

Manage Life Insurance or Personal Accident Insurance Elections

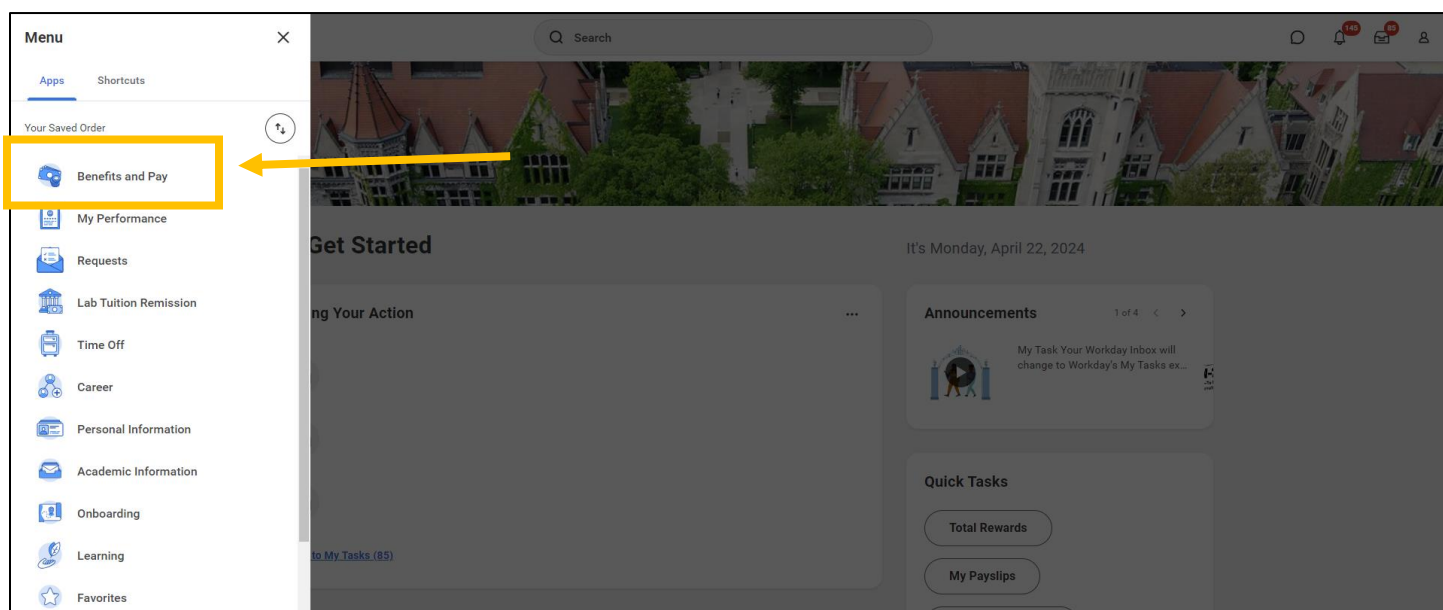
Purpose

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.

Steps to Manage Insurance Elections

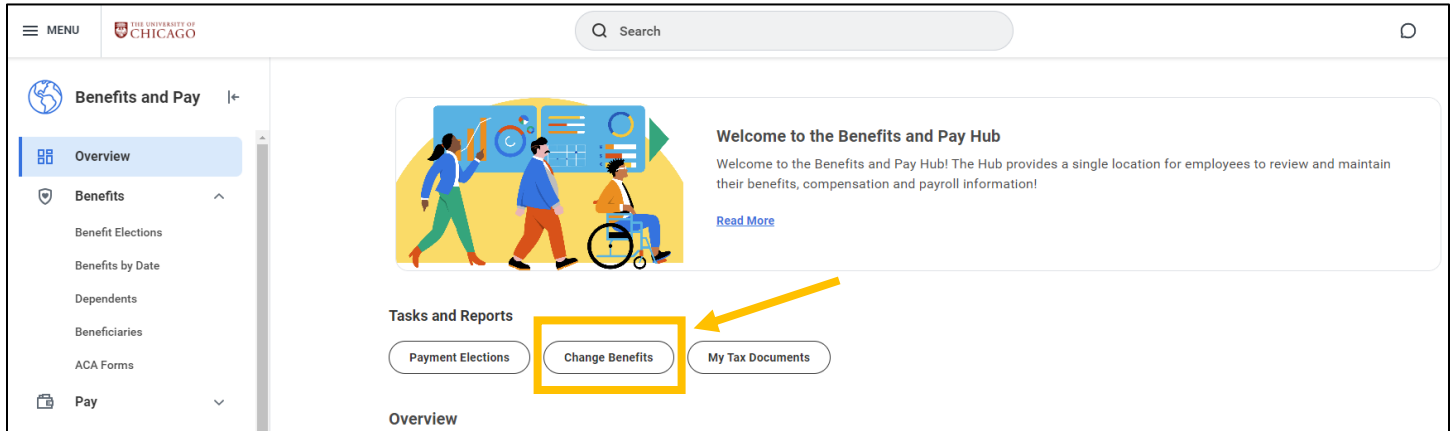
1. Log in to [Workday](#) using your CNet ID and Password.
2. From the Home page, click **Menu** at the top left of the screen. Click **Benefits and Pay**.



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.

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



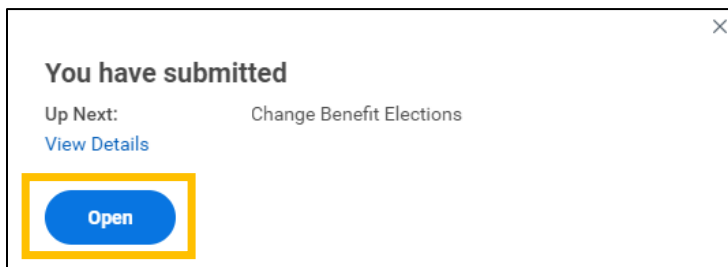
4. From the **Change Reason** dropdown menu, choose **Life Insurance/PAI Change**.

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.

The 'Change Benefits' form is shown. The 'Change Reason' dropdown is set to 'Life Insurance/PAI Change'. The 'Date of Change Request' is 08/27/2021, with a calendar icon. A calendar for August 2021 is open, showing the 27th selected. The 'Submit Elections By' date is 09/02/2021. Under 'Benefits Offered', the following are listed: Basic Life Insurance, Child Life Insurance, Personal Accident Insurance, Spouse Life Insurance, and Supplemental Life Insurance.

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.

Supplemental Life Insurance - Sun Life (Employee)

Projected Total Cost (Monthly)
\$300.39

Coverage

Calculated Coverage

Coverage

Plan cost (Monthly)

Beneficiaries

Select an existing or add a new beneficiary

Primary Beneficiaries 0 items

+

Beneficiary

1 X Salary

2 X Salary

3 X Salary

4 X Salary

5 X Salary

6 X Salary

7 X Salary

8 X Salary

so adjust the percentage allocation for each beneficiary.

Percentage

Data

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.

Personal Accident Insurance - Sun Life (Family)

Projected Total Cost (Monthly)
\$78.29

Coverage

Calculated Coverage \$150,000.00

Coverage

Plan cost (Monthly) \$3.45

Dependents

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

Add New Dependent

4 items

Select	Dependent	Relationship	Date of Birth
☒		Child	
☒		Child	
☒		Spouse	
☒		Child	

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.

Basic Life Insurance - Sun Life To a Maximum of \$50,000 (Employee)

Projected Total Cost (Monthly)
\$300.39

Coverage

Calculated Coverage \$50,000.00

Coverage 1 X Salary

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 >

Add New Beneficiary or Trust

Search

Percentage

0

- 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.

Add New Beneficiary or Trust Conni

Relationship *

Use as Beneficiary ☒

Date of Birth MM/DD/YYYY

Age (empty)

Gender

Allow Duplicate Name ☐

Legal Name Contact Information National IDs Additional Government IDs Other IDs

Country * x United States of America

Prefix

First Name *

Middle Name

Last Name *

Suffix

Legal Name
Contact Information
National IDs
Additional Government IDs
Other IDs

Phone
Add

Address
Add

Email
Add

Instant Messenger
OK Cancel

- 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.

Basic Life Insurance - Sun Life To a Maximum of \$50,000 (Employee)

Projected Total Cost (Monthly)
\$305.13

Coverage

Calculated Coverage \$50,000.00

Coverage 1 X Salary

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
× Beneficiary Person 1 ...	100

Secondary Beneficiaries 3 items

Beneficiary	Percentage
× Beneficiary Person 2 ...	33
× Beneficiary Person 3 ...	33
× Beneficiary Person 4 ...	34

Save
Cancel

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**.

Electronic Signature

I hereby apply for participation in the University of Chicago's benefits plan(s) for those benefits for which I am or may become eligible under the terms and conditions of said plan and any present or future amendments thereto, and subject to acceptance of my enrollment.

By selecting the I AGREE button, you certify that:

- You authorize the University of Chicago to deduct from your earnings the required contributions, if any, toward the cost of the plan(s); and
- You cannot change any of your elections for medical, dental, vision, or health and/or dependent care flexible spending accounts until the next open enrollment period, unless you have a qualified life event. Proof of the life event is required and must be submitted within 31 days of the life event effective date.

I Accept ☒

Submit

Save for Later

Cancel



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.