


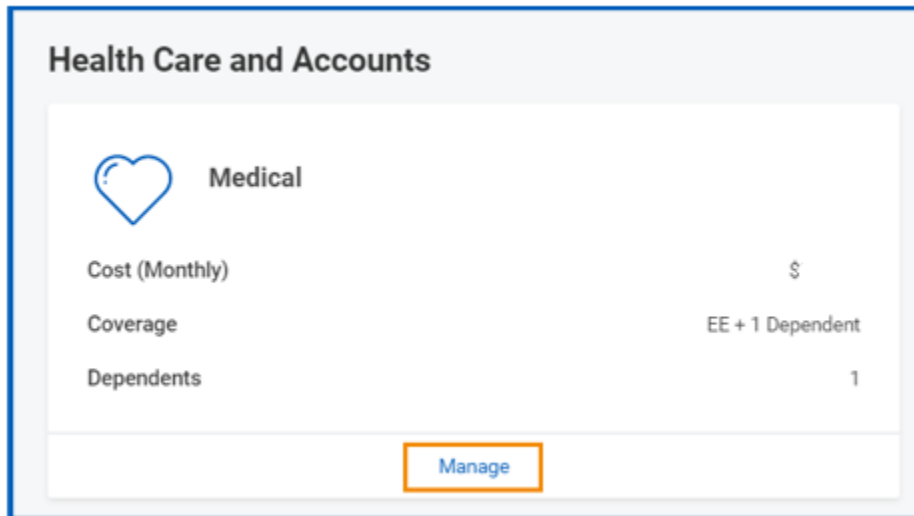
OPEN ENROLLMENT STEPS


Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your Inbox. Based on your organization's configuration, approvals may be necessary to complete this task. Review this job aid for steps on completing your open enrollment.

SELECT YOUR BENEFITS

From your Home page:

1. Click the **Inbox** icon .
2. Click the **Open Enrollment Change** task.
3. Click **Let's Get Started**.
4. Click **Manage** to update any benefit options or click **Enroll** to enroll in a new benefit plan.



Health Care and Accounts	
	Medical
Cost (Monthly)	\$
Coverage	EE + 1 Dependent
Dependents	1
Manage	

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

DEPENDENTS COVERAGE

From the Dependents section for each benefit:

8. Next to the name of your dependents, select the **checkbox of dependents you are covering**.
9. Click **Save**.

The screenshot shows the 'Dependents' section of the Workday Open Enrollment interface. At the top, it displays 'Projected Total Cost (Monthly)' as \$421.00 and 'Projected Total Credits' as \$55.50. Below this, the 'Dependents' section is titled, and the 'Coverage' is set to 'EE + Family' with a plan cost of \$262.00. A table lists two dependents: Jianyu Liu (Spouse, DOB 02/18/1959) and Joe Jin (Child, DOB 02/01/2021). Both have their 'Select' checkboxes checked. At the bottom, there are 'Save' and 'Cancel' buttons.

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Jianyu Liu	Spouse	02/18/1959
<input checked="" type="checkbox"/>	Joe Jin	Child	02/01/2021

ADD DEPENDENTS

If you need to add new dependents during open enrollment, you must save the Open Enrollment Event and navigate to your dependent page:

1. After saving the Open Enrollment Event, go to the dependents page, click on the global navigation (menu) icon on the top left, then click on the Benefits icon, then “Dependents”.
2. Click the Add button.
3. Click the pencil icon to enter Reason and Select the **Add Dependent > Open Enrollment** button as the reason for adding a new dependent.
4. Complete all required fields.
5. Attach certification documentation. Document must be saved on the device you are using for enrollment in order to upload.
6. Click Submit.
7. Return to your **Open Enrollment** in your inbox to resume your elections on benefits.

HEALTH SAVINGS ACCOUNT ELECTIONS



Note: In order to elect a Health Savings Plan (HSA), you must first elect a High Deductible Health Plan (HDHP).




Health Care and Accounts		
Medical	Dental	Vision
Cost (Monthly) \$	Cost (Monthly) \$	Cost (Monthly) \$
Coverage EE + Family	Coverage EE + 1 Dependent	Coverage EE + 1 Dependent
Dependents 2	Dependents 1	Dependents 1
Manage	Manage	Manage
Health Savings Account Waived	Healthcare FSA Waived	Dependent Care FSA Waived
Enroll	Enroll	Enroll

1. Return to the Health Care and Accounts section.
2. Click **Manage** to update or **Enroll** to enroll in the Health Savings Account.
3. Choose **Select** or **Waive** for the Health Savings Account election.
4. Click Confirm and Continue.
5. Enter the amount you want to contribute; otherwise just click save.

ADD/MODIFY LIFE INSURANCE BENEFICIARIES

An option to add /modify primary and secondary beneficiaries is available. Additional information is provided in the enrollment session.

From the **Beneficiaries** section:

1. Click on **Manage** in **Basic Life/AD&D**
2. Click **Confirm and Continue**
3. Click the **Add Row** icon  to add a beneficiary.
4. In the Beneficiary field, click the **prompt** icon  to select from a list of existing beneficiaries. Or select **Add New Beneficiary or Trust** to create and add a new beneficiary. To remove a beneficiary, locate the beneficiary and click the **Remove Row** icon  next to the name.
5. In the Percentage column, enter the percentage of benefits for each beneficiary.
6. Click **Save**.



Projected Total Cost (Monthly)
\$345.00

Projected Total Credits
\$55.50

Coverage
Calculated Coverage \$75,000.00
Coverage \$75,000
Plan cost (Monthly) Included

Beneficiaries
Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 1 item

Beneficiary	Percentage
  Jane	100

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

Save

Cancel

ADD ADDITIONAL BENEFITS

You can click **Enroll for a PTO Sell** option if you would like to enroll in the **Additional Benefits** section.

From the **Additional Benefits** section:

1. Click **Enroll** for each additional benefit you would like to enroll in.
2. Choose **Select** One plan for July and/or December to enroll for a PTO Sell Plan.
3. Click **Confirm and Continue**.
4. Click **Save**.

REVIEW AND SIGN TO COMPLETE ENROLLMENT

1. Review your elections for accuracy. Notice your monthly cost at the top of the screen.
2. Confirm that your coverage information is accurate.
3. Click **Review and Sign**.
4. Select the **I Accept** checkbox to confirm your electronic signature.
5. Click **Submit**. You've submitted your elections.
6. Optionally, click the **View 2023 Statement** button to view the benefits statement and print. Otherwise, just click **Done**.