

Benefits: Navigate Open Enrollment for Desktop

Employee

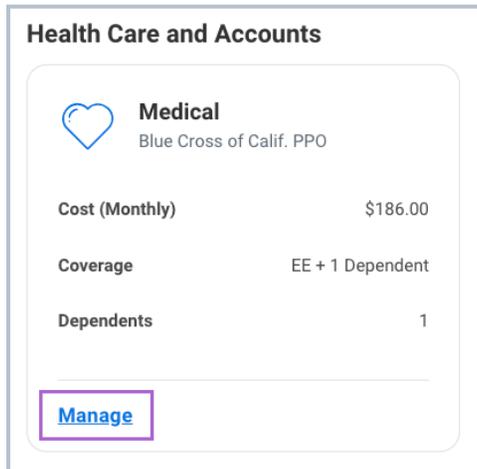
Open Enrollment Steps

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

Select Your Benefits

From your Home page:

1. Select the **My Tasks** icon.
2. Choose the **Open Enrollment Change** task.
3. Select **Let's Get Started**.
4. Select **Manage** to update your medical elections as shown in the image below.



5. Select **Enroll** to enroll in a new benefit plan.

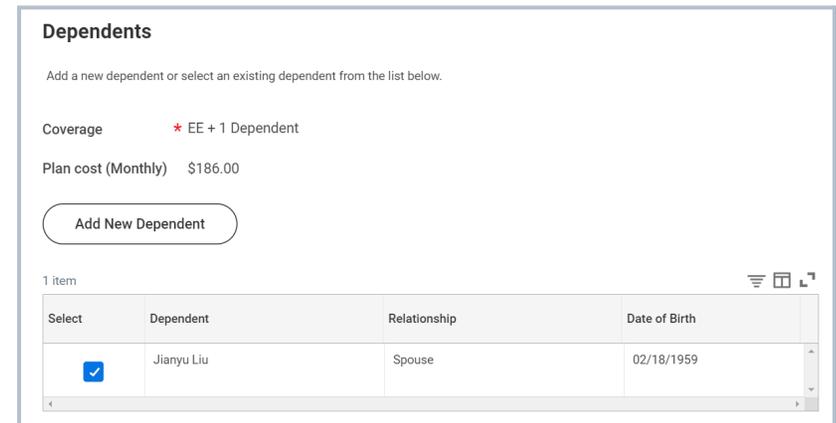
6. Choose **Select** or **Waive** for each medical election. Your current elections default.
7. Choose the **Benefit Plan** links to review the provider website and monthly deduction rates.
8. Modify your coverage, if needed.
9. Select **Confirm and Continue**.

Add Dependents

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

After selecting Confirm and Continue in the previous step:

1. If a dependent already exists, Workday selects them automatically as shown in the image below.



2. To add a new dependent, select the **Add New Dependent** button.
3. Select the **Use as Beneficiary** checkbox if you want to use this dependent as a beneficiary and select **OK**.
4. Complete all required information and select **Save**.

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Note: If your company configures derived coverage on the medical plan, Workday selects a coverage target automatically based on who the employee covers.

Modify Dependents

From the Dependents section for your elections:

1. Next to the name of your dependents, select the **checkbox** highlighted in the image below.
2. Select **Save**.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * EE + Family

Plan cost (Monthly) \$262.00

[Add New Dependent](#)

2 items

| Select | Dependent | Relationship | Date of Birth |
|-------------------------------------|------------|--------------|---------------|
| <input checked="" type="checkbox"/> | Jianyu Liu | Spouse | 02/18/1959 |
| <input checked="" type="checkbox"/> | Joe Jin | Child | 01/05/2023 |

Health Savings Account Elections

1. Return to the Health Care and Accounts section.
2. Choose **Enroll** to enroll in the Health Savings Account as shown in the image below.

3. Choose **Select** or **Waive** for the Health Savings Account election.
4. Enter the amount you want to contribute.
5. Select **Confirm and Continue**.

Note: To elect a Health Savings Account (HSA), you must first elect the Harvard PPO plan, which is a High Deductible Health Plan (HDHP).

Add Group Life Insurance

From the Insurance section:

1. Choose **Manage** or **Enroll** to update or add basic group life insurance.
2. Choose **Select** or **Waive** for each insurance election and modify your coverage levels as needed.
3. Select **Confirm and Continue**.

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Designate Life Insurance Beneficiaries

If your life insurance plan requires beneficiaries, the option to add primary and secondary beneficiaries will appear. In this case, you will need to designate one or more beneficiaries for each plan.

From the Beneficiaries section:

1. Select the **Add Row** icon to add a beneficiary.
2. In the Beneficiary field, select the **prompt** icon to select from existing beneficiaries. Or select **Create > Add New Beneficiary or Trust** to add a new beneficiary. To remove a beneficiary, locate the beneficiary and select the **Remove Row** icon next to the name.
3. In the Percentage column, enter the percentage of benefits for each beneficiary, highlighted in the image below.
4. Select **Save**.

| Beneficiary | Percentage |
|-------------|------------|
| Jenny Liu | 100 |

Add Additional Benefits

You can elect optional benefits in the Additional Benefits section, such as employee assistance or legal assistance.

From the Additional Benefits section:

1. Choose **Manage** or **Enroll** for each additional benefit you would like to update or enroll in.
2. Choose **Select** or **Waive** for each benefit plan, as needed.
3. Select **Confirm and Continue**.
4. Review your elections for accuracy. Your monthly cost is highlighted at the top of the screen, as shown in the image below.
5. Confirm that your coverage information is accurate.
6. Select **Save**.

| Projected Total Cost (Monthly) | Projected Total Credits | Remaining Credits |
|--------------------------------|-------------------------|-------------------|
| \$465.66 | \$305.50 | \$95.50 |

Attach Supporting Documents

To add attachments, if required by your organization:

1. Select the **Review and Sign** button.
2. Drag and drop the file in the Attachments area, or choose **Select files**, to find the file. Then, select the file you want to attach.
3. Enter comments, as needed.

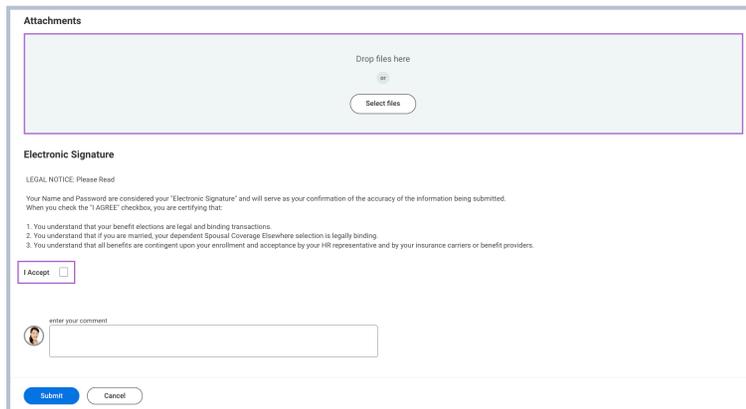
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4. Select **Upload** to attach additional documents.

Complete Your Enrollment

1. Select the **Review and Sign** button to complete your enrollment.
2. Scroll to the bottom of the page. Select the **I Accept** checkbox, highlighted in the image below, to confirm your electronic signature, if required.
3. Enter comments, as needed.



The screenshot shows a web form titled "Attachments" with a "Drop files here" area and a "Select files" button. Below this is the "Electronic Signature" section, which includes a "LEGAL NOTICE: Please Read" and three numbered points. A checkbox labeled "I Accept" is highlighted with a red box. Below the checkbox is a text input field labeled "enter your comment" and a "Submit" button.

4. Select **Submit**. A confirmation page displays.
5. Optionally, select the **View 2025 Benefits Statement** button to view and print the benefits statement.
6. Select the **PDF** icon to generate a PDF version for your records.
7. Select **Done** to complete the task.