Welcome to your New Hire Enrollment!

Please follow this step-by-step guide to complete your Enrollment Event.



Enrollment Instructions

For Health & Welfare Benefits effective the first of the month following your date of hire through June 30 of the following year.

Step 1: Workday Home Page



To make your Enrollment election, access the Enrollment task in your Workday inbox. You can access your Workday inbox by clicking on your Inbox Worklet.

Let's Focus on You

Awaiting Your Action



Benefit Change - New Hire / Rehire :

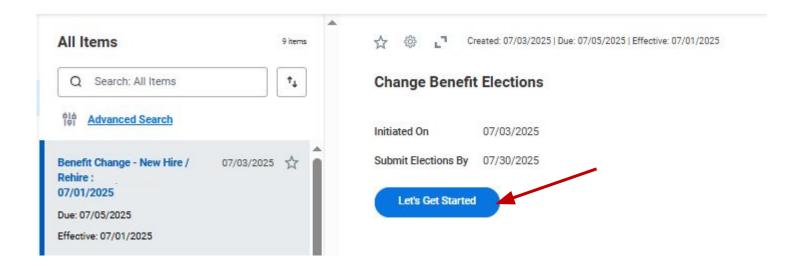
My Tasks - 4 day(s) ago DUE 07/05/2025

Step 2: Workday Inbox



Select the **Benefit Change - New Hire/Rehire** task in the left margin of your Workday inbox, then click Let's Get Started.

**You can expand the view to fill your screen by clicking on this icon

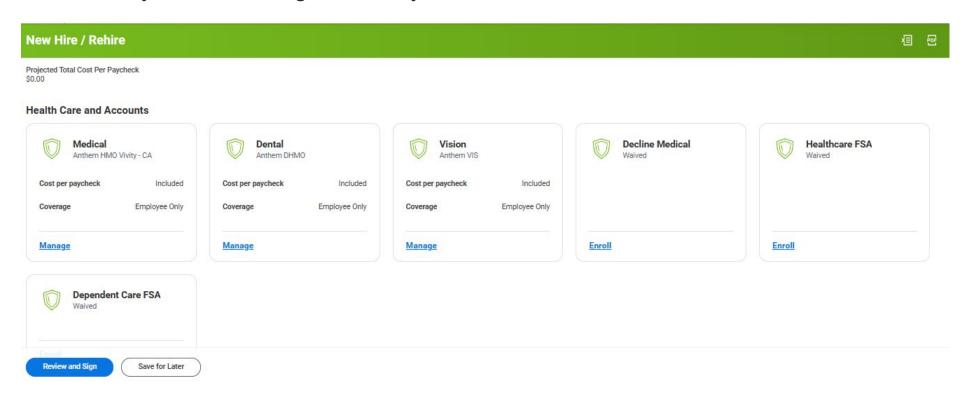


Step 3: Open Enrollment Health Care and Accounts



To make your open enrollment elections, click on Enroll or Manage in each category: Medical, Dental, Vision, Decline Medical, Healthcare FSA and Dependent Care FSA.

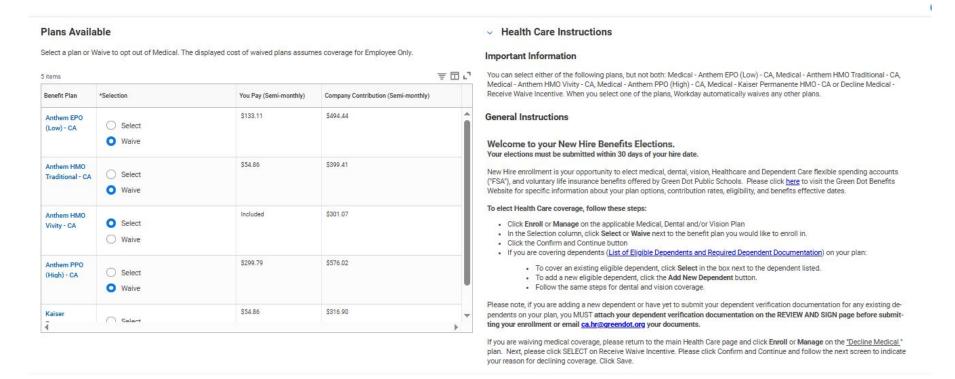
Note: If you are waiving Medical, you must Enroll in Decline Medical



Step 3: Medical



Click Enroll or Manage to review the Medical Worklet. Review the Enrollment Instructions and Helpful Tips on each page of the enrollment process.



Review Enrollment Instructions and Helpful Tips before you begin making your elections.

Helpful tips can be found at the top of each page of the enrollment

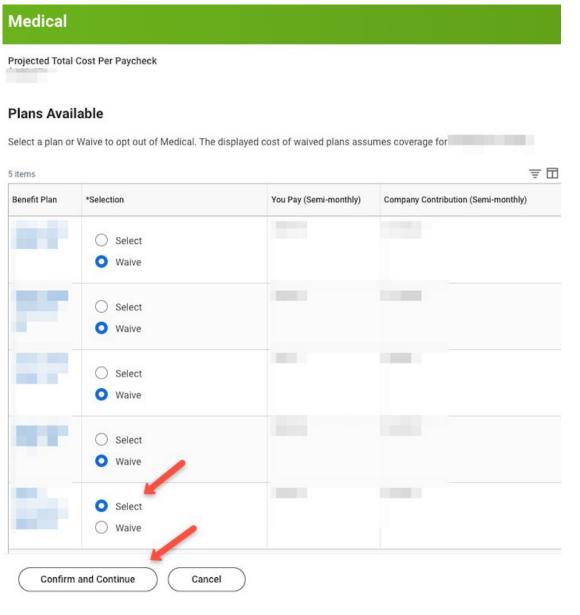
Confirm and Continue

Cancel

Step 3: Medical

schools™

On the Medical Worklet, click Select next to the plan you would like to enroll. Click Confirm and Continue to proceed.

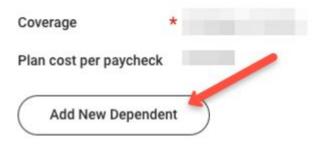




To add new dependents to coverage, click the "Add New Dependent" button as shown below.

Dependents

Add a new dependent or select an existing dependent from the list below.



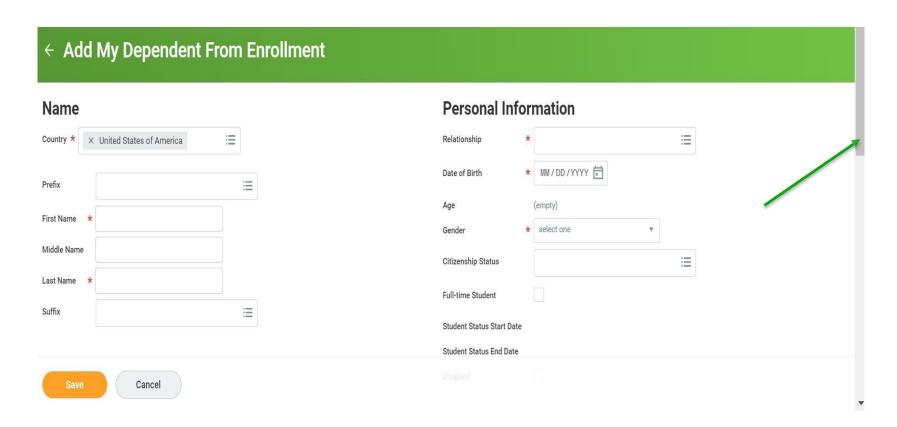


Review the instruction shown on the enrollment screen. If you would like this dependent to also be a beneficiary, check *Use as Beneficiary*. Then click OK.

Add N	My Dependent From Enrollment
Use as	Beneficiary
Please	review required Dependent Verification Documentation
•	California
To add	a dependent onto coverage, follow these steps:
•	Click OK below to enter your dependent's information such as date of birth, etc.
•	Scroll down to the National ID section and click Add to enter the SSN or ITIN number.
•	Once all information is entered, click Save to be returned to the dependents page.
•	The coverage type will populate based on the dependents you selected.
•	Click Save to be returned to the main election screen.
	In order to add a new dependent, you must attach your dependent verification documentation on the REVIEW AND SIGN page before submitting your enrollment. Any dependents on your plan that do not have dependent verification documentation submitted via Workday or directly to the
	People Team by the end of Open Enrollment on May 24 will be ineligible for coverage and will not be covered for the benefits year.
	beliefts year.
	(Cancel) OK



Enter information in all required fields (*). Use the scroll bar on the right side of the screen to view and update <u>all</u> required fields.





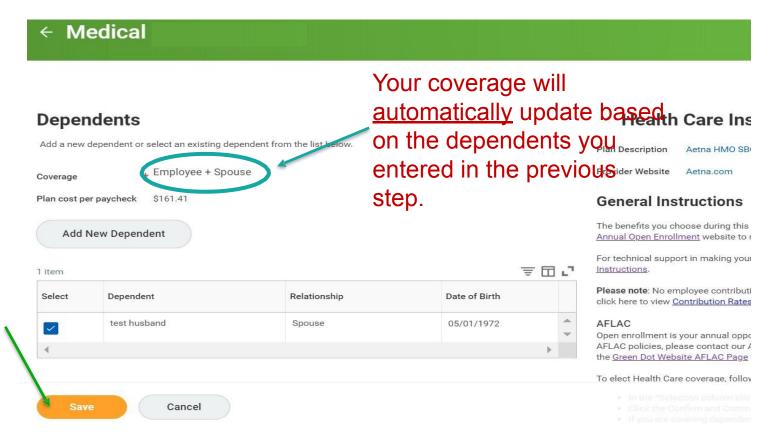
Click "Add" under National IDs to enter the dependent's SSN or Taxpayer ID Number. When all fields are complete, click Save.

Prefix	⊫	Date of Birth WMM / DD / YYYYY 🔳							
		Age (empty)							
First Name *		Gender ★ select one ▼							
Middle Name		Citizenship Status							
Last Name *		,							
Suffix	-	Full-time Student							
Sullix		Student Status Start Date							
		Student Status End Date							
		Disabled							
Allow Duplicate Name									
Check this box only when there is more than one dependent with the same name.									
Check this box only when there is more than one dependent with the same name.									
National IDs									
Click the Add button to enter one or more National Identifiers for this dependent.									
Add									
Save	Cancel								
Address		Phone & Email							



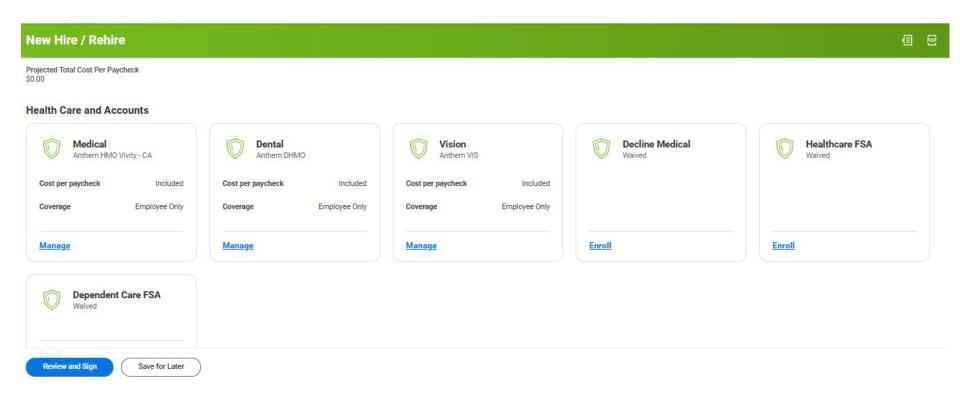
Your coverage will automatically update based on the relationship type of the dependents entered in the previous step.

Review the enrolled dependents here and click Save.



Step 5: Open Enrollment Health & Welfare Benefits

You will be returned to the enrollment homepage. Follow the steps outlined on slides 4 - 11 to enroll or make changes in the dental, vision, healthcare FSA and dependent care FSA plans.

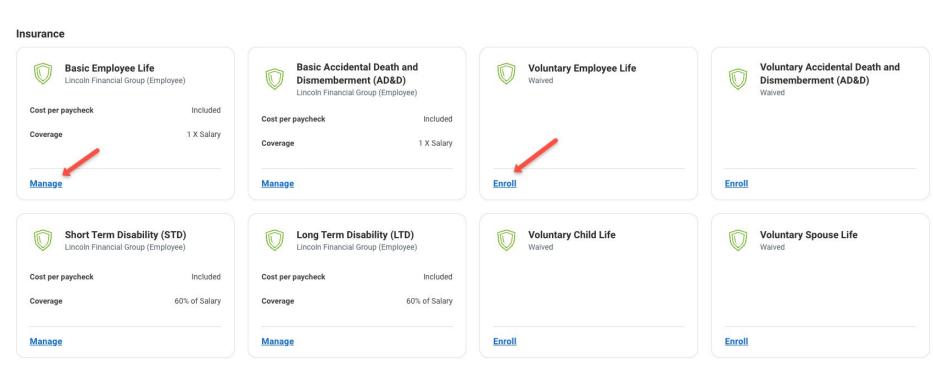


Step 6: Basic Life and AD&D Insurance



Click Manage on the Basic Employee Life Insurance, and Basic AD&D plans to review and update your beneficiaries.

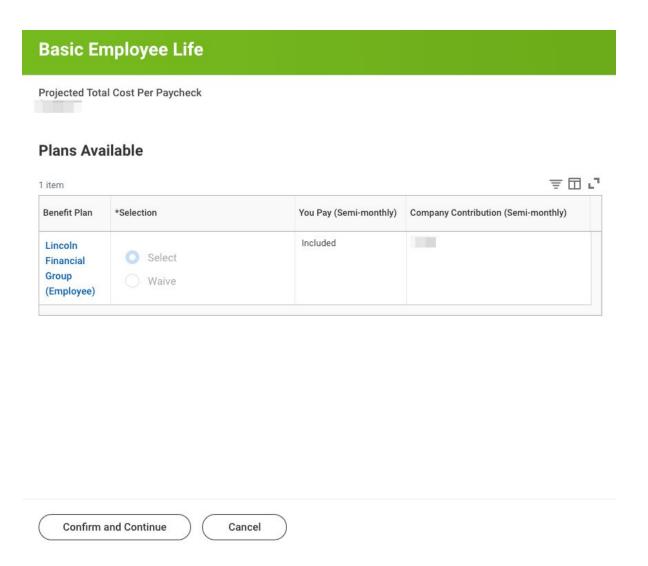
Basic Employee Life and AD&D insurance is provided by Green Dot at NO cost to you.



Step 6: Basic Employee Life Insurance



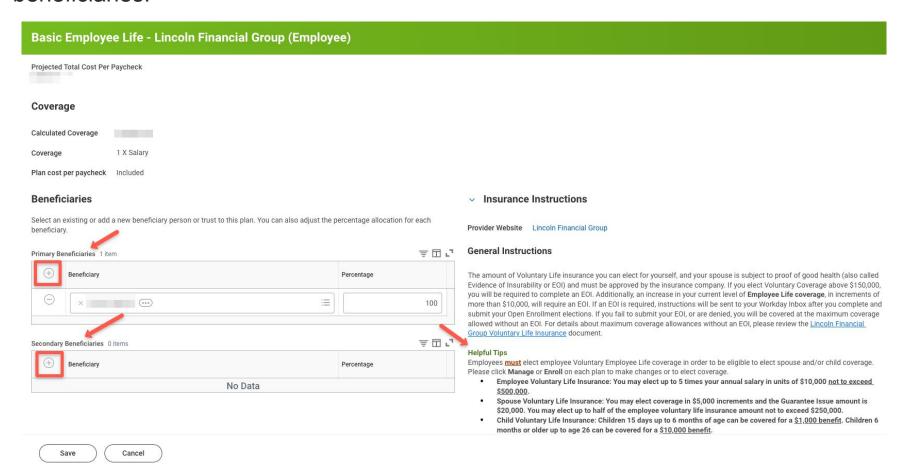
There is no action needed on this screen. Click Confirm and Continue.



Step 6: Basic Employee Life Insurance

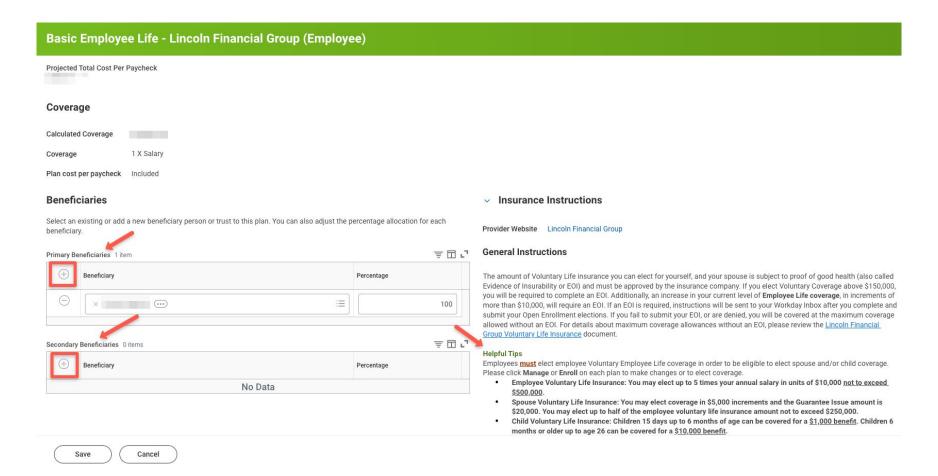


Next, you may designate Primary and Secondary Beneficiaries. Review the help text on the screen for information on Primary and Secondary beneficiaries.





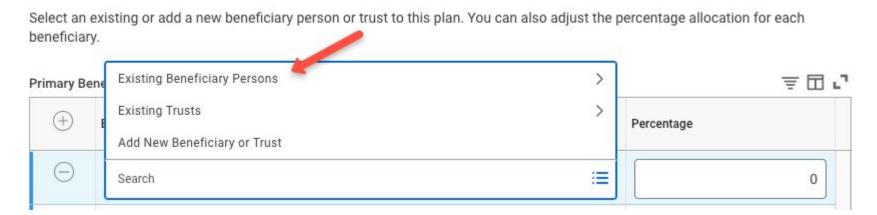
Click "+" to add a beneficiary. You may add multiple beneficiaries by clicking "+". Please ensure that the percentage of the benefit totals 100%.





After clicking "+", please select the applicable option from the drop down menu.

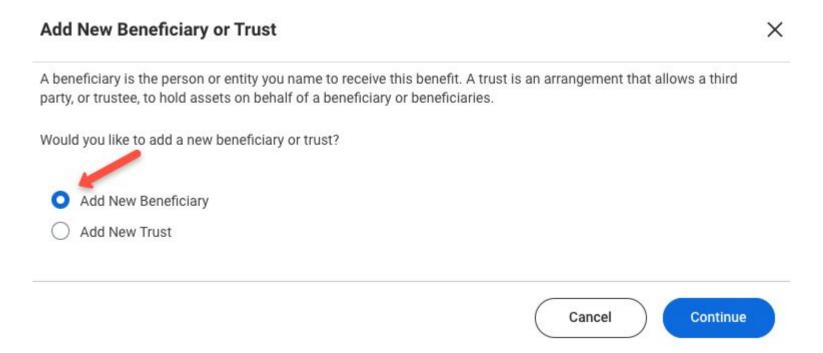
Beneficiaries





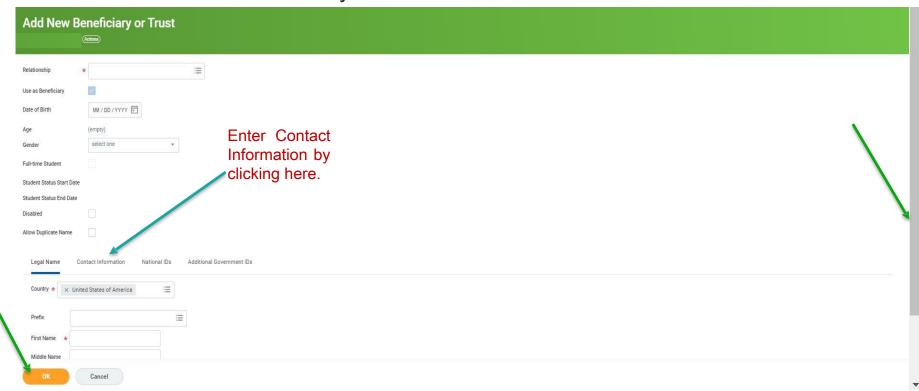
Select the button to Add a New Beneficiary or to Add a New Trust.

Click Continue.





- Enter the information in all required fields (*) for your beneficiaries. Use the scroll bar to scroll down to enter the remaining fields.
- Click Contact Information to enter the address, phone, and email information for your beneficiary.
- Click OK to continue with your enrollment.





Click "Add" to open the fields under Phone and Address. Enter the information in all required fields (*) in each section for your beneficiaries.

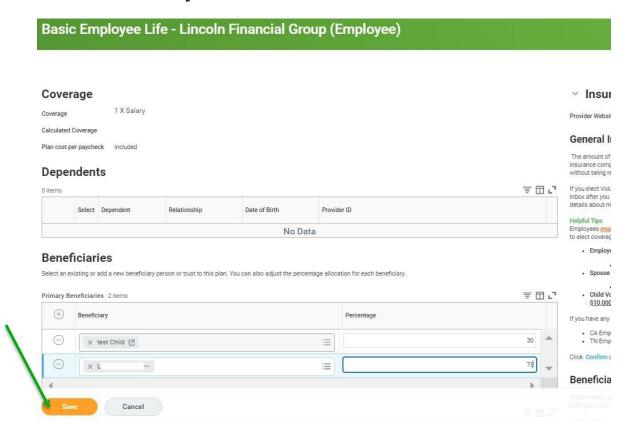
Click OK to continue with your enrollment.

Legal Name	Contact Information	National IDs	Additional Government IDs
Phone			
Add			
Address	3		
Add			
Email			
Add			
Instant	Messenger		
Add			
Web Ad	dress		
Add	urcoo		
Add			
\			
ОК	Cancel		



Enter the percentage of the benefit for each beneficiary. The percentages should total 100% for your Primary Beneficiaries and separately total 100% for Secondary Beneficiaries.

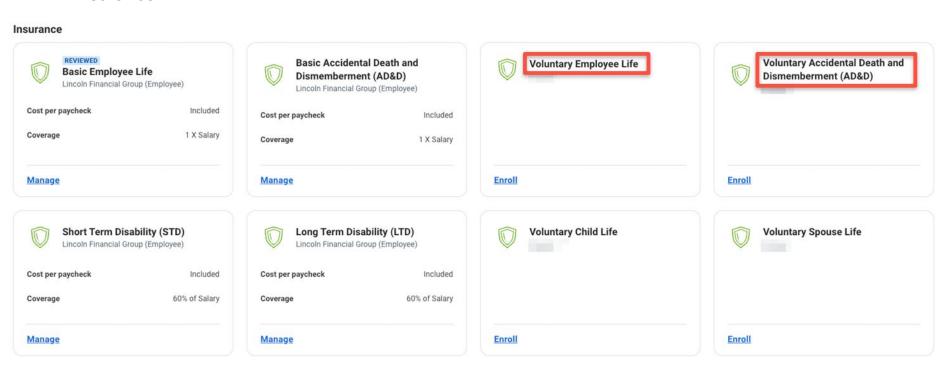
Click Save to continue with your enrollment.





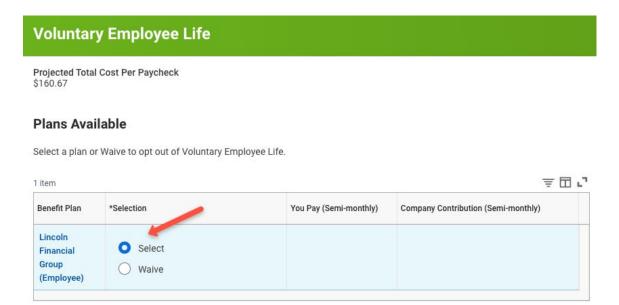
Click Manage or Enroll on the Voluntary Employee Life Insurance, and Voluntary AD&D plans to elect and designate your beneficiaries.

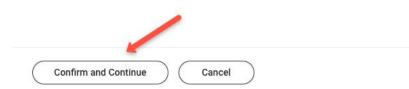
- You <u>may</u> elect optional Voluntary Employee Life insurance. **Please see the Helpful Tips on the enrollment screen for important information on the Guaranteed Issue provision**
- You <u>may</u> elect child and spouse life insurance ONLY if you elect Voluntary Employee life insurance.





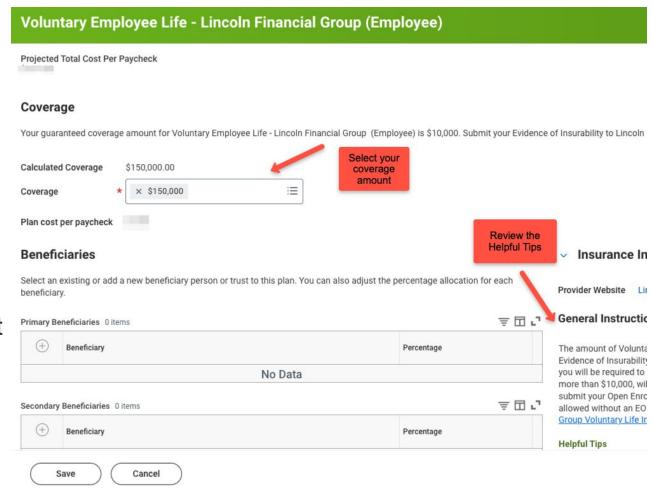
- Click "Select" to enroll in Voluntary Employee Life Insurance.
- Click Confirm and Continue to proceed to the next page of the enrollment.





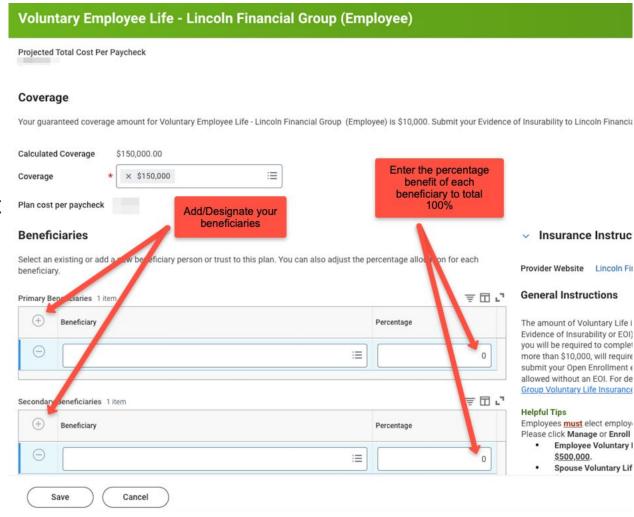


- Review the
 Helpful Tips for
 important
 information on
 the Guaranteed
 Issue provision
 for the Open
 Enrollment.
- Select the Coverage Amount for the Voluntary Employee Life Insurance plan.





- Enter or Update
 your Primary (and
 optional
 Secondary)
 beneficiaries.
 Enter the
 percentage benefit
 for the beneficiary
 or beneficiaries.
- Click Save to proceed to the next page of the enrollment.

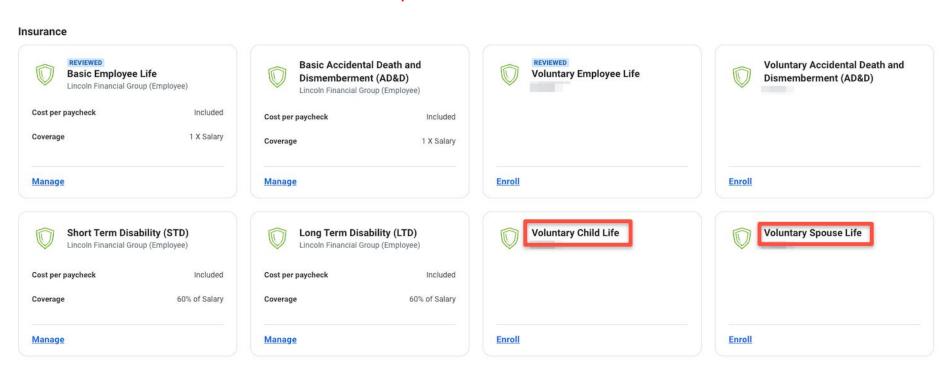


Step 9: Voluntary Spouse and Child Life Insurance



Click Manage or Enroll on the Voluntary Spouse Life Insurance, and/or Voluntary Child Life Insurance plans to elect coverage.

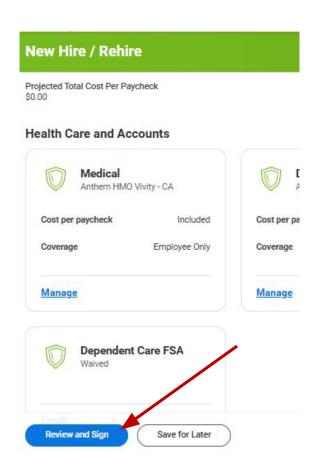
You may elect child and spouse life insurance ONLY if you elect Voluntary Employee life insurance. **Please see the Helpful Tips on the enrollment screen for important information on the Guaranteed Issue provision.**



Step 10: Review and Confirm Enrollment



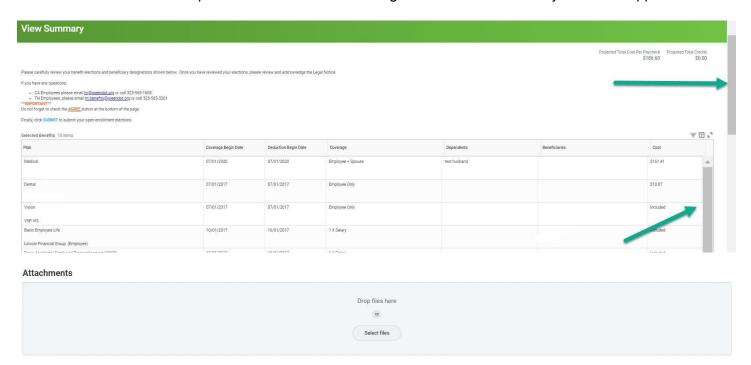
- Upon completing your life insurance elections and beneficiary designations, you will return to the overview screen.
- Click Review and Sign to proceed to the next steps of your enrollment.



Step 10: View Summary



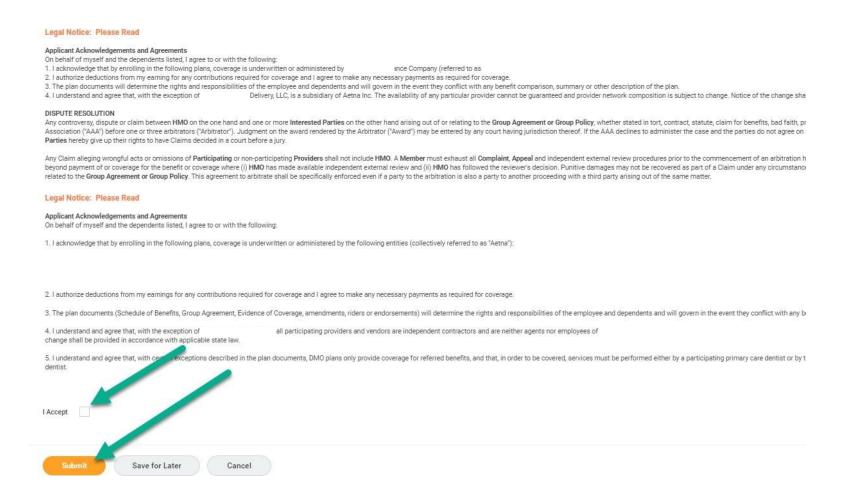
- Carefully review your benefit enrollment.
- Use the interior scroll bar to view all of your selected benefits.
- Use the exterior scroll bar to scroll down to the Legal Notices and Electronic Signature.
- <u>If you elected Decline Medical</u>, you will receive a Waive Attestation Form task in your Workday Inbox to complete. This task must be completed by the end of your 30 day window in order to receive your decline medical incentive for the upcoming benefits year.
- <u>If you added a new dependent</u> or have yet to submit your <u>dependent verification documentation</u> for any existing dependents on your plan, you must attach your dependent verification documentation in the attachments section of this page before submitting your enrollment. You can upload more than one document. Any dependents on your plan that do not have dependent verification documentation submitted via Workday or directly to HR by the end of your 30 day window will be ineligible for coverage and will not be covered for the upcoming benefits year.
- If you elected Voluntary Life Insurance above the guaranteed amount, you must visit the Lincoln Financial Portal and submit an EOI Online. You will be provided life insurance at the guaranteed amount until your EOI is approved.



Step 11: Electronic Signature and Submit



- Review the Legal Notices. Click the "I Accept" box.
- Click Submit.



Step 11: Submitted



Click View Benefits Statement.

Submitted

You've submitted your elections.

You have successfully completed your Annual Open Enrollment.

STOP - ADDITIONAL TASKS MAY BE REQUIRED IF - Note: Your elections will NOT be complete

- If you elected <u>Decline Medical</u>, you are pending an additional step you will receive a Waive Attestation Form task in your benefits year.
- If you <u>added a new dependent</u> or have yet to submit your dependent verification documentation for any existing depende
 update your Open Enrollment. Any dependents on your plan that do not have dependent verification submitted via Workd
- If you elected Voluntary Life Insurance above \$150,000 or more than \$10,000 above your prior elected amount,
 - You must submit the additional task in your Workday Inbox you receive immediately after submitting your open
 - You must visit the Lincoln Financial Portal, following the EOI Submission Instructions, to submit your EOI Online

SCROLL DOWN

Click View Benefits Statement to generate a downloadable PDF summary of your enrollment. Click Print to download your s

IMPORTANT

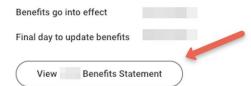
Save a copy of your enrollment summary. This document serves as verification of your open enrollment elections. You will be requ

After you have submitted your open enrollment elections, you can view or continue to make changes through

If you have any questions, please contact your applicable People Team at:

CA.HR@greendot.org, 323-565-3278

Important Dates:

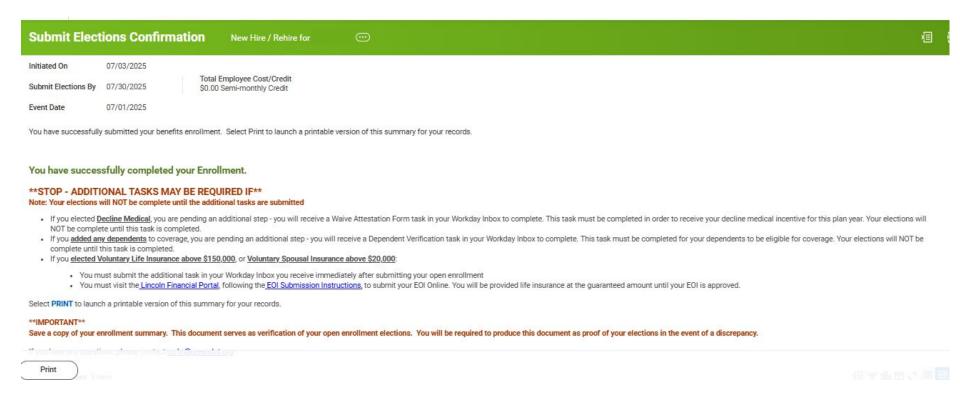


Done

Step 12: Print Confirmation Statement



Click **Print** to download and print confirmation statement and keep for your records. This document will serve as verification of your open enrollment elections.





COMPLETE!