

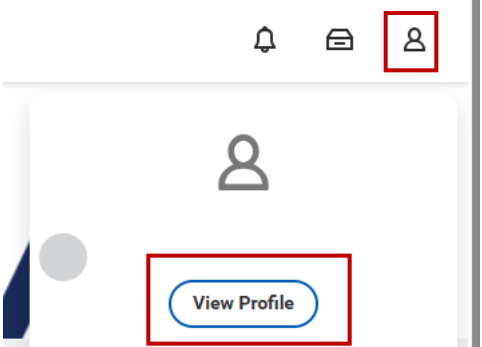
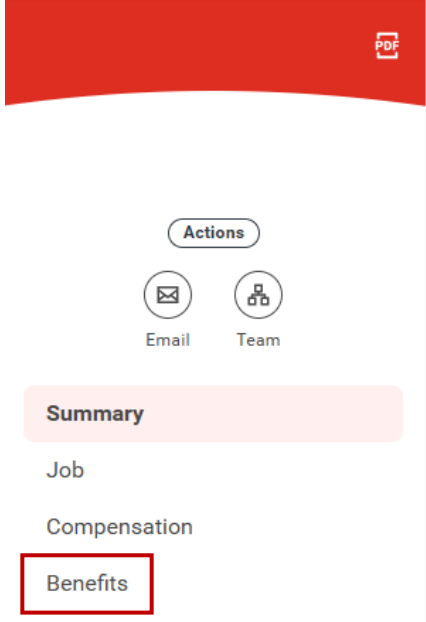
Change Benefits for Optional Retirement



Employee Self-Service Job Aid

Use this job aid for steps on how to initiate a change in your optional retirement benefits in Workday.

Employees can change retirement benefits in Workday after the initial paperwork with the vendor has been completed.

Step	Action
1.	Select your Profile and then View Profile .  A screenshot of the Workday user interface. At the top right, there are three icons: a bell, a document, and a person icon. The person icon is highlighted with a red box. Below these icons is a profile card with a person icon and a 'View Profile' button. The 'View Profile' button is also highlighted with a red box.
2.	Select Benefits .  A screenshot of the Workday profile summary page. At the top, there is a red banner with a PDF icon. Below the banner, there is an 'Actions' section with two icons: 'Email' and 'Team'. Below the 'Actions' section, there is a 'Summary' section with four items: 'Job', 'Compensation', and 'Benefits'. The 'Benefits' item is highlighted with a red box.

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3. Select the **Change Benefits** button.

The screenshot shows the 'Benefits' tab selected in a navigation bar. Below the navigation bar, there is a section titled 'My Monthly Totals' with 'My Cost \$67.79' and 'Employer Cost \$871.27'. A red box highlights the 'Change Benefits' button, which is next to a 'View as Grid' button. Below this is a 'Health Care and Accounts' section with two cards: 'Medical' (Anthem HDHP Ram Pre-Tax) and 'Dental' (Delta Dental Direct Reimbursement Basic Pre-Tax).

4. Select the **Change Reason**, for this example **Optional Retirement Change**.

The screenshot shows a 'Change Reason' dropdown menu with a red asterisk. The dropdown is open, showing a list of options. The 'Optional Retirement Change' option is highlighted with a red box. The other options in the list are: select one, select one, Beneficiary Change, Birth/Adoption, Dependent Care Change, Gain of Coverage, Gain of Medicare/Medicaid, HSA Amount Update, Loss of Coverage, Loss of Medicare/Medicaid, Marriage, and Move out of CO Pathways Network.

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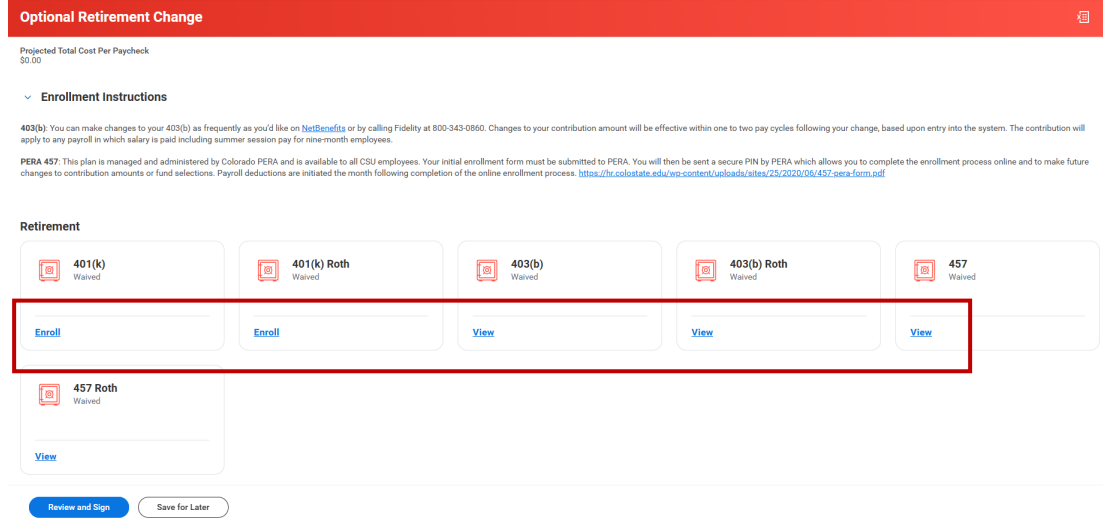

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5.	<p>Select the Benefit Event Date, enter any Comments, as needed, and select Submit.</p> <p>Change Reason * <input type="text" value="Optional Retirement Change"/></p> <p>Benefit Event Date * <input type="text" value="MM/DD/YYYY"/> </p> <p>enter your comment <input type="text"/></p> <p><input type="button" value="Submit"/> <input type="button" value="Save for Later"/> <input type="button" value="Cancel"/></p>
6.	<p>Select the Open button from the submitted confirmation message.</p> <p></p>
7.	<p>Select Let's Get Started.</p> <p>Change Benefit Elections</p> <p>Click the Let's Get Started button below to start enrolling in benefits.</p> <p>When you reach the enrollment page, click each tile to Enroll, Manage or View the benefit options available.</p> <p>For some benefits such as Basic Life and AD&D you will not be able to change the option, but you should Manage it to add beneficiary allocations. For other options, you will only be able to View the election and no changes may be made. Please ensure you review each tile for all the benefit options available to you.</p> <p>When you are done with your elections, click the Review and Sign button to review your final elections and complete the Electronic Signature. Scroll down the page and review any messages.</p> <p>Initiated On 02/23/2026</p> <p>Submit Elections By 03/31/2026</p> <p><input type="button" value="Let's Get Started"/></p>

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8.	<p>Select View or Enroll under the retirement plan that you want to change.</p> 
9.	<p>Once you've made the changes, select Review and Sign.</p> 
10.	<p>Verify the information, select the I Accept checkbox, and then Submit.</p> 