workday@UCHICAGO

Have a nice Workday

Manage Life Insurance or Personal Accident Insurance Elections

Purpose

This document explains how to change your elections for Supplemental Life Insurance, Spouse Life Insurance, Child Life Insurance, or Personal Accident Insurance (PAI) outside of the annual Open Enrollment period or a qualifying life event.

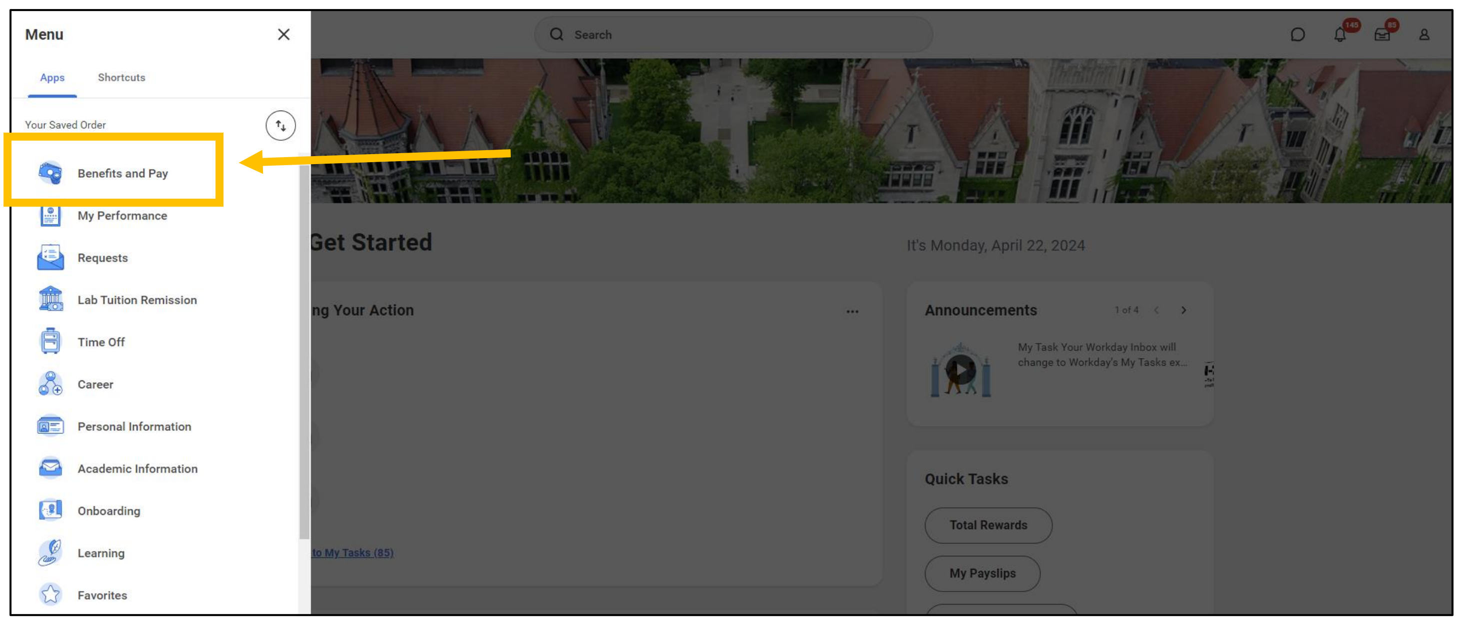
Evidence of Insurability (EOI) is required if you are electing Supplemental or Spouse Life Insurance for the first time, or if you are increasing your coverage. If EOI is required, the insurance plan provider will contact you directly. Evidence of Insurability is not required for Child Life Insurance or Personal Accident Insurance.

Keep in Mind

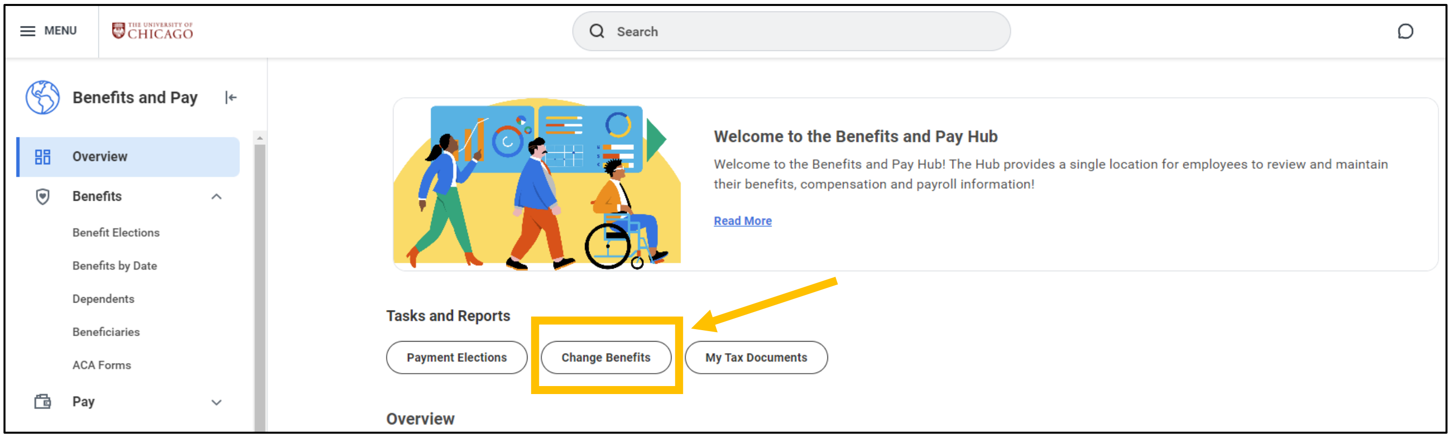
- You have 7 days to complete your changes to your Insurance elections. After 7 days, you will need to re-initiate the event.
- You have 90 days to complete and return your Evidence of Insurability (EOI) for your election to be approved.

Steps to Manage Insurance Elections

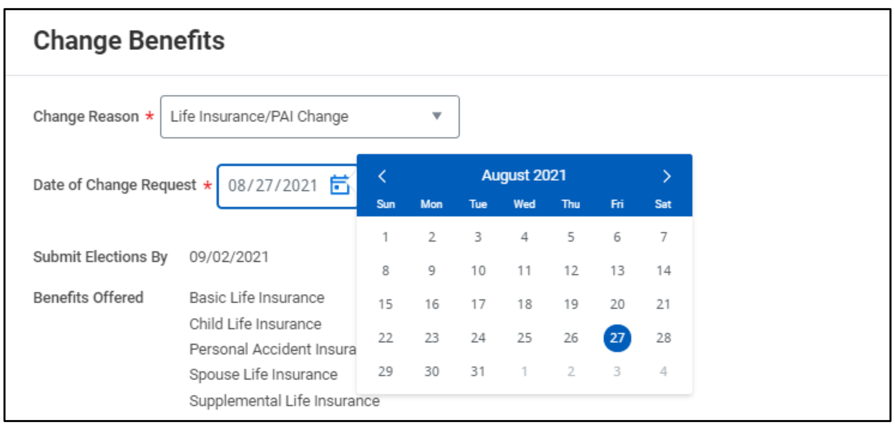
1. Log in to Workday using your CNet ID and Password.
2. From the Home page, click **Menu** at the top left of the screen. Click **Benefits and Pay**.



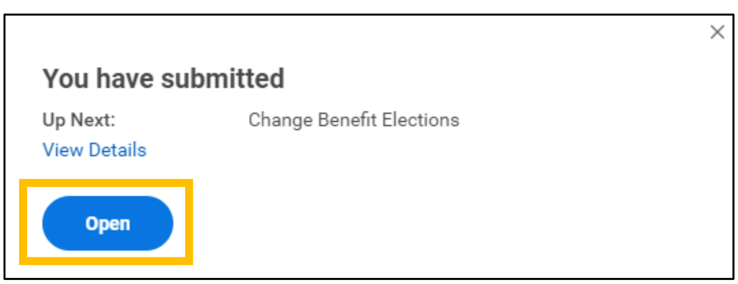
3. From the Overview page, click the Change Benefits button under Tasks and Reports.



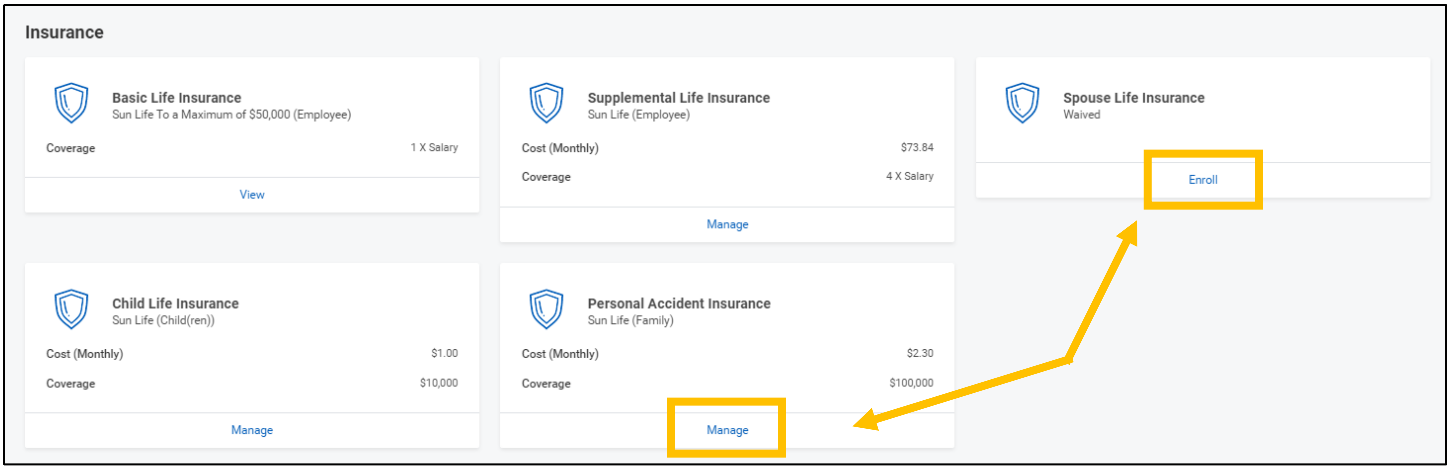
4. From the **Change Reason** dropdown menu, choose **Life Insurance/PAI Change.**
5. Enter today's date or a date in the future as the **Date of Change Request** by typing in the prompt box or using the calendar icon.



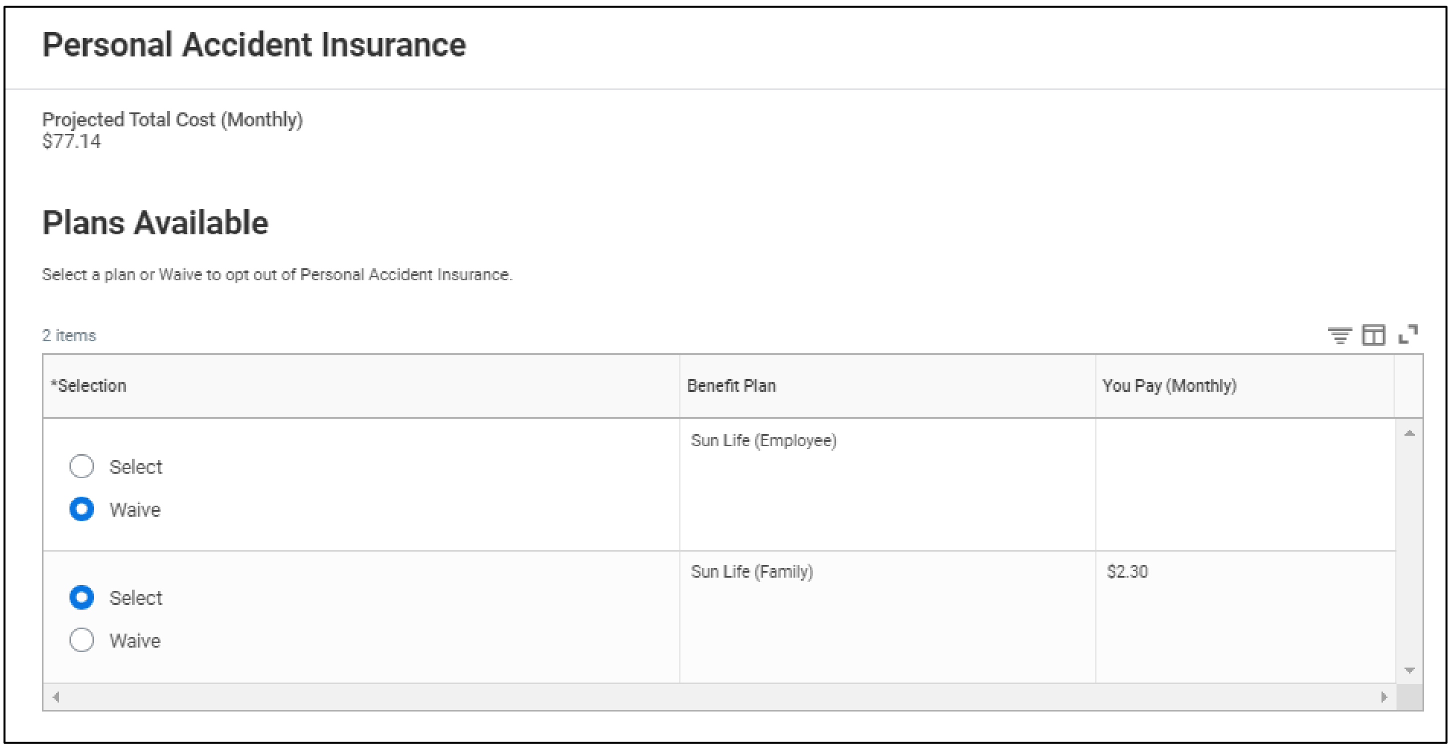
6. Click the **Submit** button.
7. You will see a pop-up with the next task to complete. Click **Open**.



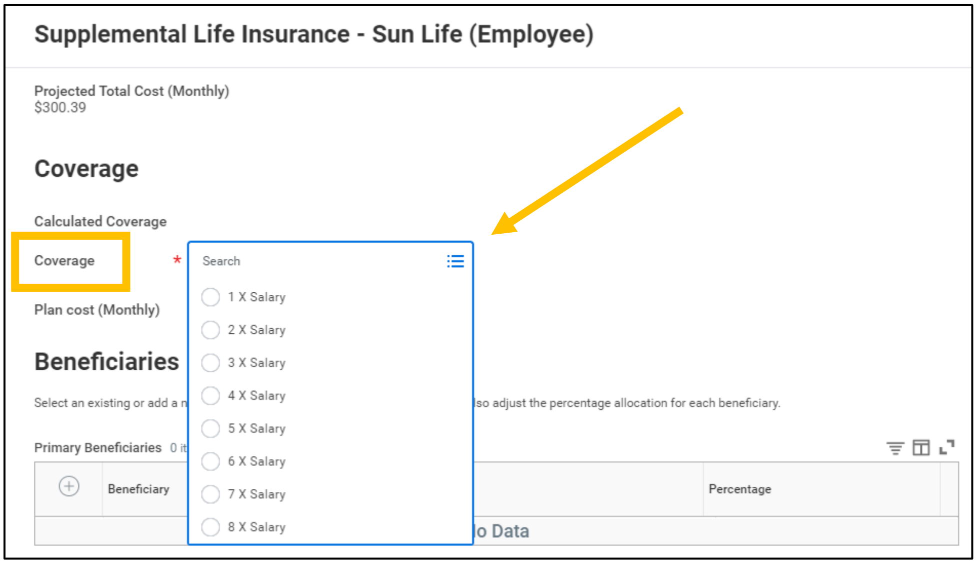
8. On the next screen, click the **Let's Get Started** button.
9. Click **Manage** or **Enroll** on the card for the plan you would like to change.
   a. You will not be permitted to make any changes to Basic Life Insurance.



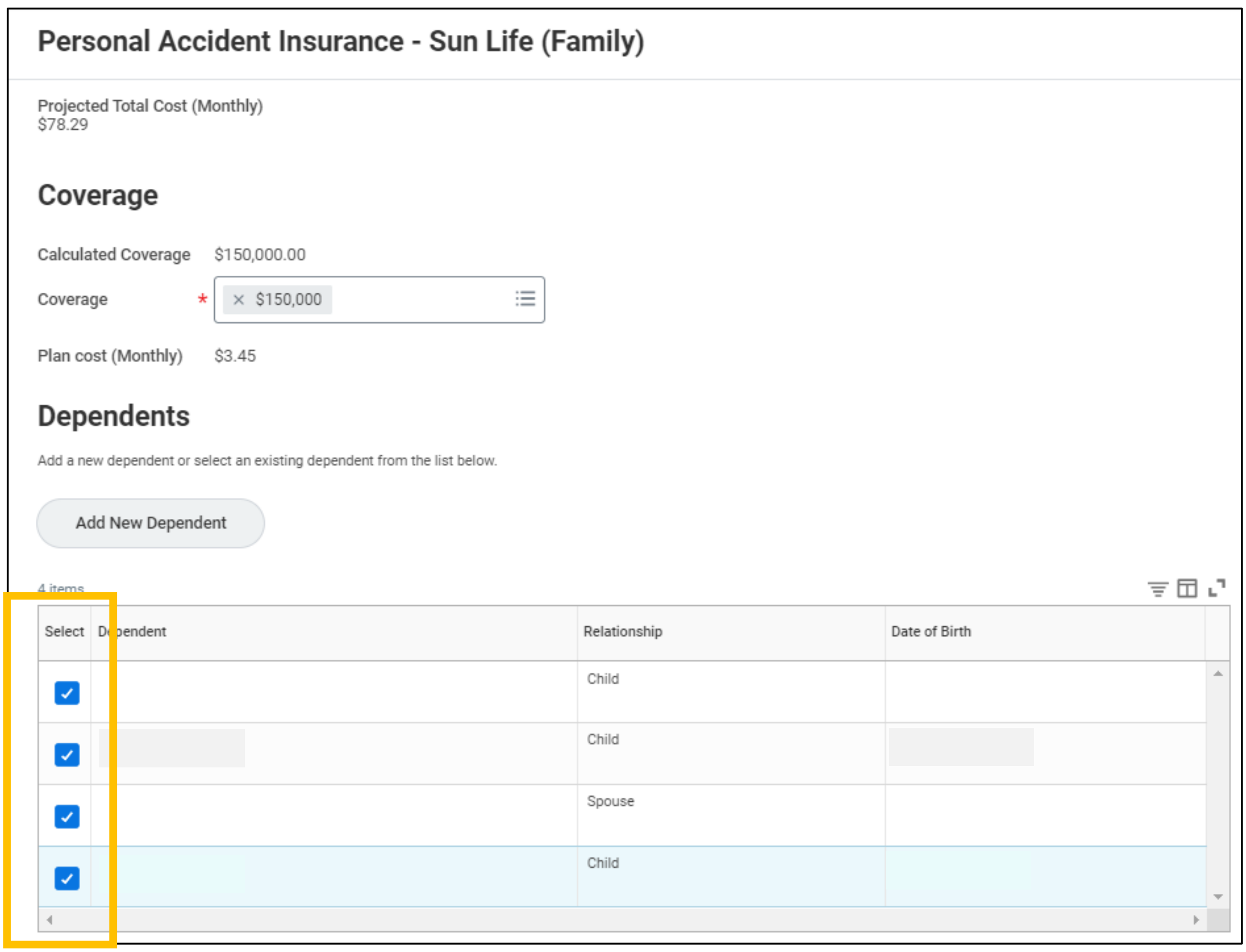
10. Click the radio button next to the appropriate option for the plan you wish to **Select** or **Waive**.



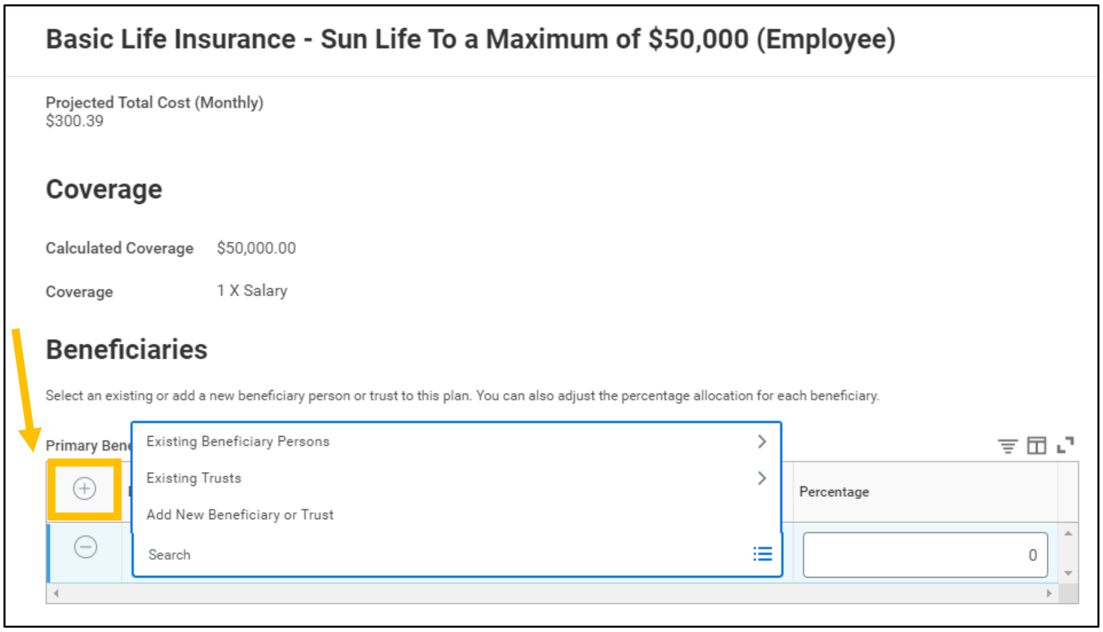
11. Click the **Confirm and Continue** button to proceed to the next screen.
12. On the next screen, indicate the coverage level in in the **Coverage** prompt box.
    a. For Supplemental Life Insurance, select 1X Salary, 2X Salary, etc.
    b. For Spouse Life, Child Life, or Personal Accident Insurance select $10,000, $20,000, etc.



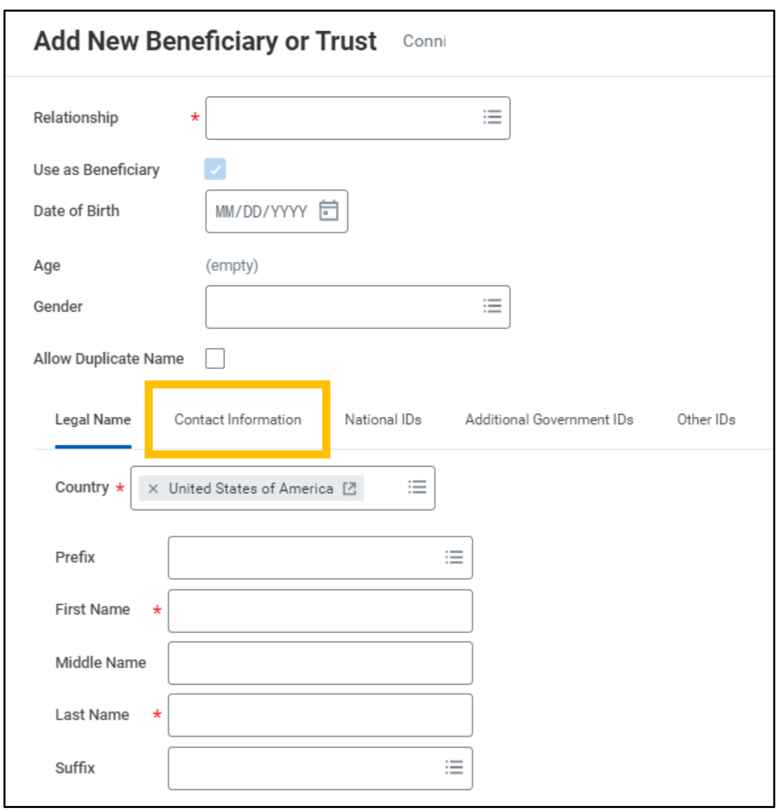
c. For Spouse Life Insurance, Child Life Insurance, or Personal Accident Insurance (Family), click the checkbox next to each dependent you wish to cover under the plan.

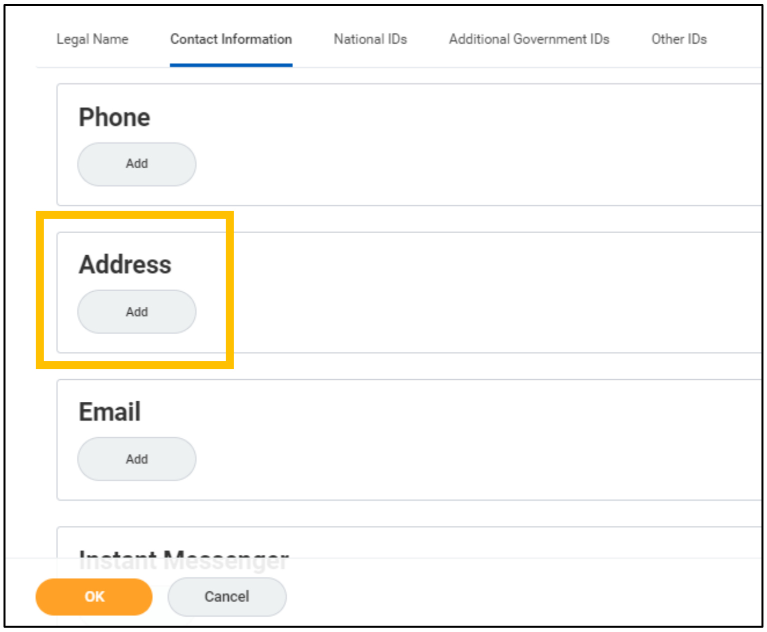


13. Use the Plus (+) radio button under Beneficiaries to add one or more beneficiary persons or trusts.
    a. If you already created Beneficiary Persons or Trusts, or checked the **Use as Beneficiary** box when creating your dependent(s), they will be available to select. Otherwise, use Add New Beneficiary or Trust to create a new beneficiary person or trust.

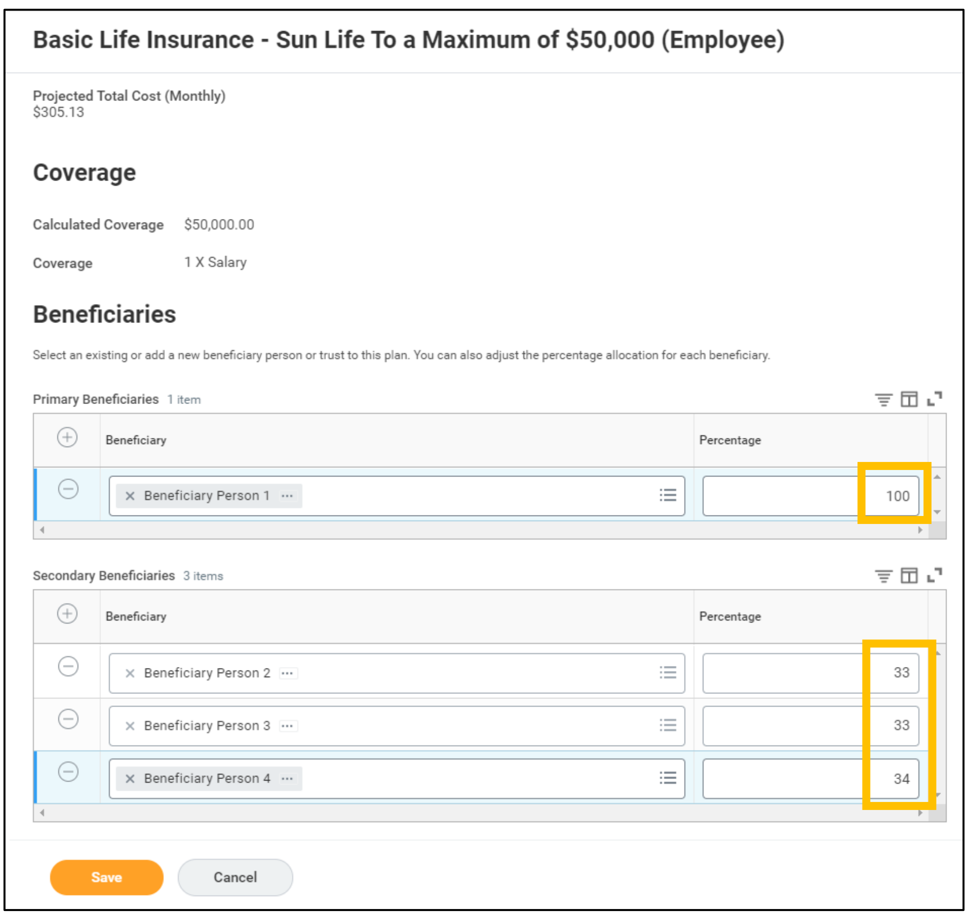


    b. For each new beneficiary person, you must enter a first & last name, relationship to you, and an address. The enter an address, click on the Contact Information tab.



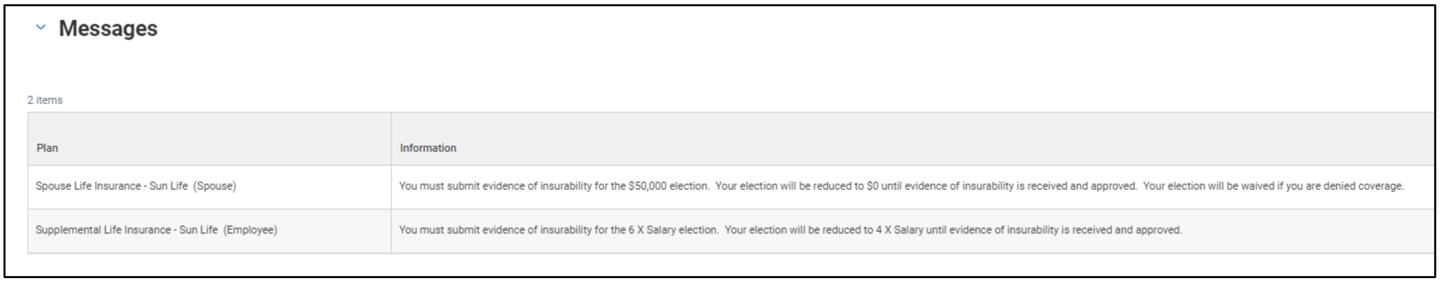


c. You may add as many beneficiary persons or trusts as you wish, but the sum of Percentages must be equal to 100% for both Primary and Secondary Beneficiaries.



14. Once you have chosen your coverage level, selected the appropriate dependents (if necessary), and designated beneficiaries, click **Save**.

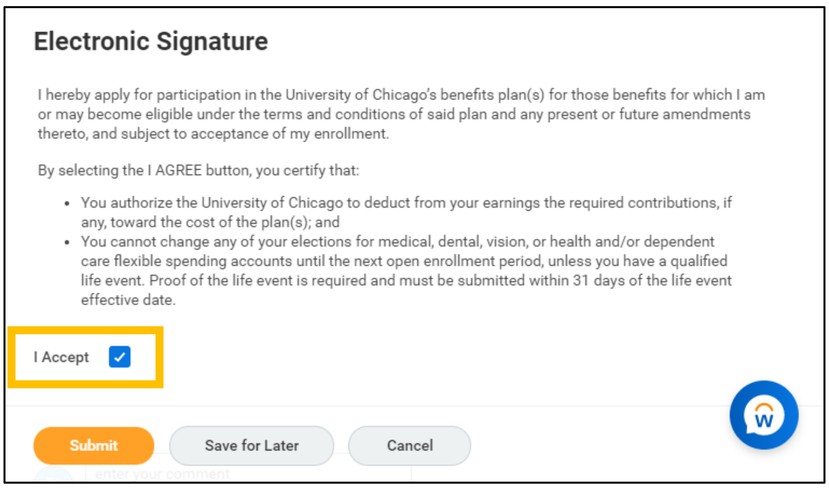
15. When you have finished making changes to each of the insurance plan cards, click **Review and Sign**.
16. Review the Selected Benefits, Dependents, Beneficiaries, Waived Benefits, and Messages regarding Evidence of Insurability.
    a. If EOI is required, the insurance provider will contact you directly. Benefit elections will take effect on the date evidence of insurability is approved.


Messages

2 items

Plan	Information
Spouse Life Insurance - Sun Life (Spouse)	You must submit evidence of insurability for the $50,000 election. Your election will be reduced to $0 until evidence of insurability is received and approved. Your election will be waived if you are denied coverage.
Supplemental Life Insurance - Sun Life (Employee)	You must submit evidence of insurability for the 6 X Salary election. Your election will be reduced to 4 X Salary until evidence of insurability is received and approved.

17. Scroll down to the bottom of the page. Read the Electronic Signature and click the **I Accept** checkbox.
18. Click **Submit**.



19. Click the **View Benefits Statement** button to print your insurance elections for your records.
    a. Once you click **Submit**, the event will be routed to a Benefits Specialist for approval. You will be able to view your updated insurance plan elections on your Workday profile once the event is approved and Evidence of Insurability has been approved, if required.