Enroll in Benefits

Purpose: The open enrollment period allows you to update your benefit elections once a year. During this time, you will receive a task in your Workday Inbox that may require approval to complete. This job aid will guide you through completing your open enrollment. Employees had until the end of the open enrollment period to finalize their benefit election.

In Workday's Benefit Open Enrollment, the options Manage, Enroll, and View each serve a distinct purpose depending on your current benefit status and what actions you're allowed to take. Here's a brief explanation of each:

These options help guide employees through the enrollment process by clearly indicating the available actions for each benefit type.

Enroll

- Purpose: Used when you are not currently enrolled in a specific benefit plan.
- Action: Allows you to select a new plan, add dependents, and enter contribution amounts (e.g., for HSA or FSA).
- Example: If you haven't enrolled in dental coverage yet, clicking Enroll lets you choose a dental plan and add dependents.

Manage

- Purpose: Used when you are already enrolled in a benefit and want to make changes.
- Action: Lets you update coverage, change contribution amounts, or modify dependents and beneficiaries.
- Example: If you're already enrolled in Basic Life Insurance, clicking Manage allows you to update your beneficiary information.

View

- Purpose: Used when you can only review the benefit details but cannot make changes.
- Action: Displays your current selections, coverage levels, and costs.
- Example: If a benefit is employer-paid and not editable (like Basic), you may only see a View option.

SELECT YOUR BENEFITS

1. From your **Workday** homepage, the **Awaiting Your Action** card displays the task **Open Enrollment Change**.
2. The **My Tasks** inbox displays in the **All Items** column the **Open Enrollment Change** display.
3. The page to the right displays **Change Benefits for Open Enrollment**.
4. Click the **Let's Get Started** button.
5. The **Open Enrollment** page displays.
6. Review the **Enrollment Instructions**.

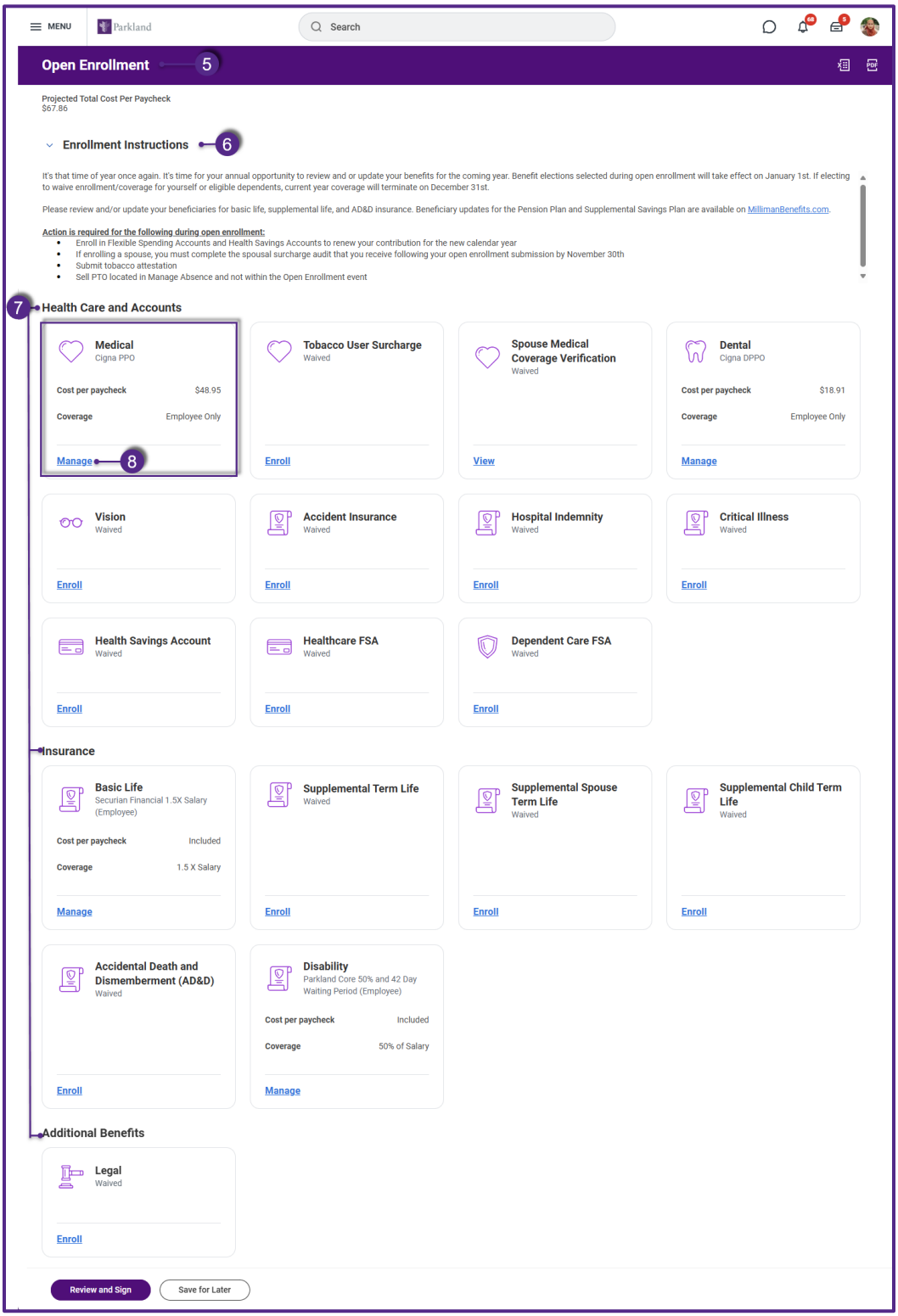


TIP: For step-by-step directions on how to sell PTO, access the job aid titled Sell of PTO.

7. There are three sections in which benefits may populate.
   - Health Care and Accounts
   - Insurance

- Additional Benefits

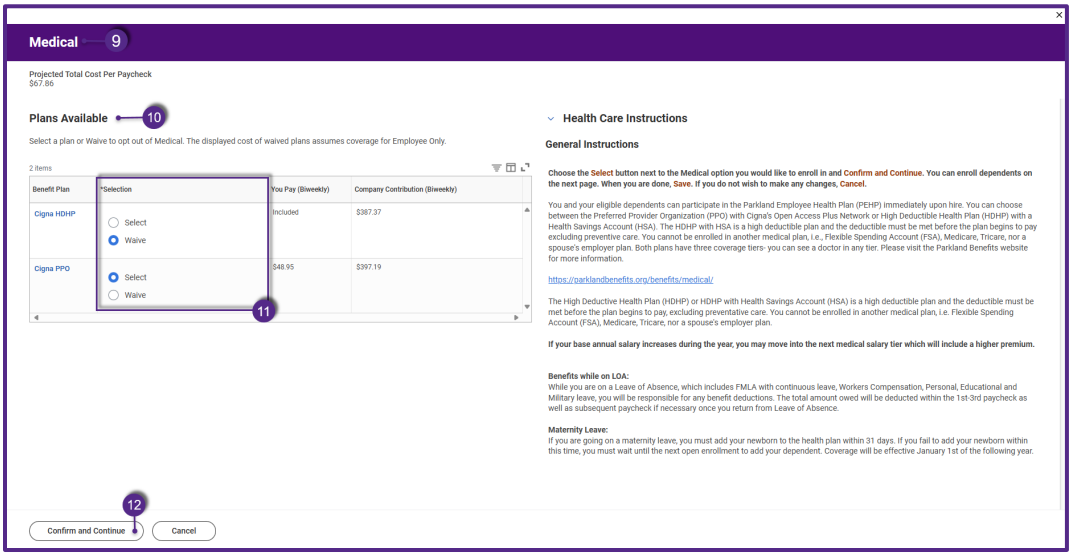
8. From the **Medical card**, click the **Manage** button to enroll or waive in benefits.



9. The **Medical** page displays.

TIP: Under the Health Care Instructions, the General Instructions will assist with selecting medical benefits.

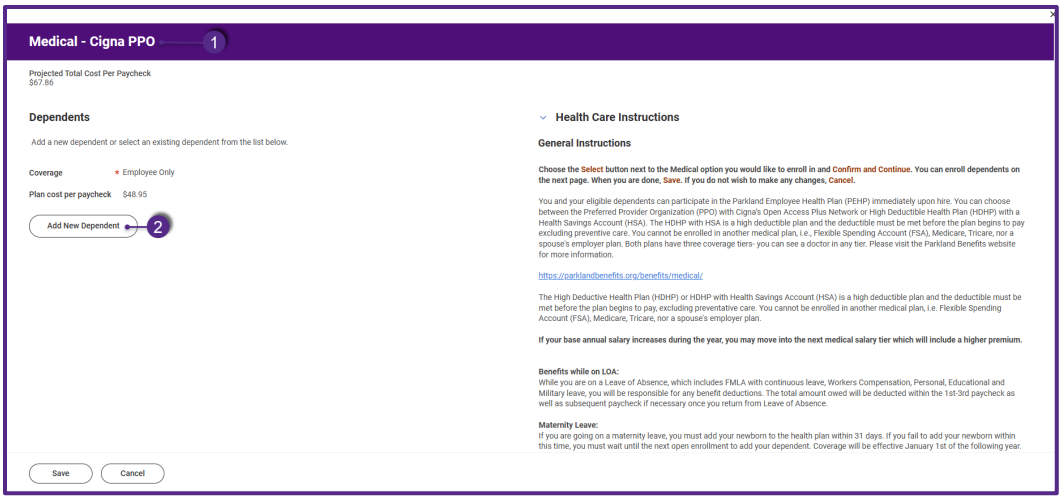
10. Review the plan details under the **Plans Available** section.
11. In the **Selection** column, click the radio button next to one of the options.
    - Select: When you click **Select**, you're opting into that benefit for the upcoming plan year.
    - Waive: Clicking **Waive** means you are **opting out** of that benefit for the upcoming plan year.
12. Click the **Confirm and Continue** button to move forward to the Dependents section of your benefits selection.



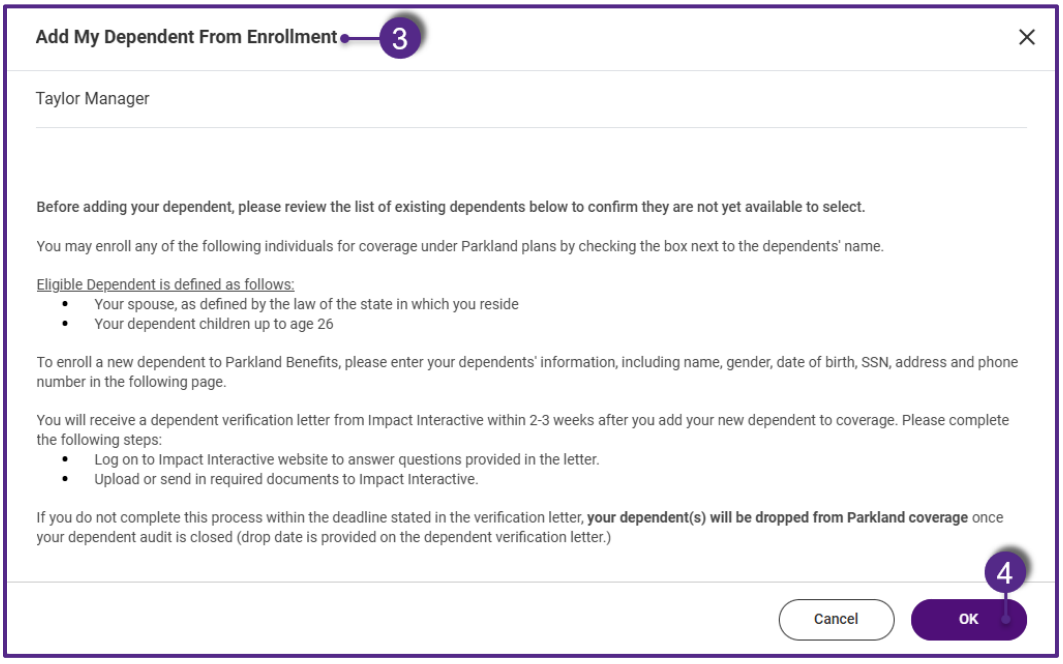
ADD DEPENDENTS

You can also add dependents if you select or modify a benefit plan during open enrollment. If a dependent already exists, Workday will display the current enrollment or any eligible dependents.

1. After selecting **Confirm and Continue**, the **Medical** Plan selected screen displays.
2. Under the **Dependents** section, click the **Add New Dependent** button to add a new dependent.



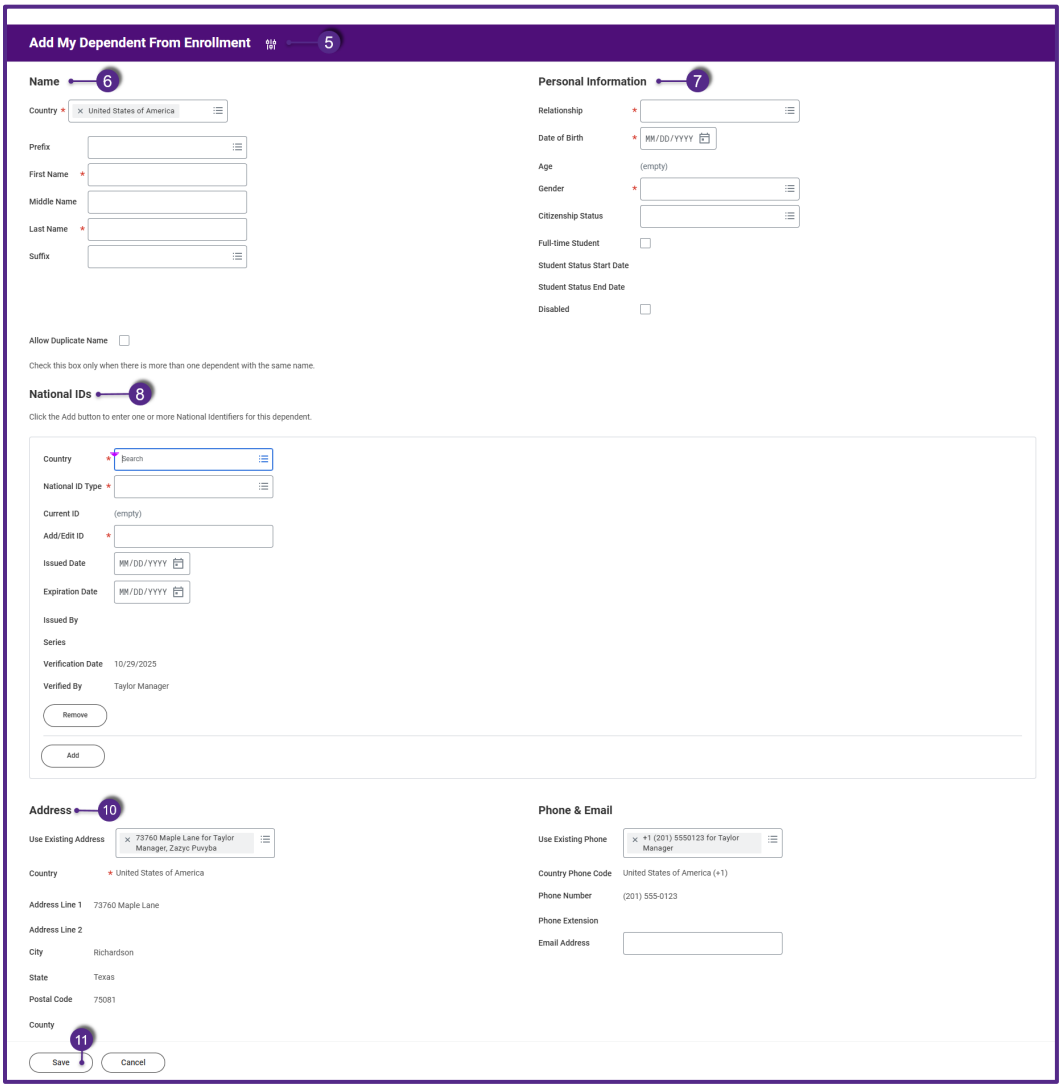
3. The **Add My Dependent From Enrollment** pop-up displays instructions regarding dependent eligibility.
4. Review and click **OK** to proceed to the **Add My Dependent From Enrollment** page.



5. The **Add My Dependent From Enrollment** page displays.
6. Under the **Name** section, enter the following required fields.
   - Country that defaults to the United States of America
   - First Name
   - Last Name
7. Under the **Personal Information** section, enter the following required fields.
   - Relationship
   - Date of Birth
   - Gender
8. Under the **National IDs** section, enter one or more **National Identifiers** for the dependent.
9. Click the **Add** button and enter the following required fields.

- Country
- National ID Type
- Add/Edit ID

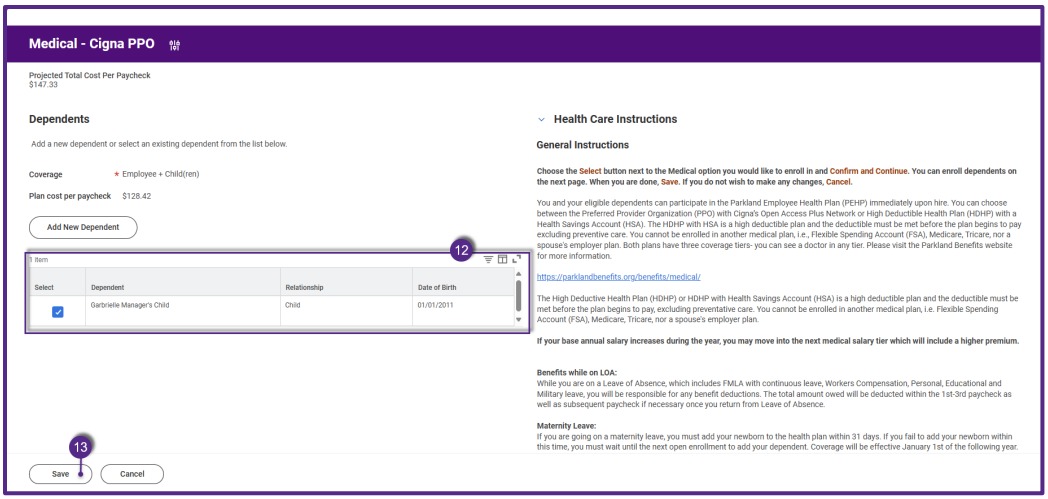
10. Scroll down the page to the **Address** section, where your address, phone number, and email default to your information.
11. Click the **Save** button to move forward to the appropriate page.



TIP: To add additional dependents once the Medical page displays, repeat steps 2 – 6 to enroll in the remaining benefit plans.

12. The added dependent will now display in the table.
13. Click the **Save** button, and a pop-up displays the following message: '**Your Medical changes have been updated, but not submitted. Next steps: Update another plan or click Review and Sign once you're ready to submit your changes.**'

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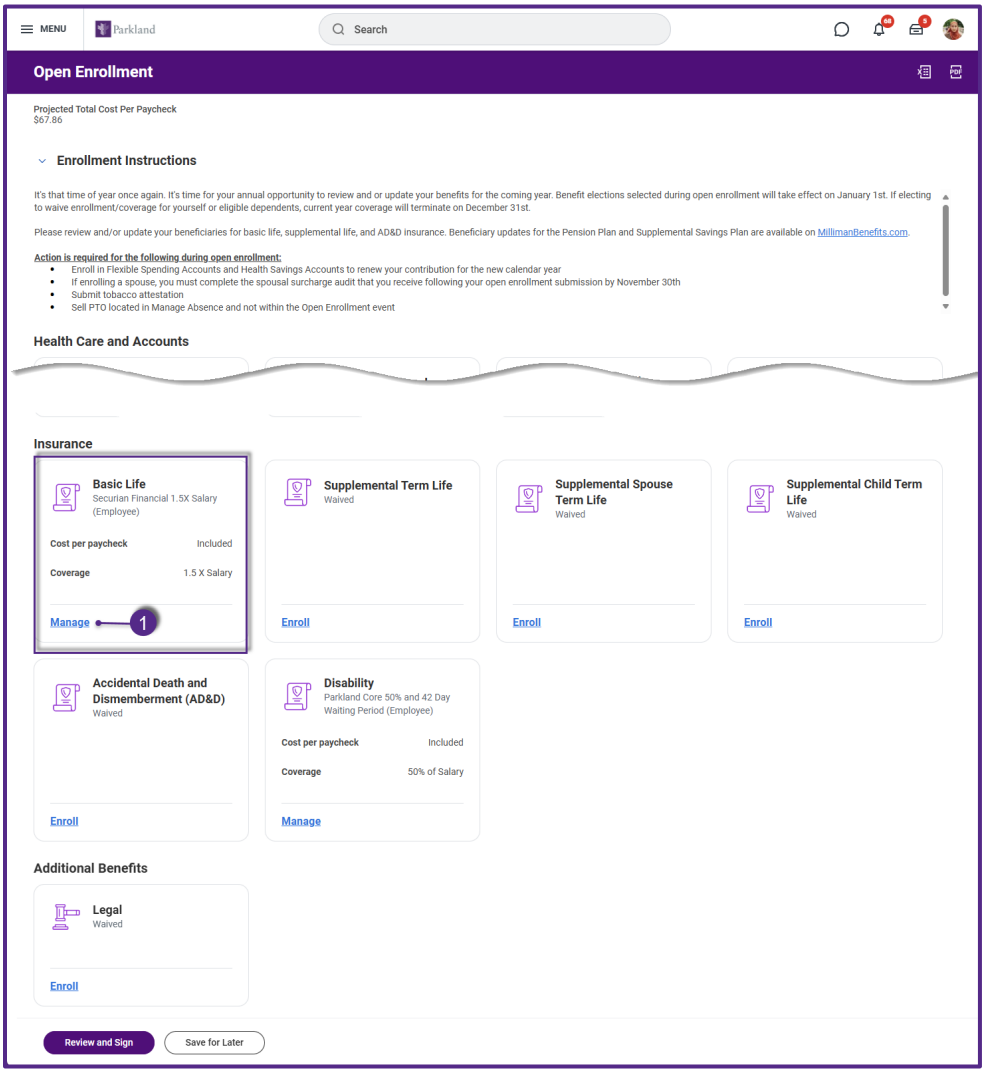


TIP: Once you have completed each card, a notation will appear at the top of the card.

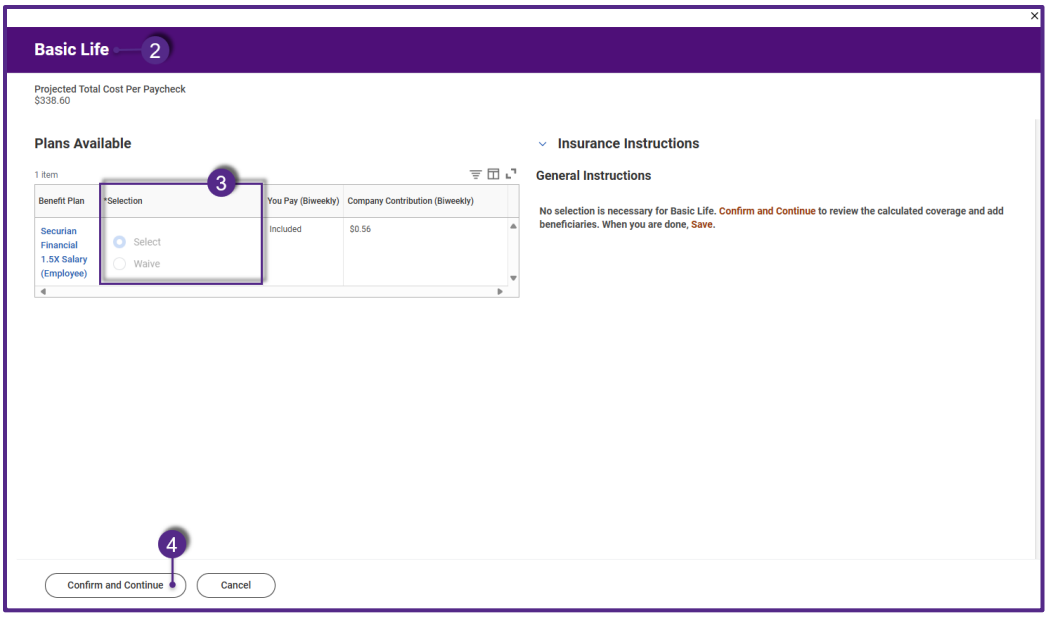
- Updated -Indicates that the employee has made changes to that specific benefit plan during the Open Enrollment process.
- Reviewed - Indicates that the employee has looked at the benefit plan but did not make any changes.

ADD BENEFICIARY

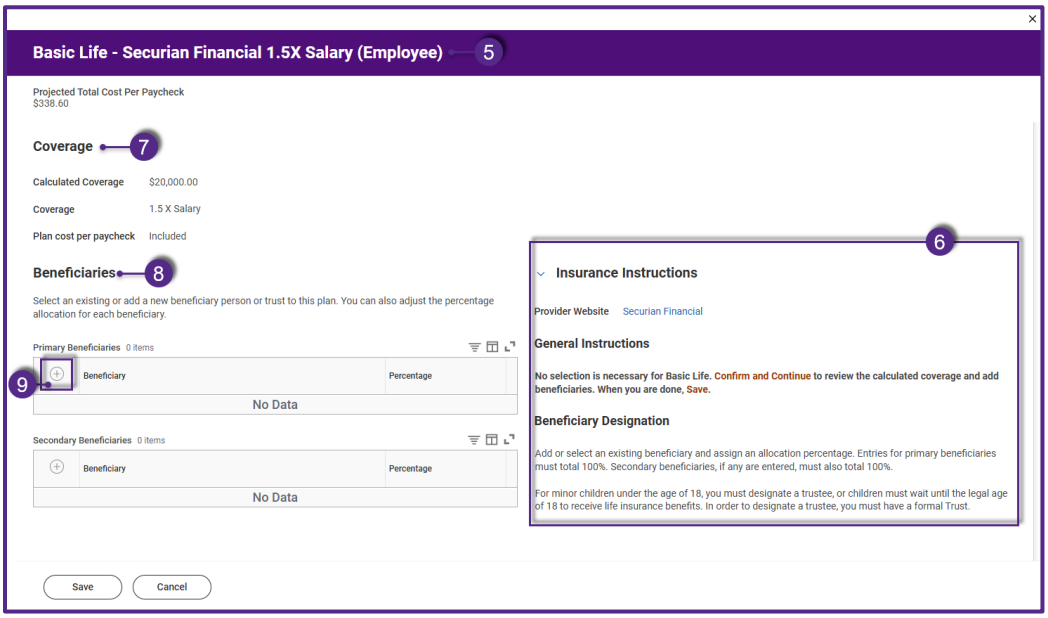
1. Under the **Insurance** section, click the **Basic Life card**, click the **Manage** button to enroll or waive in benefits.



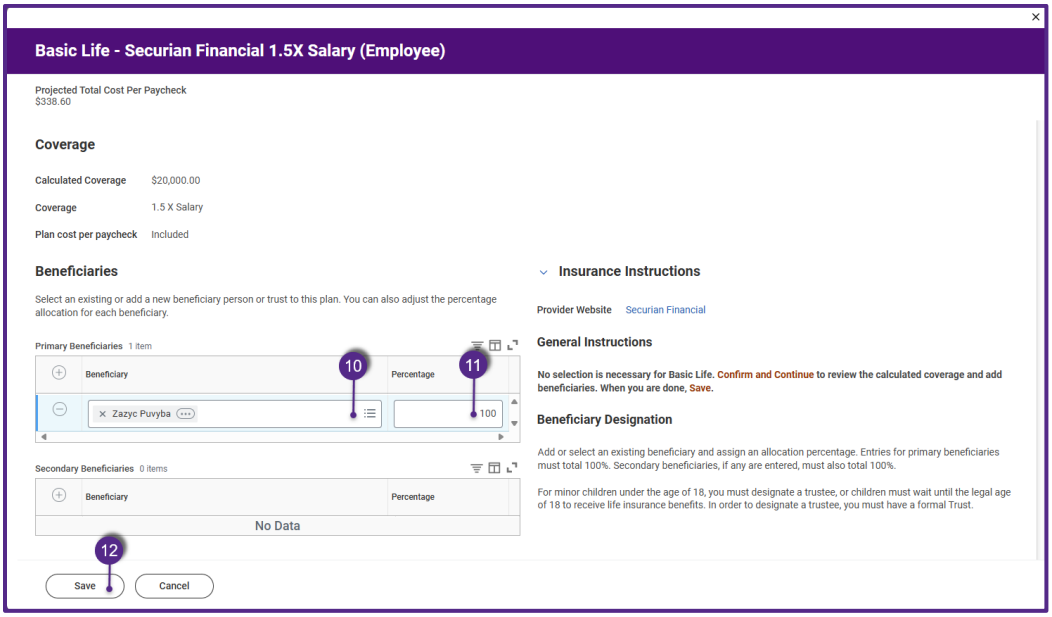
2. The **Basic Life** page displays.
3. Under **Plan Available**, the selection has defaulted. Review the **Insurance Instructions** located to the right of the screen.
4. Click the **Confirm and Continue** button.



5. The **Basic Life** page displays.
6. Review the **Insurance Instructions** located to the right of the screen. That outlines two topics.
   - General Instructions
   - Beneficiary Designation
7. The **Coverage** section displays the following:
   - Calculated coverage
   - Coverage
   - Plan cost per paycheck
8. The **Beneficiaries** section allows for the selection of an existing beneficiary, adding a new beneficiary, or turning to your plan.
9. Click the **"+"** icon to add to either the **Primary** or **Secondary Beneficiaries** table.

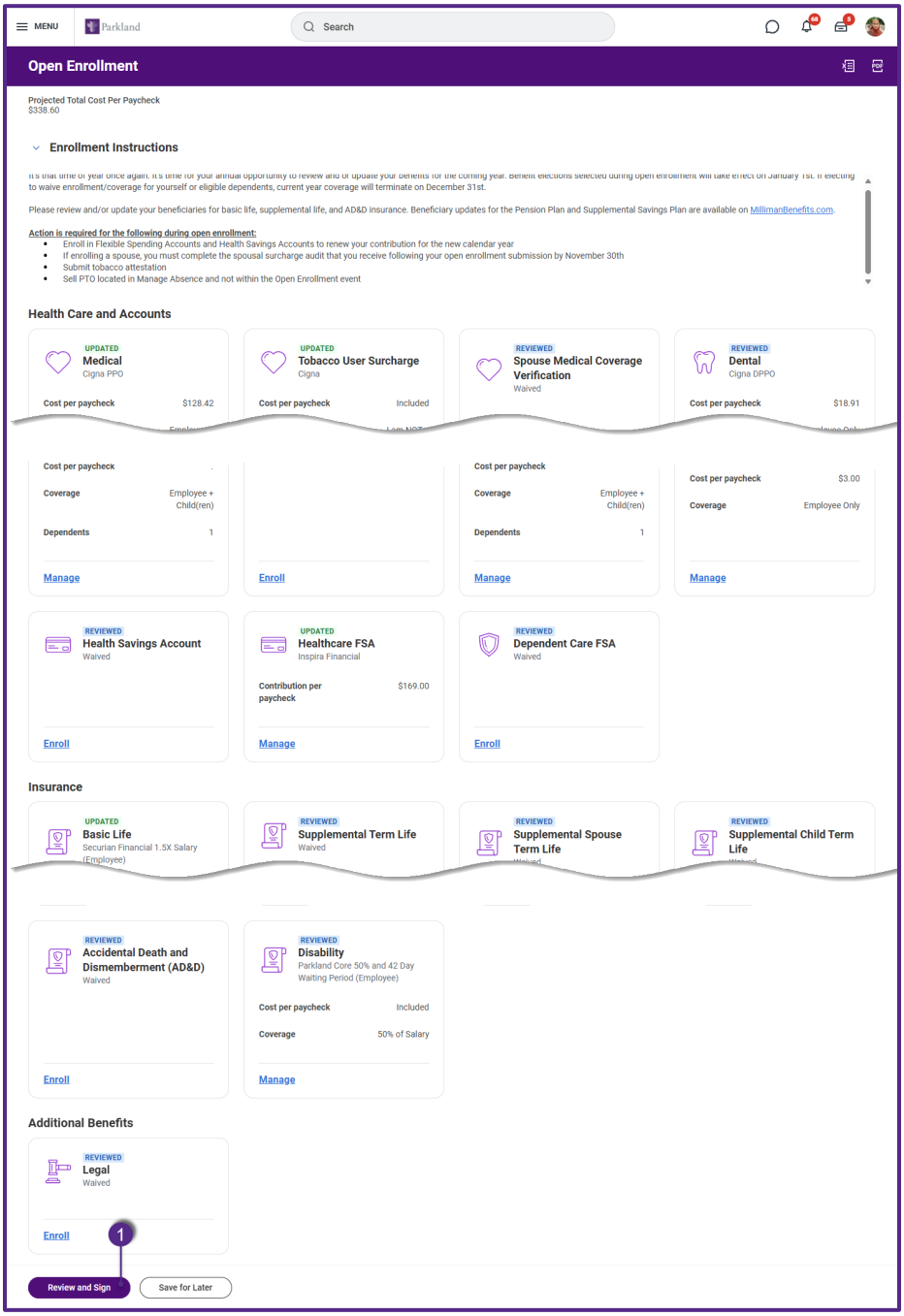


10. From the **Beneficiary** drop-down list, select the beneficiary.
11. From the **Percentage** text box, enter the allocated percentage.
12. Click the **Save** button, and a pop-up displays the following message: '**Your Medical changes have been updated, but not submitted. Next steps: Update another plan or click Review and Sign once you're ready to submit your changes.**'

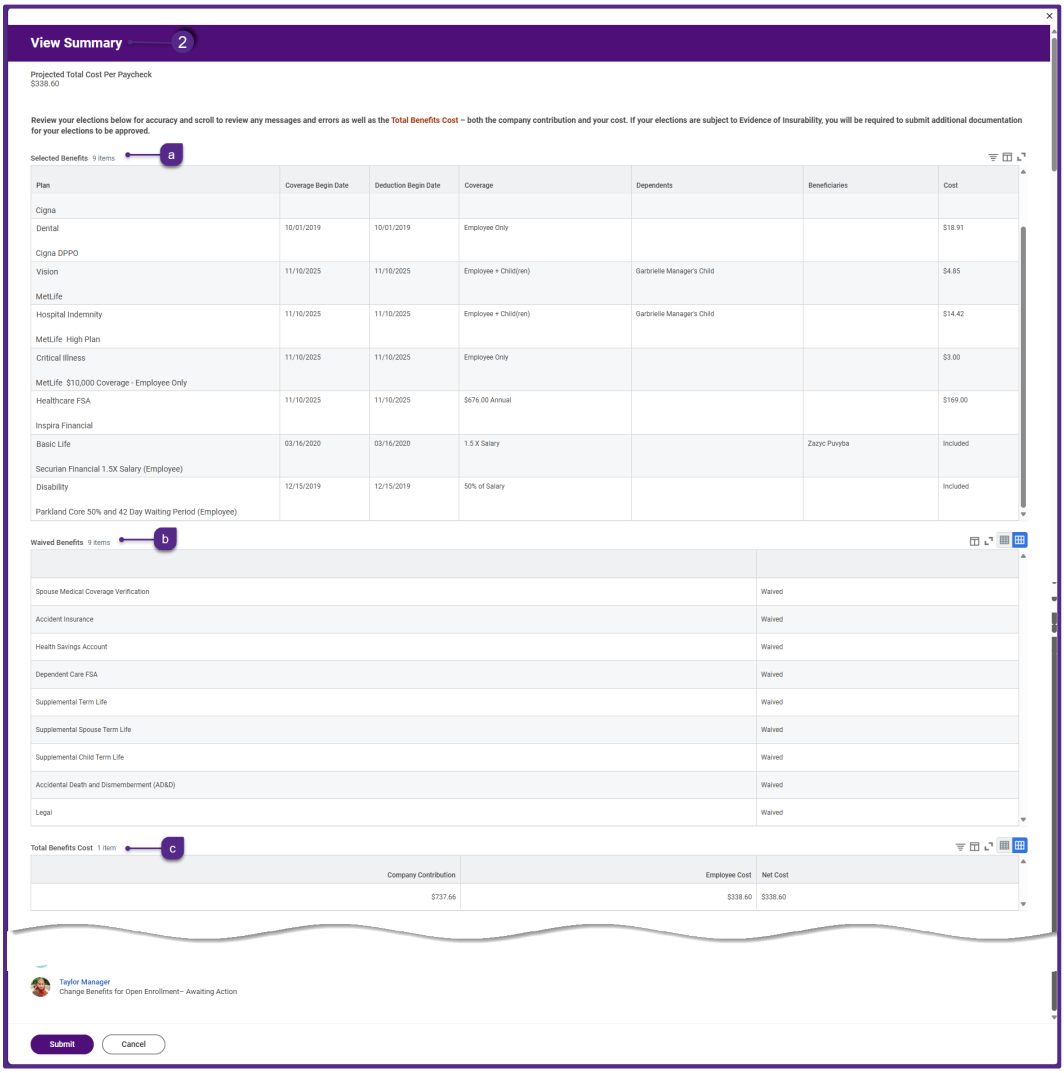


COMPLETE ENROLLMENT

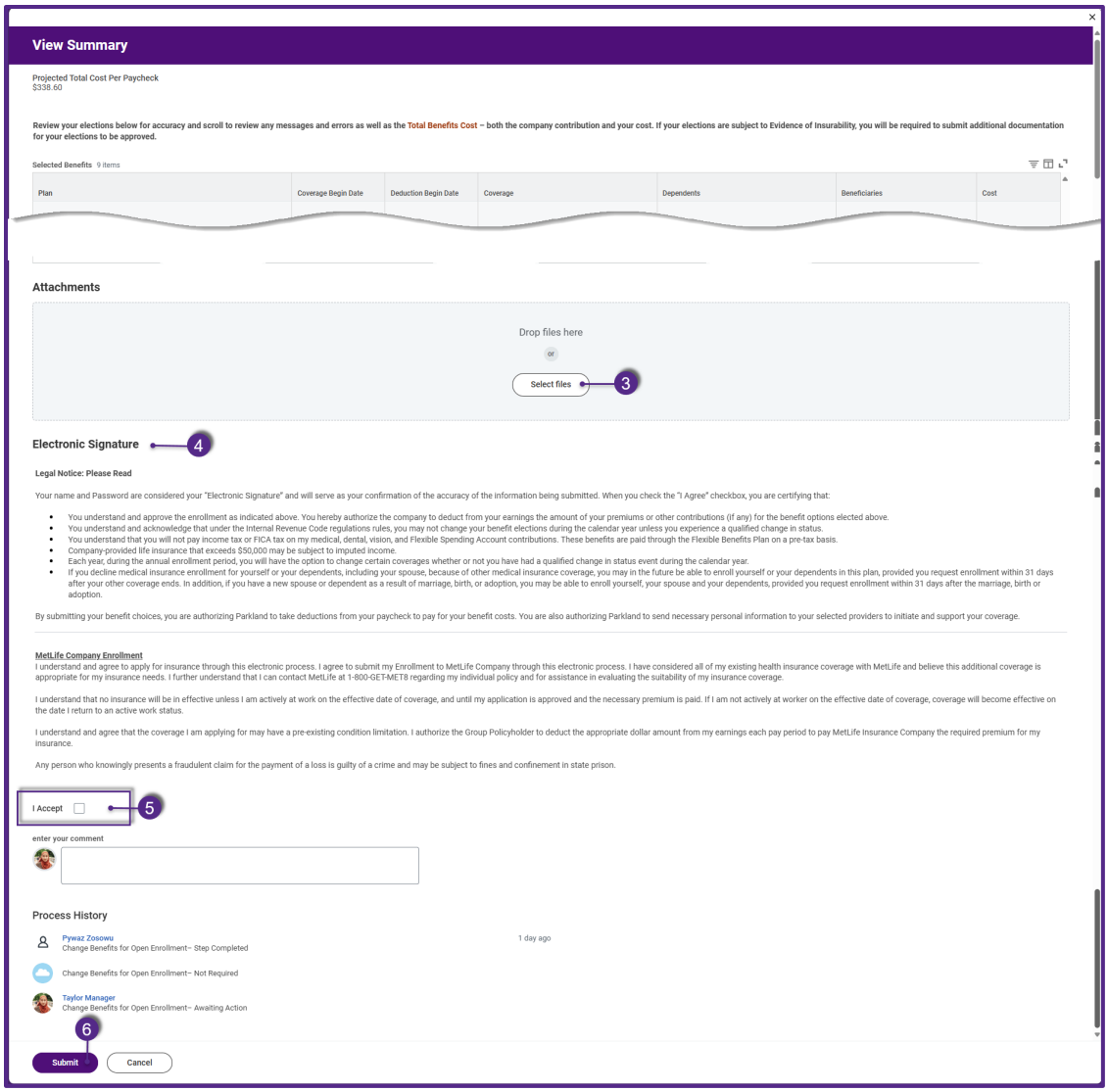
1. From the **Open Enrollment** page, submit your enrollment by clicking the **Review and Sign** button.



2. The **View Summary** page displays all
   a. Selected Benefits
   b. Waived Benefits
   c. Total Benefits Costs

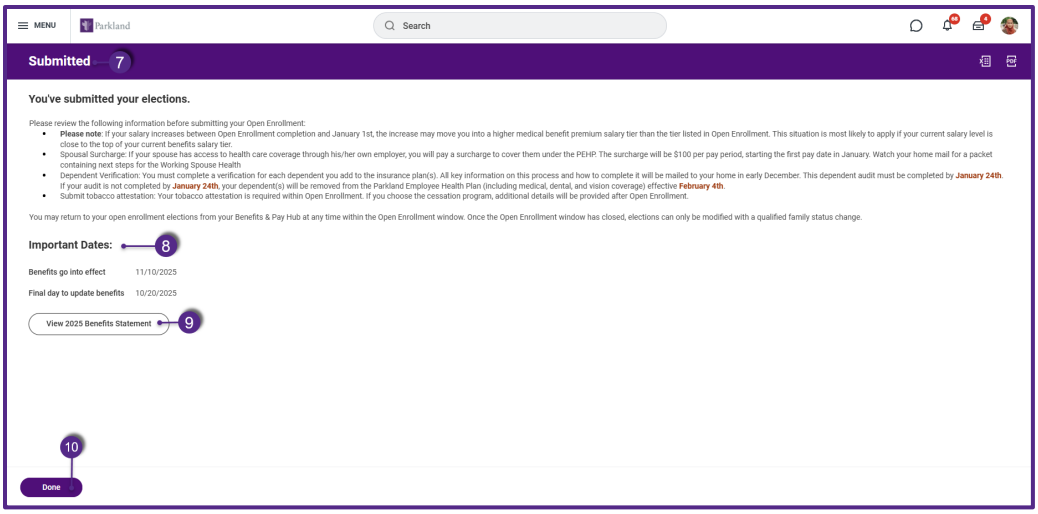


3. From the **Attachment** section, click the **Select** files button to add any supporting documents.
4. Scroll down to the **Electronic Signature** section.
5. Click the **I Accept** checkbox.
6. Click the **Submit** button.



7. The **Submitted** screen confirms by displaying You've submitted your elections with additional information for you to review.
8. Under **Important Dates**:
   - Benefits go into effect
   - Final day to update benefits
9. Click the **View <YEAR> Benefit Statement** button to access a summary of the **Submit Election Confirmation** page.
10. Click the **Done** button to return to the **Workday Homepage**.

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If you need additional support, please email Learning@phhs.org.