

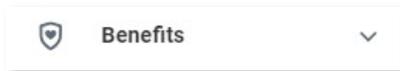
1. In the upper left-hand corner of Workday, **click on MENU.**



2. Click on **Benefits and Pay.**



3. Click on **Benefits.**



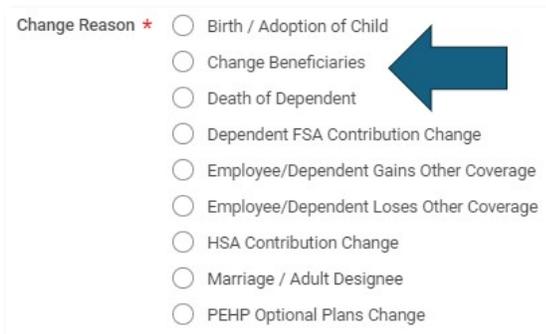
4. Click on **Benefit Elections.**



5. Click on the **Change Benefits button** under Benefit Elections.



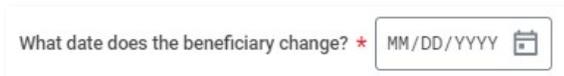
6. For the Change Reason, **click on the Change Beneficiaries radio button.**



Change Reason *

- Birth / Adoption of Child
- Change Beneficiaries
- Death of Dependent
- Dependent FSA Contribution Change
- Employee/Dependent Gains Other Coverage
- Employee/Dependent Loses Other Coverage
- HSA Contribution Change
- Marriage / Adult Designee
- PEHP Optional Plans Change

7. For the date, put today's date (you cannot future or past date this enrollment).



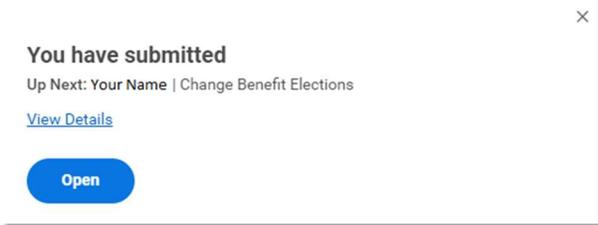
What date does the beneficiary change? * MM/DD/YYYY

(You do not need to attach any documents or enter comments for this change.)

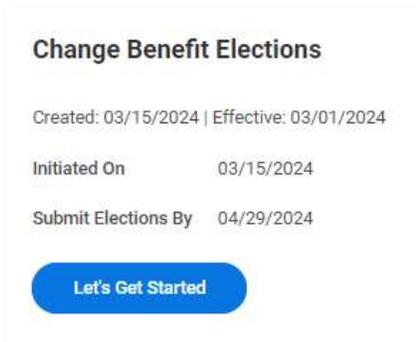
8. Click the blue Submit button at the bottom of the screen.



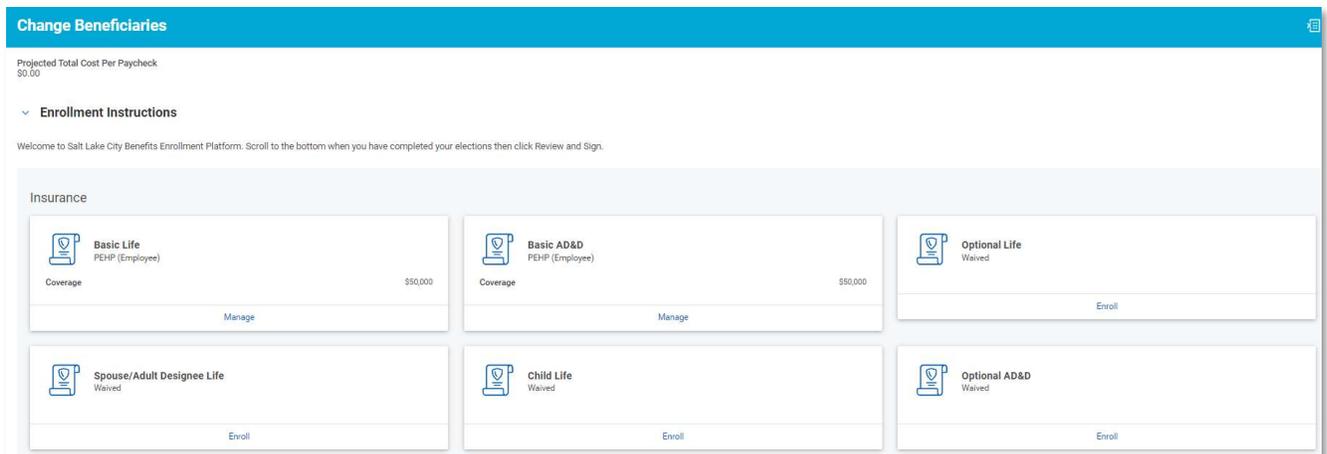
9. Click the **Open button** in the 'You have submitted' pop up window.



10. Once you click in, you will click on the **Let's Get Started button**.



11. You will see all plans with beneficiaries. If the bottom of the box says "Manage" you are enrolled in that plan and can change your beneficiaries. If it says "Enroll" you have previously waived that plan. You **must** choose beneficiaries for the Basic Life (the City-paid \$50,000 basic life policy) and the Basic AD&D (the City-paid \$50,000 Accidental Death & Dismemberment policy). Any others that you are enrolled in, you will need to pick beneficiaries for that policy.



IMPORTANT THINGS TO KNOW:

- 1) PEHP will **not** pay out claims to minors, if you want your policies to be left to your children, you will have to create a trust (see an estate lawyer for this).
- 2) You are the employee, therefore, if you make yourself a beneficiary on Spouse or Dependent Life (you are the insured party on everything else), add yourself and choose "Self" as the relationship type.
- 3) Do not put your spouse as the dependent AND the beneficiary on Spouse/Adult Designee Life. If something happens to your spouse, the money cannot be paid to them.
- 4) For the Basic AD&D and Optional AD&D plans, do **not** put yourself as a beneficiary. If you are still living in the case of dismemberment, PEHP will pay you directly. The primary beneficiary will only be paid in the case of your death.

12. Click **Manage** at the bottom of the Worklet.



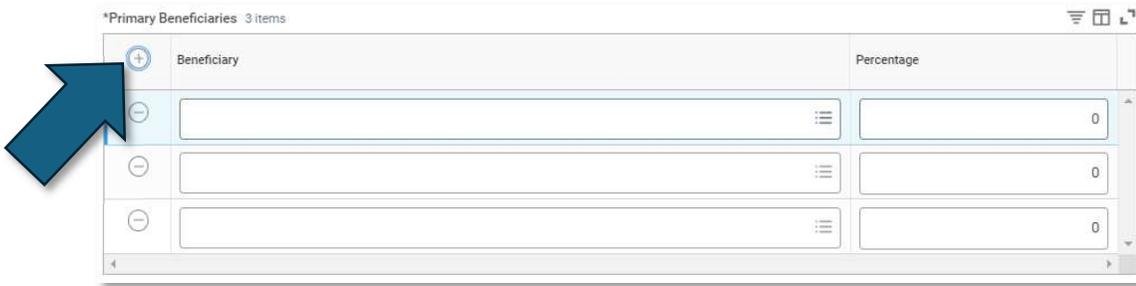
(For the Basic Life and Basic AD&D, you cannot select or waive because it is a City-provided benefit (at no cost to you).)

13. Click **Confirm and Continue** at the bottom of the screen.



14. You are required to enter 1 beneficiary per policy. If you choose to do only one, make them the Primary Beneficiary.

15. Click on the  to the left of Beneficiary. If you know you are going to have 3 beneficiaries per category, click the  sign 3 times.



If you clicked it too many times, be sure to click the  to the left of the empty box. (You will get an error when attempting to save if you have any empty lines.)

16. Click in the empty box, click on Existing Beneficiary Persons if you want to choose an existing beneficiary (or, if you're making changes, a beneficiary you've already added):



Click on Existing Trusts if you have already entered a Trust.

Click on Add New Beneficiary or Trust if you would like to add a new beneficiary or trust.

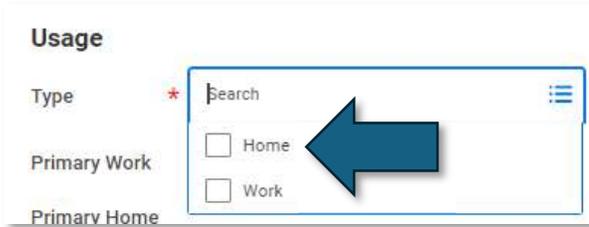
17. Click continue. (Click the radio button to Add New Trust if you want to add a trust.)

The dialog box is titled 'Add New Beneficiary or Trust' and has a close button (X) in the top right. It contains the following text: 'A beneficiary is the person or entity you name to receive this benefit. A trust is an arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries.' Below this, it asks 'Would you like to add a new beneficiary or trust?' with two radio button options: 'Add New Beneficiary' (which is selected) and 'Add New Trust'. At the bottom, there are two buttons: 'Continue' and 'Cancel'.

18. You must fill out all items with a red asterisk *.
- a. **Relationship** (beneficiary's relationship to YOU)
 - i. If person's relationship doesn't match any listed, choose **other**.
 - ii. Do not put Adult Designee unless you have provided the paperwork to human resources and been approved.
 - b. **First Name**
 - c. **Last Name**
 - d. **Address** (on the Contact Information tab)



You must click address usage type:



e. **Phone number** is not required, but a good idea (also located on the Contact Information tab).

19. Click **OK** at the bottom of the screen.



20. If you're only going to have one beneficiary, put the percentage amount to 100.



If you are selecting multiple primary beneficiaries, choose the percentage of the policy payout you would like them to receive. You can use decimals, but they must add up to 100 (i.e., you cannot have three beneficiaries and do 33.33, 33.33, and 33.33 – you must have one person be 33.34).

Same goes for Secondary Beneficiaries. You do not need secondary beneficiaries if you have multiple primary beneficiaries. If something happens to one of your primary beneficiaries, PEHP will pay out that share to the other beneficiaries listed.

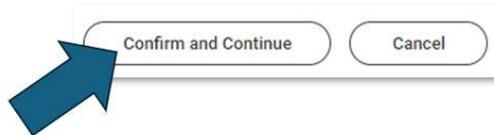
More than one beneficiary is always a good idea.

21. When you are happy with your chosen beneficiaries and percentages for Basic Life, click on the **Save button** at the bottom of the page.

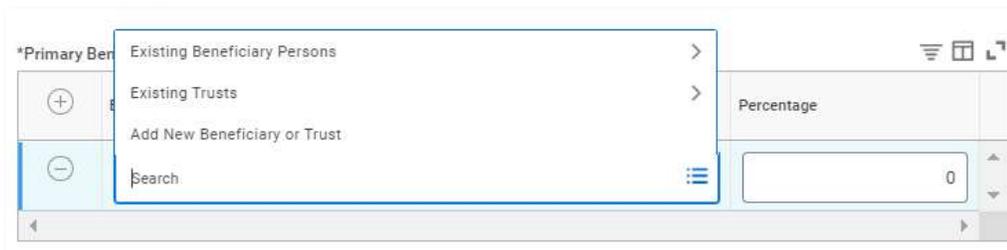


22. Click on **Manage** under Basic AD&D. Now that you have entered beneficiaries, it is faster to choose them in the other policies.

23. Again, you cannot select or waive Basic AD&D, click on **Confirm and Continue**.



24. If you are using the same beneficiary as before, you can now search for them in the empty box.

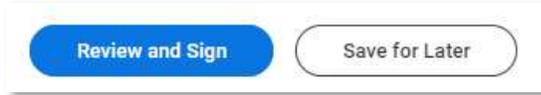


Don't forget to enter the percentage.

25. When you are happy with your chosen beneficiaries and percentages for Basic AD&D, click on the **Save button** at the bottom of the page.



26. Click the **Review and Sign button** at the bottom of the page.



27. On the **View Summary page**, check your work for accuracy.

View Summary

Projected Total Cost Per Paycheck
\$0.00

Selected Benefits 2 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Basic Life	04/30/2023	04/30/2023	\$50,000		First Name	Included
PEHP (Employee)						
Basic AD&D	04/30/2023	04/30/2023	\$50,000		First Name	Included
PEHP (Employee)						

You do not need to upload documents for this change.

28. Read the Legal Notice and click the **"I Accept" box**.

Electronic Signature

Legal Notice: Please Read

Your Name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

- You understand that your benefit elections are legal and binding transactions.
- You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carrier and benefit providers.
- You understand that if you willfully misrepresent your eligibility or the eligibility of your dependents during this enrollment, or fail to take the necessary action to remove ineligible dependents within 60 days, or in any way obtain benefits to which you are not entitled, your benefits will be canceled, you will be required to repay the full value of the lesser of any claims or insurance premiums, and may face criminal investigation and prosecution.
- You understand and certify that you are not a part to a divorce proceeding and not subject to an injunction/order which prevents you from modifying insurance or changing beneficiaries.
- You understand you are responsible to provide all required documents for dependents (birth or marriage certificates) within 90 days of enrollment. You understand that if adequate documentation is not provided timely, it will result in termination for your dependent coverage retroactively to the time the dependent was not eligible.

I Accept

29. Click the **Submit button** at the bottom of the page.



If you click "Save for Later" and do not return to your enrollment in a timely manner, your choices will be lost when we finalize open, unfinished enrollments.

Questions? Run into issues?
Reach out to us at benefits@slcgov.com
or **call 801-535-6600**

Something to consider: do you have beneficiaries other places?

You may want to consider changing your beneficiaries with:

1. URS (Utah Retirement Systems – pension/401(k)/457/Traditional IRA/Roth IRA) – <https://www.urs.org/>
2. HealthEquity (our HSA administrator) – <https://www.healthequity.com/>
3. Empower – <https://www.empower.com/>