



FREQUENTLY ASKED QUESTIONS

EMPLOYEE SELF SERVICE: BENEFITS

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Version 19 (March 2013)

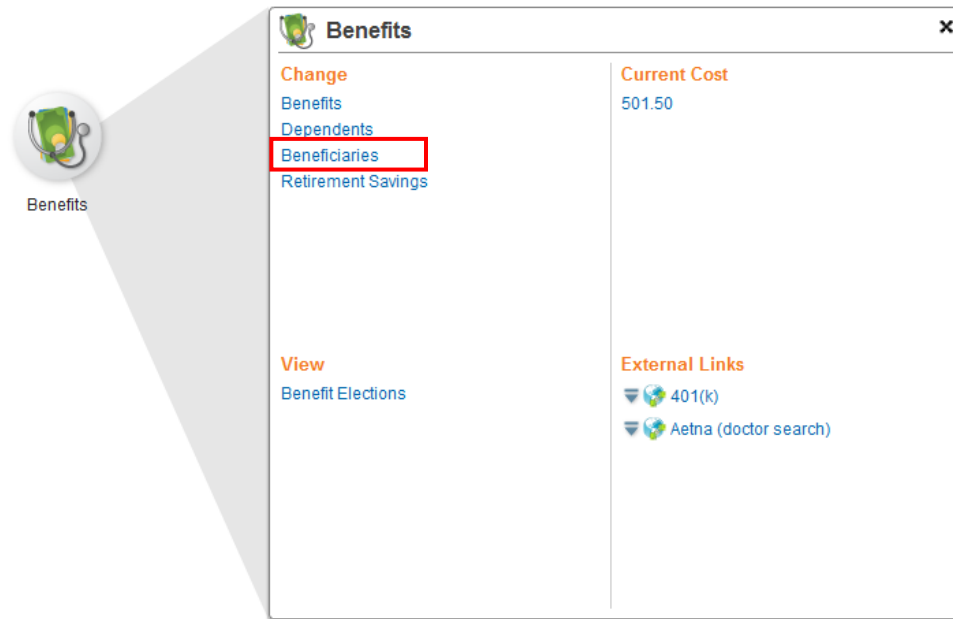
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BENEFITS

HOW DO I VIEW OR CHANGE MY BENEFICIARIES FOR LIFE INSURANCE, 403(B), AND OTHER BENEFIT PLANS WHERE BENEFICIARY INFORMATION IS MAINTAINED?

- 1 From the **Benefits** worklet, select the **Beneficiaries** link.

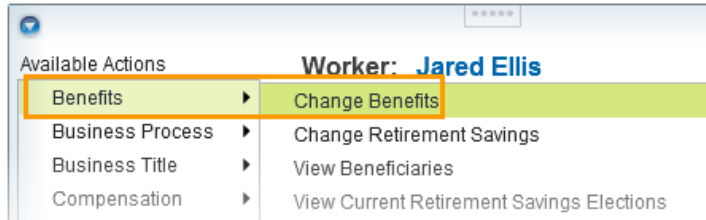


- 2 View existing beneficiaries for enrollment benefit plans, or modify the existing information. Select **Add** to add a new beneficiary.

Beneficiaries:			
Jared Ellis			Actions
Add			
2 Items			
Beneficiary	Relationship	Benefit Elections	
Julie Ellis	Spouse	401(k) - Charles Schwab: 100% Primary Basic Group Life - Liberty Mutual (Employee): 100% Primary Voluntary AD&D - Liberty Mutual (Employee): 100% Primary Voluntary Supplemental Life - Liberty Mutual (Employee): 100% Primary	Edit
Thornton Ellis	Child		Edit Delete

HOW DO I REPORT A BIRTH, MARRIAGE, OR OTHER LIFE EVENT WHICH MAY IMPACT MY ELIGIBILITY FOR CERTAIN BENEFIT PLANS OR COVERAGE CHANGES?

- 1 From the **Related Actions** menu linked to your name, select **Benefits>Change Benefits**.



~ OR ~

From the **Benefits** worklet, under Change, select **Benefits**.



- 2 **Instructional Text** can be customized for your workforce. Choose from the list of **Benefit Event Types**. If you do not find a type that matches what you are looking for, contact your Benefits or HR representative for assistance.

Change Benefits:
Jared Ellis

Instructional Text

Some benefit events require proof of the change in family status, prior to making mid-year benefit election changes.

If documented proof is available in electronic format, please attach here, prior to submitting the event.
If not available, please submit directly to the Benefits Department at your convenience.

Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval.

Please refer to the 'Business Policy Document' related link for specifics on the requirements.

Benefit Event Type *

Benefit Event Date *

Submit Elections By Enrollment Offering Types

Attachments

+ Attachment C

HSA Contribution Change

Legal Marital Status Change

Medicare/Medicaid Change

File

- 3 Enter the date for the Life Event. Once a change is selected, a list of available elections related to the Life Event will be displayed. These elections are defined by your organization.

Change Benefits:
Jared Ellis /

Instructional Text


Some benefit events require proof of the change in family status, prior to making mid-year benefit election changes.

If documented proof is available in electronic format, [please attach here, prior to submitting the event](#).
If not available, please submit directly to the Benefits Department at your convenience.

Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval.

Please refer to the 'Business Policy Document' related link for specifics on the requirements.

Benefit Event Type * ▼

Benefit Event Date * 

Submit Elections By

Enrollment Offering Types


- Basic Group Life
- Dental
- Dependent Care FSA
- Employee Assistance Program
- Healthcare FSA
- Health Savings Account
- Legal Assistance
- Long Term Disability
- Medical
- Short Term Disability
- Spouse Life
- Vision
- Voluntary AD&D
- Voluntary Supplemental Life

- 4 When you click **Submit** and accept the change, you will see the next step in the Business Process defined by your organization. This will usually be an approval by an HR or Benefits Associate.

You have submitted:

Benefit Event: Jared Ellis on 10/15/2012 ▼ Actions

Next Steps



Review Benefit Changes
Maria Cardoza

- 5 Upon approval, a task in your **Inbox** will instruct you to complete any benefit plan changes. Click on the event to view the details.

My Inbox ▾ Actions

Business Process Event

▾ Benefit Change - Dependent Change : Jared Ellis on 10/15/2012

- 6 Click on the **Open** button.

View Event:
Benefit Change - Dependent Change : Jared Ellis on 10/15/2012 ▾ Actions

For ▾ Jared Ellis

Overall Process ▾ Benefit Event: Jared Ellis on 10/15/2012

Overall Status Successfully Completed

My Actions Details Process Related Links

My Actions

Awaiting Me	Due Date	Business Process
Open		▾ Benefit Change - Dependent Change : Jared Ellis on 10/15/2012

- 7 Make whatever changes are allowable based on the Life Event type chosen. Click **Continue** when finished.

Change Benefit Elections

Dependent Change for Jared Ellis - Step 1 of 7 #

Event Date: 10/15/2012 Initiated On: 10/17/2012 Submit Elections By: 11/13/2012

\$443.50 Monthly Cost
Total Employee Cost/Credit

Instructional Text

Election changes must be submitted within 30 days of the 'Dependent Change' or 'Legal Marital Status Change' benefit event, regardless of when it was approved by the Benefits Department.

Health Care Elections - 6 Items

Benefit Plan	*Elect / Waive	Coverage	Enroll Dependents	Employee Cost (Monthly)	Employer Contribution (Monthly)
Medical - Aetna HDHP (High Deductible Health Plan)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
Medical - Aetna HMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
Medical - Aetna PPO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	EE + 1 Dependent	<input type="text" value="Julie Ellis"/>	\$222.00	\$413.00
Dental - Aetna DMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				

Continue Save for Later Cancel

8 Enter additional information as required. Click **Continue**. . .

Change Benefit Elections
Dependent Change for Jared Ellis - Step 2 of 7 **\$443.50 Monthly Cost**
Event Date: 10/15/2012 Initiated On: 10/17/2012 Submit Elections By: 11/13/2012
Total Employee Cost/Credit

Instructional Text

Election changes must be submitted within 30 days of the 'Dependent Change' or 'Legal Marital Status Change' benefit event, regardless of when it was approved by the Benefits Department.

In order to elect a **Health Savings Plan (HSA)**, you must first elect a **High Deductible Health Plan (HDHP)**. For more information about the HSA, please go to <http://www.workday.com>.

Note: Enrollment is allowed in either a **Health Savings Plan (HSA)** or a **Healthcare Flexible Spending Account Plan (FSA)**, not both.

Health Savings Account Plan Dependencies

Health Savings Election

Benefit Plan	*Elect / Waive	Contribution Range (Annual)	Supporting Inform
Health Savings Account - OptumHealth Bank	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 6 Your estimated contributions made this year \$0.00 How much do you want to contribute for the total year? \$0.00 How much do you want to contribute per paycheck (Semi-monthly)? \$0.00 Your contribution (Monthly) \$0.00	Provider Website Plan Description

Continue **Save for Later** **Go Back** **Cancel**

9 . . . and complete all required screens. You must provide an electronic signature confirming your changes.

Change Benefit Elections
Benefit Elections Review for Other Dependent Change - Step 7 of 7 **\$543.50 Monthly Cost** **\$10.00 Monthly Credit**
Worker: Jared Ellis Event Date: 03/10/2013 Initiated On: 03/20/2013 Submit Elections By: 04/08/2013
Total Cost Total Credits

Liberty Mutual (Employee)								
Spouse Life - Liberty Mutual (Spouse)	01/01/2011	01/01/2011	\$150,000	\$150,000.00	Julie Ellis		\$13.50	
Short Term Disability - Liberty Mutual (Employee)	01/01/2005	01/01/2005	75% of Salary	\$44,587.50				\$8.50
Long Term Disability - Liberty Mutual Enhanced (Employee)	01/01/2005	01/01/2005	60% of Salary	\$35,670.00				\$7.40
Voluntary AD&D - Liberty Mutual (Employee)	01/01/2011	01/01/2011	\$150,000	\$150,000.00	Julie Ellis		\$6.00	\$21.00
Employee Assistance Program - Liberty Mutual MyLibertyAssist®	01/01/2011	01/01/2011						
Total:							543.50	683.40

Waived Coverages

Beneficiary Designations

Benefit Credits Summary

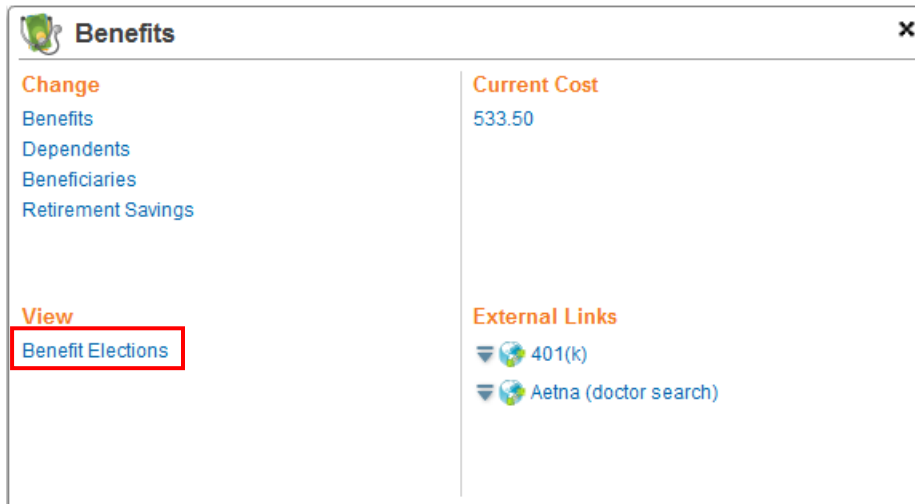
Benefit Credits	Total
Medical	\$10.00
Total:	10.00

Attachments

Attachment	Comment	File
Electronic Signature		
LEGAL NOTICE: Please Read		
Your Name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I AGREE" checkbox, you are certifying that:		
1. You understand that your benefit elections are legal and binding transactions.		
2. You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.		
I Agree <input type="checkbox"/>		

HOW DO I VIEW MY EXISTING BENEFIT PLAN ELECTIONS INCLUDING COVERAGE BEGIN DATE, TYPE OF COVERAGE, DEPENDENTS, BENEFICIARIES, AND EMPLOYEE AND EMPLOYER COST?

- 1 From the **Benefits** worklet, select the **Benefit Elections** link.



- 2 You may view all your Benefit Plan information. You can also access this information by selecting **Benefits > View My Current Benefit Elections** as a related action on your name.

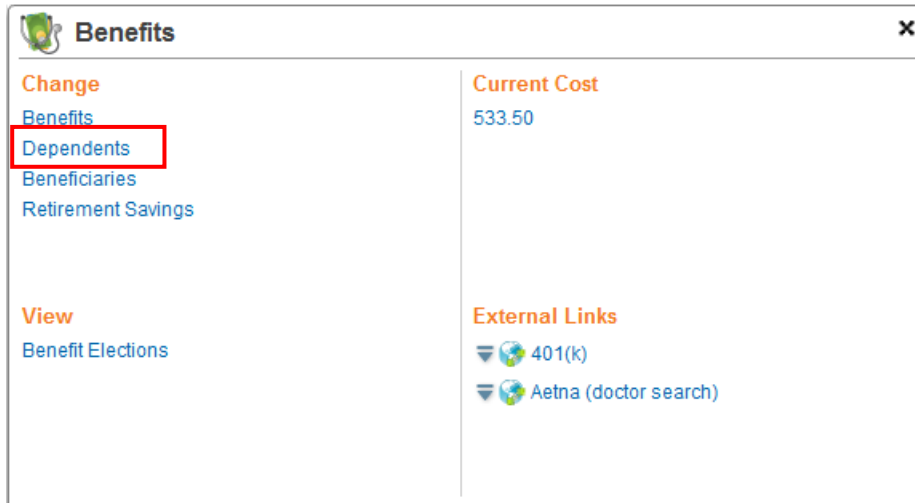
Benefit Elections: **Jared Ellis** ▾ Actions

Current Benefit Elections and Costs - 11 items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)	Employer Contribution (Monthly)
▼ Medical - Aetna PPO	04/14/2011	04/14/2011	EE + Family		▼ Julie Ellis ▼ Thornton Ellis		\$312.00	\$579.00
▼ Dental - Aetna PPO	01/01/2008	01/01/2008	EE + 1 Dependent		▼ Julie Ellis		\$25.00	\$30.50
▼ Healthcare FSA - SHPS	01/01/2012	01/01/2012	\$1,800.00 Annual				\$150.00	
▼ Basic Group Life - Liberty Mutual (Employee)	01/01/2005	01/01/2005	\$75,000	\$75,000.00		▼ Julie Ellis		\$33.00
▼ Voluntary Supplemental Life - Liberty Mutual (Employee)	01/01/2011	01/01/2011	\$300,000	\$300,000.00		▼ Julie Ellis	\$27.00	
▼ Spouse Life - Liberty Mutual (Spouse)	01/01/2011	01/01/2011	\$150,000	\$150,000.00	▼ Julie Ellis		\$13.50	

HOW CAN I VIEW MY CURRENT DEPENDENTS AND THE ELECTED BENEFIT PLANS THAT COVER THEM?

- 1 From the **Benefits** worklet, select the **Dependents** link.



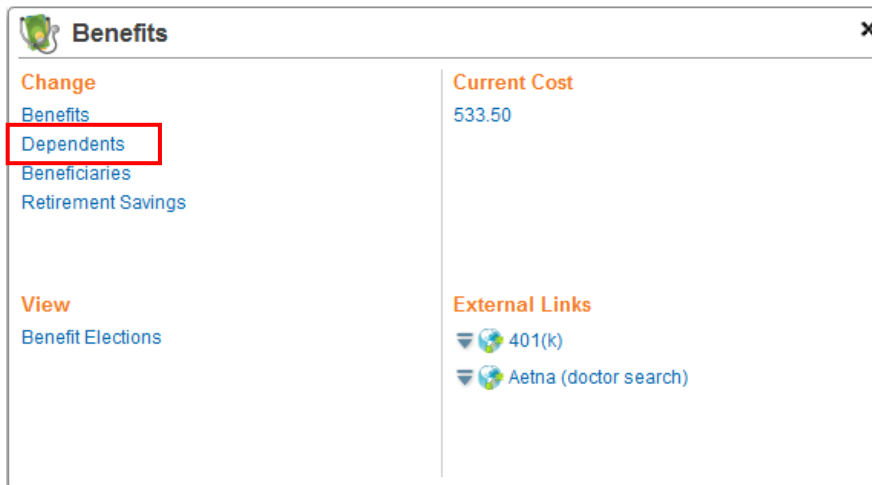
- 2 Review your existing Dependents and their benefit plan coverages. Click **Edit** to make changes, or click **Add Dependents** if needed.

The screenshot shows the 'Dependents' table in the Workday system. The table has columns for 'Dependent', 'Relationship', 'Age', 'Benefit Elections', and an 'Edit' button. There are two rows of data: Julie Ellis (Spouse, 42 years, 1 months, 27 days) and Thornton Ellis (Child, 1 years, 6 months, 7 days). The 'Benefit Elections' column for Julie Ellis lists three active elections: Dental - Aetna PPO, Medical - Aetna PPO, and Spouse Life - Liberty Mutual (Spouse). The 'Benefit Elections' column for Thornton Ellis lists one active election: Medical - Aetna PPO.

Dependent	Relationship	Age	Benefit Elections	
Julie Ellis	Spouse	42 years, 1 months, 27 days	Jared Ellis Benefit Elections Active on 01/01/2012 (Dental - Aetna PPO) (Elect) Jared Ellis Benefit Elections Active on 01/01/2012 (Medical - Aetna PPO) (Elect) Jared Ellis Benefit Elections Active on 01/01/2012 (Spouse Life - Liberty Mutual (Spouse)) (Elect)	Edit
Thornton Ellis	Child	1 years, 6 months, 7 days	Jared Ellis Benefit Elections Active on 01/01/2012 (Medical - Aetna PPO) (Elect)	Edit

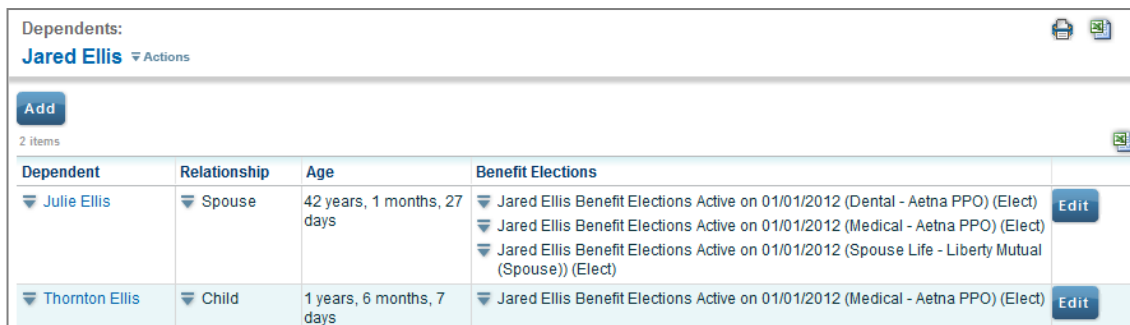
HOW DO I ADD A NEW DEPENDENT?

- 1 From the **Benefits** worklet, select the **Dependents** link.



The screenshot shows the 'Benefits' worklet interface. On the left, under the 'Change' section, the 'Dependents' link is highlighted with a red box. Other links in this section include 'Benefits', 'Beneficiaries', and 'Retirement Savings'. Under the 'View' section, there is a link for 'Benefit Elections'. On the right, the 'Current Cost' is displayed as 533.50. Below that, under 'External Links', there are links for '401(k)' and 'Aetna (doctor search)'.

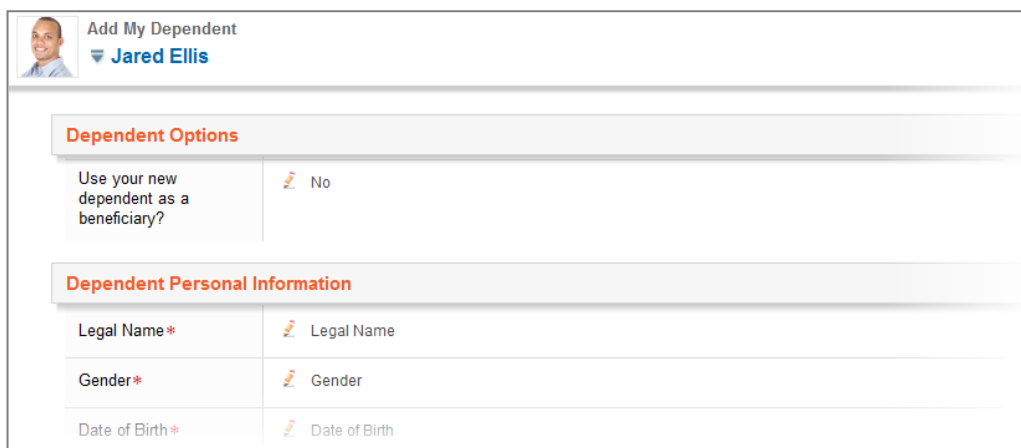
- 2 Use the **Add** button to add a new dependent.



The screenshot shows the 'Dependents' page for Jared Ellis. There is an 'Add' button and a table with 2 items. The table has columns for 'Dependent', 'Relationship', 'Age', and 'Benefit Elections'. Each row has an 'Edit' button.

Dependent	Relationship	Age	Benefit Elections	
Julie Ellis	Spouse	42 years, 1 months, 27 days	Jared Ellis Benefit Elections Active on 01/01/2012 (Dental - Aetna PPO) (Elect) Jared Ellis Benefit Elections Active on 01/01/2012 (Medical - Aetna PPO) (Elect) Jared Ellis Benefit Elections Active on 01/01/2012 (Spouse Life - Liberty Mutual (Spouse)) (Elect)	Edit
Thornton Ellis	Child	1 years, 6 months, 7 days	Jared Ellis Benefit Elections Active on 01/01/2012 (Medical - Aetna PPO) (Elect)	Edit

- 3 Complete the **Add My Dependent** page. Be sure to fill out all the required fields, and then click the **Submit** button at the bottom of the page to save.



The screenshot shows the 'Add My Dependent' page for Jared Ellis. It includes a 'Dependent Options' section with a question 'Use your new dependent as a beneficiary?' and a 'No' button. Below that is the 'Dependent Personal Information' section with fields for 'Legal Name*', 'Gender*', and 'Date of Birth*'. Each field has a placeholder text and a red asterisk indicating it is required.

Dependent Options

Use your new dependent as a beneficiary?

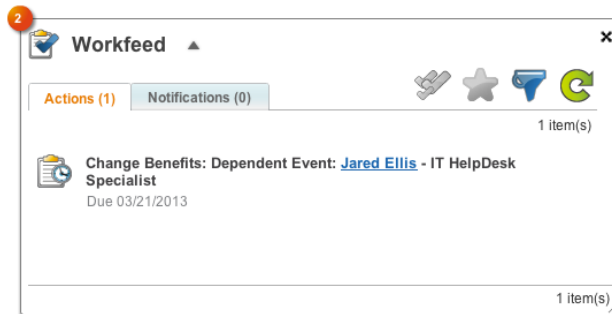
Dependent Personal Information

Legal Name*

Gender*

Date of Birth*

- 4 Once a new dependent is added, from your **Workfeed**, or using the **Related Action** icon, you may change your benefits, report a Benefit Event and make new benefit elections.



- 5 Once the Dependent Change event type is selected, a list of available elections related to the Life Event will be displayed.

Click **Submit** to accept the change.

Change Benefits:
Jared Ellis

Instructional Text

Any dependent/marital status change event requires proof of the change in family status, prior to making mid-year benefit election changes.

You will be required to [attach supporting documentation](#) to your request for such a benefit event.

Keep in mind that certain types of election changes must be submitted within a specific time frame, after Benefit Department approval.

Reminder: The [Benefits Policy Document](#) includes specifics on all of the requirements.

Benefit Event Type *

Birth / Adoption of Child

Benefit Event Date *

03/17/2013

Submit Elections By

04/15/2013

Enrollment Offering Types

Basic Group Life
Dental
Dependent Care FSA
Employee Assistance Program
Healthcare FSA
Health Savings Account
Legal Assistance
Long Term Disability
Medical
Short Term Disability
Spouse Life
Vision
Voluntary AD&D
Voluntary Supplemental Life

Attachments

Attachment	Comment	File
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enter your comment

All Comments (0) Process History Related Links

Submit

Save for Later

Cancel

- 6 Review the next step in the process by selecting the **Process** tab on the **Next Steps** page. Approvals may be required, depending on your organization's business process.

Details and Process
 For [Jared Ellis](#)
 Overall Process [Benefit Event: Jared Ellis on 03/01/2013](#)
 Overall Status **In Progress**

Details **Process**

Process History - 2 Items

Process	Step	Status	Completed On	Due Date	Person
Change Benefits	Change Benefits	Submitted	03/21/2013 12:17:43 PM		Jared Ellis
Change Benefits	Review Benefit Changes	Awaiting Action			Maria Cardoza (Benefits Partner)

Remaining Process - 3 Items

Process	Step	Group	Person
Change Benefits	Change Benefit Elections	Employee As Self Retiree As Self	Jared Ellis
Change Benefits	Change Benefit Elections	Benefits Partner	Maria Cardoza
Change Benefits	To Do: Change Marital Status	Employee As Self	Jared Ellis

- 7 Once the benefit change has been approved, a new task will appear in your Workfeed. Open the task and complete the new benefit elections process.

Workfeed ▾

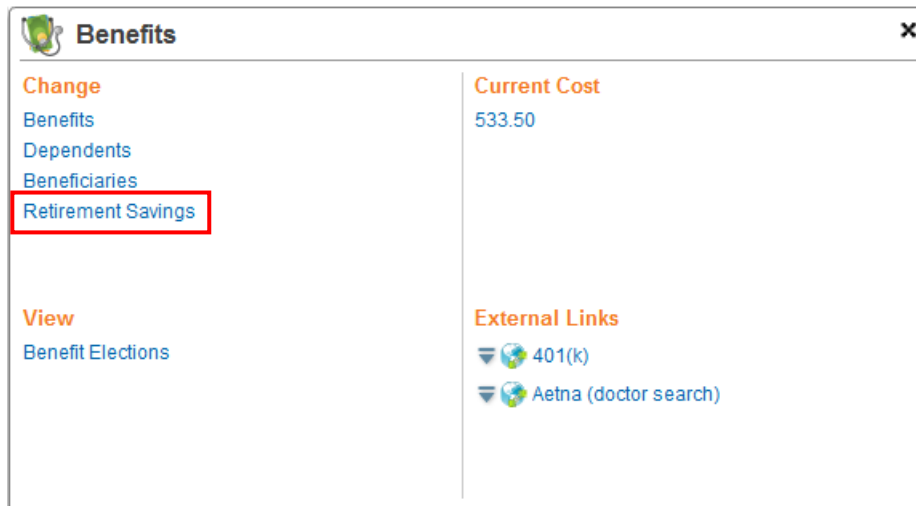
Actions (2) **Notifications (0)**

2 item(s)

 **Benefit Change - Birth / Adoption of Child : [Jared Ellis](#) on 03/01/2013**
 25 minute(s) ago - Effective 03/01/2013

HOW CAN I CHANGE MY RETIREMENT SAVINGS ELECTION, SUCH AS 403(B)?

- 1 From the **Benefits** worklet, select the **Retirement Savings** link.



The screenshot shows a 'Benefits' worklet window. On the left, under the 'Change' section, there are links for 'Benefits', 'Dependents', 'Beneficiaries', and 'Retirement Savings'. The 'Retirement Savings' link is highlighted with a red rectangular box. On the right, under the 'Current Cost' section, the value '533.50' is displayed. Below that, under the 'View' section, there is a link for 'Benefit Elections'. On the far right, under the 'External Links' section, there are two links: '401(k)' and 'Aetna (doctor search)', each with a small globe icon.

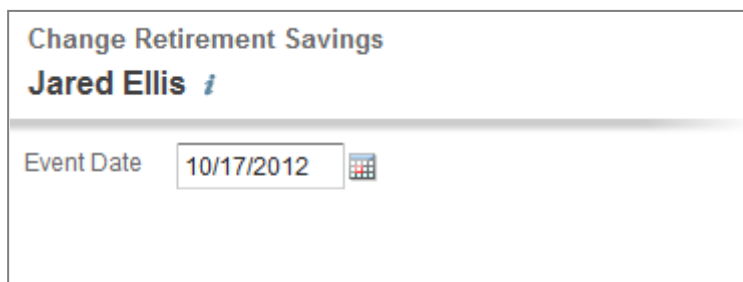
- 2 To change elections, select the **Edit** button.



The screenshot shows the 'Retirement Savings Elections' page for Jared Ellis. At the top, there is a header with the name 'Jared Ellis' and a dropdown arrow next to 'Actions'. Below the header, there is a blue 'Edit' button. Underneath the button, the title 'Retirement Savings Elections' is displayed. Below the title is a table with the following data:


Benefit Plan	Employee Contribution	Employer Contribution	Beneficiaries		
			Beneficiary	Primary Percentage	Contingent Percentage
401(k) - Charles Schwab	Percent 5		Julie Ellis	100	0

- 3 Select the Event Date.







The screenshot shows the 'Change Retirement Savings' page for Jared Ellis. Below the header, there is a form with an 'Event Date' field. The date '10/17/2012' is entered in the field, and a calendar icon is visible to the right of the input box.

4 Make your changes and select the **Submit** button.

Change Retirement Savings
Jared Ellis 


6.00%
Total Employee Contribution (Percent)

Retirement Savings Elections - 2 items

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution	Plan Description	Provider Website
401(k) - Charles Schwab	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="8"/>	Percentage Maximum 35	 Schwab 401K Summary	 Charles Schwab
401(k) - Charles Schwab Roth	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0	Percentage Maximum 35	 Schwab 401K Roth Summary	 Charles Schwab




Continue Cancel

5 Prorate between multiple beneficiaries by **Primary** or **Contingent** percentage. Many plans require the identification of a beneficiary; set up a beneficiary by using the prompt box. Click **Submit** when finished.

Change Retirement Savings
Jared Ellis 

\$0.00 Monthly Cost
Total Employee Cost





Beneficiary Designations

Benefit Plan	Provider Website	Requires Beneficiary	*Beneficiaries	
			*Beneficiary	*Primary Percentage / Contingent Percentage
401(k) - Charles Schwab	 Charles Schwab	<input checked="" type="checkbox"/>	<div> Julie Ellis </div>	<div><input checked="" type="radio"/> Primary Percentage <input type="text" value="100"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/></div>


Submit **Go Back** Cancel

6 A confirmation screen summarizes the retirement elections you have made.


You have submitted:

Benefit Change - Retirement Savings Change : Jared Ellis on 10/17/2012    


Benefit Event Type	Retirement Savings Change
Initiated On	10/17/2012
Submit Elections By	10/17/2012
Event Date	10/17/2012
Finalized Date	10/17/2012
Benefit Group	Active Employees in U.S. - Salaried
Enrollment Status	Finalized


Attachments 


Attachment

Elected Coverages 

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Beneficiaries
401(k) - Charles Schwab	10/17/2012	10/17/2012	6%	Julie Ellis

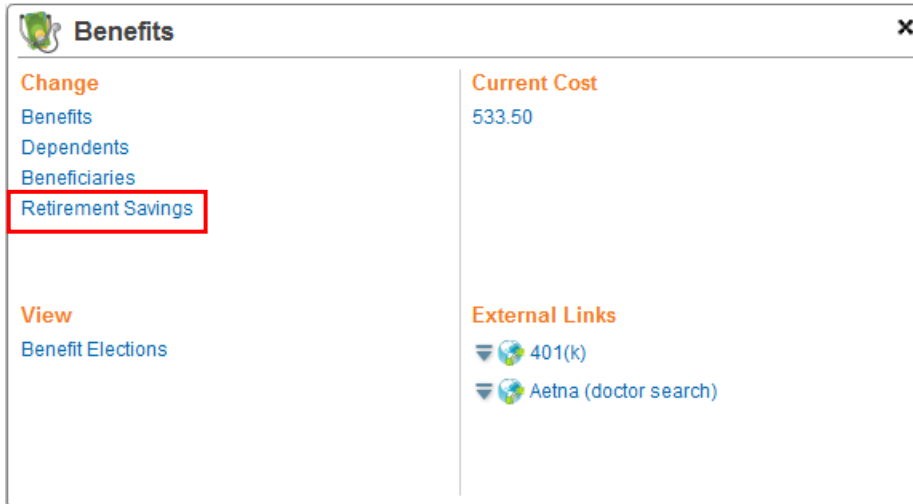
Beneficiary Designations 

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiaries	
			*Beneficiary	*Primary Percentage / Contingent Percentage
401(k) - Charles Schwab	 Charles Schwab	Yes	Julie Ellis	<input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0



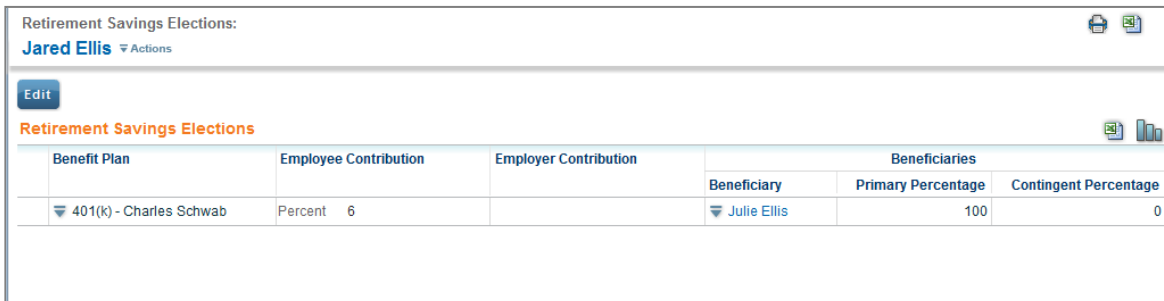
HOW CAN I VIEW MY EXISTING SAVINGS ELECTION (403 (B))?

- 1 From the **Benefits** worklet, select the **Retirement Savings** link.



The screenshot shows a 'Benefits' worklet window. On the left, under the 'Change' section, there are links for 'Benefits', 'Dependents', 'Beneficiaries', and 'Retirement Savings' (which is highlighted with a red box). On the right, under the 'Current Cost' section, the value '533.50' is displayed. Below the 'Change' section, under the 'View' section, there is a link for 'Benefit Elections'. On the right side, under the 'External Links' section, there are two links: '401(k)' and 'Aetna (doctor search)'.

- 2 From here you may view your existing Retirement Savings Elections.



Retirement Savings Elections: Jared Ellis Actions

Edit

Retirement Savings Elections

Benefit Plan	Employee Contribution	Employer Contribution	Beneficiaries		
			Beneficiary	Primary Percentage	Contingent Percentage
401(k) - Charles Schwab	Percent 6		Julie Ellis	100	0