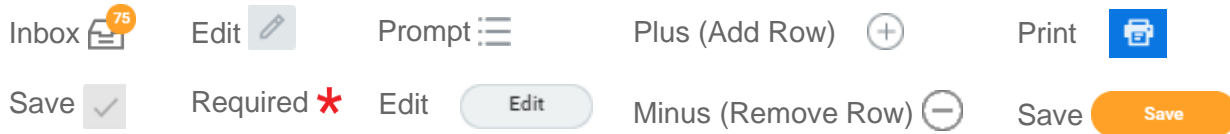


## ICONS REFERRED TO IN THIS JOB AID



Open Enrollment for the 2023 Plan Year begins on October 19, 2022 and ends on November 4, 2022. On October 19<sup>th</sup>, you will receive a notification in your Workday inbox that you will use to access your elections. During the Annual Open Enrollment period, you can view and edit your benefit elections within Workday. Any changes you successfully submit will take effect on 1/1/2023.




### Prerequisites:

#### Adding Dependents:

- If you are adding a new dependent to your coverage, you must add the dependent in Workday prior to completing the open enrollment process. Please see the Add Dependent Job Aid for instructions on adding your new dependent.

## INITIATE OPEN ENROLLMENT EVENT

From the home page:

1. Click the **Inbox** in the top right corner
2. Select the **Open Enrollment Change** action
3. Click **Let's Get Started** 



**Note:** The Open Enrollment page will show all elections made in the previous year. During the Open Enrollment period, you can change any of these elections. (HSA, FSAs and Medical Plan Affidavit will not show elections from the previous year.) You must submit an updated Medical Plan Affidavit each year. You must submit updated HSA and FSA elections if you wish to participate in 2023.

Aside from HSA, FSAs and Medical Plan Affidavit, all other prior year elections will be viewable on the benefit tile, these will be carried over if you do not make a change during Open Enrollment.

## ENROLL OR MANAGE YOUR ELECTIONS

From the Open Enrollment page click on each of the benefit options to **enroll** or **manage** benefit elections.

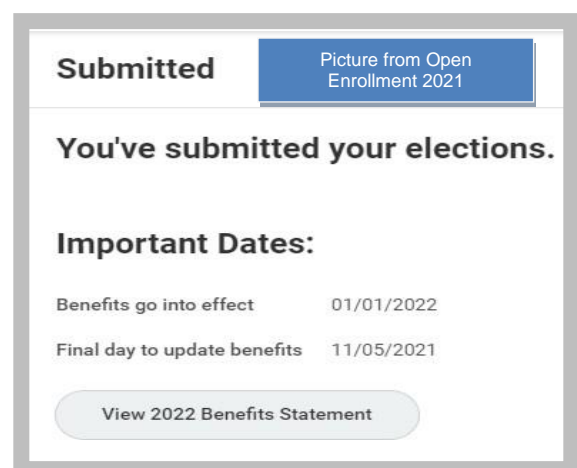
To change/review each benefit options:

1. Click **Enroll** or **Manage** for each option.
2. Click **Select** to elect your coverage choice or **Waive** to decline coverage.



**Note:** For Long Term Disability, Basic Life, Basic AD&D and EAP, you cannot decline coverage during Open Enrollment. Also note, 403(b) and Tuition Remission coverage will not be displayed.

3. Click **Confirm and Continue**
4. If you do not have any dependents, skip to step 6.
5. If you have dependents, review your existing dependents, if applicable, enroll any additional dependents on the Dependent screen.
  - a. Please see Prerequisite: Adding Dependents for instructions on how to add new dependents that are not in your Workday profile.
6. Click Save
7. Repeat steps 1 – 6 for all benefit options on the Open Enrollment page.
8. Click **Review and Sign**
9. Review your elections, read the legal notice and scroll to the bottom of the page and click **Accept** to apply your electronic signature.
10. Click **Submit**
11. Please ensure you see the message to confirm you have successfully completed your enrollment. If you do not see this screen, any benefits elections made will not take effect on 1/1/2023. Please be sure to download or print the benefits statement here if you wish to retain a copy for your records.



**Note:** You will have until November 4<sup>th</sup>, 2022, to make changes to your elections even if you hit submit. See below for instructions on how to make changes after submitting your elections.

## MEDICAL PLAN AFFIDAVIT \*

Required if you elect medical coverage. (even if you are not married or do not have spousal coverage)

1. Click **Enroll**
2. Click **Select**
3. Click **Confirm and Continue**
4. Click Prompt
5. Click the applicable option
6. Click Save



**Note:** If your spouse is employed elsewhere and you select “Spouse on Medical Coverage and Employed Elsewhere (Form Required)” your spouse’s employer will be required to complete the Medical Plan Affidavit. You will need to upload the completed form as part of Open Enrollment.

## HEALTH SAVINGS ACCOUNT

This is only available if you elect the HDHP (High Deductible Health Plan)

1. Click **Select** to elect your coverage choice or **Waive** to decline coverage.
2. Click **Confirm and Continue**
3. Enter the contribution amount. You may enter a per paycheck amount or an annual amount.
4. Click Save

## HEALTHCARE FSA

This is not available to you if you elect the HDHP (High Deductible Health Plan)

1. Click **Select** to elect your coverage choice or **Waive** to decline coverage.
2. Click **Confirm and Continue**
3. Enter the contribution amount. You may enter a per paycheck amount or an annual amount.
4. Click Save

## DEPENDENT CARE FSA

1. Click **Select** to elect your coverage choice or **Waive** to decline coverage.
2. Click **Confirm and Continue**
3. Enter the contribution amount. You may enter a per paycheck amount or an annual amount.
4. Click Save

## INSURANCE BENEFITS

For any Life Insurance or AD&D benefits, you are required to designate a beneficiary.

1. Click **Select** to elect your coverage choice or **Waive** to decline coverage.
2. Click **Confirm and Continue**
3. To designate a beneficiary:
  - a. Click the Plus (Add Row)
  - b. Click the Prompt
  - c. Choose applicable beneficiary type and follow steps for adding the beneficiary.
4. Enter the Percentage for the beneficiary
5. Repeat steps 3 and 4 for the Secondary Beneficiary
6. Click Save



**Note:** For any increases to coverage levels in Supplemental Life Insurance, you are required to complete the Evidence of Insurability Form for New York Life. You will need to complete all required fields and electronically sign the form. After submission of your Open Enrollment elections, you will also receive a “To Do” task in your Workday inbox to confirm you have completed the form.

## MAKING CHANGES TO YOUR ELECTIONS AFTER HITTING SUBMIT



1. Click the **Benefits** application on the right side of the Workday home page:
2. Click the **Change Open Enrollment** button. This will take you back to the Open Enrollment page. (If you do not see this button, you did not successfully submit your elections, or the Open Enrollment period has ended.)
3. You must hit submit for any additional changes made to take effect.