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.

Health Care and Accounts		
Medical Blue Cross of C	alif. PPO	
Cost (Monthly)	\$186.00	
Coverage	EE + 1 Dependent	
Dependents	1	
Manage		

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.

	ento			
Add a new de	ependent or select an existing dep	pendent from the list below.		
Coverage	* EE + 1 Dependen	t		
ิขลก cost (N	/onthly) \$186.00			
Add No	ew Dependent			≡ 🖽
Add No	Dependent Dependent	Relationship	Date of Birth	Ē
Add N l item Select	Dependent Dependent Jianyu Liu	Relationship Spouse	Date of Birth 02/18/1959	= □

- 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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<u>Note</u>: 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 depen	dent or select an existing dependent from	the list below.	
Coverage Plan cost (Monthl Add New Dep	* EE + Family y) \$262.00		
2 items			≂ ⊡ ∟'
Select	Dependent	Relationship	Date of Birth
	Jianyu Liu	Spouse	02/18/1959
	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.

P	HSA Waived
Enroll	

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

<u>Note</u>: 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.
- 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.

\$465.66 \$305.50 \$95.50		
Coverage		
Calculated Coverage \$75,000.00		
Coverage \$75,000		
Plan cost (Monthly) Included		_
Beneficiaries		 Insurance Instructions
Select an existing or add a new beneficiary person or trust to this plan. You can also illocation for each beneficiary.	adjust the percentage	Plan Description Liberty Life Insurance Summary
Primary Beneficiaries 1 item	± ⊡ ".	Provider Website Liberty Mutual
(*) Beneficiary	Percentage	General Instructions
🕞 🛛 🗙 Jianyu Liu 📖	100	You are automatically enrolled in Basic Group Life for \$75,000 at no cost to you. In addition, you can enroll in Voluntary Supplemental Life to increase your coverage.
		Beneficiary Designation
Benuficiary Benuficiary	⊤ ⊡ L ¹ Percentage	Select one or more Primary Beneficiaries. Their percentages must add up to 100%. Secondary Beneficiaries may also be selected.

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) \$465.66	Projected Total Credits \$305.50	Remaining Credits \$95.50	
Coverage			 Additional Benefits Instructions
You will be enrolled in this plan.			Plan Description Liberty Mutual MyLibertyAssist®
			Provider Website Liberty Mutual
			General Instructions
			You are automatically enrolled in the Employee Assistance Prog

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.



Employee

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.

Attachments	
	Data fire have
	Drop mes nere
	Select files
lectronic Signature	
EGAL NOTICE: Please Read	
'our Name and Password are When you check the 'I AGREE	considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. checkbox, you are certifying that:
I. You understand that your b	snefit elections are legal and binding transactions.
 You understand that if you a You understand that all ben 	re manned, your dependent apousal coverage balewine selection is inguity unique. Effs are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.
Accept	
enter your comment	
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- 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.

