Benefit: Navigate Open Enrollment for Desktop

Employee

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** icon 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: Benefits**

7. Click **Submit**.

National IDs

Add

Government IDs

Add

enter your comment

Attachments

DOC   Fillable Affidavit of Marriage.docx
✓ Successfully Uploaded!

Description

Category   *   ✕ Benefits

Submit   Save for Later   Cancel

<u>Note</u>: 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 dependnet.

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.

UPDATED
Medical
Aetna AWH HMO Plan

Cost per paycheck $10.32

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)
Aetna AWH HMO Plan	○ Select ● Waive	$10.32	$533.76
Aetna EPO Plan	● Select ○ Waive	$71.42	$768.87
Aetna HMO Plan	○ Select ● Waive	$69.88	$752.35
Aetna OAMC PPO High Deductible (HD)	○ Select ● Waive	$105.44	$922.53
Kaiser HMO	○ Select ● Waive	$41.12	$547.38
Santa Clara University Medical Waiver Plan	○ Select ● Waive	Included	$0.00

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6. Modify your coverage, if needed. When one plan is selected all other plans will automatically waive.

7. Click **Confirm and Continue.**

| Confirm and Continue | Cancel |

Select/Modify Dependents

Note: Any dependents that you are covering in 2025, will be listed as dependent for 2026 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

1 item

Select	Dependent	Relationship	Date of Birth
☑	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 Numbers 1 item

Dependent	*Social Security Number	
Becky Bronco	○ Social Security Number (SSN)	__-__-____
	○ Reason SSN is Not Available	

| Save | Cancel |

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

| Save | Cancel |

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

4. Click **Save**

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Enrolling or modifying Flexible Spending Accounts or Health Savings Accounts

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

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

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

workday. | **EDUCATION**

Contribute

Per Paycheck | 12.50

Annual | 300.00

Remaining Paychecks   24

Minimum Annual Amount: $300.00

Maximum Annual Amount: $3,400.00

Summary

Total Annual Contribution | $300.00

(Save)   (Cancel)

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.

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   Projected Total Credits
$38.83 $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)
○ Select ○ 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.**

Coverage

Coverage **3** * $100,000

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

4 | Beneficiary   **5/6** | Percentage   **7**

× Becky Bronco ••• | 100

Secondary Beneficiaries   0 items

Beneficiary | Percentage

No Data

Save   Cancel

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

Health Care and Accounts

Medical
Aetna AWH HMO Plan
UPDATED

Cost per paycheck $9.43
Coverage   Employee Only

Manage

Dental
Guardian DPPO
REVIEWED

Cost per paycheck   Included
Coverage   Employee Only

Manage

Vision
Waived

Enroll

Health Savings Account
Waived

Enroll

Healthcare FSA   Dependent Care FSA

Review and Sign   Save for Later

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.

View Summary

Projected Total Cost Per Paycheck   Projected Total Credits
$114.26 $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.

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

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

6. Click **Done** to complete the task. Optionally, click the **View 2026 Benefits Statement** button to view the benefits statement.

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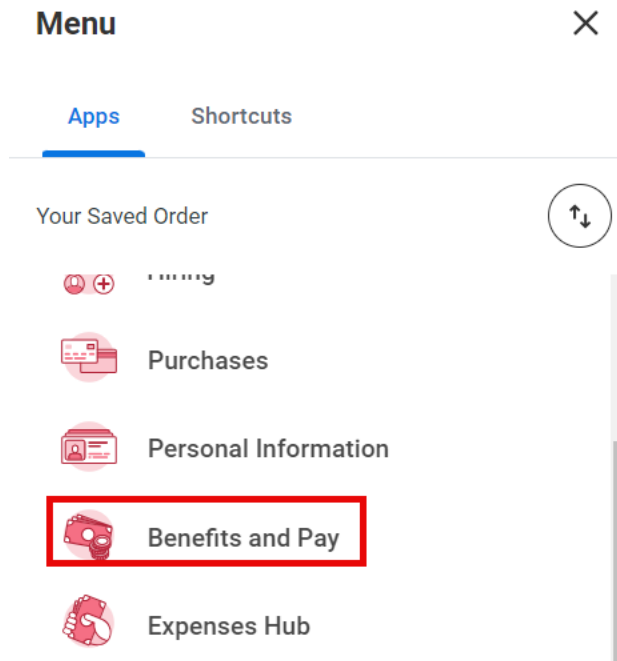

REVIEWING/MODIFYING ELECTIONS ONCE SUBMITTED

Note: This can only be done prior to the closing of Open Enrollment on November 21.

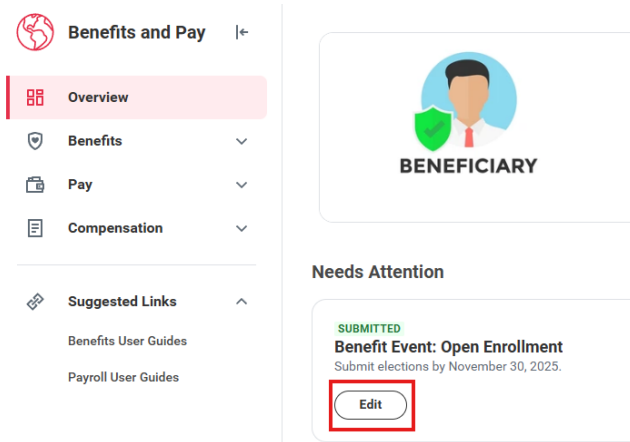**1.** Go to the Benefits and Pay App in the Menu

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

2. In the Overview Page click **Edit** in the **Benefit Event: Open Enrollment**