

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



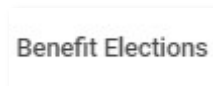
2. Click on **Benefits and Pay.**



3. Click on **Benefits.**



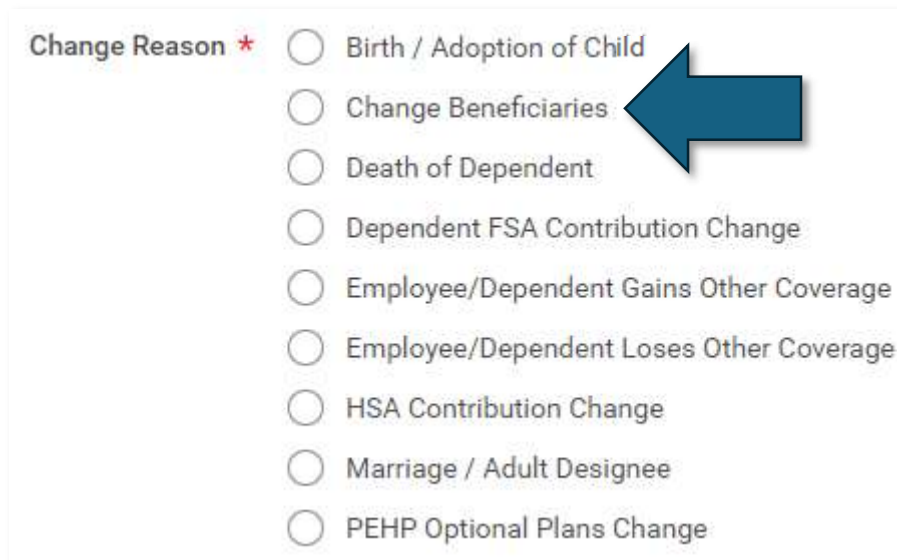
4. Click on **Benefit Elections.**



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




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

A screenshot of the 'Change Reason' section. It features a list of radio buttons for selecting a reason for a change. The 'Change Beneficiaries' option is selected, and a large blue arrow points to it from the right. The other options are: Birth / Adoption of Child, Death of Dependent, Dependent FSA Contribution Change, Employee/Dependent Gains Other Coverage, Employee/Dependent Loses Other Coverage, HSA Contribution Change, Marriage / Adult Designee, and PEHP Optional Plans Change.

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.

Submit Save for Later Cancel

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

×

You have submitted

Up Next: Your Name | Change Benefit Elections

[View Details](#)

Open

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

Change Benefit Elections

Created: 03/15/2024 | Effective: 03/01/2024

Initiated On 03/15/2024

Submit Elections By 04/29/2024

Let's Get Started

11. You will see all plans which, if enrolled in, require beneficiaries. 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 in which you are enrolled also require beneficiaries.

Change Beneficiaries

Projected Total Cost Per Paycheck
\$0.00

Enrollment Instructions

Welcome to Salt Lake City Benefits Enrollment Platform. Scroll to the bottom when you have completed your elections then click Review and Sign.

Insurance

Basic Life
PEHP (Employee)

Coverage

\$50,000

Manage

Basic AD&D
PEHP (Employee)

Coverage

\$50,000

Manage

Optional Life
Waived

Enroll

Spouse/Adult Designee Life
Waived

Enroll

Child Life
Waived

Enroll

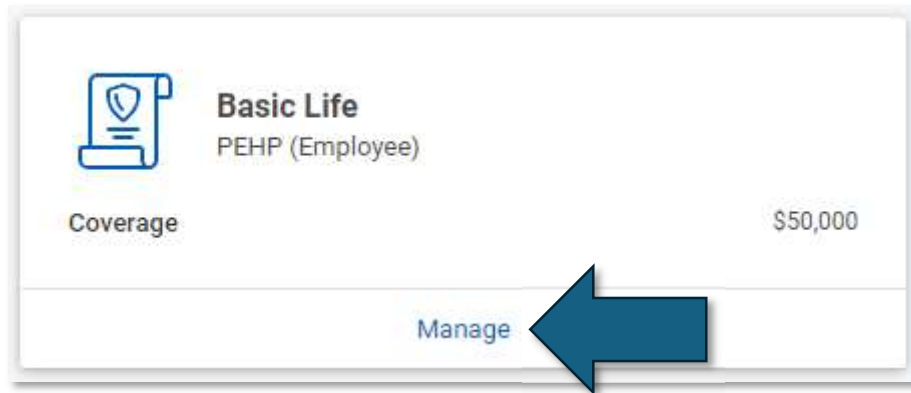
Optional AD&D
Waived

Enroll

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 want to 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 listed will only be paid in the case of your death.
- 5) If anything happens to one of your beneficiaries before the policy is paid out, that person's percentage will go to the remaining beneficiaries.
- 6) Questions? Call PEHP's life department at 801-366-7495.

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



Plans Available

1 item

Benefit Plan	*Selection	Company Contribution (Biweekly)
PEHP (Employee)	<input checked="" type="radio"/> Select <input type="radio"/> Waive	\$2.51

(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 one beneficiary per policy. If you choose to do only one, make them the Primary Beneficiary.

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	

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



The screenshot shows a table titled "*Primary Beneficiaries 3 items". The table has two columns: "Beneficiary" and "Percentage". The first row has a plus icon in the Beneficiary column and an empty input field in the Percentage column. The second and third rows also have minus icons in the Beneficiary column and empty input fields in the Percentage column.

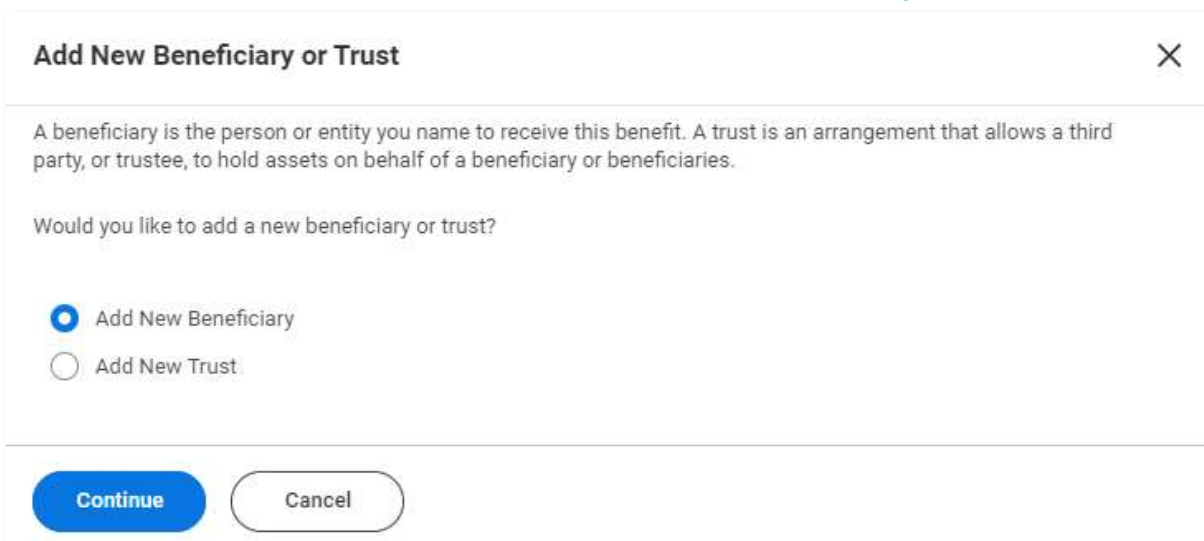
If you clicked it too many times, be sure to click the  to the left of the empty box. (Any empty boxes when trying to submit will cause an error.)

16. Click in the empty box, click on Add New Beneficiary or Trust.



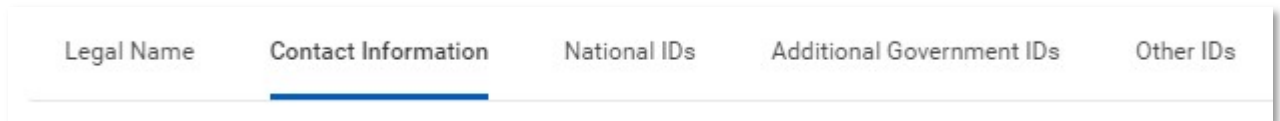
The screenshot shows the same table as in step 15, but with a dropdown menu open in the first row's Beneficiary column. The menu options are "Existing Beneficiary Persons", "Existing Trusts", "Add New Beneficiary or Trust", and "Search". A large blue arrow points to the "Add New Beneficiary or Trust" option. The Percentage column for the first row is empty.

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



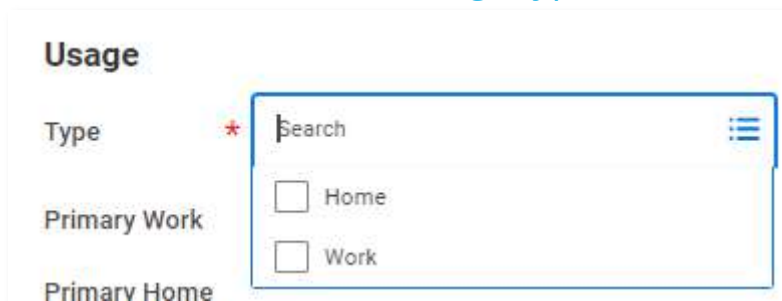
The screenshot shows a dialog box titled "Add New Beneficiary or Trust" with a close button (X) in the top right corner. The dialog contains the following text: "A beneficiary is the person or entity you name to receive this benefit. A trust is an arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries." Below this, it asks "Would you like to add a new beneficiary or trust?". There are two radio buttons: "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)



The screenshot shows a horizontal tabbed interface with five tabs: 'Legal Name', 'Contact Information', 'National IDs', 'Additional Government IDs', and 'Other IDs'. The 'Contact Information' tab is selected and highlighted with a blue underline.

You must click address usage type:



The screenshot shows a form section titled 'Usage'. It contains three labels: 'Type', 'Primary Work', and 'Primary Home'. The 'Type' label is followed by a red asterisk and a search dropdown menu. The dropdown menu is open, showing two options: 'Home' and 'Work', each with an unchecked checkbox. The 'Primary Work' and 'Primary Home' labels are followed by empty checkboxes.

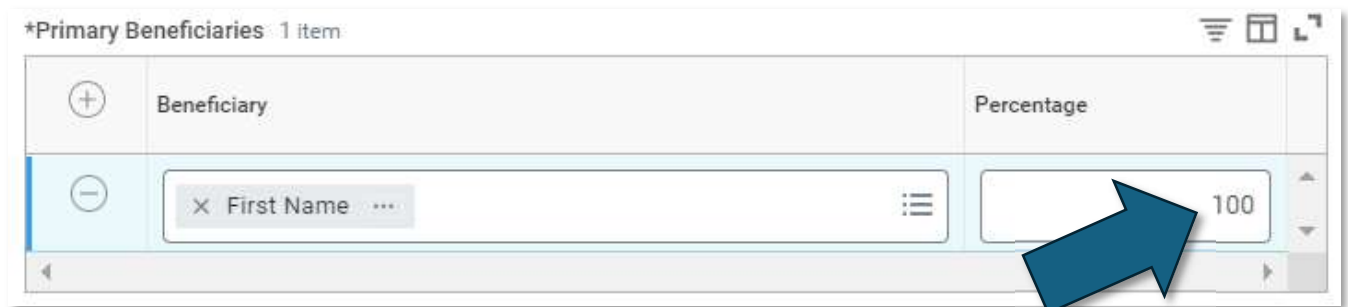
- e. **Phone number** is not required, but a good idea (also located on the Contact Information tab).

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



The screenshot shows two buttons at the bottom of a screen. The 'OK' button is blue with white text, and the 'Cancel' button is white with a black border and black text.

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



The screenshot shows a table titled '*Primary Beneficiaries 1 item'. The table has two columns: 'Beneficiary' and 'Percentage'. The 'Beneficiary' column contains a search dropdown menu with 'First Name' entered. The 'Percentage' column contains a text input field with the value '100'. A large blue arrow points to the '100' value in the 'Percentage' column.

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.

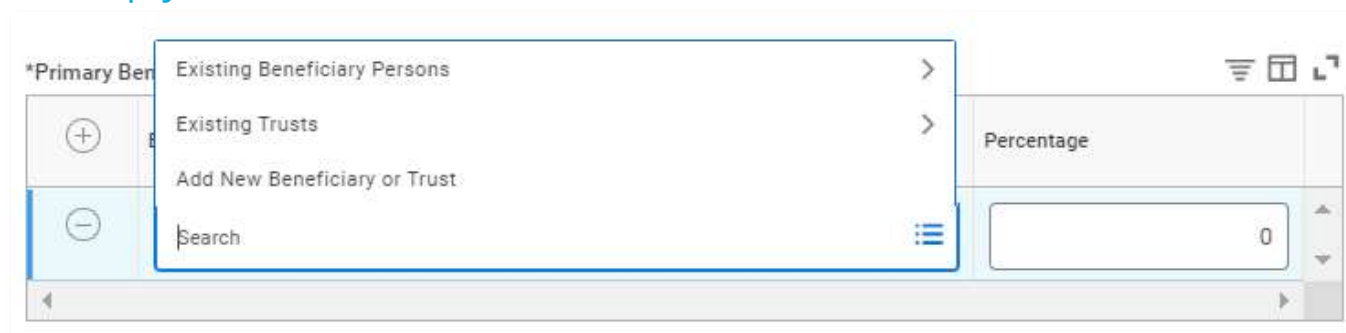


22. Click on **Manage** under Basic AD&D. Now that you have entered beneficiaries, it is faster to choose them in the other policies.

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.



*Primary Beneficiaries

+

Existing Beneficiary Persons

Existing Trusts

Add New Beneficiary or Trust

First

Percentage

0

*Primary Beneficiaries 1 item

Beneficiary	Percentage
<div>×</div> <div>First Name</div> <div>...</div>	100

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.

Save

Cancel

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

Review and Sign

Save for Later

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 PEHP (Employee)	04/30/2023	04/30/2023	\$50,000		First Name	Included
Basic AD&D PEHP (Employee)	04/30/2023	04/30/2023	\$50,000		First Name	Included

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 lessor 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 60 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.

Submit **Save for Later** **Cancel**



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**

If you have not done so, consider adding beneficiaries for your other Salt Lake City Corporation benefits:

- **URS** – Utah Retirement Systems (pension, 401(k), 457, IRAs – urs.org
- **Empower** – 457 – empower.com
- **HealthEquity** – HSA administrator – healthequity.com