Introduction

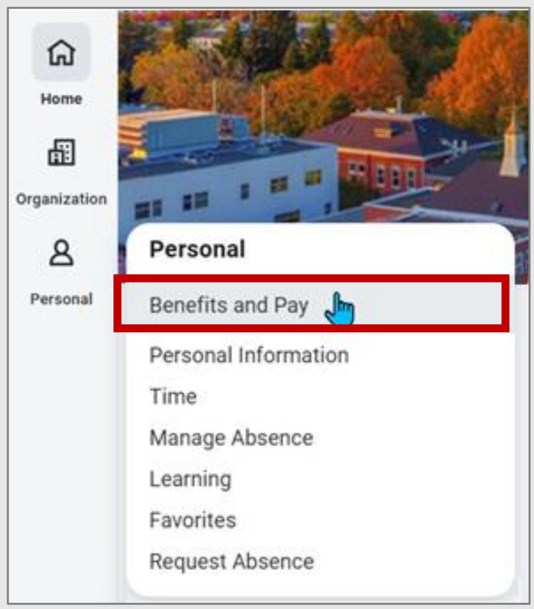
With the exception of your voluntary retirement plan contributions, your benefit elections must remain unchanged until Open Enrollment, which occurs in February and is effective on April 1 of each year.

However, there are life events known as qualifying events, that are an exception to this rule and allow changes to be made to your benefits outside of Open Enrollment. These qualifying events are related to big changes in your life, such as the birth of a child, marriage, divorce, and a family member who becomes no longer eligible to participate in their own health insurance.

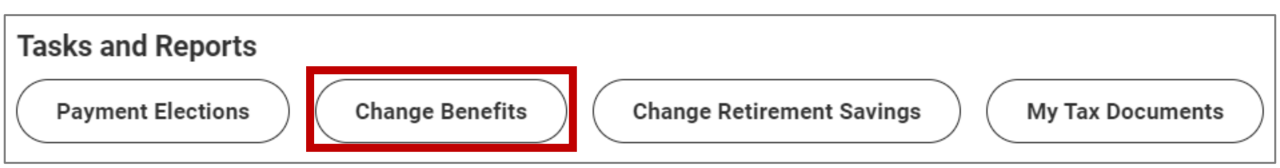
Follow these steps to make a change for a qualifying event. If you are unsure if what has occurred would be defined as a qualifying event or not, please contact Human Resources at hr@willamette.edu.

Getting Started

1. After logging into Workday, hover over the **Personal** Icon in the left-hand navigation. From the menu that appears, select **Benefits and Pay**.

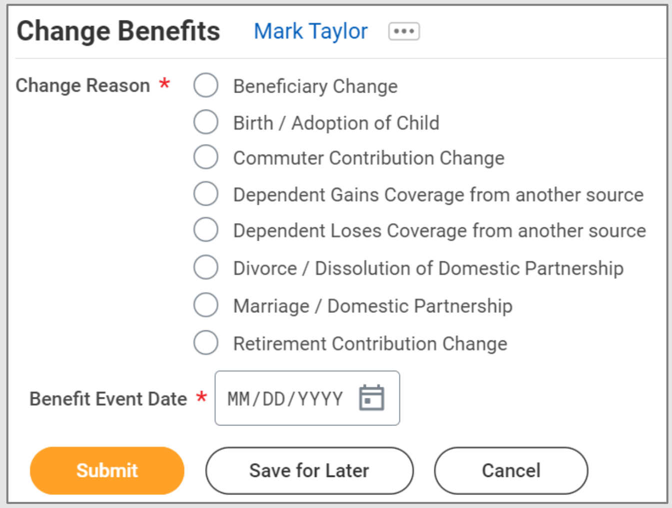


2. Click the **Change Benefits** button under Tasks and Reports. Note that the buttons that appear are based on your usage, and so the view is customized and may be different than the image shown below.



3. Select the reason for your change.

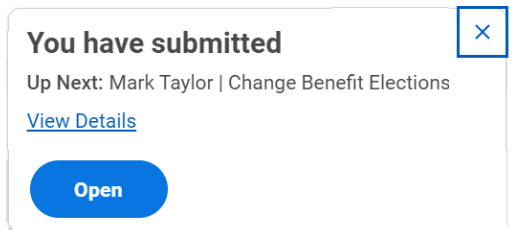
Note: The beneficiary change, the commuter contribution change, and the retirement contribution change can occur at any time and are not dependent on a qualifying event occurring.



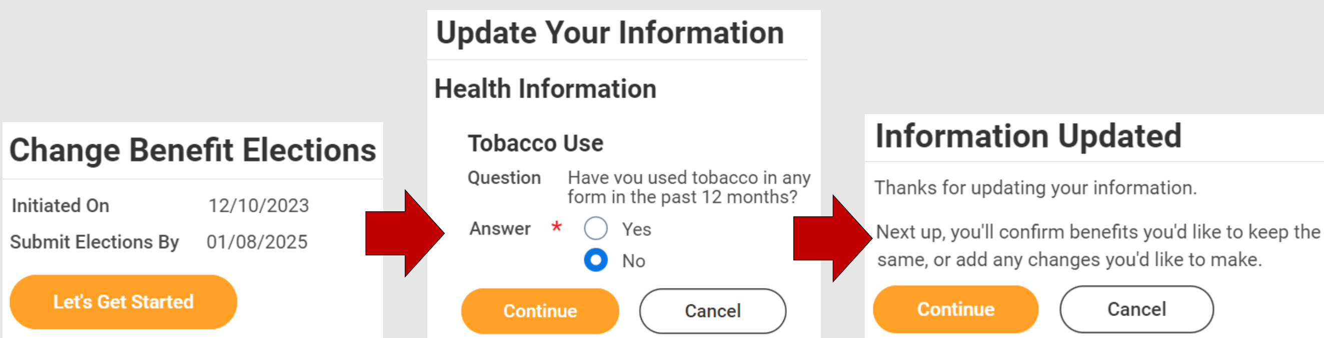
Enter the date of the qualifying event.

Click **Submit**.

4. An acknowledgement of your change request will display. Click the **Open** button to proceed with making your benefit changes.



5. Next, you will confirm you wish to proceed, update the answer related to your tobacco use as needed, then click continue to proceed to benefits.



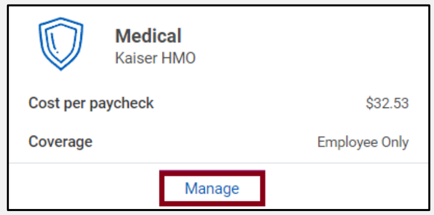
6. The following sections will describe how to enroll in or change each benefit. The process is pretty straightforward, so reference as needed.

Make Changes to Health Care Elections

Medical and Dental Elections

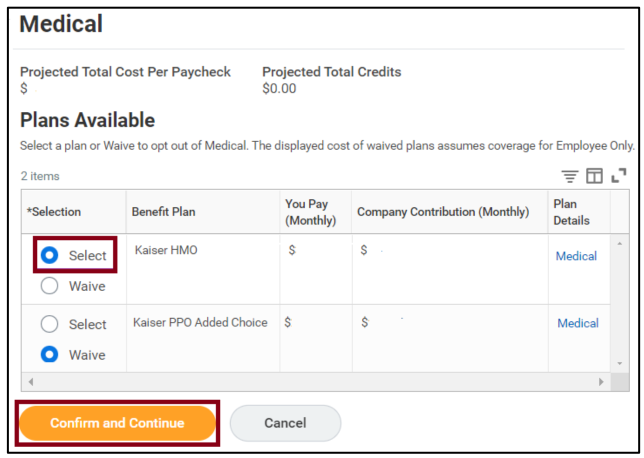
The same method is used to enroll in or make changes to medical and dental plans.

1. Click **Manage** or **Enroll** at the bottom of the Medical tile.



2. Click the **Select** radio button next to the plan you wish to enroll in. In this example, the Kaiser HMO button is selected.

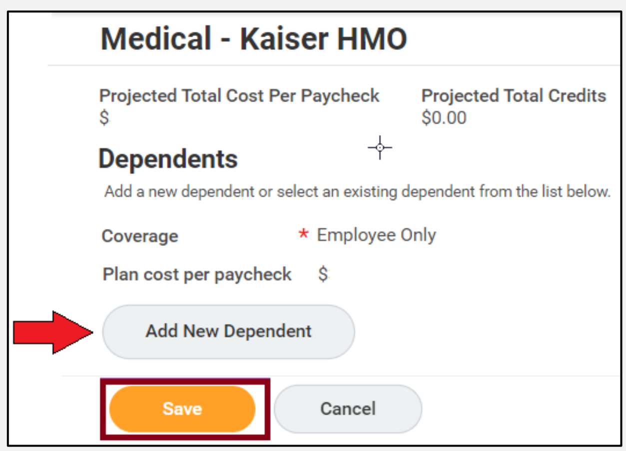
Click **Confirm and Continue**.



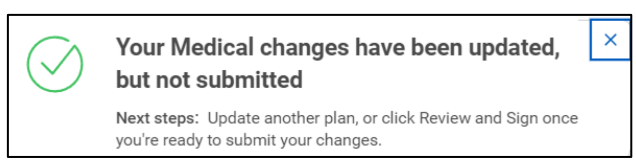
3. Your cost per paycheck for enrolling in the plan will display.

If you wish to add dependents to the plan, click **Add New Dependents** and follow the instructions later in this guide.

When you are done, click **Save**.



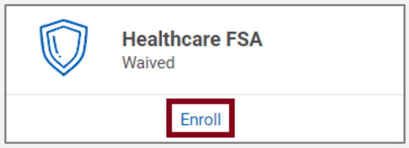
4. You will receive a confirmation that your changes have been updated.



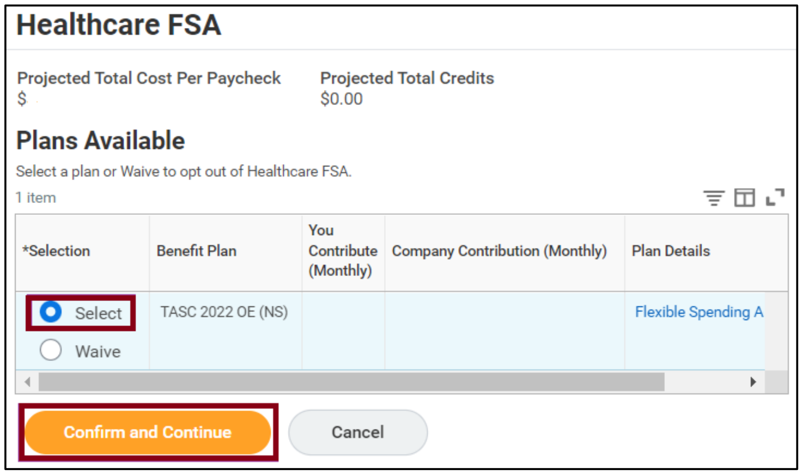
Flexible Spending Account Elections

These instructions demonstrate enrollment in the Healthcare Flexible Spending account, but the same process is used for Dependent Care enrollment. The Mass Transit Flex can be joined at any time during the year and is therefore not included here.

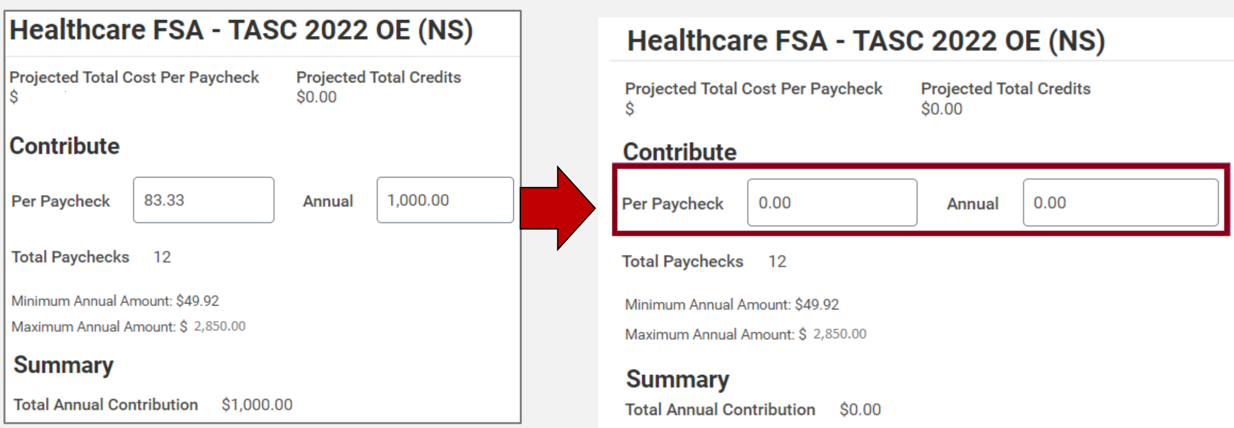
1. Locate the Healthcare FSA tile and click **Enroll**.



2. On the following screen, click the **Select** and then the **Confirm and Continue** button.

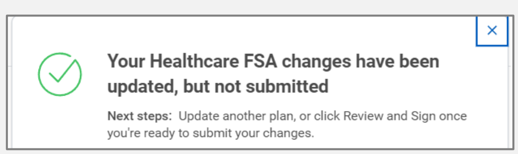


3. You may enter either a per paycheck amount or the annual amount you wish to contribute. Entering either input area will populate the other and provide a total annual contribution. In this example, $1,000 was entered as the annual amount.



4. Click **Save** at the bottom of the screen after your selection is made.

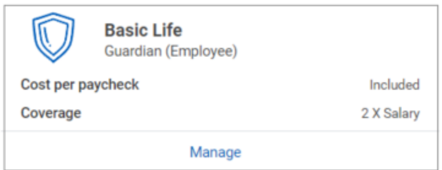
5. When finished you will receive a confirmation of your choice.

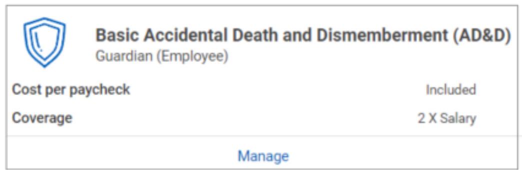


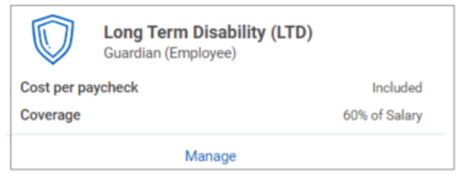
Change Insurance and Retirement Elections

Willamette Sponsored Benefits

Basic Life, Accidental Death & Dismemberment (AD&D) Insurance, and Long-Term Disability benefits are provided by Willamette to employees working 75% of a full-time schedule (30 hours a week). You may view, but not make changes to these plans.



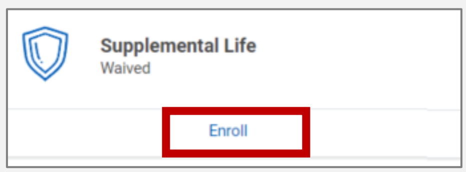




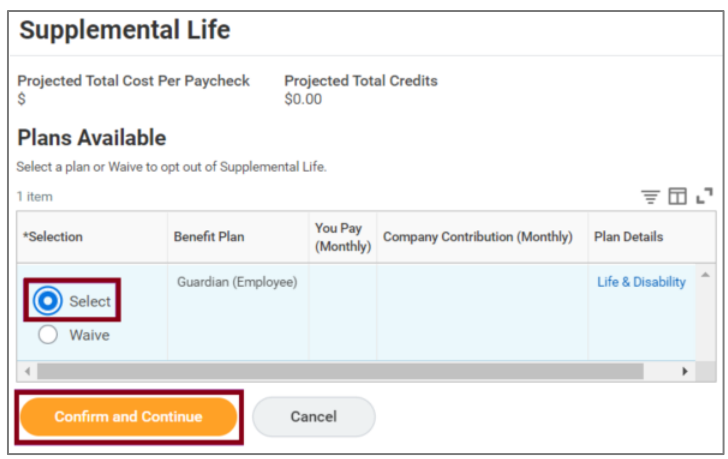
Voluntary Supplemental Life and AD&D Insurance

The directions below show how to add Supplemental Life and AD&D Insurance for yourself, but the same directions apply to adding these benefits for your spouse and children.

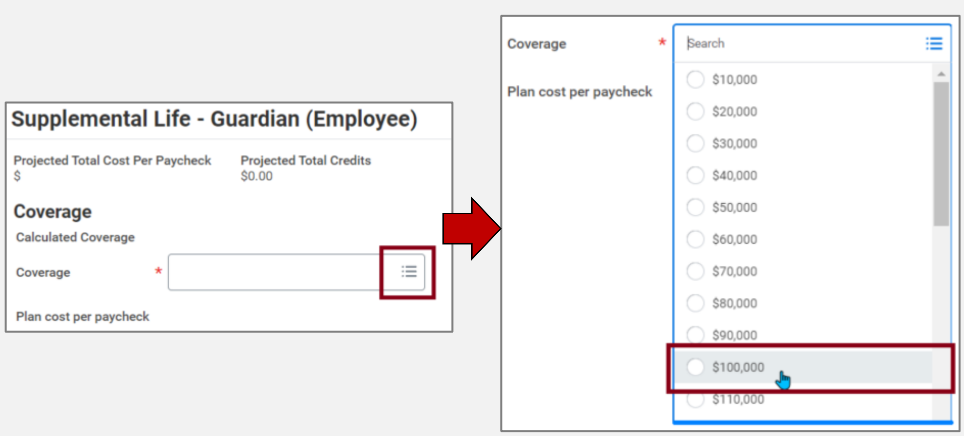
1. Click **Manage** or **Enroll** on the Supplementary Life tile.



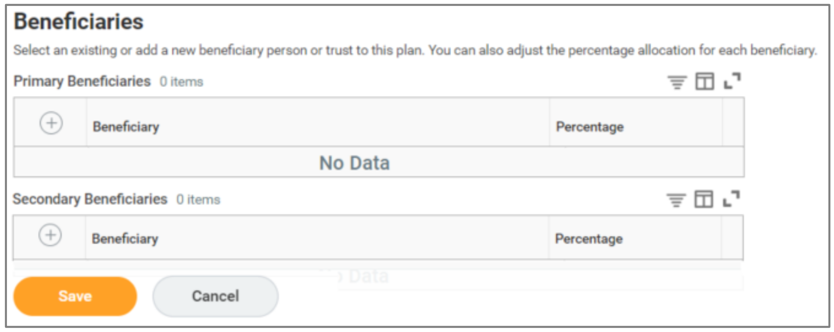
2. Click the **Select** button and then **Confirm and Continue**.



3. Click the list icon on the right-hand side of the Coverage box. A list of coverage amounts will appear. Select the amount of coverage you wish to have. In this example, $100,00 is chosen.



4. If you have not entered beneficiaries for this benefit, do so in the following section. When done, click **Save** and you will receive a confirmation message that your changes were successful.



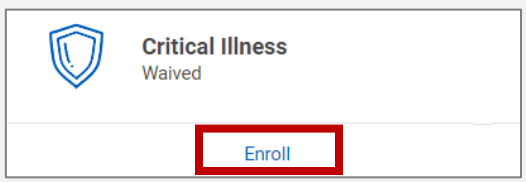
5. The Supplemental Life and AD&D Insurance are bundled, so it will also be necessary to add Supplemental AD&D. The process is the same as adding Supplemental Life.

- Click **Manage** or **Enroll** on the Supplemental Life tile.
- Select the coverage amount desired from the drop down list.
- Add beneficiaries as needed.
- Click **Save**.

Critical Illness

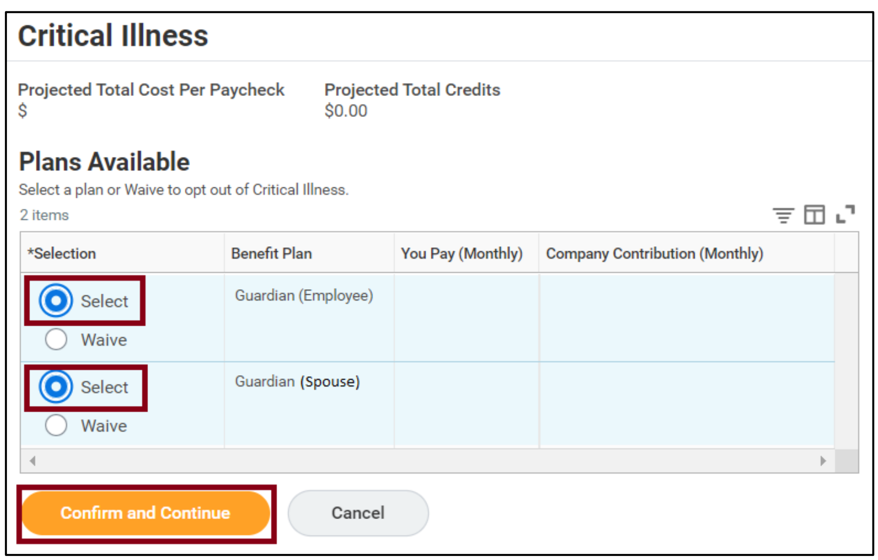
Critical Illness Insurance can help with expenses that medical insurance doesn't cover like deductibles or out of pocket costs, or services like experimental treatment. To find more information about this benefit, click here, and scroll down to Guardian Accident and Critical Illness section. The process for signing up for Critical Illness is similar to Supplemental Life Insurance.

1. Click **Enroll** to join the benefit or **Manage** to make changes.

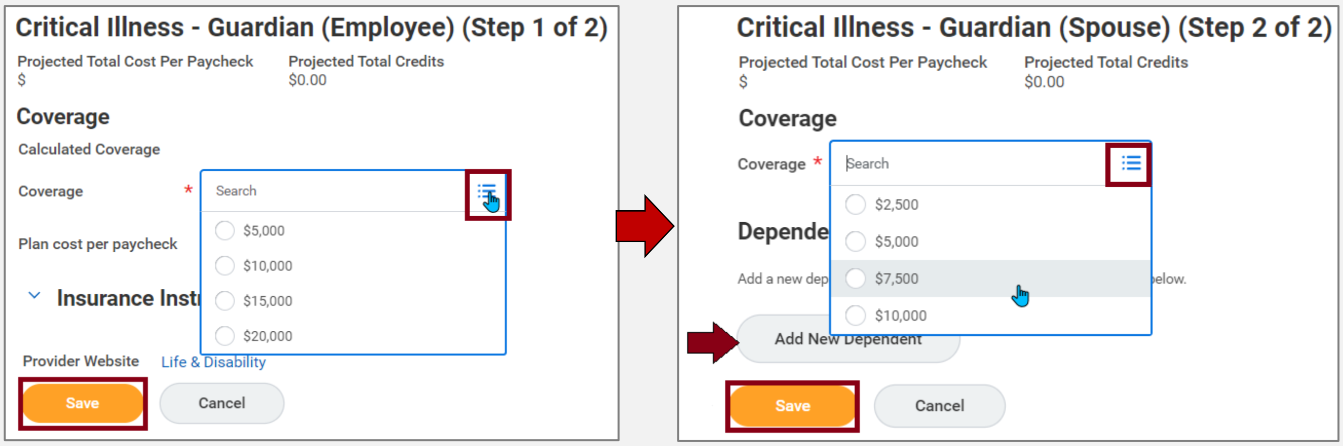


2. Click **Select** for each level of benefit you wish to elect. In this example, both employee and spouse are selected.

Click Save and Continue when done.



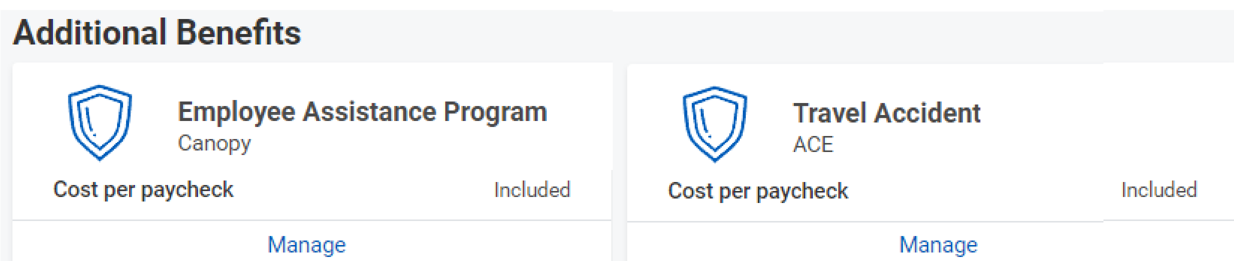
3. On the following screen, select the amount of coverage for yourself by clicking the menu icon in the Coverage field, selecting the amount, and then clicking **Save**. Repeat selecting a coverage amount for your spouse, clicking the **Add New Dependent** button to add your spouse, and then clicking **Save.**



4. You will receive the standard confirmation pop-up window indicating you have finished.

Additional Benefits

Willamette Sponsored Benefits

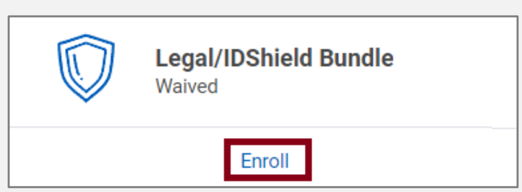


Willamette provides an Employee Assistance Program (EAP) and Travel Accident Insurance to employees at no cost. These plans are automatically populated with your plan information. You may view, but not make changes to these plans.

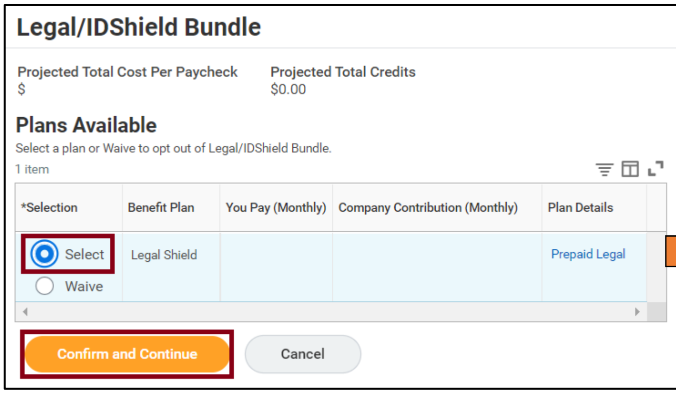
Legal Shield/ID Shield

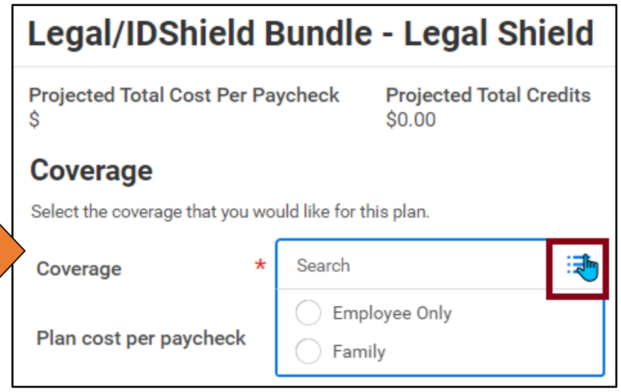
Legal Shield and ID Shield provide additional personal protection with legal and financial concerns as well as identity theft protection. You can opt to join one or the other or choose to have them bundled together. These instructions show you how to join the bundled program.

1. Click **Enroll** in the Legal/IDShield Bundle tile.



2.	Click **Select** and then **Confirm and Continue**. On the following screen, select whether you are covering yourself only or if you wish to cover yourself and your family.	
3.	When done, click the **Save** button, and you will receive a confirmation message.	

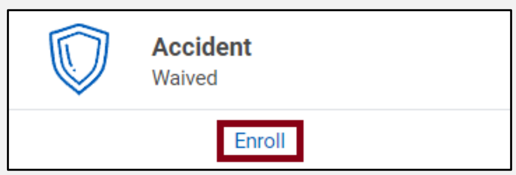




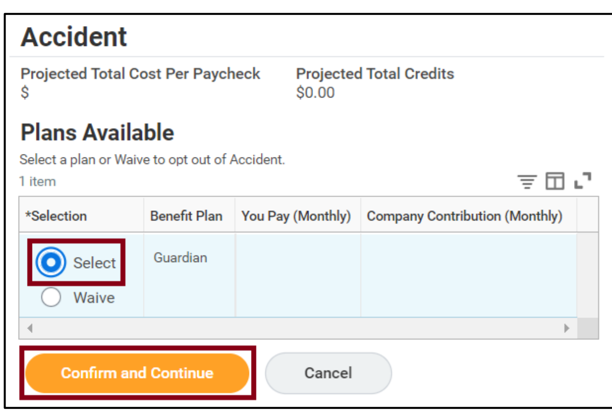
Accident Insurance

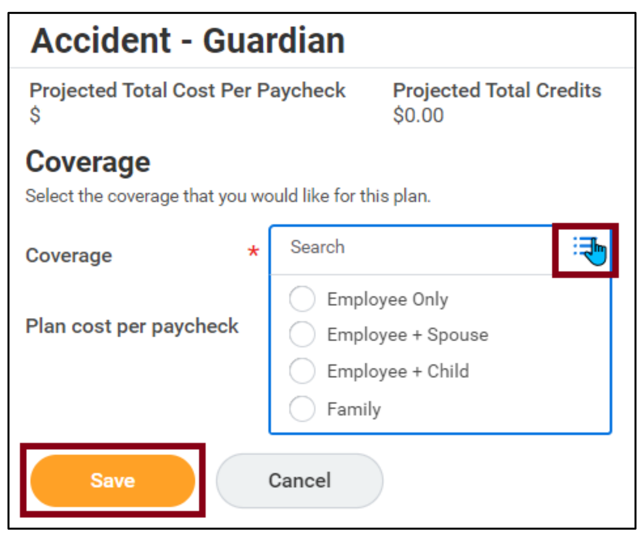
Accident Insurance can help you with your medical deductibles and co-pays, and cover household expenses like groceries, mortgage payments, and childcare, which can begin to pile up if you have to take some time off from work due to an accident. For more information about this benefit, click here.

1. Click **Enroll** in the Accident tile.



2. Click **Select**, then click **Confirm and Continue**. On the following screen, click the menu button in the coverage field and select the level of coverage from the drop-down menu. Click **Save**.



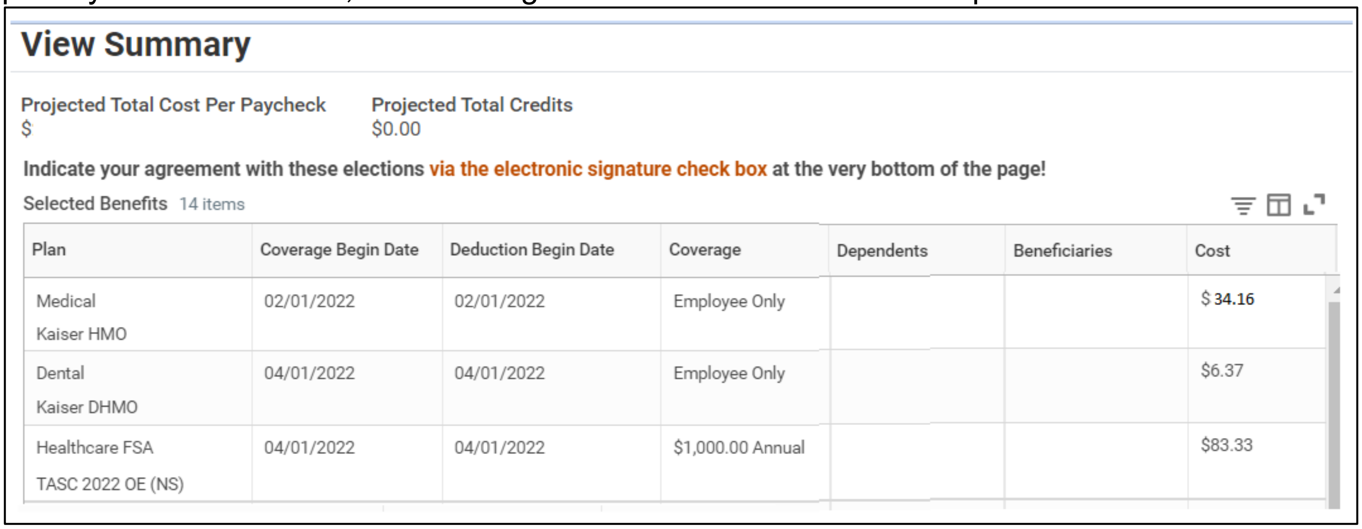


3. You will receive a confirmation message indicating you are done.

Finalize Benefit Selections

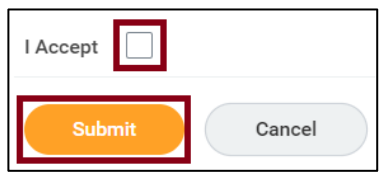
1. Once you made your benefit selections, go to the bottom of the screen that displays the benefit tiles. If you are ready to finalize your selections, click **Review and Sign**. If you wish to stop and come back later to complete your benefit elections, click **Save for Later**. This will create a reminder task in your Workday inbox to complete the process.

2. After clicking **Review and Sign**, you will be presented with the total cost of your benefits, the plans you have selected, and coverage details associated with each plan.



3. After the summary of your current elections, you will see a section showing which benefits you have waived, messages regarding any further action needed, and a summary of your total cost share.

4. If you are satisfied with your elections and are ready to complete your Open Enrollment, scroll down to the **I Accept** checkbox and select the box after reading through the Electronic Signature message. Click the **Submit** button.



5. You will receive a confirmation of submission message. Click **Done** to complete the open enrollment process.