

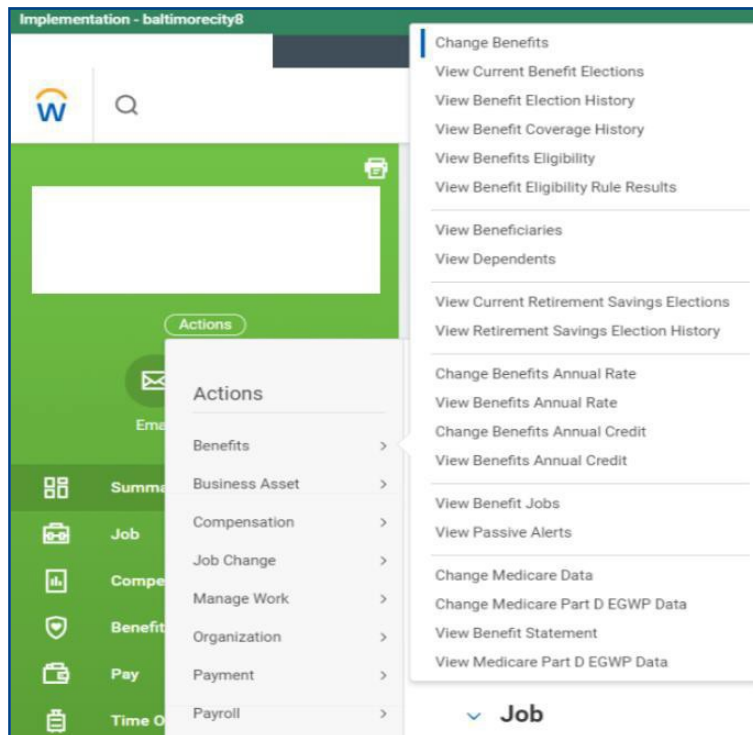
Retiree Benefits Partner can change benefits of a retiree if necessary.

CHANGE BENEFITS FOR RETIREES WITH LIFE EVENTS

Retirees that have life events (i.e., birth, death, marriage, divorce, etc.) will need to have their benefits updated in Workday.

From the home page:

1. Enter the retiree's name in the search field.
2. Click on Actions under the retiree's name.
3. Click on Benefits > Change Benefits.



- Select Pension Contribution Change (this would be for Pension Plan enrollment; the other ones would say either select 401(a) Contribution Change, select DCP Pre-Tax 457(b) Contribution Change, or select DCP Roth 457(b) Contribution Change)

Prior to submitting you must attach the following documentation for these life events:

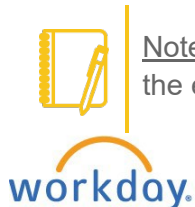
- Birth / Adoption of Child - Official State Birth Certificate
- Court Ordered Coverage - Official Medical Child Support Order
- Death of Spouse or Child - Death Certificate
- Divorce - Divorce Decree
- Gaining Eligibility for Medicare (for retirees) - Letter from Employer or Medical Plan
- Gains / Loses Coverage from Another Source - Letter from Employer or Medical Plan
- Marriage - Legal Spouse - Official State Marriage Certificate
- Marriage of Dependent Child - Official State Marriage Certificate

If you wish to drop your spouse due to a divorce, you must go to the dependent tab on your benefit profile page and click on edit to change your spouse to an ex-spouse. This action will trigger a benefit event that will allow you to drop your spouse from your coverage.

If you are retired and have gained eligibility for Medicare, you must click on Medicare Information from your home page under the benefits worklet. Adding your Medicare information will trigger a benefit event that will allow you to make your benefit elections.

- The Other forms would be:
 - 401 (a) Contribution Change
 - Pre-Tax 457 (b) Contribution Change
 - Roth 457 (b) Contribution Change
- Enter Benefit Event Date (This is the date where deduction should begin)

Note: submit elections box is not relevant for retirement plan elections since our members are not making the elections themselves in Workday



7. Click on Open to enter the Benefit Elections
8. Click on Let's Get Started
9. Click on Enroll for Pension
10. Select the appropriate Pension Plan (or 401(a)/DCP Plan)



Note: Retiree Partners can enroll members in plans they have been granted security access to enroll a member in the respective retirement plan. If a retiree should be enrolled in a DCP Plan, please refer to the plans listed below:

DCP Plans:

- Enroll in Pre-Tax 457 (b) **OR**
- Enroll in Roth 457 (b)

11. Input the Percentage (or Contribution Amount for DCP/457(b) plans)
12. Click Review and sign
13. Click submit

STILL HAVE QUESTIONS ABOUT WORKDAY

For additional support and questions about Workday please email Workday.Baltimorecity.gov.