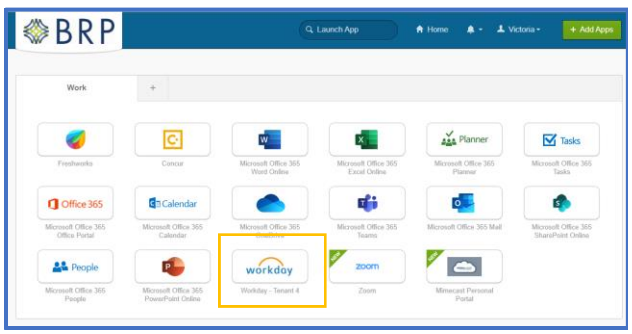
GETTING STARTED Onboarding

7/22/22

LOGIN FROM A DESKTOP OR LAPTOP

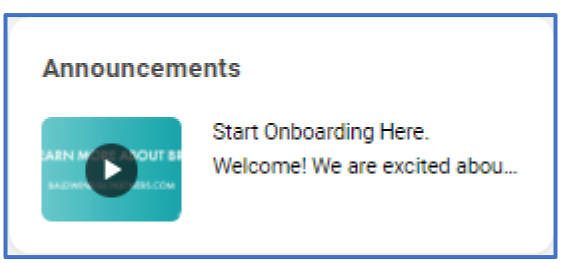
All colleagues will access Workday from a desktop or laptop via Okta, BRP's new password management system. If you have not done this, please consult the **Okta User Reference Guide** before proceeding. If you have already set up your Okta access, follow steps below:

1. From the BRP Okta homepage, click on the **Workday** tile.
2. You will be brought into your Workday homepage. If you experience any issues logging into Okta or accessing Workday, reach out to the BRP IT Integrations Help Desk at BRPITIntegrations@baldwinriskpartners.com.



INITIATE ONBOARDING

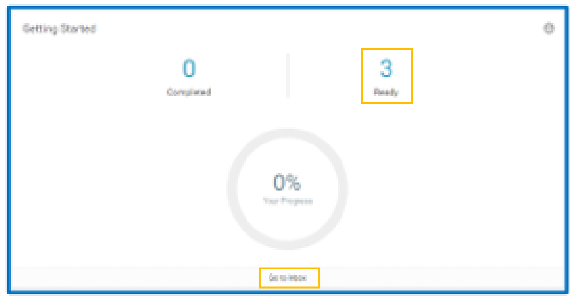
Assigned tasks in your inbox will also display in the **Awaiting Your Action** section of the homepage. To begin the Onboarding process, navigate to the **Announcements** section, click, Start Onboarding Here.



3. Click the **Onboarding** link to launch the process.

We encourage you to play the Welcome to BRP!, What is BRP?, and The BRP Azimuth video available on the your onboarding dashboard to learn more about BRP and our culture!

4. Click on the number of tasks **ready** for you to complete or **Go to Inbox** to open tasks in your inbox. Once an action is completed and you click submit, the next item will display on your screen. **These tasks might be ordered differently; the system will move you from one to the next.*



Fields with asterisk (*) are required. To bypass non-mandatory fields as you work through the onboarding tasks and revisit it later, click **"Save for Later."** If you receive an error message, click on the error for more information. If you Save for Later, this will hold up the remaining onboarding process. Please refrain from doing this to avoid any delays.

You will receive an on-screen confirmation once each action item event has been submitted.

UPDATE PERSONAL INFORMATION

Review your personal information, click the edit icon to make changes. Please ensure the **Legal Name** section has your full legal name, for payroll purposes. If you have a preferred name, please add it to the **Preferred Name** section. **Your preferred name will be incorporated into your new email when migrating to BRP IT platforms.** Add your Date of Birth, Gender, and Race/Ethnicity information. Click **submit** once all personal details have been confirmed. Click **submit** once all personal details have been confirmed.

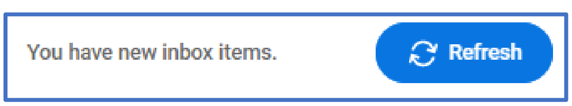
UPDATE CONTACT INFORMATION

Add your address, phone number, and **personal email**. Click the edit icon to make changes. Note: When adding your phone number, select the "private" default visibility option. Click **submit** once all personal details have been confirmed.

UPDATE GOVERNMENT ID

Under National IDs, click on the icon to add a line item. Select the Country, and Social Security Number (SSN) from beneath the National ID Type. Enter your Social Security. Click the **Submit** when done.

Once you have completed the Personal Information, Contact Information, and Government ID action items, additional actions will be added to your inbox for you to complete. If items do not automatically load into your inbox, click the **refresh** button of your inbox and they should now display.

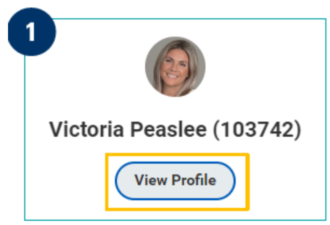


COMPLETE FORM I-9

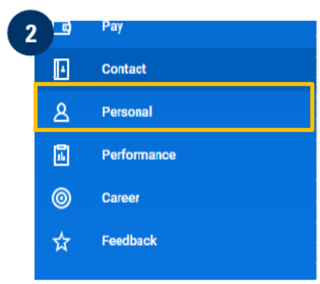
Step 1: Complete the Employment Eligibility Verification form in your Workday Inbox. Some fields will be pre-populated, verify information in Section 1 (Employee Information and Attestation) and select the radio button for your attestation. Click the **I agree** under Signature of Employee to agree to the attestation and electronically sign. Select a radio button option for Preparer and/or Translator Certification.

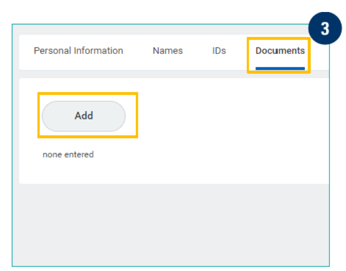
Move forward to complete Step 2 below only if you were previously a 1099 Contractor and are completing your Form I-9 for the first time.

Step 2: Upload a (clear) photo of your List A or List B and C acceptable documents. To upload your documents, navigate to the menu icons ribbon at the top right of the screen and click the cloud icon, then click view profile.



Next, navigate to the **Personal** section on the menu to the left, then, click the **Documents** link, and select a category for your documents (Licenses or Passports).





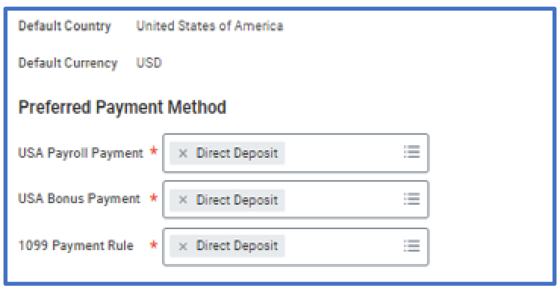
COMPLETE WITHHOLDING ELECTIONS (STATE/LOCAL AND FEDERAL)

Completion of your W-4 affects payroll. If your W-4 action is not completed timely, your Withholding election will default to Single. Enter your taxation information and click **submit.** Please note that there is a Tax Withholding Estimator that you can use to help you determine the right tax withholding for you.

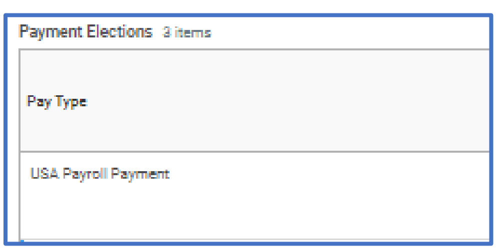
To use the tax withholding estimator, click here. You will be directed to the tool on the IRS website.

PAYMENT ELECTION ENROLLMENT EVENT

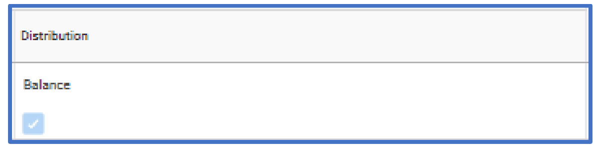
Under Manage Payment Elections, provide direct deposit information for accounts you would like to set up to receive direct deposit. Disregard the 1099 Payment Rule under Preferred Payment Method as that is not applicable to you as a W-2 Colleague. Click **OK** once you have entered direct deposit account information. You will be able to add additional accounts on the next screen.



The account(s) you have added will be listed in the first table. Review the Payment Elections table to add the distributions you would like for each direct deposit account. To elect the dollar amount or percentage of regular earnings you would like to allocate to your account(s), click the **edit** button for the **USA Payroll Payment** Pay Type under the Payment Elections table.



If you have set up one account, the Distribution will default to Balance.



If you have entered more than one account, click the edit button to the right of the Distribution column. A new screen will display for you to set up each account. If you only see one account in the table, click the icon to add a row. Click within each field to populate the information. If you are selecting a dollar amount for an account(s), select Balance for the last account; you may need to click the reorder arrow to move a row up or down. If you are selecting distribution by percentage, the account allocations must equal to 100%.

For the **USA Bonus Payment** Pay Type, select account(s) you would like any applicable bonus payments to go to.

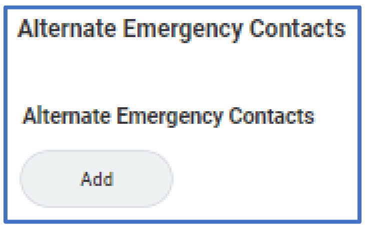
Note: Disregard the **1099 Payment Rule** Pay Type as that is not applicable to you as a W-2 Colleague earning W-2 wages.

CHANGE BENEFIT ELECTIONS

The benefit enrollment can be completed as the final step in onboarding. A step-by-step job aid is included starting on page 5. You have 30 days to enroll in benefits. You must actively make an election in Workday during this time period in order to have active benefits with BRP. Elections cannot be changed once submitted. Please visit the landing page to review the Benefits Guide. Note: Enrollment elections will be communicated to the insurance carrier(s) on the weekly file once your enrollment elections have been completed.

CHANGE EMERGENCY CONTACTS

Provide legal name and relationship of a primary contact by clicking the edit icon. A primary phone number or primary email address is required for each contact. Scroll to the end of the page to add additional Alternate Emergency Contacts. Click **Submit.**



EDIT LICENSES

Please add any professional licenses in this section to add your credentials to your profile. If not applicable to you, bypass by clicking **submit**.

BRP HANDBOOK

Click the document link to open and review the Handbook. To access state handbook addendums, please visit the landing page. Click **submit** once finished.

BRP HANDBOOK ACKNOWLEDGEMENT

Click the document link to acknowledge receipt of the BRP Handbook. Click the **I Agree** box to acknowledge electronically. By clicking to sign the document, you are agreeing to use the electronic signature to execute acknowledgement of this handbook.

BALDWIN RISK PARTNERS AZIMUTH BOOKLET

Click the document link to open and review the Azimuth. Click **Submit** once finished.

BRP CONSENT TO RECEIVE ELECTRONIC NOTICES

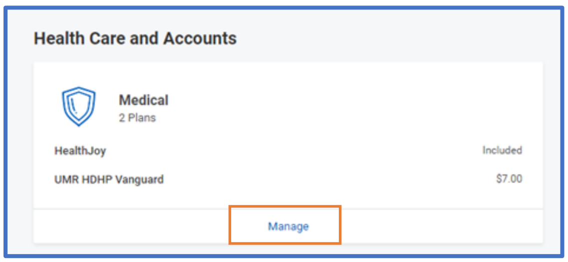
Click the document link to open and review the Consent to Receive Electronic Notices. Click the **I Agree** box to acknowledge electronically. By clicking to sign the document, you are agreeing to use the electronic signature to execute acknowledgement of this document. Click **Submit** once finished.

If all actions have been completed, your **Actions** inbox should be empty, and your onboarding is complete. You can view your completed tasks by clicking the **Archive** tab in your inbox. If you selected the **Save for Later** button for any actions in your inbox, onboarding will be complete once you submit those items. Your Onboarding dashboard will show 100% completion once all items are completed. To navigate back to the onboarding dashboard, click the cloud or silhouette icon at the top menu bar, select **Home**, then click **Announcement.**

CHANGE BENEFIT ELECTIONS

From your Home page:

1. Click the **Inbox** icon .
2. Click the **Benefit Change** task.
3. Click **Let's Get Started**.
4. Answer the **Health Questionnaire** for Tobacco Use and click Continue.
5. Click **Continue** again to proceed with benefit selection.
6. Click **Manage** to update your medical elections or click **Enroll** to enroll in a new benefit plan.



NOTES:

HealthJoy is available to all benefit eligible colleagues and is automatically included in your enrollment within the Medical benefit tile. Please ensure to make your Medical plan election within the same tile if enrolling in a BRP Medical plan.

When you elect to enroll in the Kaiser, UMR HDHP Vanguard, or UMR PPO Traditional medical plan, **you must also select the additional 'Medical' tile to enroll in Mobile Health and PlushCare.** (These are included benefits for colleagues enrolled in a Medical plan.) If you waive Medical coverage, Workday automatically waives any of these: Medical - Mobile Health, Medical - PlushCare.

Dependents enrolled in the Vanguard, Traditional, or Kaiser Medical plans will automatically be enrolled in Cure8 PlushCare and Mobile Health.

If your home zip code is within a Kaiser region, the applicable Kaiser plan will be presented to you as a Medical plan option.

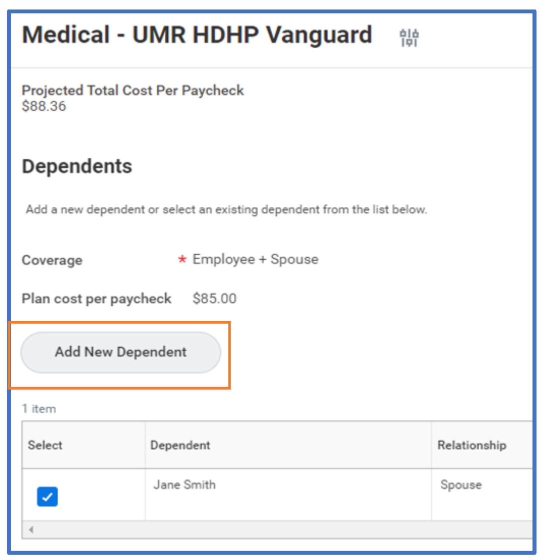
7. Click **Confirm** and **Continue**.

ADD DEPENDENTS

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

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

1. Click the **Add New Dependent** button to add a new dependent.



2. Select the **Use as Beneficiary** checkbox if you want to use this dependent as a beneficiary and click **OK**.

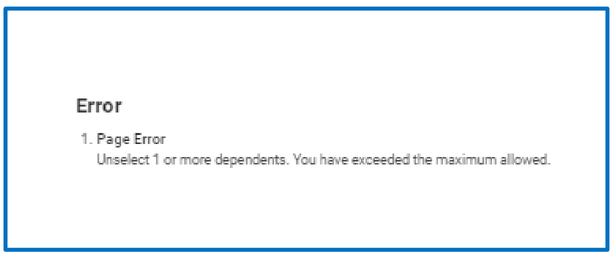
3. Complete all required information and click **Save**.

NOTES:

Workday selects a coverage target automatically based on who the employee covers.

If you receive a yellow Alert, this is informational. Please read and continue your elections.

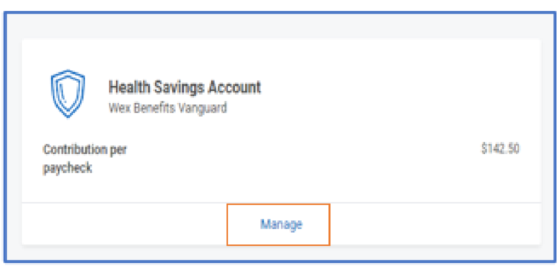
If you receive a red error with the error message seen below, please select the appropriate coverage level.



HEALTH SAVINGS ACCOUNT

From the Health Care and Accounts section:

1. Click **Enroll** to enroll in the Health Savings Account or **Manage** to make changes.



IMPORTANT

If you enroll in the Vanguard medical plan, you MUST enroll in the WEX Health Savings Account to receive BRP funds. You may enroll at $0 if you do not wish to contribute your own funds.

NOTES:

To elect a Health Savings Plan (HSA), you must first elect the Vanguard medical plan.

You may change your contribution any time during the year through the Change Benefits task in the Benefits app/icon.

2. Choose **Select** or **Waive** for the Health Savings Account election.
3. Enter the amount you want to contribute.
4. Click Save.

ADD VOLUNTARY LIFE INSURANCE

You may need to complete evidence of insurability (EOI) to qualify for new voluntary life insurance. You can submit your EOI directly to Mutual of Omaha at Mutualofohama.com/eoi. You will also have a "To Do" in your Inbox for EOI after you submit your enrollment elections.

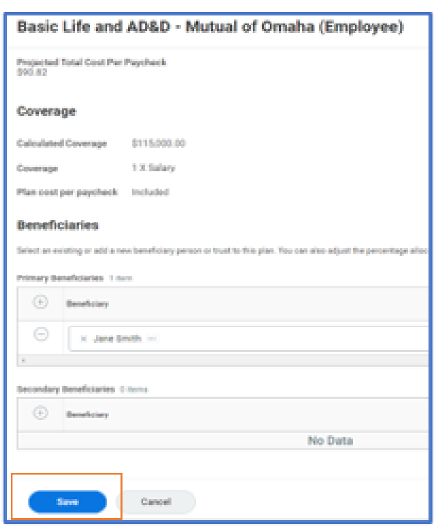
From the Insurance section:

1. Click **Manage** or **Enroll** to update or add Voluntary Life insurance. You may also Manage Basic Life to change/update your beneficiaries, if needed (see next section).
2. Choose **Select** or **Waive** for each insurance election and modify your coverage levels, as needed.
3. Modify your **Coverage**.

ADD BENEFICIARIES

You will also need to add beneficiary information for the BRP paid Basic Life & AD&D benefit, click **Manage**, then click **Confirm and Continue** and follow the steps below:

4. Click the **Add Row** icon ⊕ to add a beneficiary.
5. In the Beneficiary field, click the **prompt** icon ☰ to select from a list of existing beneficiaries (select this option if you already selected the **Use as a Beneficiary checkbox** option when adding a dependent to a benefit). 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.
6. In the Percentage column, enter the percentage of benefits for each beneficiary.
7. Click **Save**.

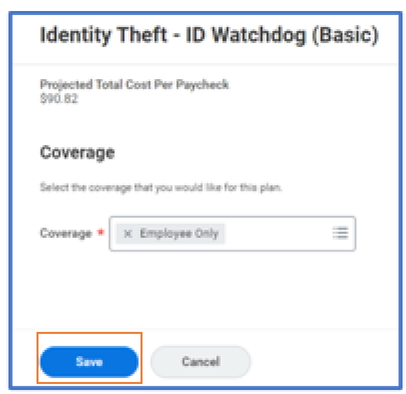


ADD ADDITIONAL BENEFITS

You can elect benefits in each section, such as dental, vision, voluntary life, worksite benefits or other ancillary plans.

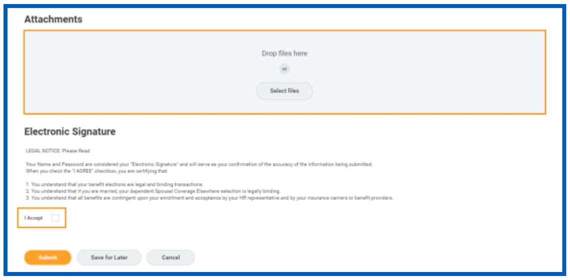
From the Health and Accounts, Insurance, or Additional Benefits section:

1. Click **Manage** or **Enroll** for each benefit you would like to enroll in.
2. Choose **Select** or **Waive** for each benefit plan, as needed.
3. Enter your **contributions** where appropriate.
4. Review your elections for accuracy. Notice your per paycheck cost at the top of the screen.
5. Confirm that your coverage information is accurate.
6. Click **Save**.



COMPLETE YOUR ENROLLMENT

1. Click the **Review** and **Sign** button.
2. Review your elected and waived benefits carefully.
3. Select the **I Accept** checkbox to confirm your electronic signature.



4. Click **Submit**. A confirmation page displays. No attachments or comments are required to submit your elections.

IMPORTANT

Once you click submit, you will not be able to access Open Enrollment again to make changes. Please ensure you've reviewed all benefits for accuracy before submitting.

NOTE:

If you are enrolling a Domestic Partner, you will receive a "To Do" in your Inbox to submit a Domestic Partner affidavit after you submit your open enrollment elections.

5. Optionally, click the **View 2022 Benefits Statement** button to view the benefits statement.

6. Click the **PDF** icon to generate a PDF version for your records.

7. Click **Done** to complete the task.

IMPORTANT

Save for Later: you can continue to access Enrollment to complete your changes through the deadline. However, your elections will not be submitted, and you will not be enrolled in those saved elections. **You must access the Benefit Change task again and finalize your elections by clicking Submit.**

Save for Later will display a line for your signature which is not required. When you access again to finalize your elections, your elections will be signed electronically by clicking Accept, followed by Submit.

401(K)

401(k) elections and election changes cannot be made within Workday. The 401(k) tiles are placeholders that initiate the 401(k) administration process. You must complete and **submit** your benefit enrollment event for your account to be created with Fidelity. You will receive an auto-generated welcome email within a couple of weeks from Fidelity once your account has been created. You will then be able to make elections directly with Fidelity within the NetBenefits portal by following the instructions as outlined in the Fidelity email.