


## OPEN ENROLLMENT STEPS

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your Inbox. Based on the university's configuration, approvals may be necessary to complete this task. Review this job aid for steps on completing your open enrollment. To modify your beneficiaries or dependents, please refer to the *Add or Change Beneficiaries and Dependents* job aid.

### 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. Your current elections default.
4. Click the **Plan Description** or **Provider Website** links to review.
5. Modify your coverage, if needed.

Health Care Elections								
Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Plan Description	Provider Website
Medical - Aetna HDHP (High Deductible Health Plan)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Aetna Medical HDHP Summary	<a href="#">Aetna URL Address</a>
Medical - Blue Cross of Calif. HMO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Blue Cross of Calif. Medical HMO Summary	<a href="#">Blue Cross of Calif.</a>
Medical - Blue Cross of Calif. POS	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Blue Cross of Calif. Medical POS Summary	<a href="#">Blue Cross of Calif.</a>
Medical - Blue Cross of Calif. PPO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>	EE - Employee Only	\$90.00	\$200.00	\$0.50	Blue Cross of Calif. Medical PPO Summary	<a href="#">Blue Cross of Calif.</a>
Dental - Blue Cross of Calif. DMO	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>	EE - Employee Only	\$13.00	\$18.00	0.00	Blue Cross of Calif. Dental HMO Summary	<a href="#">Blue Cross of Calif.</a>
Dental - Blue Cross of Calif. PPO	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					0.00	Blue Cross of Calif. Dental PPO Summary	<a href="#">Blue Cross of Calif.</a>
Vision - Vision Service Plan VSP	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text"/>	EE - Employee Only	\$13.00	\$25.00	0.00	VSP Summary	<a href="#">Vision Service Plan</a>
				116.00	243.00	\$50.50		

## 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**

2 items

**Cross Plan Dependency**

Medical - Aetna HDHP (High Deductible Health Plan) -- is (are) prerequisite(s) for -- Health Savings Account - OptumHealth Bank.

Primary plan(s) include Healthcare FSA - SHPS and Secondary plan(s) include Health Savings Account - OptumHealth Bank. You cannot elect a primary plan and a secondary plan. They are mutually exclusive.

**Health Savings Election** 1 item

Benefit Plan	*Elect / Waive	Contribution Range (Annual)	Supporting Information
Health Savings Account - OptumHealth Bank	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 10  How much do you want to contribute for the total year? 0.00  How much do you want to contribute per paycheck (Semi-monthly)? 0.00  Your contribution (Monthly) \$0.00	Provider Website <a href="#">OptumHealth Bank</a>  Plan Description <a href="#">OptumHealth Bank HSA</a>

1. Select **Elect** or **Waive** for the Health Savings election.
2. Enter the amount you want to contribute.
3. Click **Continue**.

## ADD GROUP LIFE INSURANCE

Depending on your organization’s policy and local, state, and federal laws, you may be required to complete a physical examination in order to qualify for life insurance during open enrollment. Ask your HR or benefits representative for additional information.

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.

> **Insurance Plan Dependencies and Coverage Limitations**

Insurance Elections 6 items ☰ ↗

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Calculated Coverage
Basic Group Life - Liberty Mutual (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$75,000		\$75,000.00
Voluntary Supplemental Life - Liberty Mutual (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text" value="\$300,000"/>		\$300,000.00
Spouse Life - Liberty Mutual (Spouse)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive			
Short Term Disability - Liberty Mutual (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	75% of Salary		\$107,166.75
Long Term Disability - Liberty Mutual Enhanced (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	60% of Salary		\$85,733.40
Voluntary AD&D - Liberty Mutual (Employee)	<input type="radio"/> Elect			

3. 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**.

### Change Benefits for Open Enrollment

Open Enrollment for - Step 6 of 7 (Actions)

Total Cost: \$345.00 Monthly Cost

Total Credits: \$55.50 Monthly Credit

Total Employee Net Cost/Credit: \$289.50 Monthly Cost

Event Date: 02/22/2019

Initiated On: 02/12/2019

Submit Elections By: 02/22/2019

1 day(s) ago - Effective 02/22/2019

Additional Benefits Elections: 2 items

Benefit Plan	*Elect / Waive	Coverage	Amount (Monthly)	Percent	Employee Cost (Monthly)	Employer Contribution (Monthly)	Benefit Credit (Monthly)	Plan Description	Provider Website
Employee Assistance Program - Liberty Mutual MyLibertyAssist®	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		0.00	0				Liberty Mutual MyLibertyAssist®	Liberty Mutual
Legal Assistance - ARAG UltimateAdvisor®	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		0.00	0				ARAG UltimateAdvisor®	ARAG
					0	0	0		

Continue

Save for Later

Go Back

Cancel

## ATTACH SUPPORTING DOCUMENTS

To add attachments if required:

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.

The screenshot shows a web form interface. At the top, there is a section titled "Attachments" with a large light blue area containing the text "Drop files here" and a "Select files" button. Below this is the "Electronic Signature" section. It includes a "LEGAL NOTICE: Please Read" and a paragraph stating that the user's name and password are considered their electronic signature. There are three numbered points of notice. Below the notice is an "I Agree" checkbox, which is currently unchecked. At the bottom of the signature section is a text input field with a placeholder "enter your comment" and a small profile picture icon. At the very bottom of the form are three buttons: "Submit" (highlighted in orange), "Go Back", and "Cancel".

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.