BENEFIT ENROLLMENT STEPS

You have 30 days from your date of hire or date of benefit eligibility to enroll in benefits, add dependent(s) and supply dependent verification (birth certificates, marriage certificate, Federal 1040, etc.). During this period, you will receive a task in your Inbox AFTER you have completed all necessary onboarding steps (I-9, contact change, emergency contact information, disability status identification, veteran status identification). Those steps can be found and completed by clicking “Awaiting Your Action” on the home page of Workday. You must complete these steps before you can enroll in benefits. NOTE: Colleagues will only receive/have to complete the Onboarding tasks if they are new hires. Newly benefits eligible colleagues will not receive that task.
SELECT YOUR BENEFITS

From your Home page:

1. From the Workday home page, click change Benefits for Life Event.

2. Click on the Let's Get Started box to begin.
3. Click **Enroll** for Medical, Dental and Vision and then click the “Select” radio button next to your desired plan. Next, click **Confirm and Continue**. IMPORTANT, if you are enrolling dependents, please see the information below, **ADD DEPENDENTS**.
ADD DEPENDENTS

You may add dependents to your insurance plans, like medical, dental, etc. **Please note that dependent verification must be provided for each dependent on your benefits within 30 days from your date of employment or date of benefit eligibility.** Verification includes birth certificates, marriage certificate, Federal 1040, etc. **For further information and a full list of acceptable documents, please click here.**

After clicking **Confirm and Continue** in the plan selection as described in the previous steps:

1. Click **Add New Dependent** to add a new dependent. Complete all required information.

**Note:** Workday will select your coverage level automatically, based on the dependents selected for coverage.
SPENDING ACCOUNT INSTRUCTIONS:

1. Click **Enroll** to enroll in the Health Savings Account, Healthcare FSA or Dependent Care FSA.
2. Select **Elect** or **Waive** for the desired plan.
3. Enter the amount you want to contribute.
4. Click **Confirm and Continue**.

**Notes:**

- If you have selected the Health Savings Medical Plan option, you must elect the Health Savings Account. You are not required to contribute to the account; however, the plan must be selected to receive the employer contribution. You are not eligible to participate in the Healthcare FSA because you will have access to the Health Savings Account.
- Dependent Care FSA is used for eligible expenses for the care of your eligible dependents (child under age 13 or qualifying adult incapable of self-care) or eldercare while you are actively at work. This account is not used for medical expenses.
LIFE INSURANCE

If you are eligible, Basic Life and AD&D insurance will automatically default to enrollment status and cannot be changed. It is important to designate beneficiary(ies) for this benefit (see additional information below, Designate Life Insurance Beneficiaries).

DESIGNATE LIFE INSURANCE BENEFICIARIES

If your life insurance plan requires beneficiaries, the option to add primary and secondary beneficiaries will appear. This means that you must designate one or more beneficiaries for each plan.

From the Beneficiaries section:

1. Click the Add Row icon to add a beneficiary.

2. Click the prompt icon in the Beneficiary field to select from a list of existing beneficiaries. Or, select Add New Beneficiary or Trust to add a new beneficiary. To remove a beneficiary, click the Remove Row icon next to that beneficiary.

3. Enter the percentage of benefits for each beneficiary in the Percentage column.

4. Click Save.
ADDITIONAL BENEFITS

Depending on your ministry’s plan offerings, additional/optional benefits may be available to you and displayed in the Insurance section.

From the Insurance Benefits section:

1. Click Manage or Enroll for each additional benefit you would like to enroll in.
2. Review your elections for accuracy. Notice your monthly cost in the upper-right corner.
3. Confirm that your coverage information is accurate.
4. Click Confirm and Continue.
5. Click Save.
COMPLETE YOUR ENROLLMENT

1. Select the I Accept checkbox to confirm your electronic signature, if required.

2. Click Submit. A confirmation page displays.

3. Click View Benefits Statement to view the benefits statement.

4. Click Print to generate a PDF version for your records or click Done to complete the task.
BENEFITS GUIDE

A Benefits Guide can be very helpful in understanding your options and related costs and to assist you in making your plan selections. To access the Benefit Guide, please see the instructions at the end of this job aid.

To access the Guide, click **New Hire Welcome!** on your Workday home page.
Then click **Onboarding**

**New Hire Welcome!**

Click the Onboarding link above to get started on your new-hire tasks and to access your benefits orientation.
Then click **HR4U Colleague Portal** under Helpful Resources; you will be directed to HR4U.
After logging in, type **Benefit Guide** into the search bar.
Benefits:

Navigate Benefits Enrollment

Click the link for Benefit Guide under the Attachments section of the article to view and print your Guide.