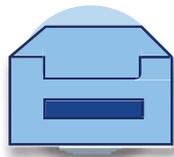




KEAN | workday
My Guide

**Change Benefits for Open Enrollment – Lincoln Financial Group
Voluntary Life and/or AD&D Insurance, Vision and Legal Plans Only**



This guide will assist you in making your benefit elections in Workday during open enrollment exclusively for the following benefits:

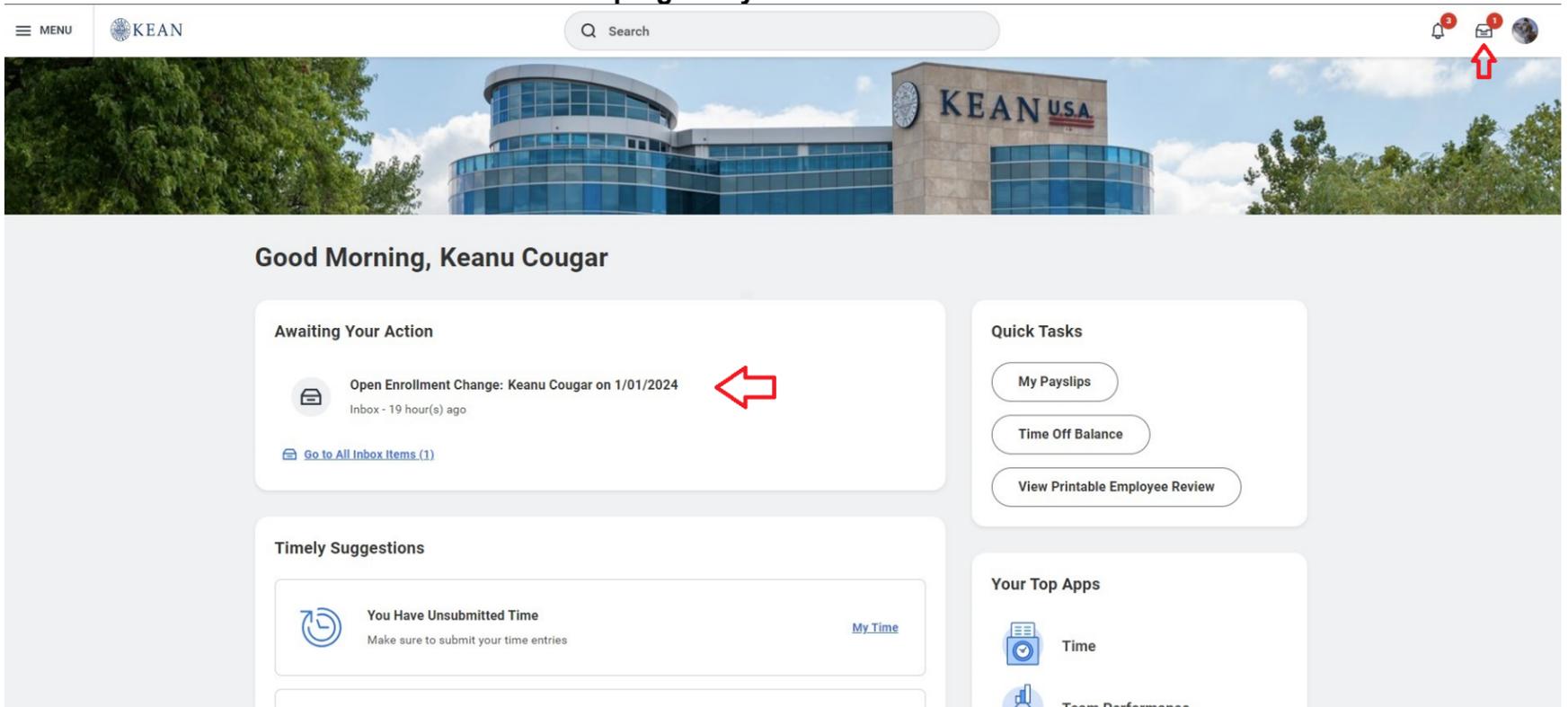
[Vision Plan](#), [Legal Plan](#), and all [Lincoln Financial Plans](#) (Employee Voluntary Life, Employee AD&D, Spouse Life, Spouse AD&D, Child Life).

Open Enrollment for the State Health Benefits Program (SHBP) including your medical, prescription drug and dental benefits will continue to be administered through [mynjbenefitshub /benefitsolver](#).

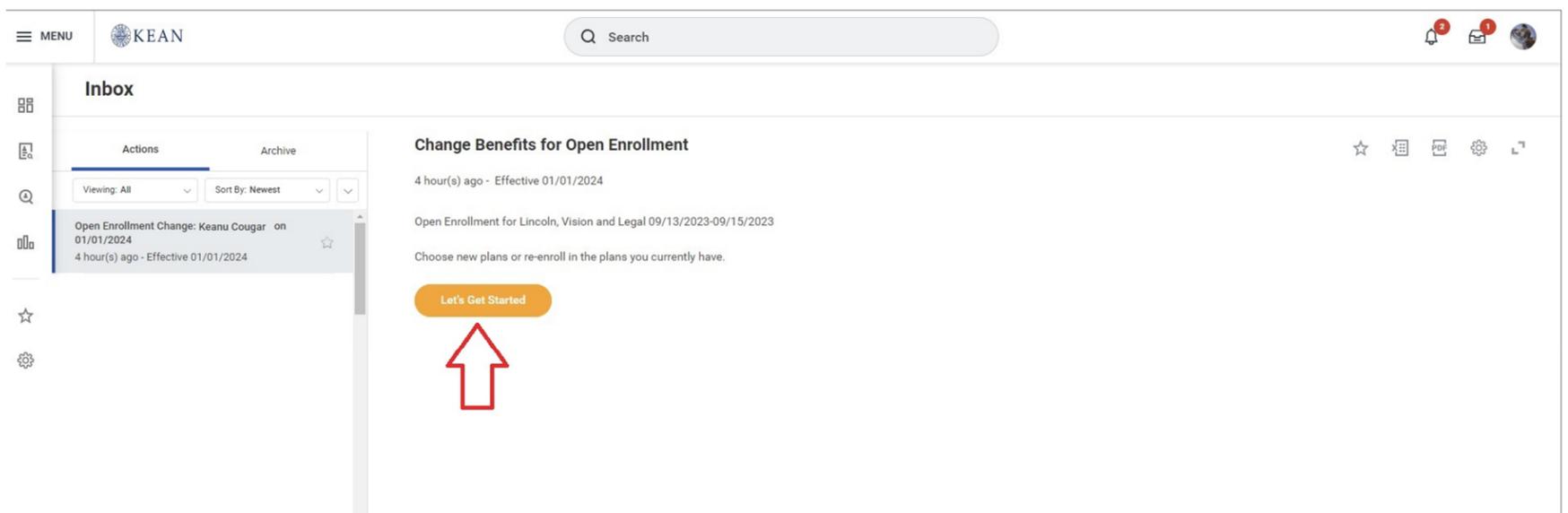
- **To make changes:** If you would like to change these plans, modify coverage, and add or delete dependents for these plans during this Open Enrollment period, follow this guide for detailed steps.
- **To maintain your current elections:** If you do not want to make any changes to your coverage for these plans, you may disregard the inbox item. No action is required.

Please go to the last page in this guide for additional information regarding updating/designating a Beneficiary, and how to view your Current Beneficiary.

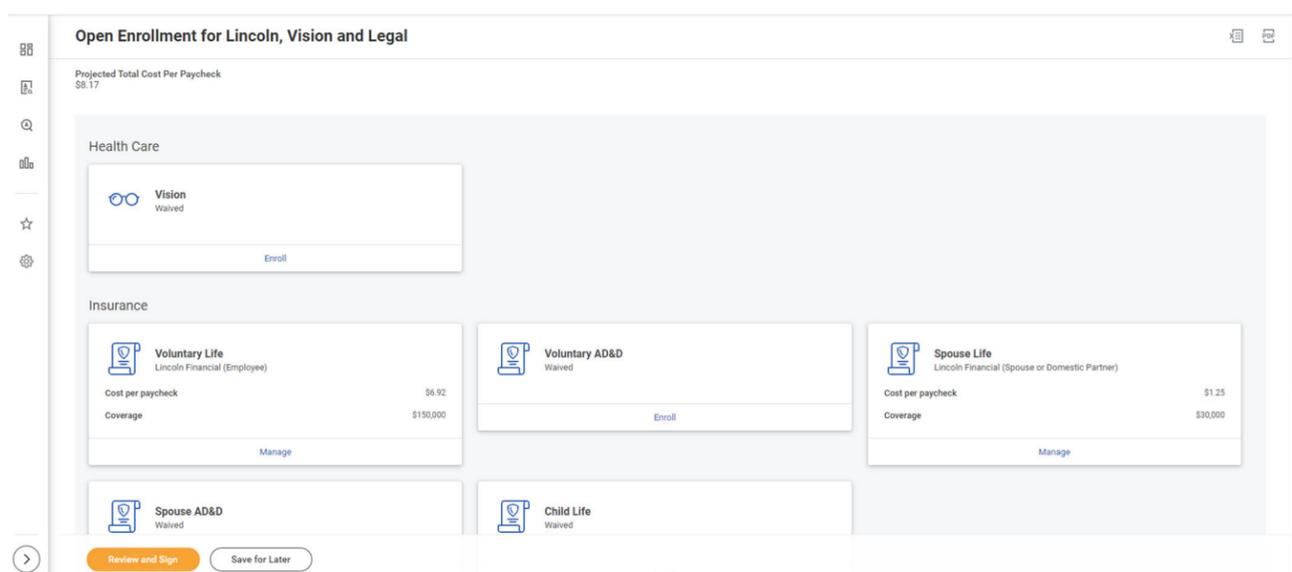
Upon logging into Workday, you will see the task below in your inbox. Please click the task, or you may also click your inbox at the top right of your screen to access it.



Click "Let's Get Started".



You will be brought to the Open Enrollment page for Lincoln, Vision, and Legal. You can select **Enroll** to enroll in a Benefit, or you can select **Manage** to waive, or make changes to your coverage/beneficiaries.



METLIFE VISION PLAN

For the Vision Plan, selecting Enroll will bring you to the following page where you will choose to enroll in a plan. You will be able to see the cost of the Benefit per Pay Period. Please click the bubble next to "Select" and click Confirm and Continue.

Vision

Projected Total Cost Per Paycheck
\$8.17

Plans Available

Select a plan or Waive to opt out of Vision. The displayed cost of waived plans assumes coverage for Employee Only.

*Selection	Benefit Plan Details	You Pay (Biweekly)
<input checked="" type="radio"/> Select  <input type="radio"/> Waive	Metlife	\$3.91 

Confirm and Continue

Cancel

On the next screen you will select a dependent to be covered, if you already have a dependent on your Benefits, their name will be listed.

The coverage amount will update upon selection of your Dependent. Click save when completed.

Vision - Metlife

Projected Total Cost Per Paycheck
\$12.08

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Employee + Child(ren) 

Plan cost per paycheck \$9.09

Add New Dependent

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	SANDRA COUGAR	Child	



Save

Cancel

You will return to the open enrollment page. Here you can enroll/update another plan or click Review and Sign if you are ready to submit your changes.

MENU KEAN

Your Vision changes have been updated, but not submitted
Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

Open Enrollment for Lincoln, Vision and Legal

Projected Total Cost Per Paycheck
\$9.09

Health Care

UPDATED

 Vision
Metlife

Cost per paycheck \$9.09

Coverage Employee + Child(ren)

Dependents 1

Manage

Insurance

 Voluntary Life
Waived

Enroll

 Voluntary AD&D
Waived

Enroll

 Spouse Life
Waived

Enroll

Review and Sign Save for Later

Child Life

Important Note:

Please review your election prior to submitting. Once your elections are submitted to Human Resources, you will not have another opportunity to make changes to your election in Workday.

MetLife Vision Plan – Adding a Dependent that is not listed in Workday

If you would like to add a Dependent, please follow the steps below:

Click “Add a New Dependent”

Vision - Metlife

Projected Total Cost Per Paycheck
\$12.08

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Employee + Child(ren)

Plan cost per paycheck \$9.09

Add New Dependent



1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	SANDRA COUGAR	Child	

Save

Cancel

Enter your Dependent’s information at the top. Click the “Add” button under National ID to add their Social Security Number. You may use your existing address and phone number at the bottom of the page.

Add My Dependent From Enrollment

Name

Country * United States of America

Prefix

First Name *

Middle Name

Last Name *

Suffix

Allow Duplicate Name

Check this box only when there is more than one dependent with the same name.

National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

Add



Address

Use Existing Address

Phone & Email

Use Existing Phone

Save

Cancel

Click “Save” when you are Done.

Your newly added Dependent will now be listed with the updated Benefits cost. Please remember to upload the dependent verification documents to Workday after you click “Review and Sign”.

Vision - Metlife

Projected Total Cost Per Paycheck
\$22.14

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Family

Plan cost per paycheck \$13.97

Add New Dependent

2 items

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	SANDRA COUGAR	Spouse	09/15/1986
<input checked="" type="checkbox"/>	Rick Cougar	Child	09/08/2018

Save

Cancel

LINCOLN FINANCIAL PLANS

To enroll, or make changes to your Lincoln Financial Plan, please click “Enroll/Manage” under any of the plans.

Insurance

 Voluntary Life Lincoln Financial (Employee) Cost per paycheck: \$6.92 Coverage: \$150,000 Manage	 Voluntary AD&D Waived Enroll
 Spouse Life Lincoln Financial (Spouse or Domestic Partner) Cost per paycheck: \$1.25 Coverage: \$30,000 Manage	 Spouse AD&D Waived Enroll
 Child Life Waived Enroll	

To enroll, click “Enroll”, and at the next screen click the bubble that says “Select” and click “Confirm and Continue” at the bottom of the screen.

Voluntary AD&D

Projected Total Cost Per Paycheck
\$8.17

Plans Available

Select a plan or Waive to opt out of Voluntary AD&D.

1 item ☰ ☐ ↻

*Selection	Benefit Plan Details	You Pay (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Lincoln Financial (Employee)	

Confirm and Continue

Cancel

Lincoln Financial Plans – Adding a Beneficiary

If you are selecting Employee Voluntary Life Insurance or Employee AD&D, you will be required to provide your beneficiaries.

If your Beneficiary is not listed, or if you would like to add an additional Beneficiary, please follow the steps below.

Click the “+” button to add a row to the “Beneficiary” section.

Voluntary Life - Lincoln Financial (Employee)

Projected Total Cost Per Paycheck
\$38.47

Coverage

Calculated Coverage \$40,000.00
Coverage \$70,000
Plan cost per paycheck \$38.10

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 1 item	
Beneficiary	Percentage
<input type="button" value="+"/> <input type="button" value="Add Row"/> Sandra Cougar	100

Secondary Beneficiaries 0 items	
Beneficiary	Percentage
No Data	

Insurance Instructions

General Instructions

If multiple Primary Beneficiaries, total percentage of all combined must equal 100%. If multiple Contingent Beneficiaries, total percentage of all combined must equal 100%.

Click “Add New Beneficiary or Trust”.

Voluntary Life - Lincoln Financial (Employee)

Projected Total Cost Per Paycheck
\$38.47

Coverage

Calculated Coverage \$40,000.00
Coverage \$70,000
Plan cost per paycheck \$38.10

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	
Beneficiary	Percentage
<input type="button" value="+"/> Existing Beneficiary Persons	
<input type="button" value="+"/> Existing Trusts	
<input type="button" value="+"/> Add New Beneficiary or Trust	
<input type="button" value="−"/> Search	
<input type="button" value="−"/> Sandra Cougar	100

Secondary Beneficiaries 0 items	
Beneficiary	Percentage
No Data	

Please select the option that applies to you and click “Continue”.

Add New Beneficiary or Trust

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.

Would you like to add a new beneficiary or trust?

Add New Beneficiary
 Add New Trust

Enter the requested information on the following screen. You must click the “Contact Information” tab and enter an address for your Beneficiary/Trust, or you will get an error. You must also click the “National IDs” tab and enter a Social Security number. Click “Submit” once all the information is entered.

Add New Beneficiary or Trust Keanu Cougar

Relationship *

Use as Beneficiary

Date of Birth

Age (empty)

Gender

Allow Duplicate Name

Legal Name Contact Information National IDs Additional Government IDs

Country *

Prefix

First Name *

Middle Name

Last Name *

Suffix

Add New Beneficiary or Trust Keanu Cougar

Relationship *

Use as Beneficiary

Date of Birth

Age 23 years, 1 months, 13 days

Gender

Allow Duplicate Name

Legal Name **Contact Information** National IDs Additional Government IDs

Phone

Address

Email

Add New Beneficiary or Trust Keanu Cougar

Relationship *

Use as Beneficiary

Date of Birth

Age 23 years, 5 months, 12 days

Gender

Allow Duplicate Name

Legal Name Contact Information **National IDs** Additional Government IDs

National IDs 1 item

	*Country	*National ID Type	Current ID	Add/Edit ID
<input type="button" value="Add"/>	<input type="text" value="United States of America"/>	<input type="text" value="Social Security Number (SSN)"/>		<input type="text" value="123-45-6789"/>

Click the plus sign to add a row. Then select United States of America as the Country and Social Security Number for National ID Type. Add the Social Security number in the box labeled Add/Edit ID

You will return to your Beneficiary screen, and your new Beneficiary is listed. You will need to edit the percentages for each Beneficiary. The total amount must equal 100%. Click Save at the bottom when you are done.

Voluntary Life - Lincoln Financial (Employee)

Projected Total Cost Per Paycheck \$38.47

Coverage

Calculated Coverage \$40,000.00

Coverage \$70,000

Plan cost per paycheck \$38.10

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 2 items

Beneficiary	Percentage
<input type="text" value="Keanu Cougar"/>	<input type="text" value="50"/>
<input type="text" value="Sandra Cougar"/>	<input type="text" value="50"/>

Secondary Beneficiaries 0 items

No Data

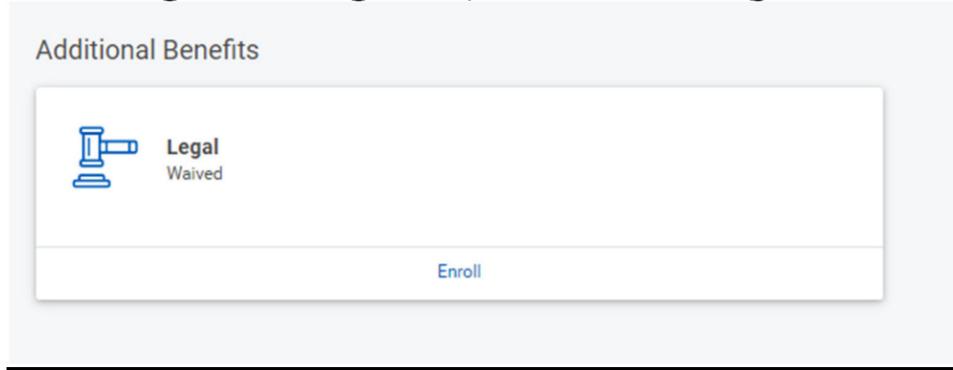
Insurance Instructions

General Instructions

If multiple Primary Beneficiaries, total percentage of all combined must equal 100%. If multiple Contingent Beneficiaries, total percentage of all combined must equal 100%.

METLIFE LEGAL PLAN

To enroll/make changes to the Legal Plan, click “Enroll/Manage” under that coverage.



Click “Select”, or “Waive”, and click “Confirm and Continue” at the bottom of the page.

Legal

Projected Total Cost Per Paycheck
\$8.17

Plans Available

Select a plan or Waive to opt out of Legal.

1 item

*Selection	Benefit Plan Details	You Pay (Biweekly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Metlife Legal Plan	

Confirm and Continue

Cancel

If you are enrolling, click the “Coverage” box and select Legal Plan Enrollment. Click “Save” at the bottom of the page.

Legal - Metlife Legal Plan

Projected Total Cost Per Paycheck
\$17.98

Coverage

Select the coverage that you would like for this plan.

Coverage *

Plan cost per paycheck \$9.81

Save

Cancel

You will be brought back to the Open Enrollment Screen.

If you are done making changes, you may click “Review and Sign” at the bottom of the page.

Important Note:

Please review your election prior to submitting. Once your elections are submitted to Human Resources, you will not have another opportunity to make changes to your election in Workday.

Projected Total Cost Per Paycheck \$9.09

Health Care

UPDATED Vision Metlife

Cost per paycheck \$9.09

Coverage Employee + Child(ren)

Dependents 1

Insurance

Voluntary Life Waived

Voluntary AD&D Waived

Spouse Life Waived

Review and Sign Save for Later

Review and confirm the changes you made. When done, scroll down to the bottom of the page.

View Summary

Projected Total Cost Per Paycheck \$38.47

Selected Benefits 2 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Voluntary Life Lincoln Financial (Employee)	02/14/2023	02/11/2023	\$70,000		Keanu Cougar Sandra Cougar	\$38.10
Voluntary AD&D Lincoln Financial (Employee)	02/14/2023	02/11/2023	\$70,000		Keanu Cougar Sandra Cougar	\$0.37

Dependent Verification Documentation Required

If you are adding a new dependent that does not appear in Workday (and is not already on your other State Health Benefits Plans), you will be required to provide dependent verification. You are required to submit the following documentation in Workday:

For a child

Copy of the child’s birth certificate showing the name of the employee is a parent.

For a spouse

A copy of the marriage certificate and a copy of the front page of the employee’s federal tax return (please redact wage information)

You can upload this information by clicking “Select Files” and attaching the documents on this screen.

Attachments

Drop files here

Select Files

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:

- This form will replace all prior designations of beneficiary(ies) for your Voluntary Life Insurance through Lincoln.
- THIS FORM DOES NOT APPLY TO ANY LIFE INSURANCE OFFERED TO YOU BY THE NJ STATE DIVISION OF PENSIONS AND BENEFITS.
- This Designation of Beneficiary form allows you to nominate a beneficiary, or beneficiaries, for benefits payable upon the death of that member.
- Please be sure to designate both primary and contingent beneficiaries. In the event of your death, the primary beneficiary(ies) will receive any death benefits that are payable. The contingent beneficiary(ies) will receive death benefits only if all primary beneficiaries have predeceased you.
- Unless otherwise stated, all beneficiaries will share and share alike.
- Do use proper names. Nicknames are not acceptable. When naming a married female as beneficiary, be certain the proper name is given, e.g., Mary J. Jones, not Mrs. John R. Jones. Do use specific names. The phrase “my children” or “my grandchildren” will not be accepted. You must list each child using his or her specific name.
- Don’t use a Designation of beneficiary form to update a beneficiary’s address. A signed letter notifying us of your beneficiary’s address change will suffice. Your letter will be added to your file so your beneficiary information remains current.
- Don’t name the same person or persons in both the primary and contingent beneficiary sections. This makes the form unacceptable.

I Accept

enter your comment

Process History

Keanu Cougar
Change Benefits for Life Event - Pending Action

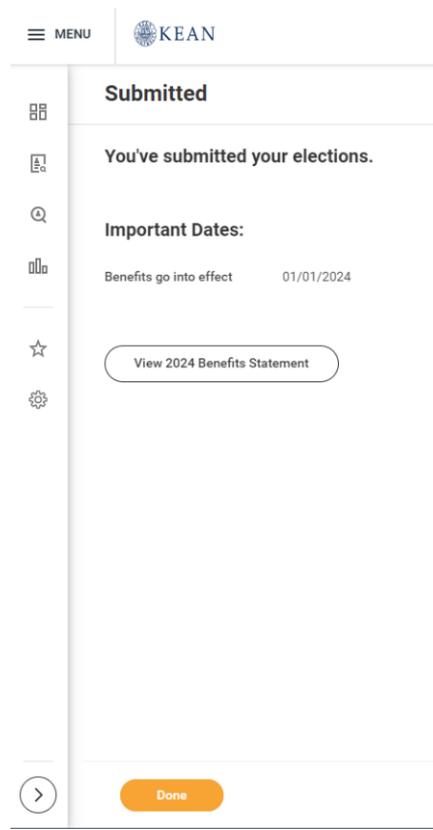
Submit Save for Later Cancel

When you are done, click “I Accept”, and submit.

You will see the following page that confirms your information has been submitted to our Benefits Team.

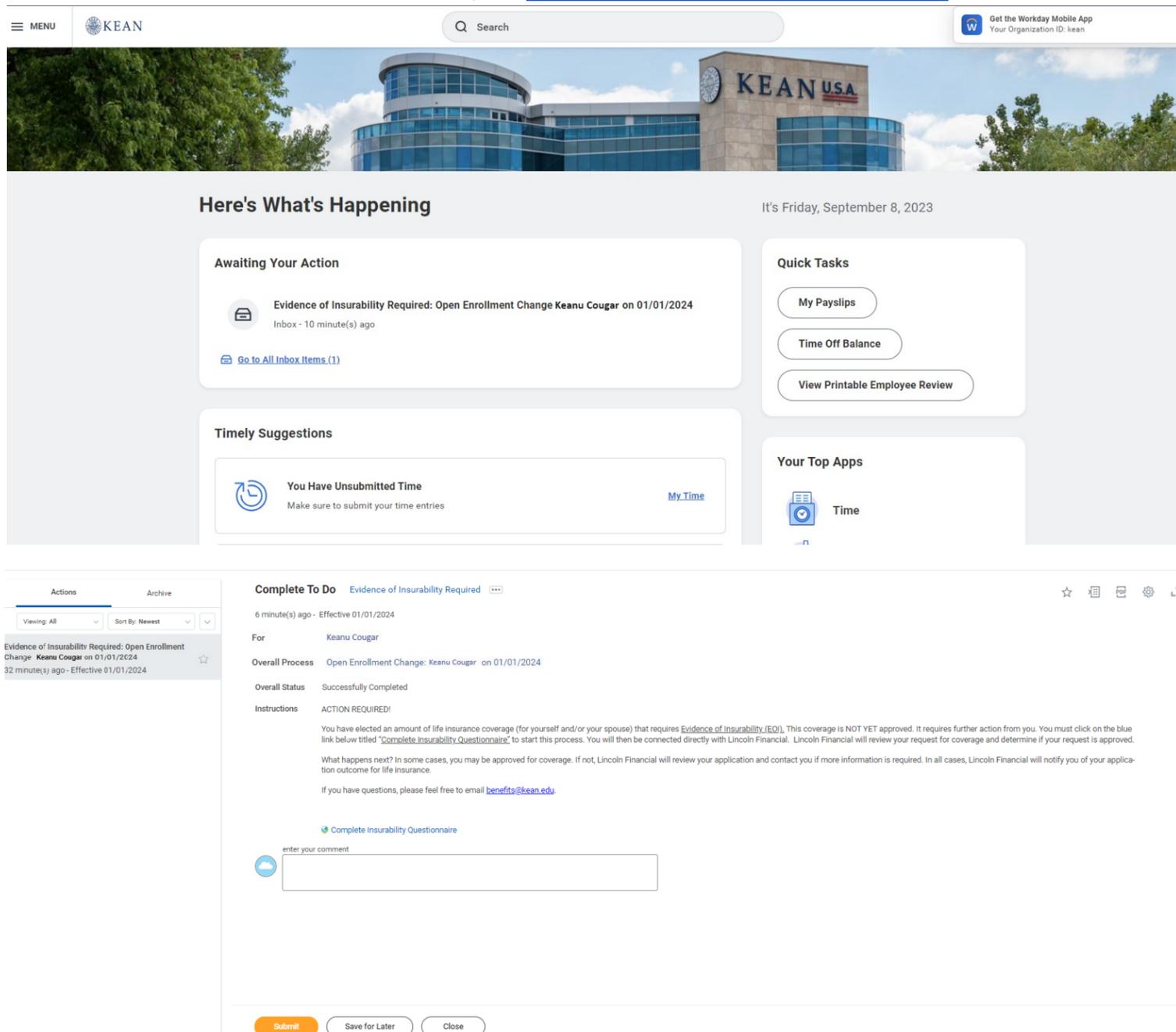
Click on the “View 2024 Benefits Statement” and PRINT this for your records.

As you will only see your elections reflected in Workday effective as of January 1, you are encouraged to print your 2024 Benefits Summary (that will appear after you submit your elections) as a personal reference.



EVIDENCE OF INSURABILITY

Employees that select Employee Voluntary Life Insurance or Spouse Life Insurance will be required to take additional steps to confirm Evidence of Insurability (EOI). If this is the case, you will receive a To Do action step in Workday with further instructions. For details, see [EOI - Instructions for Online Submission](#).



Once you have submitted your Evidence of Insurability with Lincoln Financial, please return to the inbox item and click “Submit” at the bottom to clear it from your inbox. The task will remain in your inbox until this is done.

Please feel free to email Workday@kean.edu if you have any questions throughout the process. For Benefits related questions you may reach out to our Benefits Team via email at Benefits@kean.edu

Designation of Beneficiary – NJ Division of Pensions and Benefits

If you are a member of a NJ State administered Retirement Plan, you may update your life insurance beneficiary(ies) for life insurance offered to you through the NJ Division of Pensions and Benefits as indicated below:

- **PERS/TPAF/PFRS Members** may verify beneficiary information or change/update a beneficiary online [using MBOS](#) (MBOS registration required)
- **ABP/DCRP Members** may change/update beneficiary information using the following form:
 - [ABP/DCRP Designation of Beneficiary](#)

For further information regarding designating a beneficiary for life insurance offered through the NJ Division of Pensions and Benefits, visit: <https://www.state.nj.us/treasury/pensions/documents/factsheets/fact68.pdf>

To update your beneficiary designations for non-life insurance funds held by your financial institutions, such as any of the ABP providers, contact the financial institutions directly for the appropriate forms.

Designation of Beneficiary - Lincoln Financial Group

If you have enrolled in Voluntary Employee Life and/or AD&D Insurance through Lincoln Financial Group, you may update your designation of beneficiary(ies) in Workday.

General Information

Please be sure to include the full legal name, social security number, relationship to you, and current address of the beneficiary(ies). In the event of a claim, providing this information can help expedite the claim process by making it easier to locate and verify the beneficiary(ies) you have indicated.

Naming Minors as Beneficiary(ies)

While you may designate minors as beneficiaries, please note that claim payments may be delayed due to special issues raised by these designations. In the event of a claim, the insurance proceeds may be paid to a duly appointed guardian of the child's estate. You may wish to consult with an attorney when drafting your beneficiary designation as it relates to minor children.

Trust as Beneficiary

You may designate a trust as beneficiary, using the following format: *To [name of trustee], trustee of the [name of trust], under a trust agreement dated [date of trust].* If you wish to designate a testamentary trust as beneficiary (i.e., one created by will), please contact your estate planning attorney for the proper procedure.

Life Status Changes

It is recommended that you review your beneficiary designations when various life status events occur, such as marriage, divorce, or birth of a child/grandchild.

Please note: The above guidelines are general and are not intended to be relied on as legal advice. Beneficiary designations recorded with a financial institution or custodian holding the asset are binding, even when contradicted by the language of a Will. *Unless your designation is a simple one, we recommend that you obtain the assistance of an attorney in drafting your beneficiary designation. Qualified legal counsel can help assure that your beneficiary designation clearly and correctly reflects your intentions for distribution of your benefits.* Beneficiary designations should be completed as part of an overall financial and estate plan. It's best to involve your legal and financial advisers to determine what is best for your individual situation.

How do I View my Beneficiaries?

If you would like to view your beneficiaries in the system, please navigate to your profile and click the "Action" button, select "Benefits", and then click on "View My Beneficiaries".

The screenshot displays the Kean University HR system interface. At the top, there is a navigation bar with a 'MENU' icon, the 'KEAN' logo, and a search bar. Below the navigation bar, the user's profile is shown, including a profile picture of a Kean Cougar, the name 'Keanu Cougar', and the title 'Professional Services Specialist 4 Administrative Services'. The 'Actions' button is highlighted, and a dropdown menu is open, showing various options. The 'Benefits' option is selected, and a sub-menu is displayed with 'View My Beneficiaries' as the first item. Other options in the sub-menu include 'View Dependents', 'View Current Retirement Savings Elections', 'View My Retirement Savings Election History', 'View My Benefit Statement', 'Change 1095-C Printing Election', 'View My 1095-C Printing Election', and 'View My ACA Forms'. The main content area shows the user's location as 'Kean Union Campus' and their manager as 'Lamont Repollet'. Below this, there is a section for 'Job' information, including 'Organization: Office of the President (Lamont Repollet)', 'Business Title: Professional Services Specialist 4 Administrative Services', and 'Manager: Lamont Repollet'.