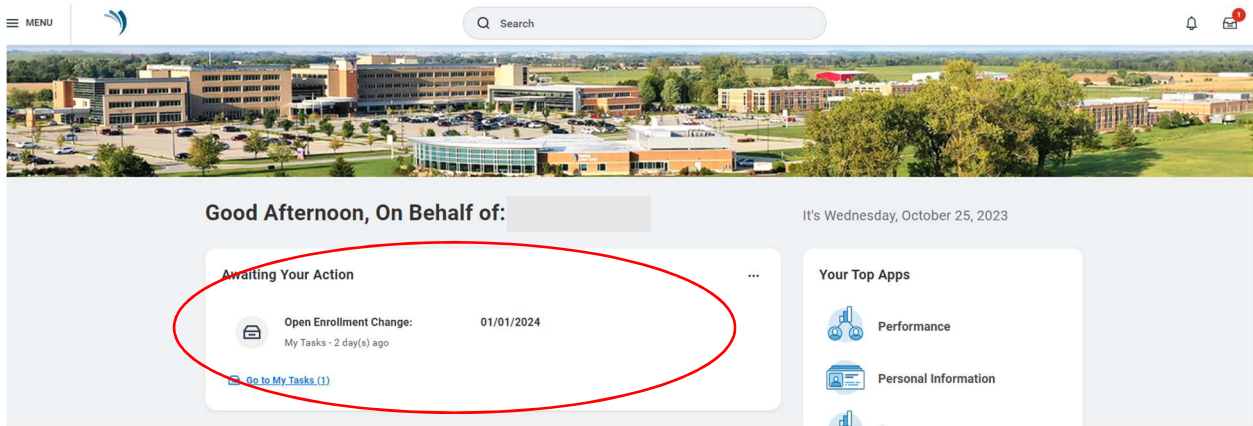
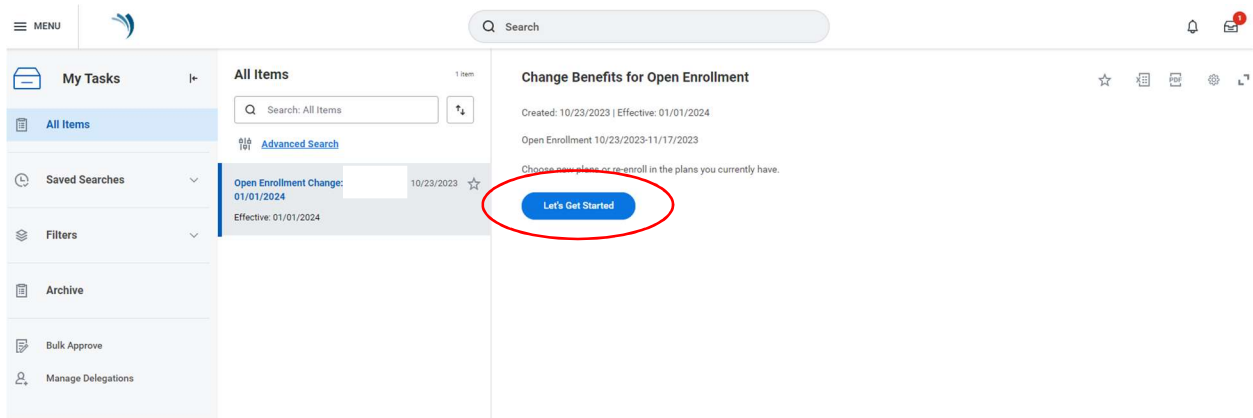


2023 Workday Open Enrollment – Updating a Beneficiary – User Guide

Step 1. Log into Workday: Click on the Open Enrollment Change: awaiting you in your task box



Step 2. Press: Let's Get Started



Step 3. Answer the prompted question:

- Please note, for this open enrollment, rates will default to the standard rate for benefits. Wellness Data will be loaded after December 10th. At this point rates will updated to the Nicotine Free Rate for Employees and spouses who met all of the requirements.
- Answer the questions with Yes, or No. Then press continue

Update Your Information

Health Information

Tobacco Use

Please note tobacco usage will be updated in late December based on your screening results.

Question Have you used tobacco in the last 12 months and have you met the wellness requirements?

Answer * Yes
 No

Step 4. After completing your health enrollments: Scroll down to the insurance section of the enrollment process. Click manage on each life insurance policy. Basic Life, Basic AD&D, Voluntary Life – Employee, Voluntary AD&D employee require a beneficiary to submit your enrollment.

The screenshot displays the 'Insurance' section with the following details:

- Basic Life:** Reliance Standard (Employee). Cost per paycheck: Included. Coverage: 2 X Salary. **Manage** button is circled in red.
- Basic AD&D:** Reliance Standard (Employee). Cost per paycheck: Included. Coverage: 2 X Salary. **Manage** button.
- Voluntary Life - Employee:** Reliance Standard (Employee). Cost per paycheck: \$5.77. Coverage: \$250,000. **Manage** button.
- Voluntary Life - Spouse:** Waived. **Enroll** button.
- Voluntary AD&D - Employee:** Waived. **Enroll** button.
- Voluntary AD&D - Spouse:** Waived. **Enroll** button.

Step 5. Press Confirm and Continue on each life plan you are updating a beneficiary for:

The 'Plans Available' section shows the following table:

*Selection	Benefit Plan Details	You Pay (Biweekly)	Company Contribution (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Reliance Standard (Employee)	Included	\$2.66

At the bottom of the screen, the **Confirm and Continue** button is circled in red, next to a **Cancel** button.

Step 6. Press the + button on the left side.

Projected Total Cost Per Paycheck
\$95.72

Coverage

Calculated Coverage \$128,000.00

Coverage 2 X Salary

Plan cost per paycheck Included

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 0 items

+	Beneficiary	Percentage
No Data		

Secondary Beneficiaries 0 items

+	Beneficiary	Percentage
No Data		

Basic Life - Reliance Standard (Employee)

Projected Total Cost Per Paycheck
\$95.72

Coverage

Calculated Coverage \$128,000.00

Coverage 2 X Salary

Plan cost per paycheck Included

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
-		0

Secondary Beneficiaries 0 items

+	Beneficiary	Percentage
No Data		

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Step 7. Hover over – add new beneficiary or trust

Projected Total Cost Per Paycheck
\$95.72

Coverage

Calculated Coverage \$128,000.00
Coverage 2 X Salary
Plan cost per paycheck Included

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 Beneficiary

Existing Beneficiary Persons	>	Percentage
Existing Trusts	>	
Add New Beneficiary or Trust		
Search	⋮	0

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

Step 8. Press either option.

- Trust must be legally set up before adding. Beneficiary, is a singular person.

Add New Beneficiary or Trust

A beneficiary is the person or entity you name to receive this benefit. A trust is an arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries.

Would you like to add a new beneficiary or trust?

Add New Beneficiary
 Add New Trust

Continue Cancel

Step 9. Complete the following information:

- Relationship, Date of Birth, Sex at birth, Legal Name, and Address are required.

Add New Beneficiary or Trust

Relationship *

Use as Beneficiary

Date of Birth

Age (empty)

Sex at Birth

Allow Duplicate Name

Legal Name **Contact Information** National IDs Additional Government IDs

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

Allow Duplicate Name

Legal Name **Contact Information** National IDs Additional Government IDs

Phone

Address

Email

Instant Messenger

Legal Name **Contact Information** National IDs Additional Government IDs

Phone

[Add](#)

Address

Use Existing Address

Country * United States of America

Address Line 1 *

Address Line 2

City *

State *

Postal Code *

County

Usage

Type *

Step 10. Press Confirm and Continue: Verify your percentages of primary and secondary = 100% in each section.

Percentage	
<input type="text" value="100"/>	

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dentl

Step 11. Do the same process for EACH plan.

Insurance

<p>Basic Life Reliance Standard (Employee)</p> <p>Cost per paycheck: Included Coverage: 2 X Salary</p> <p>Manage</p>	<p>Basic AD&D Reliance Standard (Employee)</p> <p>Cost per paycheck: Included Coverage: 2 X Salary</p> <p>Manage</p>	<p>Long Term Disability (LTD) Reliance Standard (Employee)</p> <p>Cost per paycheck: Included Coverage: 60% of Salary</p> <p>View</p>
<p>Voluntary Life - Employee Reliance Standard (Employee)</p> <p>Cost per paycheck: \$5.77 Coverage: \$250,000</p> <p>Manage</p>	<p>Voluntary Life - Spouse Waived</p> <p>Enroll</p>	<p>Voluntary Life - Child Waived</p> <p>Enroll</p>

Step 12. Use the option: Existing Beneficiary Persons to re-use beneficiary's for your plans.

Projected Total Cost Per Paycheck
\$95.72

Coverage

Calculated Coverage \$128,000.00

Coverage 2 X Salary

Plan cost per paycheck Included

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 Beneficiary

	Existing Beneficiary Persons	>	
	Existing Trusts	>	Percentage
	Add New Beneficiary or Trust		
	Search		0

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
No Data		

Step 13. Once you have updated all of your beneficiaries, scroll down to the bottom of the screen, and check box the "I agree" button.

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 Accept" checkbox, you are certifying that:

- You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your benefit elections during the calendar year unless you experience a qualified change in status.
- You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Account contributions. These benefits are paid through the Flexible Benefits Plan on a pre-tax basis.
- Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.
- Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a qualified change in status event during the calendar year.
- If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 30 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within 30 days after the marriage, birth or adoption.

I Accept