


## 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. Follow these steps to complete your open enrollment:

## SELECT YOUR BENEFITS

From your Workday Home page:

1. Click the **Inbox** icon .
2. Click the **Open Enrollment Change** task.
3. Select **Elect** or **Waive** for each Health Care Election choice. Your current elections, if you have any, will show as default values..
4. Click the **Plan Description** or **Provider Website** links to review.
5. Modify your coverage, if needed.


Health Care Elections  
6 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Plan Description	Provider Website
Medical - Aetna HDHP (High Deductible Health Plan)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	<a href="#">Aetna Medical HDHP Summary</a>	<a href="#">Aetna URL Address</a>
Medical - Aetna HMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	<a href="#">Aetna Medical HMO Summary</a>	<a href="#">Aetna URL Address</a>
Medical - Aetna PPO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		<div><div>X EE - Employee Only</div><div>search</div><div><input checked="" type="radio"/> EE - Employee Only <input type="radio"/> EE + 1 Dependent <input type="radio"/> EE + Family <input type="radio"/> EE + Domestic Partner</div></div>	\$90.00	\$264.00	45.00	<a href="#">Aetna Medical PPO Summary</a>	<a href="#">Aetna URL Address</a>
Dental - Aetna DMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	<a href="#">Aetna Dental DMO Summary</a>	<a href="#">Aetna URL Address</a>
Dental - Aetna PPO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>		\$20.00	\$24.00	0.00	<a href="#">Aetna Dental PPO Summary</a>	<a href="#">Aetna URL Address</a>
Vision - Vision Service Plan VSP	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>		\$13.00	\$25.00	0.00	<a href="#">VSP Summary</a>	<a href="#">Vision Service Plan</a>
				123.00	313.00	\$45.00		

## ADD DEPENDENTS

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

From the Change Benefits for Open Enrollment – Health Care Elections grid:

1. Click the **prompt** icon  in the desired field in the Coverage column.
2. Select a health care Coverage target.
3. Click the **prompt** icon in the Enroll Dependents column.
4. Select **Existing Dependents** to add an existing dependent or **Add My Dependent From Enrollment** to add a new dependent. Complete all required information.

Health Care Elections

6 items

Benefit Plan

\*Elect / Waive

Enroll Dependents

Coverage

Employee Cost (Monthly)

Employer Contribution (Monthly)

Benefit Credit (Monthly)

Plan Description

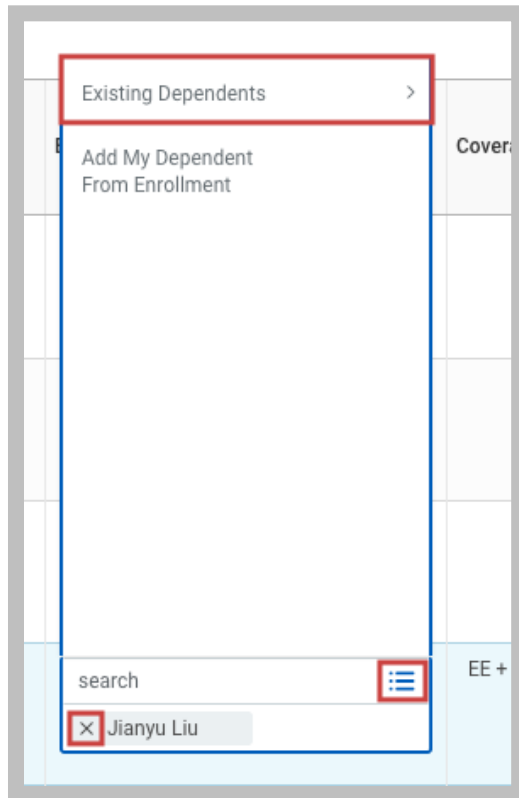
Provider Website

Medical - Aetna HDHP (High Deductible Health Plan)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	<div>Existing Dependents</div> <div>Add My Dependent From Enrollment</div>				0.00	Aetna Medical HDHP Summary	Aetna URL Address
Medical - Aetna HMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Aetna Medical HMO Summary	Aetna URL Address
Medical - Aetna PPO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		EE + 1 Dependent	\$222.00	\$413.00	45.00	Aetna Medical PPO Summary	Aetna URL Address
Dental - Aetna DMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Aetna Dental DMO Summary	Aetna URL Address
Dental - Aetna PPO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<div>search</div> <div></div>	EE - Employee Only	\$20.00	\$24.00	0.00	Aetna Dental PPO Summary	Aetna URL Address
Vision - Vision Service Plan VSP	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<div></div> <div></div>	EE - Employee Only	\$13.00	\$25.00	0.00	VSP Summary	Vision Service Plan
				255.00	462.00	\$45.00		

### MODIFY DEPENDENTS

From the Change Benefits for Open Enrollment – Health Care Elections grid:

1. Click the **prompt** icon in the Enroll Dependent field.
2. Select **Existing Dependents**.
3. Select the dependent you want to add to the plan.
4. Click the **X** next to a dependent's name to remove them from the plan.





5. Click **Continue**.

## ADD THE HEALTH SAVINGS ELECTION

The next step displays the Health Savings Election information. Depending on your elections from the previous screen, you may or may not be eligible for this plan.

From the Change Benefits for Open Enrollment – Health Savings Account Plan Dependencies section:

1. Click the **Arrow**  to expand the section. The Plan details display.
2. Click the **Go Back** button to modify your original elections, if needed.

 **Health Savings Account Plan Dependencies**

2 items

Cross Plan Dependency

Medical - Aetna HDHP (High Deductible Health Plan) --- is (are) prerequisite(s) for --- Health Savings Account - OptumHealth Bank.

Primary plan(s) include Healthcare FSA - SHPS and Secondary plan(s) include Health Savings Account - OptumHealth Bank. You cannot elect a primary plan and a secondary plan. They are mutually exclusive.

**Health Savings Election** 1 item

Benefit Plan	*Elect / Waive	Contribution Range (Annual)	Supporting Information
Health Savings Account - OptumHealth Bank	<div><input type="radio"/> Elect</div> <div><input checked="" type="radio"/> Waive</div>	<div>Your number of remaining payroll deductions for the year</div> <div>10</div> <div>How much do you want to contribute for the total year?</div> <div>0.00</div> <div>How much do you want to contribute per paycheck (Semi-monthly)?</div> <div>0.00</div> <div>Your contribution (Monthly)</div> <div>\$0.00</div>	<div>Provider Website</div> <div><a href="#">OptumHealth Bank</a></div> <div>Plan Description</div> <div><a href="#">OptumHealth Bank HSA</a></div>

3. Select **Elect** or **Waive** for the Health Savings election.
4. Enter the amount you want to contribute.
5. Click **Continue**.

## ADD GROUP LIFE INSURANCE

Depending on your organization's policy and local, state, and federal laws, you may be required to complete a physical examination in order to qualify for life insurance during open enrollment. Ask your HR or benefits representative for additional information.

From the Change Benefits for Open Enrollment – Insurance Plan Dependencies and Coverage Limitations section:

1. Click the **Arrow** to expand the Insurance Plan Dependencies and Coverage Limitations section.
2. Select **Elect** or **Waive** for each insurance election and modify your Coverage Levels, as needed.

> Insurance Plan Dependencies and Coverage Limitations

Insurance Elections 6 items

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Calculated Coverage
Basic Group Life - Liberty Mutual (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$75,000		\$75,000.00
Voluntary Supplemental Life - Liberty Mutual (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text" value="\$300,000"/>		\$300,000.00
Spouse Life - Liberty Mutual (Spouse)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive			
Short Term Disability - Liberty Mutual (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	75% of Salary		\$107,166.75
Long Term Disability - Liberty Mutual Enhanced (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	60% of Salary		\$85,733.40
Voluntary AD&D - Liberty Mutual (Employee)	<input type="radio"/> Elect			




3. Click **Continue**.


## DESIGNATE LIFE INSURANCE BENEFICIARIES

If your life insurance plan requires beneficiaries, the Requires Beneficiaries checkbox will be marked. This means that you must designate one or more beneficiaries for each plan.

Beneficiary Designations 2 items					
Benefit Plan	Provider Website	Requires Beneficiary		*Beneficiary	Beneficiaries *Primary Percentage / Contingent Percentage
Voluntary Supplemental Life - Liberty Mutual (Employee)	Liberty Mutual	<input checked="" type="checkbox"/>	+		
			-	Jianyu Liu	<input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0

From the Change Benefits for Open Enrollment – Beneficiary Designations section:

1. Click the **Add Row** icon  to add a beneficiary.
2. Click the **prompt** icon  in the Beneficiary field to select from a list of existing beneficiaries. Or, select **Create** to add a new beneficiary. To remove a beneficiary, click the **Remove Row** icon  next to that beneficiary.
3. Enter the percentage of benefits for each beneficiary in the Primary Percentage / Contingent Percentage column. Your primary beneficiary and contingent beneficiaries must add up to 100%.

Beneficiary Designations 2 items					
Benefit Plan	Provider Website	Requires Beneficiary		*Beneficiary	Beneficiaries *Primary Percentage / Contingent Percentage
Voluntary Supplemental Life - Liberty Mutual (Employee)	Liberty Mutual	<input checked="" type="checkbox"/>	+		
			-	<input type="text" value="search"/>  <input type="text" value="x Jianyu Liu"/>	<input checked="" type="radio"/> Primary Percentage 50 <input type="radio"/> Contingent Percentage 0
			-	Xiu Xiu Liu	<input checked="" type="radio"/> Primary Percentage 50 <input type="radio"/> Contingent Percentage 0

4. Click **Continue**.

## ADD ADDITIONAL BENEFITS

The additional benefits section is where you can elect supplemental coverage. .

From the Change Benefits for Open Enrollment – Additional Benefits Elections section:

1. Review your elections for accuracy. Notice your monthly cost in the upper-right corner.
2. Scroll down and confirm that your coverage information is accurate.
3. Click **Continue**.

### Change Benefits for Open Enrollment

Open Enrollment for Betty Liu - Step 6 of 7 Actions

Total Cost

\$323.00 Monthly Cost

Total Credits

\$55.50 Monthly Credit

Total Employee Net Cost/Credit

\$267.50 Monthly Cost

Event Date

08/15/2018

Initiated On

08/08/2018

Submit Elections By

08/15/2018

1 day(s) ago - Effective 08/15/2018

Additional Benefits Elections

2 Items

Benefit Plan	*Elect / Waive	Coverage	Amount (Monthly)	Percent	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Plan Description	Provider Website
Employee Assistance Program - Liberty Mutual MyLibertyAssist®	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		0.00	0				Liberty Mutual MyLibertyAssist®	Liberty Mutual
Legal Assistance - ARAG UltimateAdvisor®	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		0.00	0				ARAG UltimateAdvisor®	ARAG
					0	0	0		

## COMPLETE YOUR ENROLLMENT

1. Select the **I Agree** checkbox to confirm your electronic signature, if required.

The screenshot shows a web form for Open Enrollment. At the top, there is a section titled "Attachments" with a large dashed box for file uploads. Below this, the "Electronic Signature" section contains a "LEGAL NOTICE: Please Read" and three numbered points regarding the legal binding of the election. A red box highlights the "I Agree" checkbox, which is currently unchecked. Below the notice, there is a profile picture placeholder and a text input field for a comment. At the bottom, there are three buttons: "Submit" (orange), "Go Back" (grey), and "Cancel" (grey).

2. Click **Submit**. A confirmation page displays.
3. Click **Print** to generate a PDF version for your records or click **Done** to complete the task.

If you wish to make changes to your benefit elections after completing the above steps, but **before the Open Enrollment period ends**, you may modify your elections from the benefits Worklet by clicking Change **Open Enrollment**.