that you can configure wellbeing categories and interests.</li> <li>• The Wellbeing Interest Profile so that workers can select and update the wellbeing topics in which they have an interest.</li> <li>• These report fields on the Benefits Wellbeing Interest Configuration business object: All Benefits Program Cards - Wellbeing Interest, Enabled Benefits Program Cards - Wellbeing Interest, and Workers - Wellbeing Interest.</li> </ul> <p>We also enable benefit administrators to add wellness attributes to benefit program cards from the Maintain Benefits Program task. Administrators can:  Assign 1 wellness interest attribute to the partner program card. Choose the attribute from the delivered wellness interests that you have configured in the task, Maintain Benefits Wellbeing Interests.  Target worker interests. When you assign an interest to a program card, all users who have selected the interest can see it.  We deliver the new report, Benefits Wellbeing Interest Aggregated Data (secured to the Set Up: Benefits domain). The report provides analytics that you can use to derive which aspects of wellbeing are most important to your employees. You can also see how many program cards you have related to each interest, giving you insight about which programs to invest in.</p>	<p><b>Y/N:</b> Yes</p> <p><b>Impact description:</b></p> <p>This may impact your training materials.</p> <p><b>Defect link</b> &lt;Hyperlink here if applicable&gt;</p> <p><b>Community link</b> <a href="https://doc.workday.com/release-notes/en-us/hrbenenroll/7765487.html">https://doc.workday.com/release-notes/en-us/hrbenenroll/7765487.html</a></p>

# Workday 2024R2 setup based features

## Before release

### Configure Profile Summary

Composite View Definition Worker Profile

6 items

	Order	Card
 	 	<a href="#">wellbeing interest</a>
 	 	No matches found

## After release

### Configure Profile Summary

Composite View Definition Worker Profile

10 items

	Order	Card
 	 	<a href="#">Wellbeing Interests</a>

# Benefits messaging

## What's changing

Workday delivers a new "Send Benefits Messages" task and an enhanced Send Open Enrollment Reminders task. These tasks leverage Workday Notification Designer, and enables us to send workers emails, SMS, and push notifications related to their benefits and open enrollment. However, the SMS feature is only available in the United States, Canada, and the United Kingdom.

This feature improves the experience of creating notifications for administrators, increases employee responsiveness, and helps to improve open enrollment completion rates.

## Additional considerations

Workday delivers the new task Send Benefits Messages (secured to the new Send Benefits Messages domain) which enables us to send workers messages related to their benefits through email, SMS, and mobile push notifications. We can use notification templates in this task when sending email messages.

It adds the new notification type Benefits Notifications to the HCM parent notification type in the Edit Tenant Setup - Notifications task. Here we can configure notification routing rules for the new Send Benefits Messages task.

## What do i need to do?

You must subscribe to the Workday Messaging SKU to send SMS messages. After subscribing:

1. Access the **Innovation Services Opt-In** task. Select the check box for **Workday Messaging** under the **Cross Application Services** category.
2. Access the **Edit Tenant Setup - Notification** task and set up a default SMS configuration.

## Configure Security

1. Configure security for the new Send Benefits Messages domain.
2. Configure security for the Set Up: Message Templates domain. Add the same security groups you've added to the Send Benefits Messages domain.

Community link

<https://doc.workday.com/release-notes/en-us/abs/7873171.html>

# Benefits messaging

## Additional considerations

We can also add the new Benefits Notifications and the existing Open Enrollment for Benefits notification types as categories for our Notification Designer templates.

Finally, when we access the Send Open Enrollment Reminders task, workday routes to the new messaging task after we select the Create Message button. This reroute carries over all selected workers from the original task, as well as delivery channels enabled for the Open Enrollment for Benefits notification type.

## What do i need to do?

### Set Up Notification Routing

1. Access the **Edit Tenant Setup - Notifications** task and navigate to the **Benefits Notifications** and **Open Enrollment for Benefits** notification types under the **HCM** Parent Notification Type. If you want benefit notification settings to be different from the parent HCM settings, select the **Override Parent Notification Type Settings** check box. Then, create a Notification Routing Rule and add your preferred communication channels.
2. To send mobile push notifications and SMS, the notification frequency must be set as **Immediate**.

## What happens if i do nothing?

We won't be able to send benefits messages or use Notification Designer to send open enrollment reminders through email, SMS, and push notifications.

Community link

<https://doc.workday.com/release-notes/en-us/hrbenenroll/8072666.html>

# Workday 2024R2 setup based features

Prior to 2024R2	Post 2024R2	Impact
<p>Prior to this release, there was no provision to send out Messages to Workers related to their Benefits through SMS or push notifications.</p>	<p>Workday delivers the new task Send Benefits Messages (secured to the new Send Benefits Messages domain) which enables us to send workers messages related to their benefits through email, SMS, and mobile push notifications. We can use notification templates in this task when sending email messages.</p> <ul style="list-style-type: none"> <li>• Workday adds the new notification type Benefits Notifications to the HCM parent notification type in the Edit Tenant Setup - Notifications task. Here we can configure notification routing rules for the new Send Benefits Messages task.</li> <li>• Workday also adds the new Benefits Notifications and the existing Open Enrollment for Benefits notification types as categories for our Notification Designer templates.</li> <li>• Finally, when we access the Send Open Enrollment Reminders task, workday routes us to the new messaging task after we select the Create Message button. This reroute carries over all selected workers from the original task, as well as delivery channels enabled for the Open Enrollment for Benefits notification type.</li> </ul>	<p><b>Y/N:</b> Yes</p> <p><b>Impact description:</b></p> <p>This may impact training materials.</p>

**Effort** 1 hour

Additional description if applicable

**Defect link** Not Applicable

**Community link** [Benefits Messaging \(workday.com\)](https://workday.com/benefits-messaging)

# Workday 2024R2 setup based features

## Before release

N/A

## After release

The screenshot displays the configuration interface for Workday 2024R2, showing message templates for SMS, Email, and Mobile Push Notification. The interface is divided into three main sections: SMS, Email, and Mobile Push Notification. Each section includes a 'Message' field with a rich text editor and a 'Subject' field. The SMS section includes a note about message length and time-of-day restrictions. The Email section includes fields for 'From', 'From Display Name', and 'Reply To'. The Mobile Push Notification section includes a 'Message' field. On the right side, there is a sidebar with a list of recipients (Abigail Adams, Angel Wolfe, Bridget O'Shaughnessy, Betty Boop, Betty Brown) and a 'Recipient Count' of 5. Below this, there are sections for 'Notification Category' (Benefits Notifications+TG), 'Contact Method' (Email, Mobile Push Notification, SMS), 'Email Branding' (Workday Standard), and 'Message Template' (Benefits-Dependent Verification).

# Workday 2024R2 setup based features

## Before release

N/A

## After release

The screenshot shows the configuration page for sending open enrollment reminders. The top section, titled "Send Open Enrollment Reminders+TG", includes the following settings:

- Benefit Group:** Active Employees in U.S. - Hourly
- Open Enrollment:** Open Enrollment for Active Employees in U.S. - Hourly for Open Enrollment on 09/01/2024
- Enrollment Statuses:** Not Started
- On Hold:**
- Recipient Count:** 30

The bottom section, also titled "Send Open Enrollment Reminders+TG", provides details for the communication channels:

- SMS:** Includes a message preview: "This is a friendly reminder to complete your open enrollment for [Year] if you haven't already done so. The deadline for enrollment is approaching quickly, and it's essential to ensure all your benefits are updated and accurate. Please visit your Workday inbox and complete your enrollment task at your earliest convenience." It also includes a "Message" field for editing the text.
- Email:** Includes fields for "From" (sup@megalec.com), "From Display Name", "Reply To", and "Subject".
- Contact Method:** Includes checkboxes for Email, Mobile Push Notification, and SMS.
- Email Branding:** Includes a dropdown for Workday Standard.
- Message Template:** Includes a dropdown for OE Reminder.
- Recipient Count:** 30
- Notification Category:** Open Enrollment for Benefits

# Cloud connector for benefits: Benefits connector V2

## What's changing

Workday delivers Benefits Connector V2, a generic Cloud Connect for Benefits (CCB) outbound integration.

We can use this new version of the connector whenever an industry standard or proprietary template for a benefits provider isn't included in the CCB template catalog.

It delivers, Improved performance, more precision for data extraction, more benefits coverage types and additional benefits data.

## Additional considerations

Workday delivers a new version the CCB Benefits Connector, which generates an output file that contains worker's benefit enrollment, benefit eligibility, and demographic data. The CCB Benefits Connector V2 has separate data sections for each benefit plan type and related data. Each section has field level attributes that we use to choose the fields we want to report.

Workday delivers these new data sections:

- Plan Eligibility - supports all coverage types.
- Extensible fields - outputs a new Additional Information data section for data that you extract using extensible field overrides.

Workday includes the Health Savings Account and Additional Benefits coverage types as well now.

## What do i need to do?

NA

## What happens if i do nothing?

NA

Community link

[Cloud Connect for Benefits: Benefits Connector V2 \(workday.com\)](#)

# Workday 2024R2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	<p>Workday delivers these new data sections:</p> <ul style="list-style-type: none"> <li>• Plan Eligibility - supports all coverage types.</li> <li>• Extensible fields - outputs a new Additional Information data section for data that you extract using extensible field overrides.</li> </ul> <p>Workday includes the Health Savings Account and Additional Benefits coverage types as well now.</p>	<p><b>Y/N:</b> No</p> <p><b>Impact description:</b></p> <p>Support for a future feature.</p>

**Effort** 1 hour

Additional description if applicable

**Defect link** <Hyperlink here if applicable>

**Community link** [Cloud Connect for Benefits: Benefits Connector V2 \(workday.com\)](https://workday.com/Cloud-Connect-for-Benefits/Benefits-Connector-V2)

# Workday 2024R2 setup based features

## Before release

N/A

## After release

### Cloud Connect for Benefits - Integration Output Files

3 Items

Integration Event	Integration System	Actual Completed Date and Time	Output File 1	Output File 2	Output File 3
Q	Cloud Connect for Benefits AND Y12 E14 V2	07/10/2024 06:54:30 911 AM	Q_Audit_File.html	? C02_AND_20240710_1.txt	MessageAudit_1.zip
Q	Cloud Connect for Benefits AND Y12 E14 V2	03/19/2024 01:02:28 654 PM	Q_Audit_File.html	? C02_AND_20240319_1.txt	MessageAudit_1.zip
Q	Cloud Connect for Benefits AND Y12 E14 V2	07/16/2024 10:22:23 940 AM	Q_Audit_File.html	? C02_AND_20240716_1.txt	MessageAudit_1.zip

### Integration Attributes

### Integration Maps

### Security

### Integration Maps 37 Items

Map Provider	Map	Description	Default Value	Map Values		Exception(s)
				Internal Value	External Value	
	Loop2300_HDC3 - Insurance Line Code for Standard Loop	Map benefit plans to the insurance line code to output in Loop 2300, Segment HD, Element 03. Plans set up as a bundle (e.g. medical/pre-conditions) can be reported as separate plans using the Standard Loop, First Additional Loop and Second Additional Loop maps. One bundle can report up to three plans.	AC	Dental - Aetna DMO Dental - Aetna PPO Dental - Blue Cross of Calif. DMO Dental - Blue Cross of Calif. PPO Dental - UnitedHealthcare PPO	DEN	
				Medical - Aetna HDHP (High Deductible Health Plan) Medical - Aetna HMO Medical - Aetna PPO Medical - Blue Cross of Calif. HMO Medical - Blue Cross of Calif. POS Medical - Blue Cross of Calif. PPO Medical - UnitedHealthcare PPO • Link (2)	HLT	
	Loop2305_HDC3 - Insurance Line Code for First Additional Loop	Map benefit plans to the insurance line code to output in First Additional Loop 2305, Segment HD, Element 03. See the Standard Loop map for additional information.		Vision - Vision Service Plan VSP	VIS	

# Auto contribution increase for retirement savings plans - Secure act 2.0

## What's changing

To support Secure Act 2.0, you can now enable workers to increase retirement savings contributions for workers that opt in to automatic contribution increases.

This feature is only available for *percentage* contributions. Employees can opt in or out of annual contribution increases during an enrollment event.

We add these options to the **Edit Benefit Plan** task:

- **Auto Contribution Increase** check box.
- **Auto Contribution Percentage** field - Can be between 3%-10%.
- **Yearly Auto Contribution Increase Percentage** field - Can be 1% or greater.
- **Auto Increase Percentage Maximum** field - Can be between 10%-15%.

We add these fields to the retirement savings benefit plans during an enrollment event:

- **Auto Contribution Increase** check box - workers select to opt-in to the increase.
- **Yearly Auto Contribution Increase Percentage** report field.
- **Auto Increase Percentage Maximum** report field.

## What do i need to do?

To enable auto contribution increases, access the **Edit Benefit Plan** task and select **Auto Contribution Increases** for each retirement savings plan.

(Optional) To update workers' retirement savings elections:

1. Run a custom report with the new report fields to view current retirement savings elections for workers who've opted in to the auto-increase but haven't reached the auto increase percentage maximum.
2. Calculate the increased contribution amounts based on the annual increase you have chosen.
3. After the web service updates in Version 43.1, use the **Enroll in Retirement Savings** or **Change Benefits** EIB to load the increased elections.

Community link

[Cloud Connect for Benefits: Benefits Connector V2 \(workday.com\)](#)

# Auto contribution increase for retirement savings plans - Secure act 2.0

## What's changing

We deliver the **Election Auto Contribution Increase** report field on the Retirement Savings Election business object:

We deliver these report fields on the Retirement Savings Plan business object:

- **Auto Contribution Increase**
- **Auto Contribution Percentage**
- **Auto Increase Percentage Maximum**
- **Yearly Auto Contribution Increase Percentage**

## Additional considerations

### What's Coming Next

Updates to these web services and EIBs in Version 43.1 to support the auto contribution increases to retirement savings plans.

- Change Benefits
- Enroll in Retirement Savings Plans
- Get Benefit Plans
- Get Workers
- Put Benefit Plan

## What do i need to do?

(Optional) Automatically enroll newly eligible workers in retirement savings plans in plan years that begin after December 31, 2024. Create a passive event and a benefit default. See *Steps: Set Up Passive Events* and *Steps: Set Up Passive Events* in the **Related Links** section.

## What happens if i do nothing?

Nothing. The new fields are automatically available for retirement savings plans, but are disabled by default.

Community link

[Cloud Connect for Benefits: Benefits Connector V2 \(workday.com\)](#)

# Workday 2024R2 setup based features

Prior to 2024 release 1	Post 2024 release 2	Impact
N/A	We help U.S. employers comply with Secure Act 2.0 legislation by supporting auto contribution increases for retirement savings plans.	<p><b>Y/N:</b> No</p> <p><b>Impact description:</b></p> <p>No Impact.</p>

**Effort** 1 hour

Additional description if applicable

**Defect link** <Hyperlink here if applicable>

**Community link** [Cloud Connect for Benefits: Benefits Connector V2 \(workday.com\)](https://workday.com/Cloud-Connect-for-Benefits/Benefits-Connector-V2)

# Thank you