

OPEN ENROLLMENT STEPS

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive an Open Enrollment Change task in your Inbox. Review this job aid for steps on completing your open enrollment.



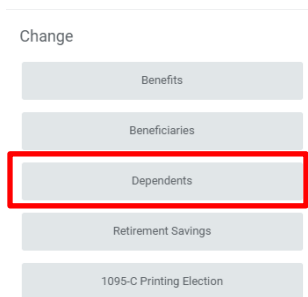
Note: If you do not need to add a dependent(s), skip to page 2 **Select your Benefits**.


ADD DEPENDENTS

A dependent is someone, like a child or a spouse, who receives benefits under your plan. You will need the following information available for adding: Full Legal Name(s), Social Security Number, Date of Birth, and Address.

From the Benefits application:

1. Click the **Dependents** button under Change.



2. Click **Add**.
3. Click the **Edit**  or click in the field to modify. Asterisks denote required fields

4. Click the **Add** button to add new information.
5. **Drop** or **Select Files** to upload required document (Affidavits of Marriage, Domestic Partner, or Eligible Dependent).
6. Select a **Category**
7. Click **Submit**.

Benefit: Navigate Open Enrollment for Desktop

Employee

National IDs
Add

Government IDs
Add

enter your comment


Attachments

Fillable Affidavit of Marriage.docx
✓ Successfully Uploaded

Description

Category * X Benefits


Submit Save for Later Cancel

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


8. Repeat steps 1-7 if you are adding more than 1 dependent.

Select your Benefits

From your Home page:

1. Click the **Inbox**  icon.
2. Click the **Open Enrollment Change** task.
3. Click **Let's Get Started**.
4. Click **Manage** to update your medical elections. Click **Enroll** to enroll in a new benefit plan.

Health Care and Accounts

 **Medical**
Aetna HMO Trio Plan

Cost per paycheck \$8.50

Coverage Employee Only

Manage

5. Choose **Select** or **Waive** for each Medical election. Your current elections default.

Plans Available

You must select a plan. The displayed cost of waived plans assumes coverage for Employee Only.

Benefit Plan	*Selection	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)	Credits (Semi-monthly)
Aetna HMO Plan	<input type="radio"/> Select <input checked="" type="radio"/> Waive	\$57.54	\$619.51	
Aetna HMO Trio Plan	<input checked="" type="radio"/> Select <input type="radio"/> Waive	\$8.50	\$439.52	
Aetna PPO High Deductible (HD)	<input type="radio"/> Select <input checked="" type="radio"/> Waive	\$86.82	\$759.65	
Kaiser HMO	<input type="radio"/> Select <input checked="" type="radio"/> Waive	\$36.84	\$490.42	
Santa Clara University Medical Waiver Plan	<input type="radio"/> Select <input checked="" type="radio"/> Waive	Included	\$0.00	\$75.00

Confirm and Continue

6. Modify your coverage, if needed. When one plan is selected all other plans will automatically waive.
7. Click **Confirm and Continue**.

Select/Modify Dependents



Note: Any dependents that you are covering in 2023, will be listed as dependent for 2024 as long as no changes are made and the dependent continues to meet eligibility rules.

After clicking **Confirm and Continue** in the previous step:

1. If a dependent already exists, Workday selects them automatically.
2. If enrolling in an Aetna HMO Plan, under “Provider ID” put the Provider ID found after following the steps on the [Aetna Medical Provider Look Up Guide](#)



Note: If you would like to be auto assigned to a primary care provider based on your zip code, type **NONE**.

Dependents

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

Coverage * Employee + Spouse

Plan cost per paycheck \$85.13

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Becky Bronco	Spouse	11/24/1993

You have dependents covered under your health care plan without a Social Security Number. Enter their Social Security Number (SSN) or Reason SSN is Not Available if you don't have access to their number at this time.

Dependent	*Social Security Number
Becky Bronco	<input type="radio"/> Social Security Number (SSN) <input type="text"/> <input type="radio"/> Reason SSN is Not Available <input type="text"/>

Save

Benefit: Navigate Open Enrollment for Desktop

Employee

Your Provider ID

Designate the Provider ID (Primary Care Physician) for yourself based on your health care elections. Select the Provider website link to find your doctor's Provider ID.

Provider ID

Provider website link [Aetna](#)

3. Select the **checkbox** next to the name of your dependents.

4. Click **Save**

Enrolling or modifying Flexible Spending Accounts or Health Savings Accounts

Health Savings Account
Waived
Enroll

Healthcare FSA
Waived
Enroll

Dependent Care FSA
Waived
Enroll

Limited Purpose FSA
Waived
Enroll

1. Click **Manage** to update your medical elections. Click **Enroll** to enroll in a new benefit plan.

Healthcare FSA
Waived
Enroll

2. **Select** or **Waive** on each Medical election. Your current elections are set as default. Click **Confirm and Continue**.

Healthcare FSA

Projected Total Cost Per Paycheck \$38.83
Projected Total Credits \$0.00

Plans Available

Select a plan or Waive to opt out of Healthcare FSA.

1 item

*Selection	Benefit Plan	You Contribute (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	WEX Health Inc.	

3. Fill in the **Per Paycheck** Amount or **Annual** Amount. Be mindful of the minimum and maximum annual amounts.

Contribute

Per Paycheck

Annual

Remaining Paychecks 24

Minimum Annual Amount: \$300.00

Maximum Annual Amount: \$3,050.00

Summary

Total Annual Contribution \$300.00

4. Click **Save**
5. If you wish to modify or enroll any other Flexible Spending or Health Savings Account, repeat steps 1-4 in this section.

Benefit: Navigate Open Enrollment for Desktop

Employee

Enrolling or modifying Life Insurance

Insurance and Retirement

- Basic Life and AD&D**
Anthem Blue Cross Employee (Employee)
Coverage \$70,000
[View](#)
- Voluntary Life Employee**
Waived
[Enroll](#)
- Voluntary Life Spouse**
Waived
[Enroll](#)
- Voluntary Life Child**
Waived
[Enroll](#)

1. Click **Manage** to update your spending accounts elections. Click **Enroll** to enroll in a new benefit plan.

Voluntary Life Employee
Waived
[Enroll](#)

2. **Select** or **Waive** Life Insurance Plans. Your current elections are set as default. Click **Confirm and Continue**.

Voluntary Life Employee

Projected Total Cost Per Paycheck \$38.83
Projected Total Credits \$0.00

Plans Available

Select a plan or Waive to opt out of Voluntary Life Employee.

1 item

*Selection	Benefit Plan	You Pay (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Sun Life Financial (Employee)	\$6.45

[Confirm and Continue](#)

[Cancel](#)

3. Select **Coverage** from the drop down menu.
4. At this point you can also add beneficiaries. Click the **Add Icon**
5. Click the **Prompt Icon** and select **Beneficiary Person(s)** or **Trust** to see the list of Beneficiaries available.
6. Click the Name of the person you want to assign
7. Enter the percentage amount.
8. To add more than one repeat steps 4-6.
9. When done, click **Submit**.

Benefit: Navigate Open Enrollment for Desktop

Employee

Coverage

Coverage 3*

Calculated Coverage \$100,000.00

Plan cost per paycheck \$7.50

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 1 item

Beneficiary	Percentage
+ <input type="text" value="Becky Bronco"/>	<input type="text" value="100"/>

Secondary Beneficiaries 0 items

Beneficiary	Percentage
No Data	

Complete Your Enrollment

Once you have made all your benefit elections, please make sure to take the following step to finalize the benefit event.

1. Review all elections made by skimming the Benefit Event Page

Open Enrollment

Projected Total Cost Per Paycheck \$114.26
Projected Total Credits \$0.00

Health Care and Accounts

Medical
Aetna HMO Trio Plan
UPDATED

Cost per paycheck \$89.91
Coverage Employee + Child
Dependents 1

[Manage](#)

Dental
Guardian DPPO
UPDATED

Cost per paycheck \$9.85
Coverage Employee + Spouse
Dependents 1

[Manage](#)

Vision
Waived

Health Savings Account
Waived

[Enroll](#)

2. Click Review and Sign



Note: Any benefit that you can view, but cannot edit is because you do not meet the eligibility or they are employer paid benefits. **Retirement elections are not made via Workday.**

3. Review the Summary Page to ensure all your desired elections were made.

Benefit: Navigate Open Enrollment for Desktop

Employee

View Summary

Projected Total Cost Per Paycheck \$114.26 Projected Total Credits \$0.00

This is a summary of your benefits. Review it carefully to confirm your elections for the 2024 plan year. If you submit your enrollment and later realize you need to make updates, you will only be able to during the Open Enrollment period November 7 - November 27, 2023. To make any contribution elections changes to your Fidelity and/or TIAA account(s) please go to SCU's Retirement Planning [Portal](#). A Portal User Guide is available [here](#).

Selected Benefits 8 Items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Medical	01/01/2024	01/01/2024	Employee + Child	Becky Bronco		\$89.91
Aetna HMO Trio Plan	01/01/2024	01/01/2024	Employee + Spouse	Becky Bronco		\$9.85
Dental	01/01/2024	12/16/2023	\$300.00 Annual			\$12.50
Guardian DPPO	01/01/2024	01/01/2024				Included
WEX Health Inc. Healthcare FSA	01/01/2024	01/01/2024				Included
Basic Life and AD&D	01/01/2024	01/01/2024	\$70,000			Included
Sun Life Financial (Employee) Voluntary Life Employee	01/01/2024	01/01/2024	\$100,000			\$2.00
Sun Life Financial (Employee) Long Term Disability Coverage (LTD)	01/01/2024	01/01/2024	66.67% of Salary			Included
Reliance Standard (Employee) Employee Assistance Program (EAP)	01/01/2024	01/01/2024				Included
Concern						

Submit **Cancel**

4. Scroll down to review any Messages and Total Benefits Cost

Plan 1 Item

Voluntary Life Employee - Sun Life Financial (Employee) Information: You must submit evidence of insurability for the \$100,000 election. Your election will be reduced to \$10,000 until evidence of insurability is received and approved.

Total Benefits Cost 1 Item

Company Contribution	Employee Cost	Credits	Net Cost
\$790.00	\$186.50	\$0.00	\$186.50

5. Check off the I Accept box to provide an electronic signature confirming your changes and click Submit.

Electronic Signature

LEGAL NOTICE: Please Read

Your Name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I AGREE" checkbox, you are certifying that:

- You understand that your benefits elections are legal and binding transactions.
- You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

Kaiser Enrolled Employees
If you enrolled into SCU's Kaiser plan, this electronic signature acknowledges that you accept the rules and regulations of Kaiser California.

I Accept

Submit **Cancel**

6. Click Done to complete the task. Optionally, click the View 2024 Benefits Statement button to view the benefits statement.

Submitted

You've submitted your elections.

Important Dates:

Benefits go into effect 01/01/2024
Final day to update benefits 11/10/2023

View 2024 Benefits Statement

Done

7. Click Print to generate a PDF version for your records.

Elected Coverages 8 Items

Benefit Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Calculated Coverage	Dependents	Beneficiaries
Medical - Aetna HMO Trio Plan	01/01/2024	01/01/2024	Employee + Child		Becky Bronco	
Dental - Guardian DPPO	01/01/2024	01/01/2024	Employee + Spouse		Becky Bronco	
Healthcare FSA - WEX Health Inc.	01/01/2024	12/16/2023	\$300.00 Annual			
Basic Life and AD&D - Sun Life Financial (Employee)	01/01/2024	01/01/2024	\$70,000	\$70,000.00		
Voluntary Life Employee - Sun	01/01/2024	01/01/2024	\$100,000	\$100,000.00		

Print

Benefit: Navigate Open Enrollment for Desktop

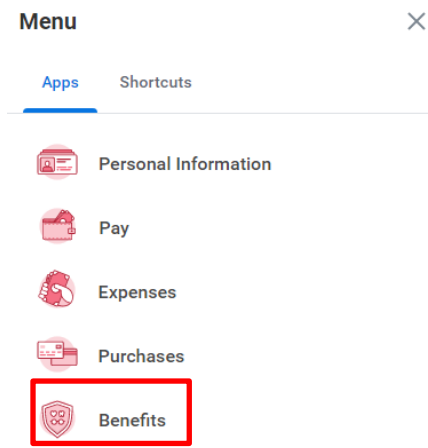
Employee

REVIEWING/MODIFYING ELECTIONS ONCE SUBMITTED

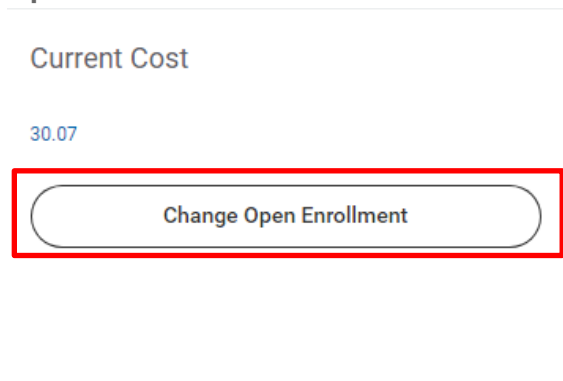


Note: This can only be done prior to the closing of Open Enrollment on November 27.

1. Go to the Benefits App in the Menu



2. Scroll down to the Current Cost section and click **Change Open Enrollment**



3. Click **Let's Get Started** and follow the Select Benefits section on Page 1.

Change Open Enrollment

Open Enrollment 10/11/2023-11/10/2023

Choose new plans or re-enroll in the plans you currently have.

