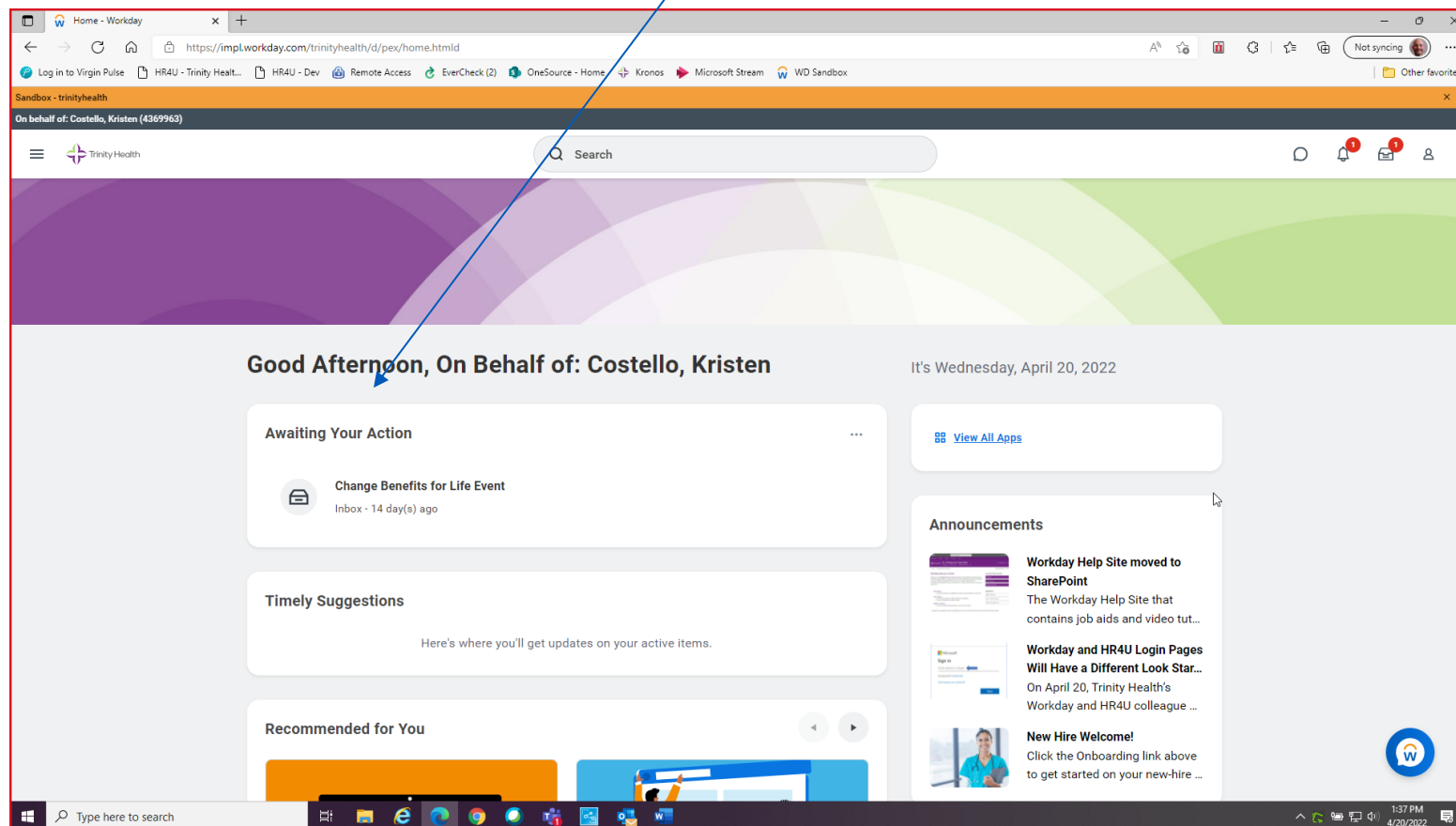


BENEFIT ENROLLMENT STEPS

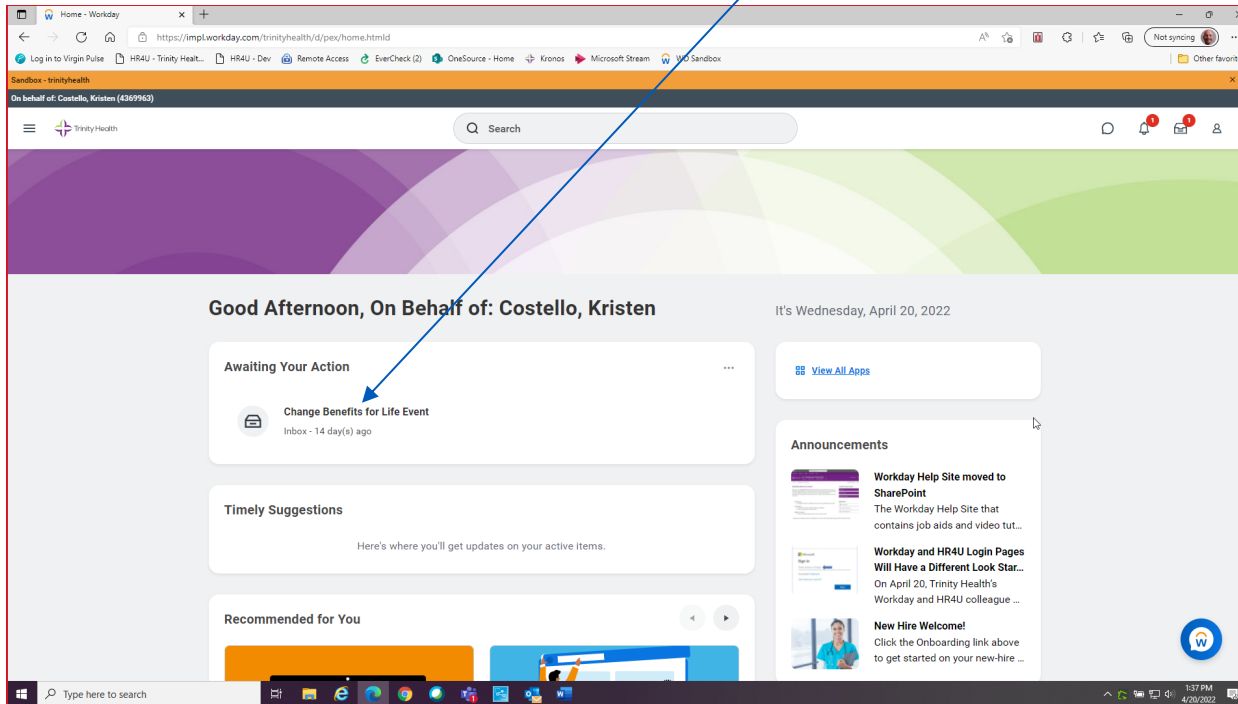
You have 30 days from your date of hire or date of benefit eligibility to enroll in benefits, add dependent (s) and supply dependent verification (birth certificates, marriage certificate, Federal 1040, etc. During this period, you will receive a task in your Inbox **AFTER** you have completed all necessary onboarding steps (1-9, 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

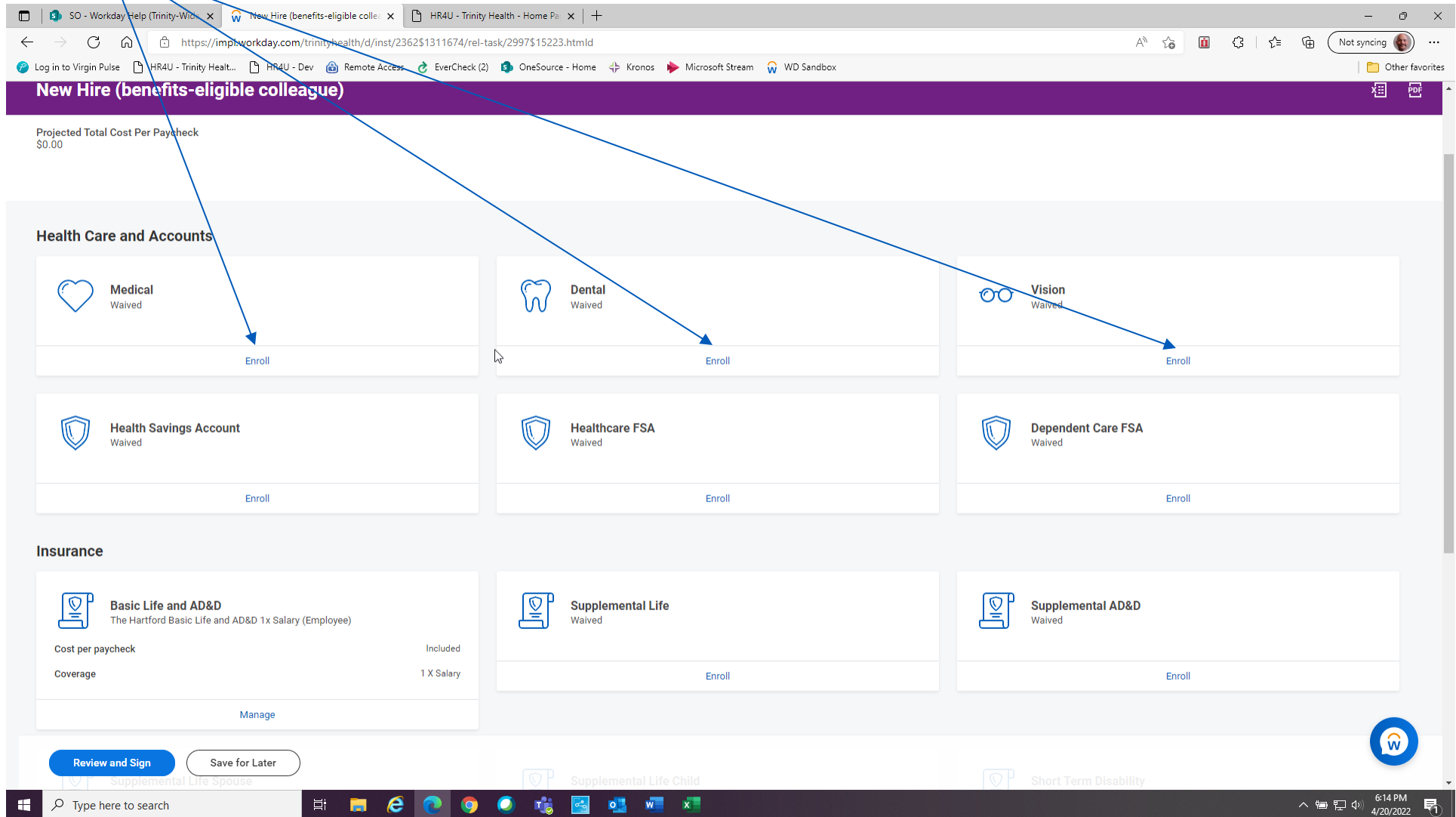
From your Home page:

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.







The screenshot displays the 'Medical - Aetna Traditional' enrollment page in a web browser. The page header shows the title 'Medical - Aetna Traditional' and the projected total cost per paycheck as '\$149.99'. Under the 'Dependents' section, there is a prompt to 'Add a new dependent or select an existing dependent from the list below.' and a radio button for 'Employee Only' coverage. A prominent 'Add New Dependent' button is visible. To the right, the 'Health Care Instructions' section is expanded, showing 'General Instructions' which include steps for enrollment and a note about retroactive coverage. At the bottom of the page, there are 'Save' and 'Cancel' buttons.



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

SPENDING ACCOUNT INSTRUCTIONS:

Health Care and Accounts

 <p>Medical Blue Cross of Calif. PPO</p> <p>Cost (Monthly) \$262.00</p> <p>Coverage EE + Family</p> <p>Dependents 2</p> <p style="text-align: right;">Manage</p>	 <p>Dental Blue Cross of Calif. PPO</p> <p>Cost (Monthly) \$24.00</p> <p>Coverage EE + 1 Dependent</p> <p>Dependents 1</p> <p style="text-align: right;">Manage</p>	 <p>Vision Vision Service Plan VSP</p> <p>Cost (Monthly) \$21.00</p> <p>Coverage EE + 1 Dependent</p> <p>Dependents 1</p> <p style="text-align: right;">Manage</p>
 <p>Health Savings Account Waived</p> <p style="text-align: right;">Enroll</p>	 <p>Healthcare FSA Waived</p> <p style="text-align: right;">Enroll</p>	 <p>Dependent Care FSA Waived</p> <p style="text-align: right;">Enroll</p>

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**.

Basic Group Life - Liberty Mutual (Employee)

Projected Total Cost (Monthly)
\$345.00
Projected Total Credits
\$55.50

Coverage

Coverage \$75,000

Calculated Coverage \$75,000.00

Plan cost (Monthly) Included

Insurance Instructions

Plan Description [Liberty Life Insurance Summary](#)

Provider Website [Liberty Mutual](#)

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 1 item

+	Beneficiary	Percentage
-	<input type="text" value="x Jianyu Liu ..."/>	<input type="text" value="100"/>

Secondary Beneficiaries 0 items

+	Beneficiary	Percentage
No Data		

Save
Cancel

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.

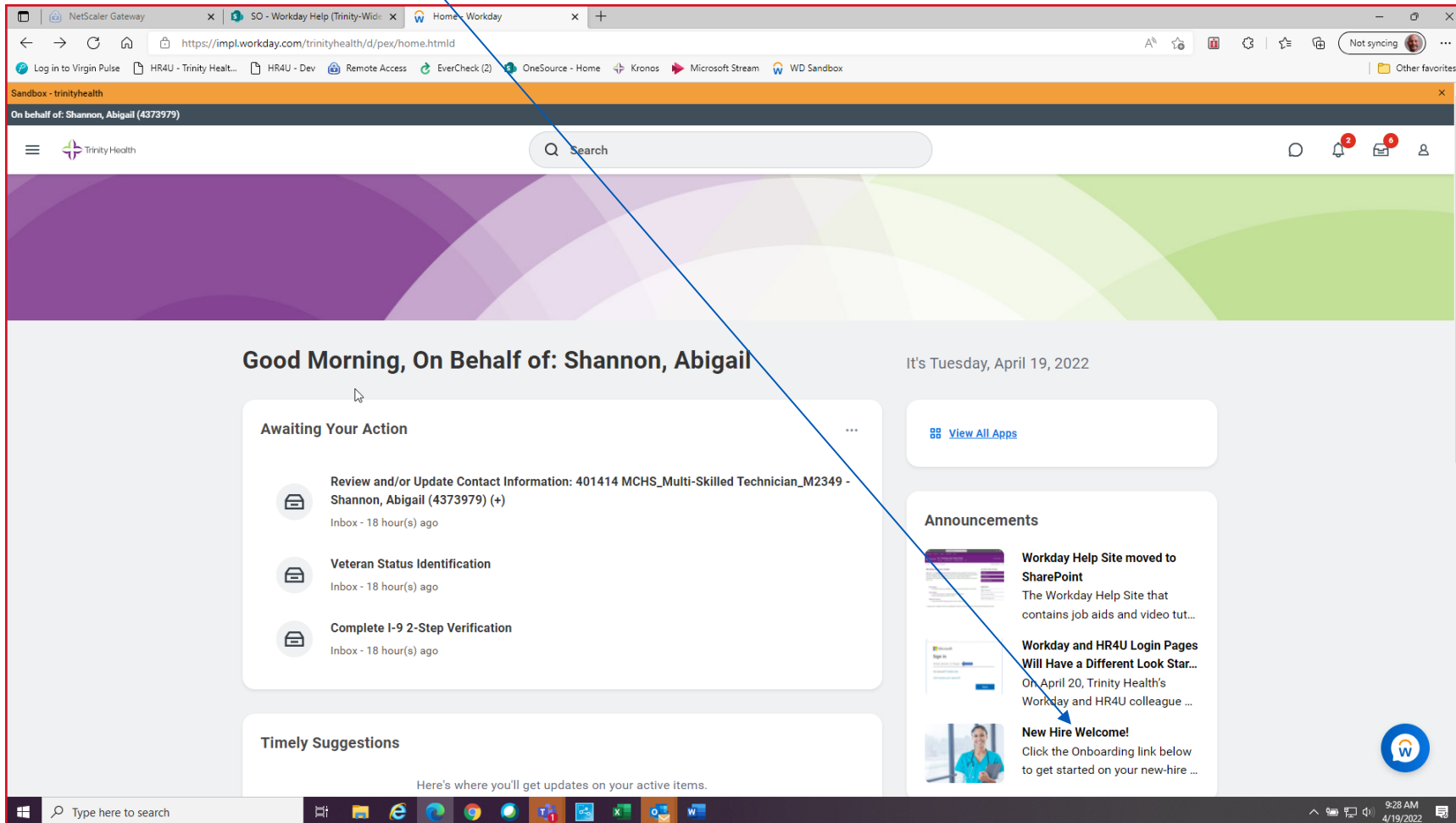
The screenshot shows a web form for benefits enrollment. At the top, there is an 'Attachments' section with a large light blue box containing the text 'Drop files here', 'or', and a 'Select files' button. Below this is the 'Electronic Signature' section. It includes a 'LEGAL NOTICE: Please Read' and a paragraph stating that the user's name and password are considered their electronic signature. It also lists three points of understanding: 1. Benefit elections are legal and binding. 2. Spousal coverage selection is legally binding if married. 3. Benefits are contingent on enrollment and acceptance. At the bottom of this section is a checkbox labeled 'I Accept'. At the very bottom of the form are three buttons: 'Submit' (orange), 'Save for Later' (orange), and 'Cancel' (grey).

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**

The screenshot shows a Workday interface with a modal window open. The modal has a close button (X) in the top right corner and contains the following text:

New Hire Welcome!

[Onboarding](#)

Click the Onboarding link above to get started on your new-hire tasks and to access your benefits orientation.

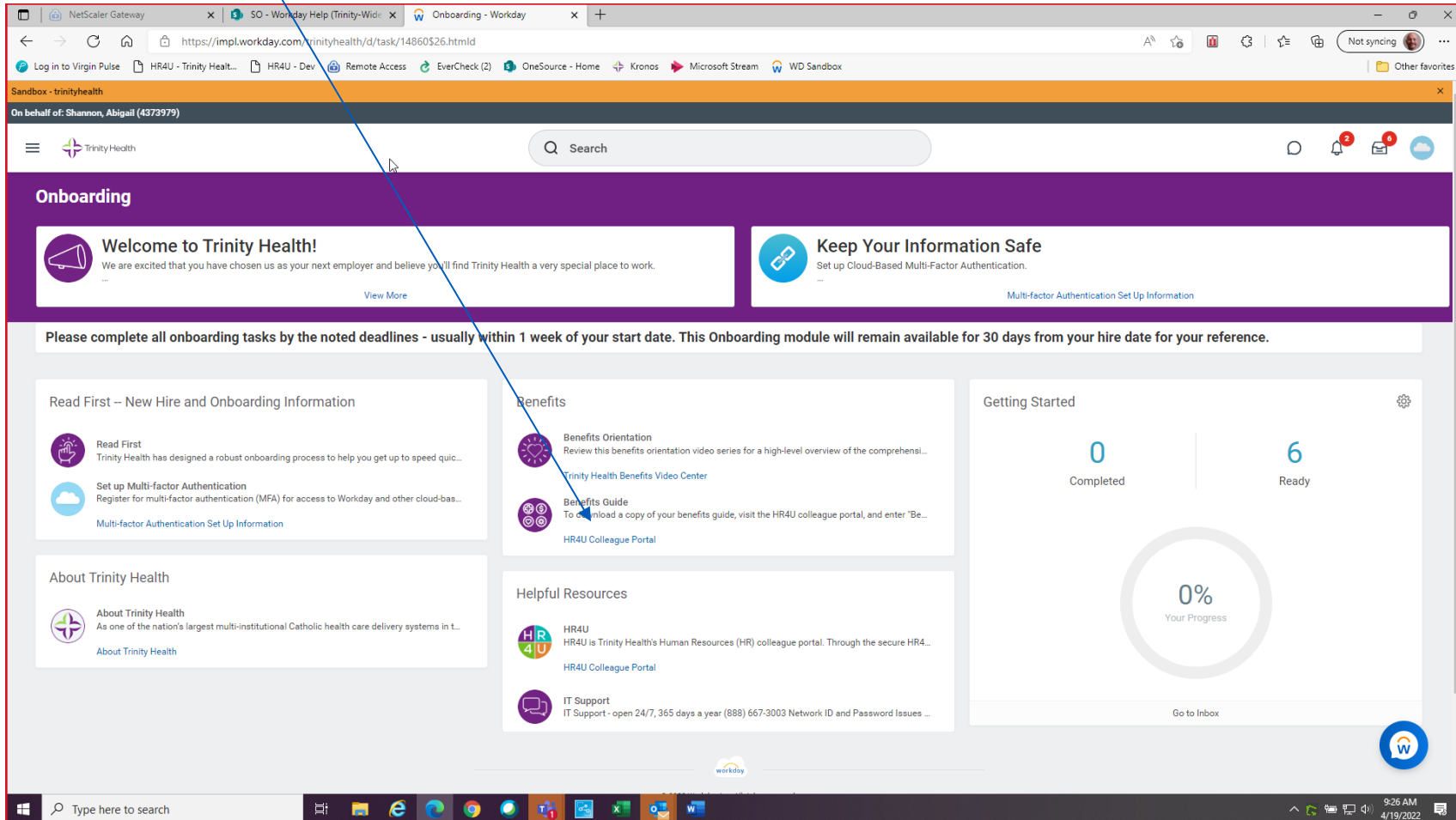
The background interface includes a 'Let's Get Started' section with 'Awaiting Your Action' (Change Benefits for Life Event), 'Timely Suggestions', and 'Recommended for You'. A blue arrow points from the text 'Then click Onboarding' to the 'Onboarding' link in the modal. In the background, there are announcements for 'Workday Help Site moved to SharePoint' and 'New Hire Welcome!'.

Benefits:

Navigate Benefits Enrollment

Colleague

Then click **HR4U Colleague Portal** under Helpful Resources; you will be directed to HR4U.



After logging in, type **Benefit Guide** into the search bar.

The screenshot shows the HR4U Trinity Health website interface. At the top, there is a search bar with a magnifying glass icon and a 'Search' button. A blue arrow points from the text 'type Benefit Guide into the search bar' to the search bar. Below the search bar is a navigation menu with icons for 'My Personal Information', 'My Benefits', 'My Time Away from Work', 'My Pay', and 'All Topics'. The main content area features a 'COVID-19 Vaccination and Booster Submission' section with text about documentation requirements. To the right, there is a 'New Requests' section with buttons for 'Ask HR4U' and 'Ask HR4U Regarding My Employee'. Below that is a 'Recommended for you' section with articles on 'Marriage, Birth of a Child, Divorce and Other Life Status Changes - Making Benefit Changes', 'Supervisory Organizational Change Request', and 'Health Savings Accounts'. A 'Useful links' section is also present on the right. The left sidebar shows the user profile for Anthony Camoratto and various task and request counts. The bottom of the page shows a Windows taskbar with the search bar and several application icons.

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

The screenshot shows a web browser window with the URL <https://hr4u.trinity-health.org/Default.aspx?PageId=1370&gse=1&gwd=Benefit%20guide&ArtId=1932>. The page is titled "Benefit Open Enrollment Guide 2022 System Office" and is categorized under "HEALTH AND WELLBEING". It includes sections for "General Description", "Applicability/Eligibility", and "Key Points". A "Search Results" sidebar on the right lists various benefit categories with percentages: "Benefit Open Enrollment Guide 2022 System Office" (88%), "Benefit Claims and Appeals" (75%), "Colleague and Dependent Benefits Eligibility Definition" (75%), "Commuter Benefits" (72%), and "Bereavement Leave Benefit" (72%). The "Attachments" section at the bottom contains a link to "Benefit Guide 2022 System Office.pdf". A blue arrow points from the text above to this link.