



Getting Started with Workday:

Attorney & Consulting Professionals - Checklist

Please click on following link to view a video demonstrating how to complete the following steps: [“Getting Started with Workday”](#).

ACCESS THE SYSTEM

- Log-in with your Manatt password
- Set-up your secondary authentication

CONTACT INFORMATION

- Ensure that your mobile phone number is public
- Confirm or add Emergency Contacts
- Edit Preferred Name, if appropriate, to be properly reflected in your Outlook Signature

PERSONAL/IDS/EDIT

- Confirm or update your Bar Info
- Add notary info, if appropriate

CAREER INFORMATION

- Confirm or update your Education info, if appropriate
- Add or update your Languages info, if appropriate

PERSONAL INFORMATION

- Review the Self-Identification message
- Complete the form on the Personal Information page
- Complete the acknowledgement form

OPEN ENROLLMENT STEPS

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your Inbox. Review this job aid for steps on completing your open enrollment.

SELECT YOUR BENEFITS

From your Home page:

1. Under **Awaiting Your Action**,
2. Click the **Open Enrollment Change** task.
3. Click **Let's Get Started**.
4. Click **Manage** to update your medical election. Or, click **Enroll** to enroll in a new benefit plan.

The screenshot shows a section titled "Health Care and Accounts" with four benefit cards. Each card has an icon, a title, a subtitle, a "Cost per paycheck" field, a "Coverage" field, and a "Manage" button.

Benefit Type	Icon	Title	Subtitle	Cost per paycheck	Coverage	Action
Medical	Heart	Medical				Manage
Dependent Only Medical	Heart	Dependent Only Medical	(Medicare Enrolled...)			View
Dental	Tooth	Dental	Guardian PPO			Manage
Vision	Glasses	Vision	VSP VIS			Manage

5. Choose **Select** or **Waive** for each benefit election. Your current elections default.
6. Modify your coverage, if needed.
7. Click **Confirm and Continue**.

ADD DEPENDENTS

If you select or modify a benefit plan during open enrollment, you can also add dependents.

After clicking **Confirm and Continue** in the previous step:

Medical

Projected Total Cost Per Paycheck

Dependents

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

Coverage

Plan cost per paycheck

Add New Dependent

2 items

Select	Dependent	Relationship	Date of Birth
☒			
☒			

1. If a dependent already exists, they will be listed. Make sure to select the dependents you want to cover and that the coverage level has changed at the top of the page.
2. Click the **Add New Dependent** button to add a new dependent.
3. Make sure to select the **"Use as Beneficiary"** checkbox and click **OK**.
4. Complete all required information and click **Save**.

REMOVE DEPENDENTS

From the Dependents section for medical elections:

1. Next to the name of your dependents, click the **checkbox** of the dependent you wish to unenroll.
2. Click **Save**.

Medical

Projected Total Cost Per Paycheck

Dependents

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

Coverage

Plan cost per paycheck

Add New Dependent

2 items

Select	Dependent	Relationship	Date of Birth
☒			
☐			

HEALTH SAVINGS ACCOUNT ELECTIONS (If applicable)

*Please note that the **Health Savings Account (“HSA”)** option is only for individuals enrolling in the **Aetna HDHP**. If you are not enrolling in the Aetna HDHP, you are ineligible to enroll in an HSA.*

The screenshot displays the 'Health Care and Accounts' section of a benefits portal. It contains five cards, each representing a different benefit or account. The 'Health Savings Account' card is highlighted with an orange border and has an 'Enroll' button. The other cards have 'Manage' buttons.

Benefit/Account	Status	Action
Medical	Cost per paycheck Coverage	Manage
Dependent Only Medical (Medicare Enrolled...)	Waived	View
Dental (Guardian PPO)	Cost per paycheck Coverage	Manage
Vision (VSP VIS)	Cost per paycheck Coverage	Manage
Health Savings Account	Waived	Enroll

If you have not yet elected your HSA contribution for 2026, please complete the following steps:

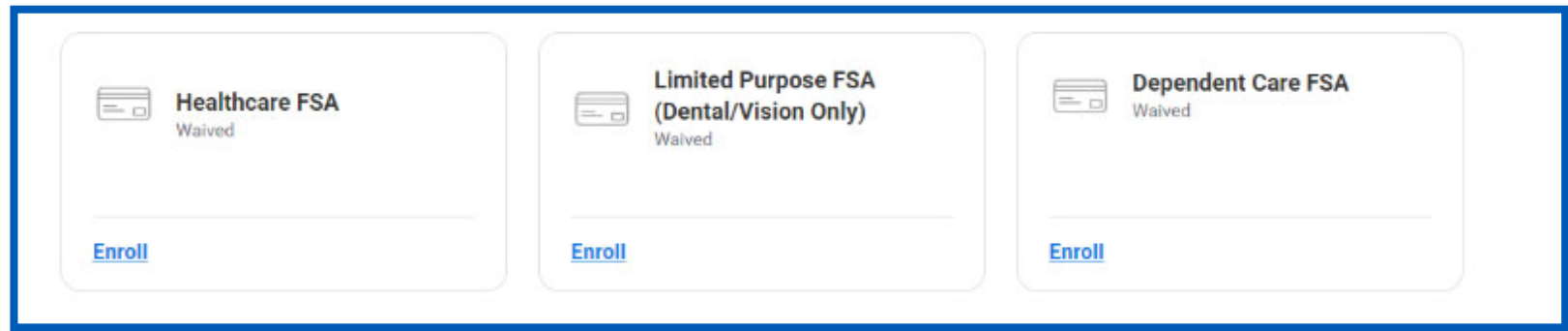
1. Return to the Health Care and Accounts section.
2. Click **Manage** or **Enroll** to make a Health Savings Account election if you are enrolled in the Aetna HDHP.
3. Choose **Select** for the Health Savings Account election.
4. Click **Confirm and Continue**.
5. Enter the amount you want to contribute.
6. Click **Save**.

Benefits: Navigate Open Enrollment for Desktop

Employee

ADD FSA, LIMITED FSA, OR DEPENDENT CARE FSA

1. Click **Enroll** for each additional benefit in which you would like to enroll.
2. Click **Select** in the desired FSA.
3. Click **Confirm and Continue**.
4. Enter the amount you would like to contribute.
5. Click **Save**.



The screenshot displays three FSA enrollment options in a row, each within a light gray rounded rectangle. Each option includes a small icon of a document with a checkmark, the name of the FSA, the status 'Waived', and a blue 'Enroll' button at the bottom. The options are: Healthcare FSA, Limited Purpose FSA (Dental/Vision Only), and Dependent Care FSA. The entire row is enclosed in a blue border.

FSA Type	Status	Action
Healthcare FSA	Waived	Enroll
Limited Purpose FSA (Dental/Vision Only)	Waived	Enroll
Dependent Care FSA	Waived	Enroll

ADD ADDITIONAL BENEFITS

1. If you wish to stop your Parking and Transit elections, set your election to \$0; do **not** waive enrollment.
2. If you wish to enroll in Supplemental Long Term Disability, please note there is a special biannual enrollment to elect the benefit (*cannot enroll during open enrollment*).

ADD VOLUNTARY LIFE INSURANCE

You will be required to submit of Evidence of Insurability and await underwriting approval from Unum.

From the Insurance section:

1. Click **Manage** or **Enroll** to update or add Voluntary and/or Spouse Life insurance.

Insurance

Basic Life and Accident Unum (Employee)	Voluntary Employee Life Unum (Employee)	Voluntary Spouse Life Waived
Cost per paycheck	Cost per paycheck	
Coverage	Coverage	
Manage	Manage	Enroll

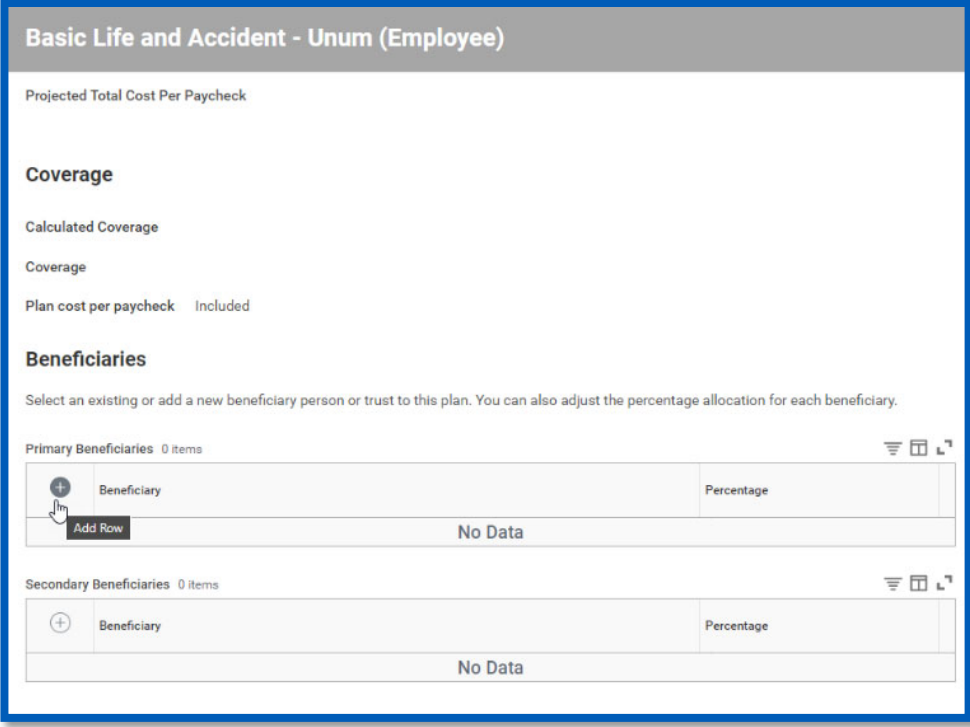
2. Choose **Select** or **Waive** for each insurance election, and then click **Confirm and Continue**
3. Choose or modify your coverage levels, as needed.
4. Designate your beneficiaries (instructions below)

DESIGNATE LIFE INSURANCE BENEFICIARIES

Your firm Basic Life and Accident policy needs a designated Primary Beneficiary, as well as any of your other elected life insurance plans. After you click **Confirm and Continue**, the option to add primary and secondary beneficiaries will appear. Be sure to designate one or more beneficiaries for each plan.

From the Beneficiaries section within the life insurance option:

1. Click the **Add Row**  icon to add a beneficiary.
2. In the Beneficiary field, click the **prompt**  icon to select from a list of existing beneficiaries. Or, select **Add New Beneficiary or Trust** to add a new beneficiary. To remove a beneficiary, locate the beneficiary and click the **Remove Row**  icon next to the name.
3. In the Percentage column, enter the percentage of benefits for each beneficiary. Total percentage must equal 100.
4. Click **Save**.



The screenshot shows the 'Basic Life and Accident - Unum (Employee)' form. The 'Beneficiaries' section is highlighted, showing a table for Primary Beneficiaries with columns for Beneficiary and Percentage. An 'Add Row' button is visible next to the table header. The table currently contains no data, showing 'No Data' in the Percentage column. Below the Primary Beneficiaries table is a similar table for Secondary Beneficiaries, also showing 'No Data'.

Beneficiary	Percentage
No Data	

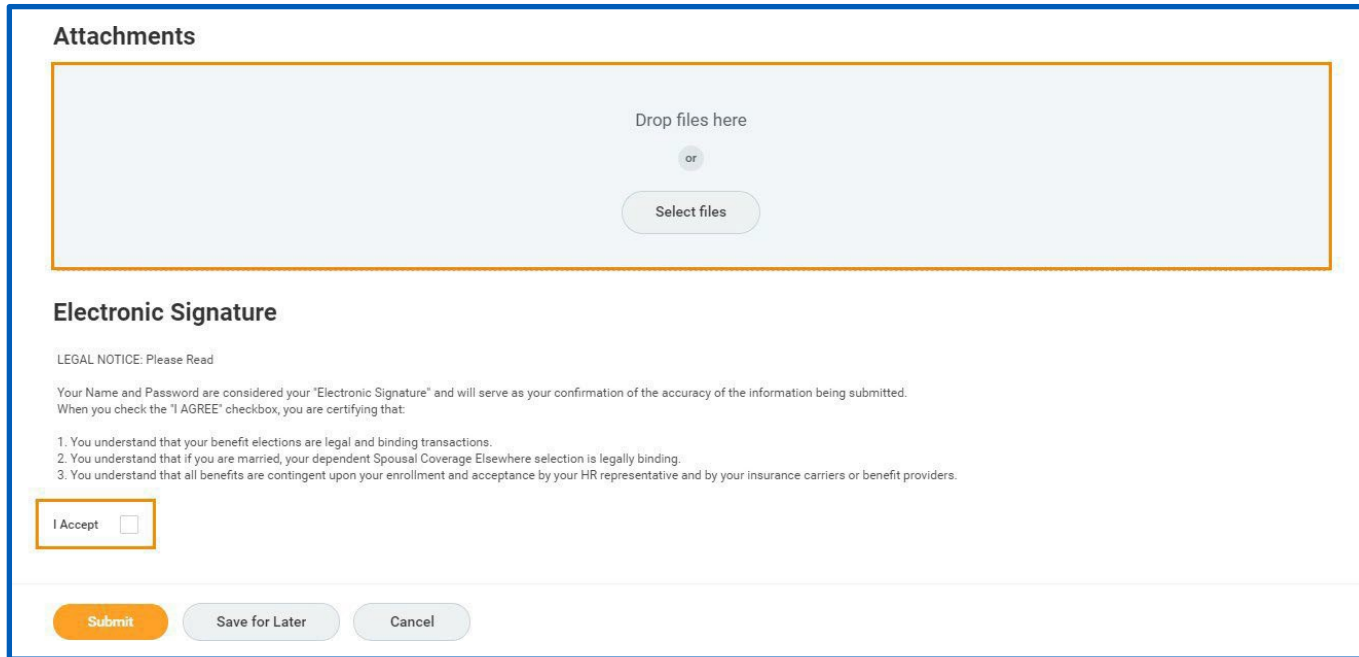
Beneficiary	Percentage
No Data	

COMPLETE YOUR ENROLLMENT

1. Once you are finished enrolling/managing all your benefit elections, click **Review and Sign**.

YOU ARE NOT ENROLLED YET! YOU MUST COMPLETE A FEW MORE STEPS...

2. Please carefully review your benefit elections
3. Scroll down and read the legal notice



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.

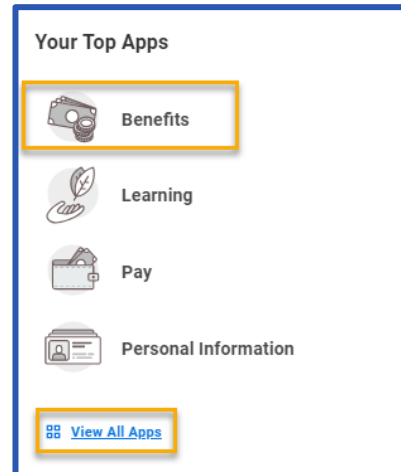
I Accept ☐

Submit Save for Later Cancel

4. YOU MUST select the **I Accept** check box to confirm your electronic signature.
5. Click **Submit**. A confirmation page displays. **YOU ARE NOW DONE!**
6. You may click the [View Benefits Statement](#) button to view your benefits statement.
7. Click **Print** to generate a PDF version for your records. You are NOT required to return the printout to Human Resources; your electronic signature in Workday is sufficient.

CHANGE OPEN ENROLLMENT ELECTIONS

1. To change your Open Enrollment elections after you have Submitted, go to your Workday home screen and choose the Benefits App. (Click on View All Apps if you do not see the Benefits App on Your Top Apps)



2. Under “Overview” click on the “Edit” button to make additional changes prior to February 17th.

