



Welcome to Trinity Health!

Please utilize the following checklist to assist you with navigating Workday to successfully complete your Onboarding Tasks and Benefit Elections. **Your Onboarding Tasks and Benefit Elections must be completed and submitted within 30 days of your January 1, 2026 hire date.**

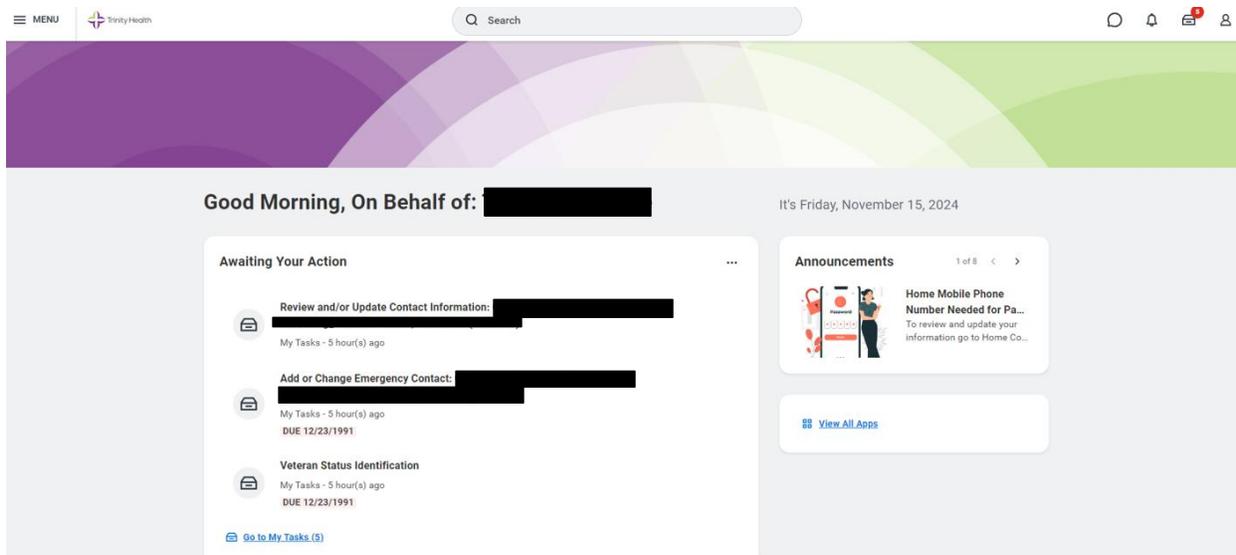
The **“New Hire”** benefit event is required to be completed for you to have benefits with Trinity Health. You must enroll in benefits for yourself and your eligible dependents (if applicable) by January 30, 2026, at 11:59 p.m. local time. If you are enrolling any dependents on your benefit plan(s), complete documentation of eligibility must also be submitted by January 30, 2026, at 11:59 p.m. local time.

If elections are *not* made by January 30, 2026, you will *not* have coverage for 2026 unless you experience a qualified life event or certain employment status changes.

In addition, the last page of this checklist provides information about your retirement savings account that will be established for you in the Trinity Health 403(b) Retirement Savings Plan at Fidelity, and the actions you should take to register your account.

To access your onboarding tasks as of January 1, 2026, log into Workday using the following link, [Workday Login](#). Please note if you are not using a Trinity Health device to access Workday, you will need to register your personal device for multi-factor authentication. For assistance with this task, please contact the Trinity Health TIS team at (1-888-667-3003).

Your Onboarding Tasks will be found on your Workday dashboard, under **“Awaiting Your Action”** or from your **“My Tasks”** tray, or by clicking on the **“Go to My Tasks”** link. When you are finished with the task, make sure to submit or click **“ok”** to move to the next task.



Once the first five tasks in the initial set of tasks listed below are complete, the second set of tasks will populate automatically by refreshing the screen.

Onboarding initial set of tasks

- Review and/or Update Contact Information (please include personal email address and mobile phone number so that the HR Shared Services can reach you if information is needed during the onboarding process)
- Add or Change Emergency Contact
- Complete Veteran Status Identification
- Complete Disability Self-Identification
- Review New Hire Documents

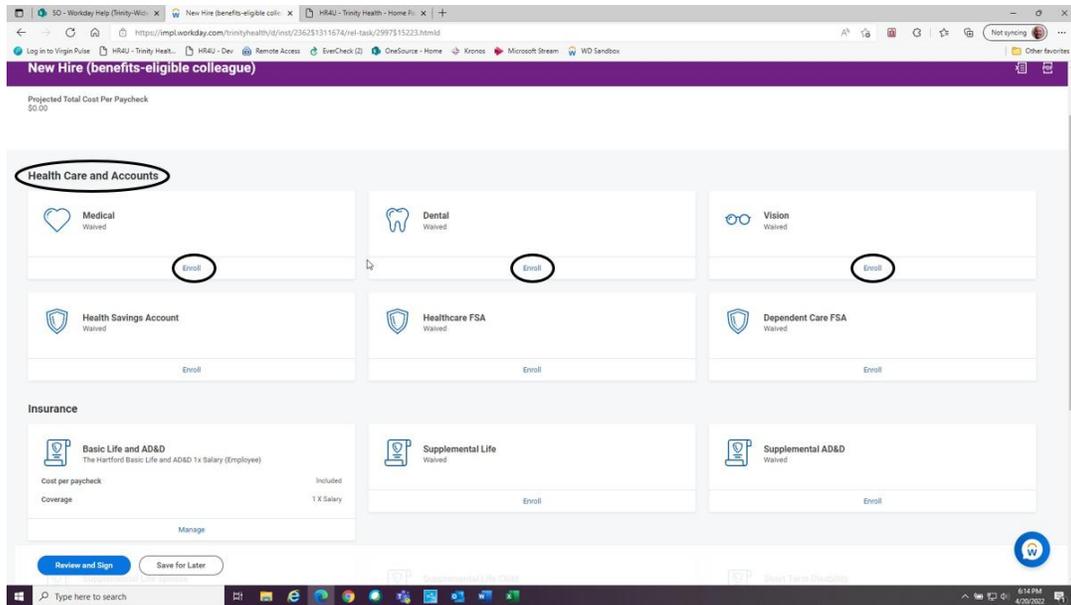
Onboarding second set of tasks

- Conflict of Interest event
- Daily Pay Opt In
- Consent to Receive My Year End Tax Documents via Electronic Delivery
- Payment Election Enrollment Event (Due by 1/9/2026)
- Update Tax Elections (With Link) (Due by 1/9/2026)
- Complete DEI Commitment Acknowledgement

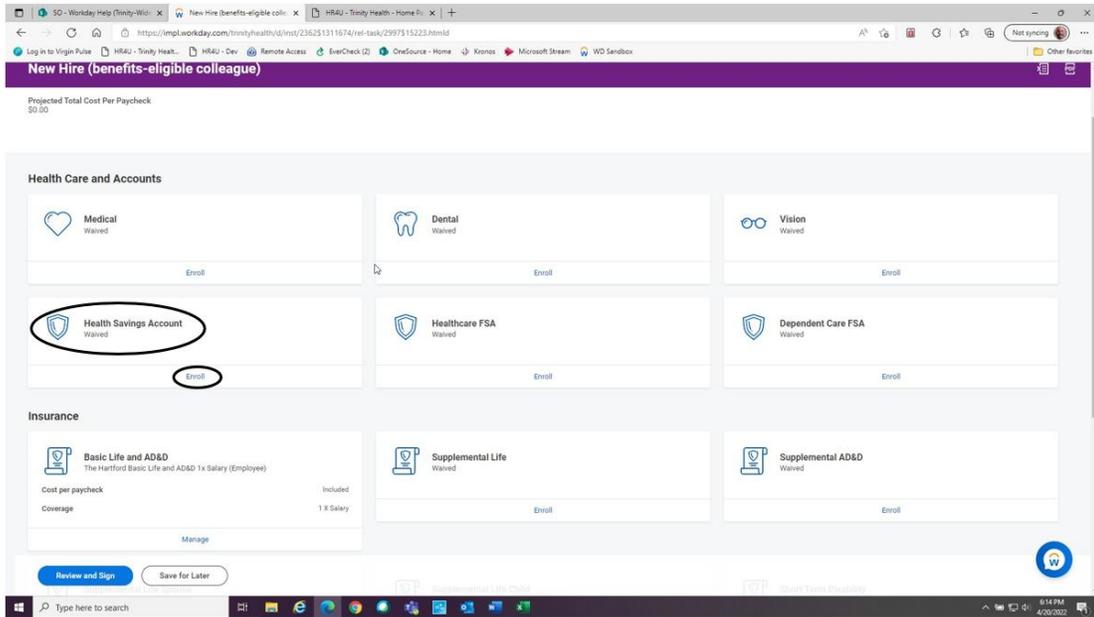
Benefit Election Task

- Elect Benefits- Your “New Hire” benefit event will populate after the onboarding steps described above have been completed. Once you have completed all onboarding tasks, you will find the event under the “Awaiting Your Action” menu. Please remember that your elections are due **no later than January 30, 2026**.
- To access your “New Hire” event, choose “Change Benefits for Life Event” from “Awaiting Your Action” box on your Workday home screen OR directly from your Workday “My Tasks” (in the upper right-hand corner by clicking the envelope).

- From the Change Benefits for Life Event task, choose **“Let’s Get Started”**.
- Once in the Enrollment screen, you will need to select **“Enroll”** under each tile under **“Health Care and Accounts”** (i.e., Medical, Dental, Vision).



- Select **Elect** or **Waive** for the desired plan
- Once you have made your selections, click **“Confirm and Continue”**
- If you elected the **Health Savings Medical Plan** you must choose the **Health Savings Account**. You are not required to contribute to the account; however, the **Health Savings Account** must be selected to receive the employer contribution. Also, if you elect the **Health Savings medical plan**, you are not eligible to participate in the **Healthcare Flexible Spending Account (FSA)** because you will have access to the **Health Savings Account**.



- ❑ Basic Life and AD&D insurance will automatically default to enrollment status and cannot be changed. It is important to designate beneficiary(ies) for this benefit.

Beneficiary designation is applied to your employer offered basic life insurance coverage and voluntary life insurance (if elected). Beneficiary(ies) designated for Basic Life Insurance apply to any Employee Supplemental Life Insurance elections.

- ❑ Click the **Add Row**  icon to add a beneficiary.
- ❑ Click the **prompt**  icon in the beneficiary field to select from the list of existing beneficiaries, or, select **Add New Beneficiary or Trust** to add a new beneficiary.
- ❑ To remove a beneficiary, click the **Remove Row**  icon next to that beneficiary.
- ❑ Enter the percentage of the benefits for each beneficiary in the percentage column.
- ❑ Click **Save**.

The screenshot shows a web browser window with the URL <https://implworkday.com/trinityhealth/d/ins/236251311674/real-task/2997515223.html#id>. The page title is "New Hire (benefits-eligible colleague)". Below the title, it says "Projected Total Cost Per Paycheck \$0.00".

The main content area is titled "Health Care and Accounts" and contains several benefit cards:

- Medical**: Waived. Enroll button.
- Dental**: Waived. Enroll button.
- Vision**: Waived. Enroll button.
- Health Savings Account**: Waived. Enroll button.
- Healthcare FSA**: Waived. Enroll button.
- Dependent Care FSA**: Waived. Enroll button.
- Insurance**: A section header circled in red, encompassing three cards:
 - Basic Life and AD&D**: The Hartford Basic Life and AD&D 1x Salary (Employee). Cost per paycheck: Included. Coverage: 1 X Salary. Manage button.
 - Supplemental Life**: Waived. Enroll button (circled in red).
 - Supplemental AD&D**: Waived. Enroll button (circled in red).

At the bottom of the page, there are buttons for "Review and Sign" and "Save for Later". A "Start Terms Disability" link is also visible. The Windows taskbar at the bottom shows the time as 6:14 PM on 4/20/2021.

- When you are finished making elections, click “Review and Sign”.

View Summary Day 1 Benefits Eligible for [REDACTED]

Projected Total Cost Per Paycheck
\$75.62

Please review the options listed below carefully before submitting them for approval and processing.

Please make note of any additional action items that must be completed with this request.

For the fastest processing of your event, please use the attachment link below to upload any required documents for newly added dependents.

Click **Submit** when you are ready to finalize your requests.

Selected Benefits 4 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Medical	12/17/2023	12/17/2023	Employee Only			\$75.62
BCBS Michigan Traditional						
Basic Life and AD&D	12/17/2023	12/17/2023	1 X Salary			Included
The Hartford Basic Life and AD&D 1x Salary (Employee)						
Short Term Disability	12/17/2023	12/17/2023	60% of Salary			Included
The Hartford TH STD 60 % (Employee)						
Long Term Disability	12/17/2023	12/17/2023	60% of Salary			Included
The Hartford TH LTD 60% (Employee)						

Waived Benefits 9 items

Dental	Waived
Vision	Waived
Health Savings Account	Waived
Healthcare FSA	Waived
Dependent Care FSA	Waived
Supplemental Life	Waived
Supplemental AD&D	Waived
Supplemental Life Spouse	Waived
Supplemental Life Child	Waived

Total Benefits Cost 1 item

Company Contribution	Employee Cost	Net Cost
\$313.27	\$75.62	\$75.62

Attachments

Drop files here

Select files

Electronic Signature

By submitting your benefit choices you are authorizing the company to take deductions from your paycheck to pay for your benefit costs. You are also authorizing the Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage.

I understand that the health plan coverage I am enrolling in provides benefits through a clinically integrated network of hospitals, physicians, and other healthcare providers and professionals, including care coordinators and case managers that monitor and coordinate all aspects of an individual's medical care. I further understand that my employer and healthcare providers and professionals affiliated with my employer participate in the clinically integrated network. As a result, I understand that, although I and my dependents may not be treated at the facilities or by the employees of my employer or a healthcare provider or professional affiliated with my employer, employees of my employer or a healthcare provider or professional affiliated with my employer will have access to and may use and disclose my and my enrolled dependents personal health information to manage and coordinate our care. Any access to and use and disclosure of protected health information will comply with the privacy and security regulations under the Health Insurance Portability and Accountability Act (HIPAA) and any applicable state privacy and security laws.

I Accept

- Choose **"I Accept"** under Electronic Signature and hit **"Submit"**
 - Please note, you can choose **"Save for Later"** but your elections cannot be processed until you hit **"Submit"**

Attachments

Drop files here
or
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:

1. You understand that your benefit elections are legal and binding transactions.
2. You understand that if you are married, your dependent Spousal Coverage Elsewhere selection is legally binding.
3. You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

I Accept

Submit Save for Later Cancel

- If you have added dependents to your benefits, attach the required dependent verification documentation under “**Attachments**”.
- Once you click submit, you will have the opportunity to print your Benefits Statement for your records.
 - We highly recommend you print/save your statement as one will not be mailed to you.**
- If there are any concerns with the new hire event, AskHR will reach out to you by email. Please watch your Trinity Health email account closely and reply to any requests for follow up promptly.

[Electing Voluntary Benefits](#)

To enroll in voluntary benefits, auto/home, identity/theft, pet and permanent life insurance you must call The Farmington Company at 1.866.251.9529, M-F 8:00am-5:00pm EST. Enrollment in these benefits can be done at any time throughout the year.

IMPORTANT: No changes to your benefit event are permitted after January 30, 2026. The required dependent documentation (where applicable) must also be submitted by January 30, 2026. If you do not enroll and submit required documentation by January 30, 2026, you will not have coverage.

Additional information related to this transition can be found at MyBenefits [[Mason City Clinic | Trinity Health Headquarters](#)]

For all other questions or assistance please contact:

Workday Log-In issues/Trinity Information Services

Phone:1-888-667-3003 (available 24/7)

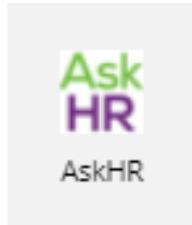
Question about Your Onboarding

Phone: 1-877-750-4748 Option 5, then Option 3

Questions about Your Benefits

Phone: 1-877-750-4748 option 5 – update for new phone tree

The **first** point of contact for all your HR Needs



[SO - Workday Help \(Trinity-Wide\) - Home](#)

Enrolling in the Trinity Health 403(b) Retirement Savings Plan

Your account will be established within seven (7) business days of your transition date of January 1, 2026. To Register:

- Go to www.NetBenefits.com and follow the registration wizard; or talk to a Fidelity representative at 800-343-0860
- Select your Trinity Health account to enroll in the Trinity Health 403(b) Retirement Savings Plan.
 - Elect your voluntary contribution rate (pre-tax and/or Roth)
 - Select your investment allocations
 - Designate your beneficiary
 - Enroll in the Automatic Increase Program
- Download the NetBenefits App
 - Text: Nbapp to 343-898 for Apple devices
 - Text: Nbplay to 343-898 for Android

IMPORTANT: If you do not register your account or enroll in the Trinity Health 403(b) Retirement Savings Plan, you become eligible for automatic enrollment and 2% of your earnings will automatically be contributed beginning on or after your 3rd paycheck date, and your future contributions will be invested in the target date fund that has a target retirement date closest to the year you might retire and assumes a retirement age of 65. Remember, you can stop or change your contribution rate at any time.

You must make a separate beneficiary election for your Retirement Plan at Fidelity. Your Retirement Plan and other benefits, such as life insurance, each require its own beneficiary designation. Updating one beneficiary does not automatically update the other. If you do not have a named beneficiary at the time of your death, your beneficiary will be your spouse. If you do not have a named beneficiary at the time of your death and you do not have a spouse, your beneficiary will default to your estate.