## Open Enrollment Steps for Mobile

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive an Open Enrollment Change task in your Inbox. Based on your organization's configuration, you may require approvals to complete this task. The following steps will help you to complete your open enrollment.
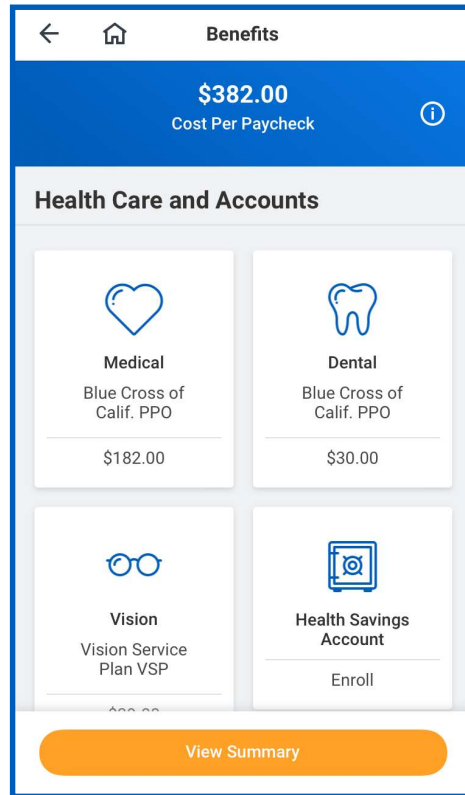
Select Your Benefits

From your Home page:

1. Select the **Inbox** icon.

2. Select the **Open Enrollment Change** task.

3. Select **Let's Get Started** and answer any configured questions.
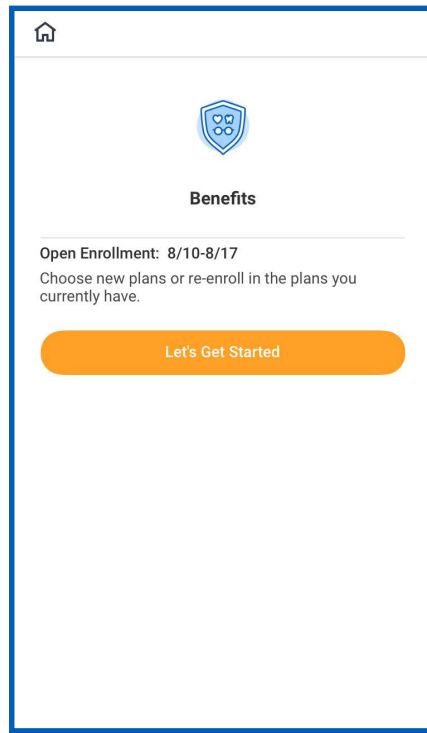
4. Answer the tobacco use question and select **Save**.

5. The Benefits page displays. Choose a category.

6. For each category, select or waive your choice. Your current elections will default.

7. Select **Details** to review plan information and contact information for the provider.

8. Select **Edit** to modify your coverage, if needed.

Add or Modify Dependents

If you elect or modify a benefit plan during open enrollment, you can add dependents or modify existing dependents.

1. Choose your new benefit election or select the **Edit** link for an existing benefit election.

2. Select **Add New Dependent** and complete the configured questions. You can also add or remove an existing dependent from the plan by selecting or clearing their checkbox. Complete all required information before moving on to the next step.

Note: If your company configures derived coverage on the medical plan, Workday selects a coverage target automatically based on who the employee covers.

3. Select **Save**.

Add Group Life Insurance

Depending on your organization's policy, and local, state, and federal laws, you may need to complete a physical examination to qualify for life insurance during open enrollment. Ask your HR or benefits representative for additional information.

From the Insurance and Retirement section, select each category to open your enrollment options.

1. Select or waive each insurance election. For existing elections, select **Edit** to modify your coverage as needed.

2. Select **Save**.

Designate Life Insurance Beneficiaries

From the Insurance and Retirement section, select each category to open your enrollment options.

1. For new enrollments, select the benefit option from the Insurance section. Select **Details** to view the plan description or provider website. Select the option to enroll. For current enrollments, select **Edit** to modify your beneficiaries.

2.   Select the **Percentage Amount** field to view and modify your beneficiary percentages and coverage amounts. Your primary beneficiary and contingent beneficiaries must add up to 100%.

3.   Select the **Edit** icon to add a new beneficiary.

4.   Select existing beneficiaries or add a new beneficiary. To add a new beneficiary, select **Add Beneficiary** or **Add Trust**. To remove an existing beneficiary, clear the checkbox next to that beneficiary.

Cancel	**Primary**	Save

Liberty Mutual (Employee)

+ Add Beneficiary

+ Add Trust

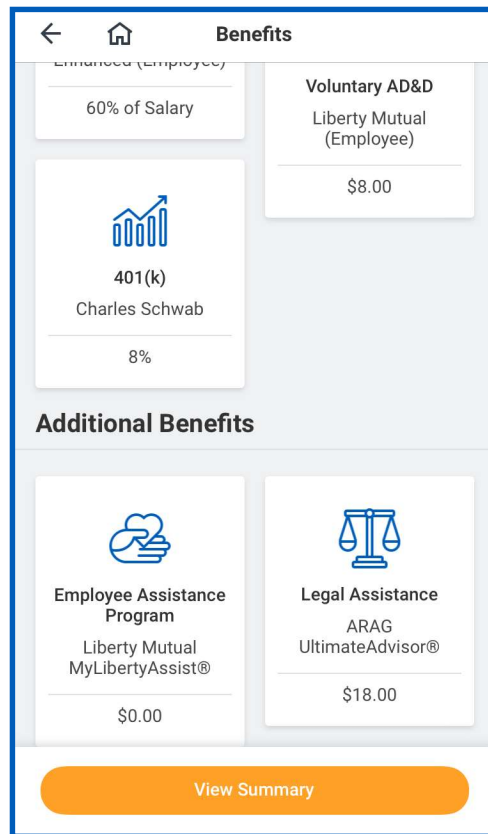**Existing Beneficiaries**

☐ Megan McNeil
  Child

☐ Pat McNeil
  Spouse

5. Select **Save** and enter the percentage of benefits for each beneficiary.

6. Select **Save**.

Add Additional Benefits

You can select optional benefits in the Additional Benefits section, such as employee assistance or legal assistance insurance. You can select or waive coverage for each category.

Complete Your Enrollment

1. Select **View Summary**.

2. Scroll down to review your benefit elections and upload any required documentation in the Attachments section.

3. Select the **I Accept** checkbox to confirm your electronic signature, if needed.

4. Select **Submit**. A confirmation page displays.

5. Select **Close** to return to your Inbox. Optionally, select the **View 2025 Benefits Statement** button to view a confirmation of your submitted elections.