ENROLLMENT STEPS

Welcome to Santa Clara University! During this enrollment period, you will receive a task in your Inbox. Review this job aid for steps on completing your Benefits Enrollment. To avoid defaulting, please make sure to complete your enrollment within 30 days of your date of hire. (The default benefits will be Blue Shield Trio Employee Only and Fidelity 401a)

**Note:** Please have social security number and contact information available for your dependents and beneficiaries readily available as it will be needed to begin the enrollment.

ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan.

From the Benefits application:

1. Click the **Dependents** button under Change.
2. Click **Add**.
3. Click the **Edit** icon or click in the field to modify. Asterisks denote required fields.
4. Click the **Add** button to add new information.
5. Click **Submit**.

**Note:** Please be sure to add social security number and contact information for your dependents and beneficiaries.

ADD BENEFICIARIES

A beneficiary is a designated individual who would receive your Life Insurance Benefit. You can change, edit, and add beneficiaries from the Benefits application.

From the Benefits application:

6. Click the **Beneficiaries** button under Change.
7. View existing beneficiaries for enrollment benefit plans or modify the existing information by clicking **Edit**.
Benefits: Navigate New Hire Benefits Enrollment

8. Click Add to add a new beneficiary. The Add Beneficiary page displays.

9. Select Existing Dependent or Emergency Contact, New Person as Beneficiary, or New Trust as Beneficiary.

10. Click OK.

11. Enter all required information, denoted by an asterisk.

12. Click Submit.

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.

4. Click the Plan Description or Provider Website links to review.
### Benefits: Navigate New Hire Benefits Enrollment

#### Employee

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Electric / Waive</th>
<th>Enroll Dependents</th>
<th>Coverage</th>
<th>Employee Cost (Monthly)</th>
<th>Employer Contribution (Monthly)</th>
<th>Benefit Credit (Monthly)</th>
<th>Plan Description</th>
<th>Provider Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - Aetna HDP (High Deductible Health Plan)</td>
<td>Elect</td>
<td>WAIVE</td>
<td></td>
<td>0.00</td>
<td>Aetna Medical HDHP Summary</td>
<td>Aetna URL Address</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical - Blue Cross of Calif. HMO</td>
<td>Elect</td>
<td>WAIVE</td>
<td></td>
<td>0.00</td>
<td>Blue Cross of Calif. Medical HMO Summary</td>
<td>Blue Cross of Calif</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical - Blue Cross of Calif. POS</td>
<td>Elect</td>
<td>WAIVE</td>
<td></td>
<td>0.00</td>
<td>Blue Cross of Calif. POS Summary</td>
<td>Blue Cross of Calif</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical - Blue Cross of Calif. PPO</td>
<td>Elect</td>
<td></td>
<td>EE: Employee Only</td>
<td>$90.00</td>
<td>$200.00</td>
<td>$30.00</td>
<td>Blue Cross of Calif. Medical PPO Summary</td>
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<tr>
<td>Dental - Blue Cross of Calif. DMG</td>
<td>Elect</td>
<td>WAIVE</td>
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<td>$18.00</td>
<td>0.00</td>
<td>Blue Cross of Calif. Dental DMG Summary</td>
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<td>Dental - Blue Cross of Calif. PPO</td>
<td>Elect</td>
<td>WAIVE</td>
<td></td>
<td>0.00</td>
<td>Blue Cross of Calif. Dental PPO Summary</td>
<td>Blue Cross of Calif</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vision - Vision Service Plan VSP</td>
<td>Elect</td>
<td>WAIVE</td>
<td></td>
<td>$13.00</td>
<td>$25.00</td>
<td>0.00</td>
<td>VSP Summary</td>
<td>Vision Service Plan</td>
</tr>
</tbody>
</table>

### 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 of the Enroll Dependents column.
2. **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.
# Benefits: Navigate New Hire Benefits Enrollment

## Health Care Elections

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Enroll Dependents</th>
<th>Coverage</th>
<th>Employee Cost (Monthly)</th>
<th>Employee Contribution (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>0.00</td>
<td></td>
<td></td>
<td>Aetna Medical HDHP Summary</td>
<td>Aetna URL Address</td>
</tr>
<tr>
<td>Medical - Blue Cross of Calif. HMO</td>
<td>Elect</td>
<td></td>
<td></td>
<td>0.00</td>
<td></td>
<td></td>
<td>Blue Cross of Calif. Medical HMO</td>
<td>Blue Cross of Calif.</td>
</tr>
<tr>
<td>Medical - Blue Cross of Calif. POS</td>
<td>Elect</td>
<td></td>
<td></td>
<td>0.00</td>
<td></td>
<td></td>
<td>Blue Cross of Calif. Medical POS</td>
<td>Blue Cross of Calif.</td>
</tr>
<tr>
<td>Medical - Blue Cross of Calif. PPO</td>
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<td>EE + 1 Dependent</td>
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<td>$306.00</td>
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<tr>
<td>Dental - Blue Cross of Calif. DMO</td>
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<td></td>
<td>0.00</td>
<td></td>
<td></td>
<td>Blue Cross of Calif. Dental DMO</td>
<td>Blue Cross of Calif.</td>
</tr>
<tr>
<td>Dental - Blue Cross of Calif. PPO</td>
<td>Elect</td>
<td>Jianyu Liu</td>
<td>EE + 1 Dependent</td>
<td>$24.00</td>
<td>$29.00</td>
<td>0.00</td>
<td>Blue Cross of Calif. Dental PPO</td>
<td>Blue Cross of Calif.</td>
</tr>
<tr>
<td>Vision - Vision Service Plan VSP</td>
<td>Elect</td>
<td>Jianyu Liu</td>
<td>EE + 1 Dependent</td>
<td>$21.00</td>
<td>$27.00</td>
<td>0.00</td>
<td>VSP Summary</td>
<td>Vision Service Plan</td>
</tr>
</tbody>
</table>

Total: 231.00  372.00  565.50
Benefits: Navigate New Hire Benefits Enrollment

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.

### Health Savings Account Plan Dependencies

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th><em>Elect / Waive</em></th>
<th>Contribution Range (Annual)</th>
<th>Supporting Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health Savings Account - OptumHealth Bank</td>
<td></td>
<td>Your number of remaining payroll deductions for the year 10</td>
<td>Provider Website OptumHealth Bank</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute for the total year? 0.00</td>
<td>Plan Description OptumHealth Bank HSA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute per paycheck (Semi-monthly)? 0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Your contribution (Monthly) $0.00</td>
<td></td>
</tr>
</tbody>
</table>

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

If you are enrolling in this benefit for the first time, or if you are trying to increase your current level of supplemental life coverage, YOU MUST COMPLETE THE APPLICATION AND STATEMENT OF HEALTH FORMS. You WILL NOT HAVE THE COVERAGE YOU INPUT until your application is approved by the insurance carrier.

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.
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.

**Note:** It is important that you designate at least one beneficiary for the Life Plan during the Open Enrollment period.

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**.
## Benefits: Navigate New Hire Benefits Enrollment

### Change Benefits for Open Enrollment

**Open Enrollment for Betty Liu - Step 6 of 7**

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Coverage</th>
<th>Amount (Monthly)</th>
<th>Percent</th>
<th>Employee Cost (Monthly)</th>
<th>Employer Contribution (Monthly)</th>
<th>Benefit Credit (Monthly)</th>
<th>Plan Description</th>
<th>Provider Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Assistance Program - Liberty Mutual MyLibertyAdvisor®</td>
<td>Elect</td>
<td></td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>Liberty Mutual MyLibertyAdvisor®</td>
<td>Liberty Mutual</td>
</tr>
<tr>
<td>Legal Assistance - ARAG UltimateAdvisor®</td>
<td>Elect</td>
<td></td>
<td>0.00</td>
<td>0</td>
<td>0</td>
<td></td>
<td></td>
<td>ARAG UltimateAdvisor®</td>
<td>ARAG</td>
</tr>
</tbody>
</table>

**Total Cost**

- $345.00 Monthly Cost
- $55.50 Monthly Credit

**Total Employee Net Cost/Credit**

- $289.50 Monthly Cost

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**Benefits: Navigate New Hire Benefits Enrollment**

**ATTACH SUPPORTING DOCUMENTS**

To add attachments, if required by your organization:

1. Drag and drop the file in the Attachments 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**.

**COMPLETE YOUR ENROLLMENT**

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.