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. To complete your open enrollment:

SELECT YOUR BENEFITS

From your 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 default.
4. Click the **Plan Description** or **Provider Website** links to review.
5. Modify your coverage, if needed.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Elect / Waive</th>
<th>Enroll Dependents</th>
<th>Coverage</th>
<th>Employee Cost (Monthly)</th>
<th>Benefit Credit (Monthly)</th>
<th>Plan Description</th>
<th>Provider Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - Aetna HDHP (High Deductible Health Plan)</td>
<td>Elect</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>Aetna Medical HDHP Summary</td>
<td>Aetna URL Address</td>
</tr>
<tr>
<td>Medical - Aetna HMO</td>
<td>Elect</td>
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<td></td>
<td></td>
<td>0.00</td>
<td>Aetna Medical HMO Summary</td>
<td>Aetna URL Address</td>
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<tr>
<td>Medical - Aetna PPO</td>
<td>Elect</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>Aetna Medical PPO Summary</td>
<td>Aetna URL Address</td>
</tr>
<tr>
<td>Dental - Aetna DMO</td>
<td>Elect</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>Aetna Dental DMO Summary</td>
<td>Aetna URL Address</td>
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<tr>
<td>Dental - Aetna PPO</td>
<td>Elect</td>
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<td></td>
<td></td>
<td>0.00</td>
<td>Aetna Dental PPO Summary</td>
<td>Aetna URL Address</td>
</tr>
<tr>
<td>Vision - Vision Service Plan VSP</td>
<td>Elect</td>
<td></td>
<td></td>
<td></td>
<td>0.00</td>
<td>VSP Summary</td>
<td>Vision Service Plan</td>
</tr>
</tbody>
</table>

Employee:

- Health Care Elections

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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.

**Note:** If derived coverage is configured on the medical plan, Workday selects a coverage target automatically, based on who the employee covers.
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 Cross Plan Dependency details display.
2. Click the **Go Back** button to modify your original elections, if needed.

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.
3. Click **Continue**.
**Benefits: Navigate Open Enrollment for Desktop**

**Employee**

### 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.

#### 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%.

4. **Click Continue.**
ADD ADDITIONAL BENEFITS

The additional benefits section is where you can elect options such as employee assistance or legal assistance insurance.

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.

ATTACH SUPPORTING DOCUMENTS

To add attachments, if required by your organization:

1. Drop your file in “Drop files here area” or click Select files to find the file.
2. Select the file you want to attach.
3. Enter comments, as needed.
4. Click Upload.
1. Select the **I Agree** checkbox to confirm your electronic signature, if required.

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.