



TRAINING MANUAL

Benefits – June 2017

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CHAPTER 1 – BENEFITS

OVERVIEW

Workday provides a system of record for all employee benefits. Employees of GCCCD will be able to view and access their benefits directly through Workday and will utilize the system for Open Enrollment to register or update their benefit elections.

OBJECTIVES

By the end of this chapter, you will:

- Navigate to your Benefit Elections
- View Your Benefit Elections

During Open Enrollment this chapter will also include: (Available August 2017)

- Updating Benefit Elections
- Registering your Benefit Elections
- Reviewing & Updating your Beneficiaries
- Reviewing & Updating your Dependents

VIEW MY BENEFITS

The employee's current benefit plans and employee costs will display in the Benefits subtab of the **Worker Profile's Overview Tab**.

The Benefits tab displays your current benefits, the date coverage began, and coverage level. This level may be a dollar amount for insurance, or a level designation such as "Employee Plus 1 Dependent" for medical or dental.

No changes to benefits are possible from this tab. Benefit changes are normally allowed only during the open enrollment period or within 31 days of a qualifying life event. You may also access this information from the Benefits worklet by selecting the **Benefit Elections** link.

BENEFITS WORKLET

The icons on your Home page provide access to worklets – groups of related tasks, reports, and links. These worklets are organized by functional category and represent different tasks or work you can perform.

The Benefits worklet links you to common actions and views related to benefits including; change benefit, beneficiaries, and dependents, view your benefit elections, and current benefits cost. This worklet can be found on the Home page.

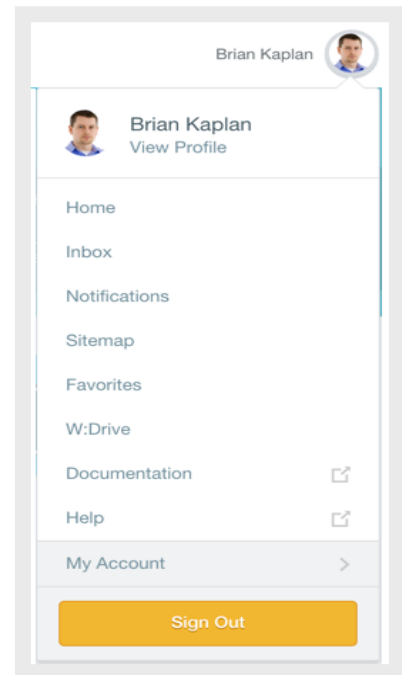




ACTIVITY 1 – VIEW YOUR BENEFITS

From the **Home** page:

1. Click on your name or the cloud in the top right side of the page.
2. Click on the **View Profile** link directly underneath your name.
3. Your worker profile will display.



From your **Worker Profile**:

1. Under the Overview tab, select the Benefits subtab.
2. View current benefit elections in the Benefits table.

Benefits 1 item						
Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Employee Cost (Monthly)
Medical - United Healthcare HMO Bronze	07/01/2016	06/11/2016	Employee			\$682.00

Benefits Worklet

From the **Home** page:

1. Click on the Benefits Worklet
2. Under the **View** menu, click on the **Benefit Elections** link.
3. Your current benefit elections will display (as seen in the above image).



View



CHAPTER 2 – RETIREMENT PLANS

OVERVIEW

GCCCD provides several different opportunities to save for your retirement. Workday allows employees to view retirement plan contributions, update 403(b) and 457(b) Retirement Savings Plans elections, and manage multiple vendors if applicable. **Currently, you CANNOT enroll in retirement plans via Workday. You can only update current elections. All paperwork for enrollment must be submitted through your selected vendor.**

NOTE

Please note that there are maximum amounts to what you can contribute.

- If you participate in one or more 403(b) plans, you cannot contribute more than \$18,000 combined in all plans for calendar year 2017 (as regulated by the IRS).
- If you also participate in the 457(b) plan, this plan has an \$18,000 annual contribution limit (as regulated by the IRS). You contribute up to \$18,000 in this plan regardless of what you contribute in your 403(b) plan(s).
- For all contributions, 403(b) and 457(b), you are limited to no more than 85% of your monthly base salary as a deduction for contributions to these retirement savings plans.

OBJECTIVES

By the end of this chapter, you will:

- Understand the various Retirement Plans offered through GCCCD and which are accessible via Workday
- Navigate & View your Retirement Savings Benefits
- Update retirement savings plans elections you are currently enrolled in

PENSION PLANS

GCCCD offers two different Pension Plans:

1. [CalPERS](#) – California Public Employees Retirement System
2. [CalSTRS](#) – California State Teachers Retirement System

For more detailed information of what is included in these Pension Plans, and to register for or access your online account follow the links above to the systems' website.

For those whose contracts include mandatory enrollment into one of the Pension Programs listed above, you will be able to view your (employee) contribution percentage in Workday under the Benefits Tab under your Worker Profile. The contribution to your Pension Plan made by GCCCD can be found on your Payslip each month, which is accessible through the **Pay Tab** in your Worker Profile under "Employer Paid Benefits".

Both contribution percentages can be found by accessing the **Benefits Worklet** from your homepage and selecting **Retirement Savings Elections**.

ALTERNATIVE RETIREMENT PLANS

GCCCD offers an alternative retirement plan for employees who are not eligible to participate in the State Employee's Retirement System. The current plan offered is:

Name: 3121
SAN DIEGO COUNTY FBC 3121
(800) 274-0503 PRESS 5
www.fbcretire/3121Plan.htm

The Plan is a partnership between San Diego County Board of Education Fringe Benefits Consortium, Life Insurance Company of the Southwest, and National Benefit Services, LLC.

NOTE: The GCCCD PEAR Plan investment has been transitioned to the San Diego County Schools FBC 3121 Retirement Plan.

For more detailed information of what is included in this plan follow the link above.

For those enrolled in this alternative retirement plan, you will be able to view your (employee) contribution percentage in Workday under the Benefits Tab under your Worker Profile. The contribution to this plan made by GCCCD can be found on your Payslip each month, which is accessible through the **Pay Tab** in your Worker Profile under "*Employer Paid Benefits*".

Both contribution percentages can be found by accessing the **Benefits Worklet** from your homepage and selecting **Retirement Savings Elections**.

403(B) & 457(B) RETIREMENT SAVINGS PLANS

GCCCD also offers voluntary participation in other retirement savings plans. Employees interested in saving more towards retirement are encouraged to contact the retirement plan counselor below.

Joel Romero
Retirement Plan Counselor
(619) 315-9653
joel.romero@empower-retirement.com

These plans are offered through the Fringe Benefits Consortium. For more detailed information and to access enrollment forms, click on the following link: www.fbcretire.com

For those who voluntarily enroll into one of the Retirement Plans listed above, you will be able to view your (employee) contribution as either a percentage or flat amount in Workday under the Benefits Tab under your Worker Profile.

The contribution can also be found by accessing the **Benefits Worklet** from your homepage and selecting **Retirement Savings Elections**.

NOTE: Currently, you cannot enroll for these plans through Workday. To enroll in these programs an employee must submit the appropriate paperwork to their selected vendor(s). If you want to change vendors, you must submit the appropriate paperwork to enroll with the new vendor before you are able to update/change contribution elections in Workday.



ACTIVITY 2 – MANAGE RETIREMENT PLANS

2.1 VIEW PENSION PLANS OR ALTERNATIVE

If you want to just view your (employee) contribution percentage:
From the **Home** page:



1. Click on the Benefits Worklet
2. Under the **View** menu, click on the **Benefit Elections** link.
3. If you are eligible and have been enrolled into a Pension Plan (CalPERS or CalSTRS) or an Alternative Retirement Plan (SDCOE 3121) you will find your (employee) current contribution percentage and the date that coverage began, and the date the deduction began.

View

Benefit Elections

Benefit Elections as of Date

Pension - CalPERS PEPPA	12/01/2016	12/01/2016	6%
Pension - CalSTRS Classic	12/01/2016	12/01/2016	10.25%

If you want to view both your (employee) contribution percentage and GCCCD's contribution percentage:
From the **Home** page:



1. Click on the Benefits Worklet
2. Under the **Change** menu, click on the **Retirement Savings** link.
3. If you are eligible and have been enrolled into a Pension Plan (CalPERS or CalSTRS) or an Alternative Retirement Plan (SDCOE 3121) you will find both your (employee) current contribution percentage and GCCCD's contribution percentage on this page. This can also be calculated from your Paystub.

Change

Beneficiaries

Dependents

Retirement Savings

Retirement Savings Elections 2 items

Benefit Plan	Employee Contribution	Employer Contribution
Pension - CalPERS PEPPA	Percent 6	Percent 13.89

2.2 VIEW RETIREMENT SAVINGS PLANS

From the **Home** page:



1. Click on the Benefits Worklet
2. Under the **View** menu, click on the **Benefit Elections** link.

View

Benefit Elections

Benefit Elections as of Date

3. If you have enrolled into one of the Retirement Savings Plans (403(b) or 457(b) you will find your (employee) current contribution flat amount or percentage and the date that coverage began, and the date the deduction began. You will also find the amount taken out of your pay under the **Employee Cost (Monthly)** Tab.

403(b) - Empower Retirement	12/01/2016	12/01/2016	\$1,500.00
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2.3 CHANGE RETIREMENT SAVINGS PLAN ELECTIONS

Employees who are already enrolled in the Retirement Savings Plans (403(b) and 457(b)) through the Fringe Benefits Consortium have the ability to update their retirement savings elections through Workday. **NOTE:** You must have processed enrollment forms and have set up an account with your vendor prior to entering a contribution election in Workday.

From the **Home** page:



1. Click on the Benefits Worklet
2. Under the **Change** menu, click on the **Retirement Savings** link.

Change

Beneficiaries

Dependents

Retirement Savings

3. Click the Edit button at the top left of the page.
4. The next screen will show today's date to reflect when this change was initiated.

Click OK.

5. Scroll down to locate your retirement savings plan under the **Benefit Plan** column. The retirement savings plan you are enrolled in will automatically have the **Elect** radio button selected under the

*Elect / Waive

☐ Elect
 ☒ Waive

***Elect/Waive** column. All plans that you ARE NOT enrolled in will automatically have the **Waive** radio button selected.

6. Once the **Elect** radio button is selected, you can edit the **Employee Contribution** column. You can now contribute to your retirement plan in two ways:
 - a. *Percent*: You can now contribute a percentage of your monthly pay.
 - b. *Amount*: You can contribute a set amount each month.

Employee Contribution	Allowed Employee Contribution
Percent 0	Percentage Maximum 85
Amount (Monthly) 0.00	Amount Maximum (Monthly) \$18,000.00

A green rectangular button with the word "Submit" in white text.

7. Once you have changed your employee contribution click .