Welcome to Workday Self Service. Within Workday, you can manage your benefits by reporting qualified life event changes viewing and editing your benefit elections. This guide covers general information on how to make a qualified life event change. If you have any questions please contact your Benefits Team.

MAKE A LIFE EVENT CHANGE

A qualified life event is a birth, death, marriage, divorce, or similar change. If you have a qualified life event, you are eligible to make changes to your benefits within 30 days of the event.

If your event requires to add or remove a dependent continue on to the next step. If you are not making any changes to your dependent’s coverage please skip to Change Benefits Section.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan.

From the Benefits application:

1. Click the Dependents button under Change.

2. Click Add.

3. Click the Edit icon or click in the field to modify. Asterisks denote required fields.

4. Click the Add button to add new information.

5. Drop or Select Files to upload required document.
Benefits: Manage Your Benefits

6. Select a Category
7. Click Submit.

**Note:** Please be sure to add social security number and contact information for your dependents and beneficiaries.

Once the Benefit Event is approved by the Benefit Partner you will receive a task in your inbox to continue to the next steps.

**VIEW AND EDIT BENEFIT ELECTIONS**

**Enrolling or modifying Medical, Dental, and Vision Benefits.**

From the Inbox:

1. Click the Benefit Change task.

2. Click Let’s Get Started
3. Click Manage to update your medical elections. Click Enroll to enroll in a new benefit plan.

**Health Care and Accounts**

**Medical**
Kaiser HMO

Cost per paycheck $28.93
Coverage Employee Only

4. Select or Waive on each Medical election. Your current elections are set as default.
5. Click **Confirm and Continue**.

6. If a dependent already exists, Workday selects them automatically.

7. Click **Save**

8. If you wish to modify or enroll in Dental and Vision Coverage, please repeat steps 3-7.

**Note:** If there is no Social Security Information in Workday, please add so then.
Enrolling or modifying Flexible Spending Accounts or Health Savings Accounts

1. Click Manage to update your medical elections. Click Enroll to enroll in a new benefit plan.

2. Select or Waive on each Medical election. Your current elections are set as default. Click Confirm and Continue.

3. Fill in the Per Paycheck Amount or Annual Amount. Be mindful of the minimum and maximum annual amounts.

Plans Available
Select a plan or Waive to opt out of Healthcare FSA.

<table>
<thead>
<tr>
<th>Selection</th>
<th>Benefit Plan</th>
<th>You Contribute (Semi-monthly)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>CBIZ</td>
</tr>
</tbody>
</table>

Confirm and Continue  Cancel
Benefits: Manage Your Benefits

Healthcare FSA - Discovery Benefits

Projected Total Cost Per Paycheck $67.57
Projected Total Credits $0.00

Contribute

Your estimated contributions made this year 0.00
Actual contributions from payroll $0.00
Per Paycheck 37.50
Annual 300.00
Remaining Paychecks

Use Paycheck Override

1. Click Manage to update your spending accounts elections. Click Enroll to enroll in a new benefit plan.

2. Select or Waive Life Insurance Plans. Your current elections are set as default. Click Confirm and Continue.

3. Select Coverage from the drop down menu.

4. At this point you can also add beneficiaries. Click the Add Icon

5. Click the Prompt Icon and select Beneficiary Person(s) or Trust to see the list of Beneficiaries available.

6. Click the Name of the person you want to assign

7. Enter the percentage amount.

8. To add more than one repeat steps 4-6.

9. When done, click Submit.

Enrolling or modifying Life Insurance

Save Cancel
Enrolling or modifying Mass Transit FSA

1. Click Manage to update your Mass Transit elections. Click Enroll to enroll in a new benefit plan.

2. Select or Waive Life Insurance Plans. Your current elections are set as default. Click Confirm and Continue.

3. Fill in the Per Paycheck Amount. $135 per paycheck maximum.

4. Click Save.

Finalize and Submit Benefit Enrollment

Once you have made all your benefit elections, please make sure to take the following step to finalize the benefit event.

1. Review all elections made by skimming the Benefit Event Page
2. Click Review and Sign

**Note:** Any benefit that you can view, but cannot edit is because you do not meet the eligibility or they are employer paid benefits. Retirement elections are not made via Workday.

3. Review the Summary Page to ensure all your desired elections were made.

4. Scroll down to review any **Messages** and **Total Benefits Cost**

5. Check off the **I Agree** box to provide an electronic signature confirming your changes and click **Submit**.

**PRINT BENEFITS STATEMENT**

Upon submitting the event you will receive the following confirmation page.
Benefits: Manage Your Benefits

Submitted

Success, You're Enrolled

1. Click View 2020 Benefits Statement to view new elections.
2. Workday will direct you to page similar to the Summary Page.
3. Click Print at the bottom of the page.
4. Click the Download button on the pop up to download the document.
5. Once done, click the WD Cloud to go to the homepage or logout.