

BENEFITS

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# Navigate Open Enrollment for Mobile




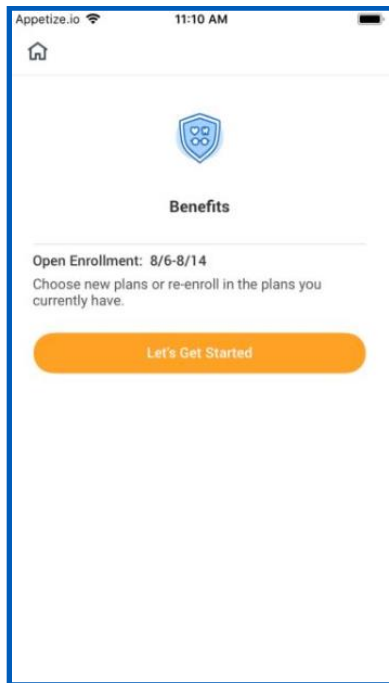
## OPEN ENROLLMENT STEPS FOR MOBILE

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive an Open Enrollment Change task in your Inbox. Based on your organization's configuration, approvals may be necessary to complete this task. The following steps will help you to complete your open enrollment.

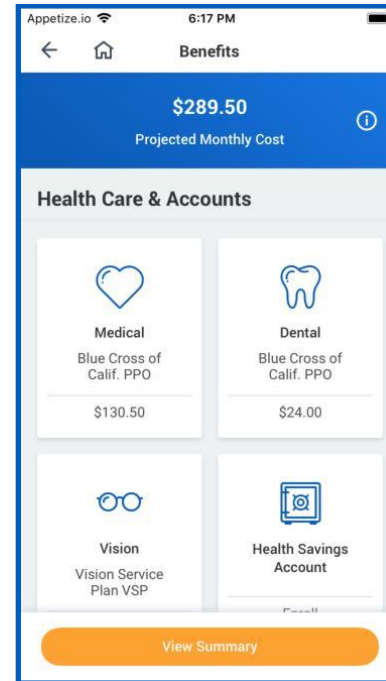
### SELECT YOUR BENEFITS

From your Home page:

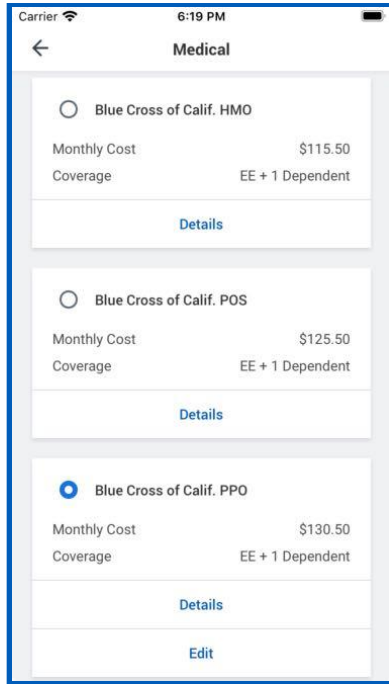
1. Tap the **Inbox**  icon.
2. Tap the **Open Enrollment Change** task.
3. Tap **Let's Get Started** and answer any configured questions.



4. Answer the tobacco use question and tap **Save**.
5. The Benefits page displays. Select a category.



6. For each category, **Select** or **Waive** your choice. Your current elections will default.
7. Tap the **Details** link to review plan information and contact information for the provider.
8. Tap **Edit** to modify your coverage, if needed.



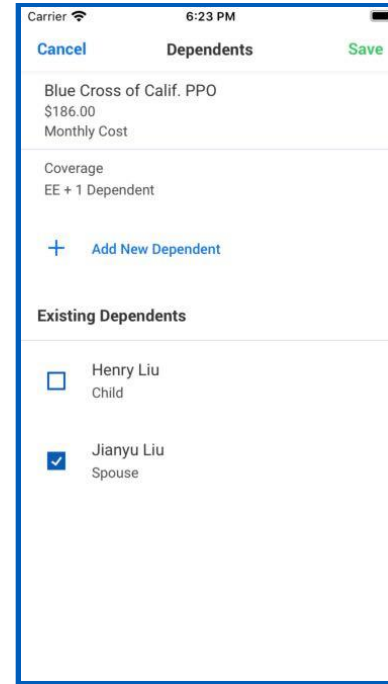
### ADD OR MODIFY DEPENDENTS

If you elect or modify a benefit plan during open enrollment, you can add dependents or modify existing dependents.

1. Select your new benefit election or tap the **Edit** link for an existing benefit election.
2. Tap **Add New Dependent** and complete the configured questions. You can also select or deselect an existing dependent to add or remove them from the plan. Complete all required information before moving on to the next step.



Note: If derived coverage is configured on the medical plan, Workday selects a coverage target automatically, based on who the employee covers.



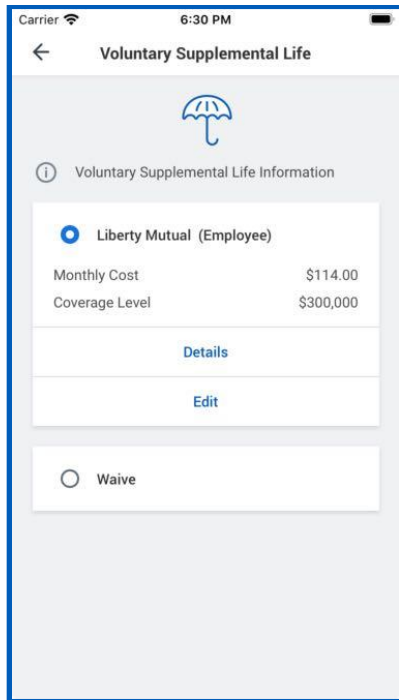
3. Tap **Save**.

## ADD GROUP LIFE INSURANCE

Depending on your organization's policy and local, state, and federal laws, you may need to complete a physical examination to qualify for life insurance during open enrollment. Ask your HR or benefits representative for additional information.

From the Insurance & Retirement section, select each category to open your enrollment options.

1. **Select** or **Waive** each insurance election. For existing elections, tap **Edit** to modify your coverage, as needed.

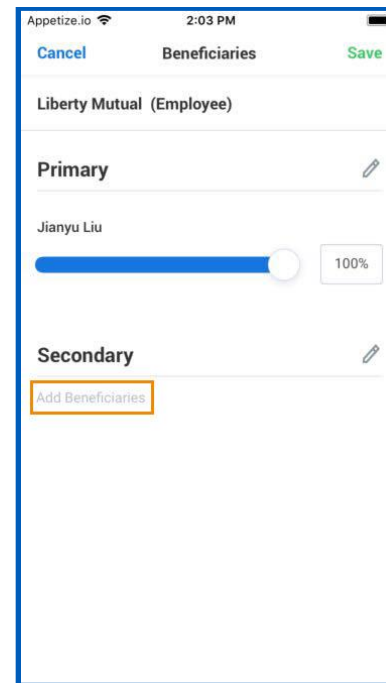


2. Tap **Save**.

## DESIGNATE LIFE INSURANCE BENEFICIARIES

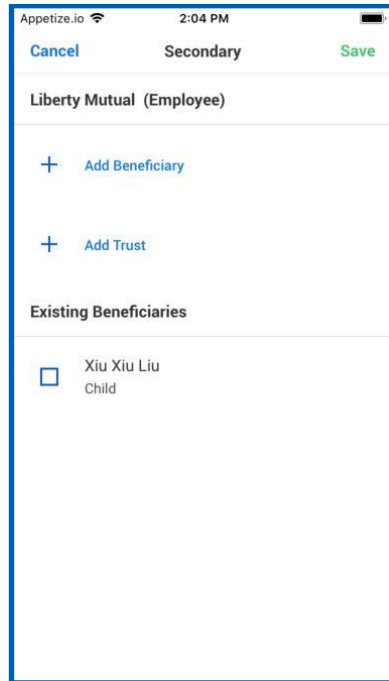
From the Insurance & Retirement section, select each category to open your enrollment options.

1. For new enrollments, select the benefit option from the Insurance & Retirement section. Tap **Details** to view the plan description or provider website. Tap the **radio button** to enroll. For current enrollments, tap **Edit** to modify your beneficiaries.
2. Tap to view and modify your beneficiary percentages and coverage amounts. Your primary beneficiary and contingent beneficiaries must add up to 100%.



3. Tap **Add Beneficiaries** to add a new beneficiary.

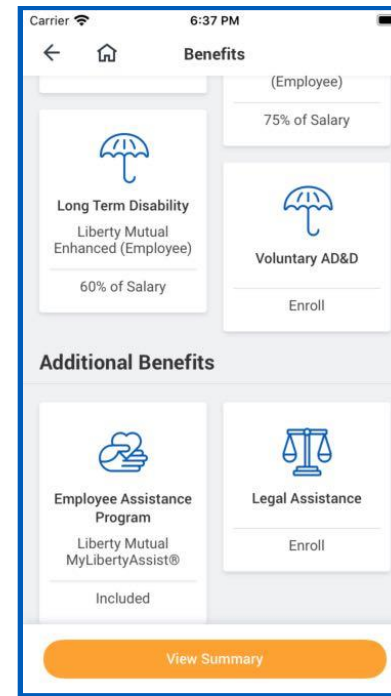
- Select existing beneficiaries or add a new beneficiary. To add a new beneficiary, tap **Add Beneficiary** or **Add Trust**. To remove an existing beneficiary, clear the checkbox next to that beneficiary.



- Tap **Save** and enter the percentage of benefits for each beneficiary.
- Tap **Save**.

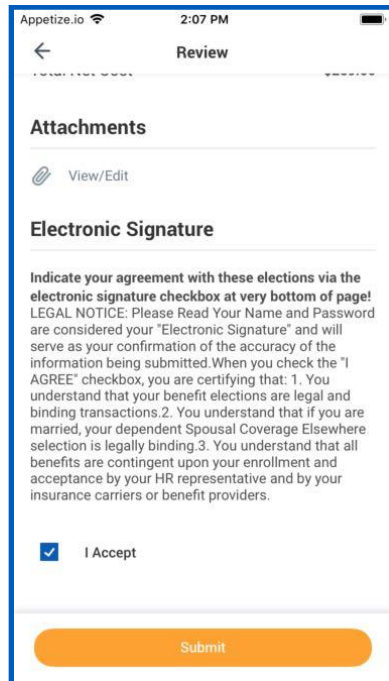
### ADD ADDITIONAL BENEFITS

The Additional Benefits section is where you can elect optional benefits, such as employee assistance or legal assistance insurance. You can select or waive coverage for each category.



## COMPLETE YOUR ENROLLMENT

1. Tap **View Summary**.
2. Scroll down to review your benefit elections and upload any required documentation in the Attachments section.
3. Select the **I Accept** checkbox to confirm your electronic signature, if needed.



4. Tap **Submit**. A confirmation page displays.
5. Tap **Close** to return to your Inbox. Optionally, tap the **View 2020 Benefits Statement** button to view a confirmation of your submitted elections.