

Life Event Change Tutorial

Workday login:

<https://wd5.myworkday.com/loandepot/login.html>



- ✓ Step 1: Log in to Workday
- ✓ Step 2: Click the Benefits icon
- ✓ Step 3: Click the gray link that says 'Click here to access your Benefits'

Welcome Jennifer, to your benefits site!

Benefit Summary **Change My Benefits** Personal Documents

Select the reason for change that applies and enter the date of the event.

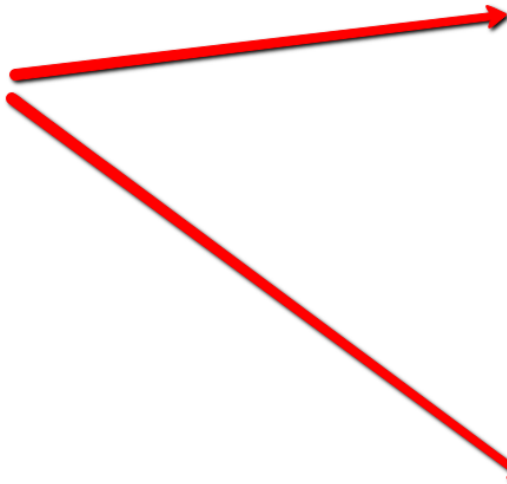
BASIC INFO

Examples:
Change of Address
Change of Beneficiary

LIFE EVENT

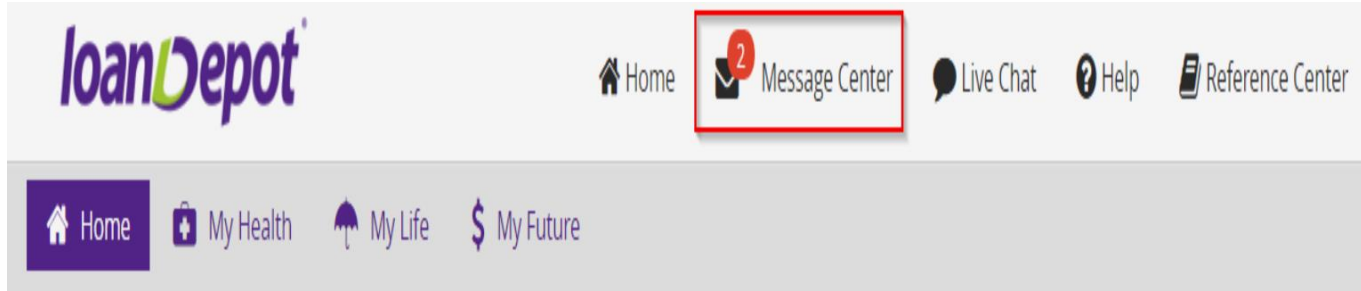
Examples:
Marriage/Divorce
Birth/Death

- Birth/Adoption/Legal Guardianship
- Dependent Reaches Max Age
- Divorce
- Employee or Dependent Gains Benefits Elsewhere
- Employee or Dependent Loses Coverage Elsewhere
- Marriage
- Update Dependent Demographic Information
- Update HSA Election
- Update Transit Election

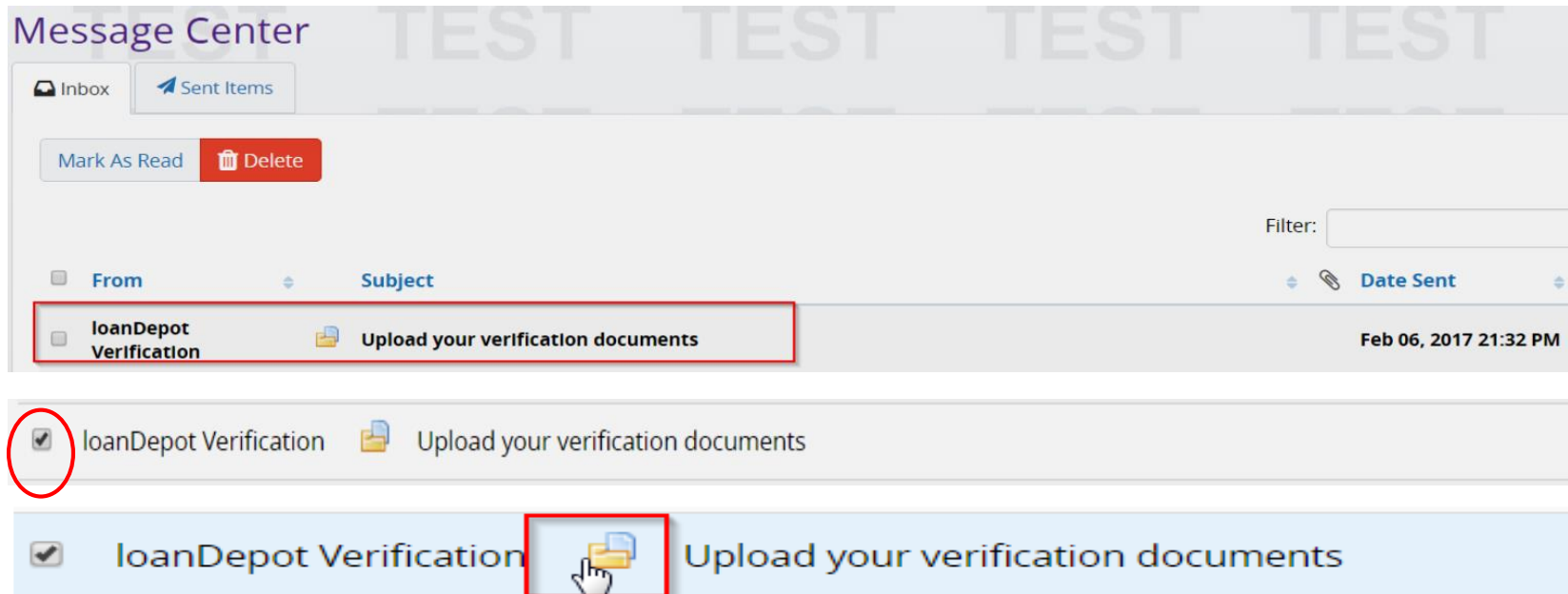


- ✓ Step 4: click the Change My Benefits box
- ✓ Step 5: From the LIFE EVENT box, select the link that pertains to your particular life event
- ✓ Step 6: When prompted for a date, make sure the date you enter matches the documentation you plan to provide
- ✓ Step 7: complete all fields and hit submit

How to upload documentation to Benefitsolver:



- ✓ After you have processed your life event, log in to Benefitsolver,
- ✓ Click “message center” along the top ribbon of the homepage:
- ✓ Once you are in the message center, find the message you’d like to attach documentation to:
- ✓ Click the box on the far left side of LoanDepot Verification:
- ✓ Then select the folder icon next to the message:



Upload a Document

Supported formats are: 'rtf', 'txt', 'doc', 'docx', 'pdf', 'jpg', 'jpeg', 'tiff', 'tif', 'bmp', 'png', 'gif'

Select file(s) for upload:

No file chosen

Upload a Document

Supported formats are: 'rtf', 'txt', 'doc', 'docx', 'pdf', 'jpg', 'jpeg', 'tiff', 'tif', 'bmp', 'png', 'gif'

Select file(s) for upload:

Birth Certificate.docx



Add More Files?

No files selected.

Upload a Document

Supported formats are: 'rtf', 'txt', 'doc', 'docx', 'pdf', 'jpg', 'jpeg', 'tiff', 'tif', 'bmp', 'png', 'gif'

Select file(s) for upload:

No files selected.

- ✓ **Next, scroll to the bottom of the page to upload your documents:**
- ✓ **Repeat for all requested documents:**
- ✓ **Once you have selected all of the documents that you wish to upload, click send:**
- ✓ **Once documentation is submitted, it does NOT mean that your transaction is complete. Please verify that approval has been completed.**