

Introduction

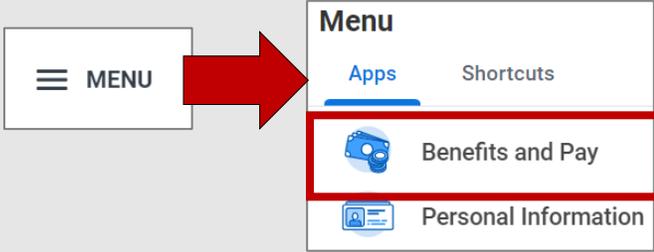
With the exception of your voluntary retirement plan contributions, your benefit elections must remain unchanged until Open Enrollment, which occurs in February and is effective on April 1 of each year.

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.

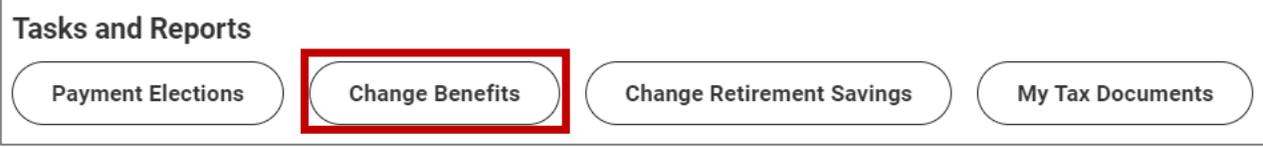
Follow these steps to make a change for a qualifying event. If you are unsure if what has occurred would be defined as a qualifying event or not, please contact Human Resources at hr@willamette.edu.

Getting Started

1. After logging into Workday, click Menu in the upper left corner of the home page. From the resulting menu, select **Benefits**.

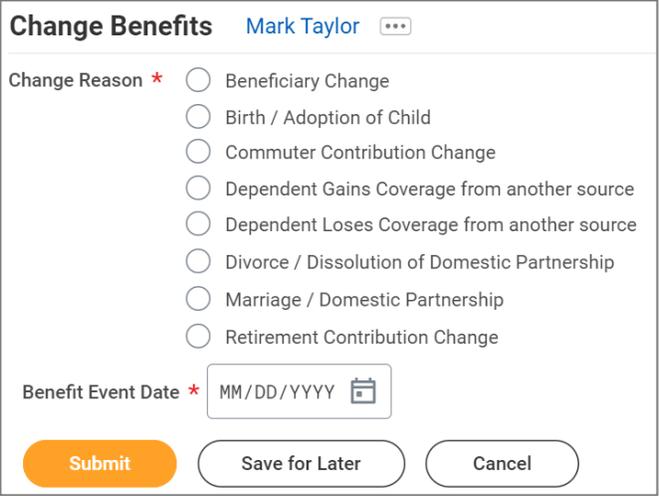


2. In the Change section, click the Benefits button.



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**.



Change Benefit Elections

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

You have submitted ×

Up Next: Mark Taylor | Change Benefit Elections

[View Details](#)

Open

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.

Change Benefit Elections

Initiated On 12/10/2023

Submit Elections By 01/08/2025

Let's Get Started

Update Your Information

Health Information

Tobacco Use

Question Have you used tobacco in any form in the past 12 months?

Answer * Yes No

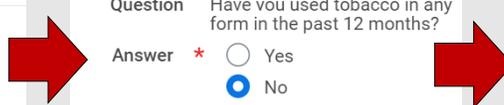
Continue Cancel

Information Updated

Thanks for updating your information.

Next up, you'll confirm benefits you'd like to keep the same, or add any changes you'd like to make.

Continue Cancel



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.

<p>1. Click Manage or Enroll at the bottom of the Medical tile.</p>	
<p>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.</p>	
<p>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.</p>	
<p>4. You will receive a confirmation that your changes have been updated.</p>	

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.**

Healthcare FSA

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Plans Available

Select a plan or Waive to opt out of Healthcare FSA.

1 item

*Selection	Benefit Plan	You Contribute (Monthly)	Company Contribution (Monthly)	Plan Details
<input checked="" type="radio"/> Select <input type="radio"/> Waive	TASC 2022 OE (NS)			Flexible Spending A

Confirm and Continue
Cancel

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.

Healthcare FSA - TASC 2022 OE (NS)

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Contribute

Per Paycheck Annual

Total Paychecks 12

Minimum Annual Amount: \$49.92
Maximum Annual Amount: \$ 2,850.00

Summary

Total Annual Contribution \$1,000.00

→

Healthcare FSA - TASC 2022 OE (NS)

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Contribute

Per Paycheck Annual

Total Paychecks 12

Minimum Annual Amount: \$49.92
Maximum Annual Amount: \$ 2,850.00

Summary

Total Annual Contribution \$0.00

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

Save

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

Your Healthcare FSA changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

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.

Basic Life
Guardian (Employee)

Cost per paycheck Included
Coverage 2 X Salary

Manage

Basic Accidental Death and Dismemberment (AD&D)
Guardian (Employee)

Cost per paycheck Included
Coverage 2 X Salary

Manage

Long Term Disability (LTD)
Guardian (Employee)

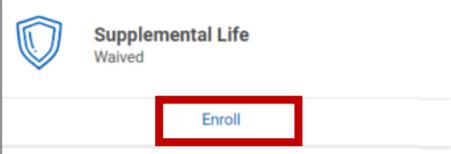
Cost per paycheck Included
Coverage 60% of Salary

Manage

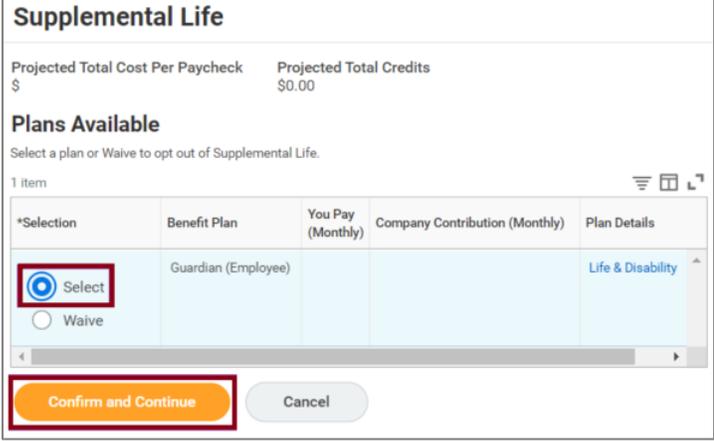
Voluntary Supplemental Life and AD&D Insurance

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.

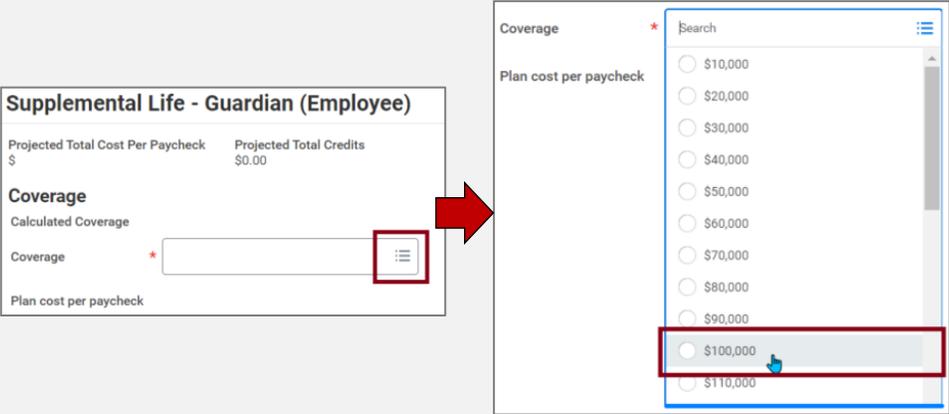
1. Click **Manage or **Enroll** on the Supplementary Life tile.**



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.



Change Benefit Elections

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.

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		

Save
Cancel

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.



Critical Illness
Waived

Enroll

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.

Critical Illness

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Plans Available
Select a plan or Waive to opt out of Critical Illness.
2 items ☰ ☰ ↗

*Selection	Benefit Plan	You Pay (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Guardian (Employee)		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Guardian (Spouse)		

Confirm and Continue
Cancel

Change Benefit Elections

- 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**.

- 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.

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

Change Benefit Elections

- 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.

Legal/IDShield Bundle

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Plans Available

Select a plan or Waive to opt out of Legal/IDShield Bundle.

1 item

*Selection	Benefit Plan	You Pay (Monthly)	Company Contribution (Monthly)	Plan Details
<input checked="" type="radio"/> Select	Legal Shield			Prepaid Legal
<input type="radio"/> Waive				

Confirm and Continue Cancel

Legal/IDShield Bundle - Legal Shield

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Coverage

Select the coverage that you would like for this plan.

Coverage * Search

Employee Only

Family

Plan cost per paycheck

Save Cancel

- 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](#).

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

Accident
Waived

Enroll

- 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**.

Accident

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Plans Available

Select a plan or Waive to opt out of Accident.

1 item

*Selection	Benefit Plan	You Pay (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select	Guardian		
<input type="radio"/> Waive			

Confirm and Continue Cancel

Accident - Guardian

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

Coverage

Select the coverage that you would like for this plan.

Coverage * Search

Employee Only

Employee + Spouse

Employee + Child

Family

Plan cost per paycheck

Save Cancel

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

Finalize Benefit Selections

- 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.



- 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.

View Summary

Projected Total Cost Per Paycheck \$ Projected Total Credits \$0.00

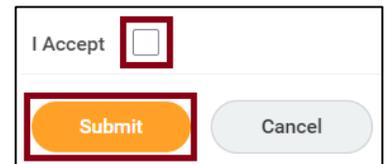
Indicate your agreement with these elections **via the electronic signature check box** at the very bottom of the page!

Selected Benefits 14 items ☰ ☐ 🔍

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Medical Kaiser HMO	02/01/2022	02/01/2022	Employee Only			\$34.16
Dental Kaiser DHMO	04/01/2022	04/01/2022	Employee Only			\$6.37
Healthcare FSA TASC 2022 OE (NS)	04/01/2022	04/01/2022	\$1,000.00 Annual			\$83.33

- 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.

- 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.



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

Submitted

You've submitted your elections.

These elections will be in effect through the end of the plan year, March 31, unless you experience a life event and choose to make changes.

Important Dates:
 Benefits go into effect 04/01/2022
 Final day to update benefits 02/25/2022

[View 2022 Benefits Statement](#)

Done