Open Enrollment Job Aid

Important Instructions

Once a year, Open Enrollment allows you to update your benefit elections. Review this job aid for steps to complete your Open Enrollment.

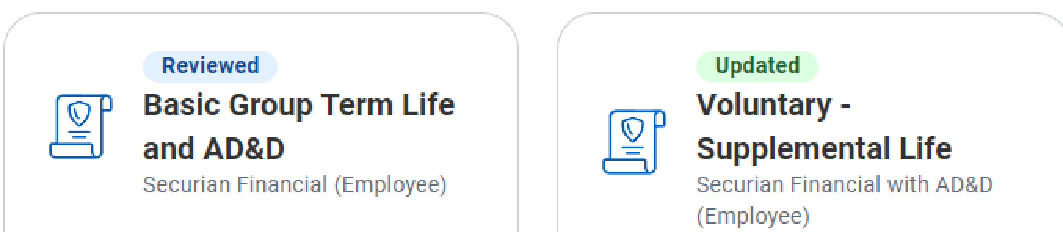
NOTE: Be sure to scroll down to review all the information before clicking on **Review and Sign**.

The benefit selections are divided into sections:

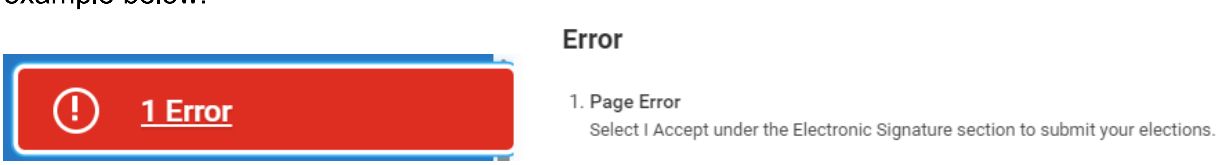
- **Health Care and Accounts** – Medical, Dental, Voluntary Accident and Hospital, Health Savings Account (HSA) and Flexible Savings Accounts (FSA).
- **Insurance and Retirement** – Basic Life, Supplemental Life, Spouse Life, Child Life, Voluntary Critical Illness, Short-Term Disability, Long-Term Disability, and 457 (Deferred Compensation).
- **Additional Benefits** – Employee Assistance Program (EAP) and Voluntary Legal and Identity Protection plans.

Your current benefits will not auto-fill in Workday. If you need to view your current benefits, log into EBS (OPUS), select PIN Employee Self Service and Benefits.

Note that all benefits are waived by default, and you need to select **Enroll** for each benefit desired. If you review a benefit offering and do not make any changes, the square will now say *Reviewed* in blue. If you make a change to a benefit offering, the square will now say *Updated* in green. See the examples below:



If you see an error message at top right, click on it to see how to fix the error, as shown in the example below:



NOTE: Each of the steps includes your biweekly cost. View a running total of your Total Cost Per Paycheck at the top (disregard Projected Total Credits).

How to Make Changes or Come Back Later

If you need to make changes later or cannot finish in one session, you can stop and come back (just be sure to finish before the enrollment period ends). Click **Personal** on the left navigation panel, select **Benefits and Pay**, and choose **Enroll** or **Edit** under **Benefit Event: Open Enrollment**. You will return to the Let's Get Started enrollment screen and answer the tobacco use question again. Your other updates will be saved.

Log in to Workday

- Log in to My Apps at myapplications.microsoft.com and click the Workday icon.

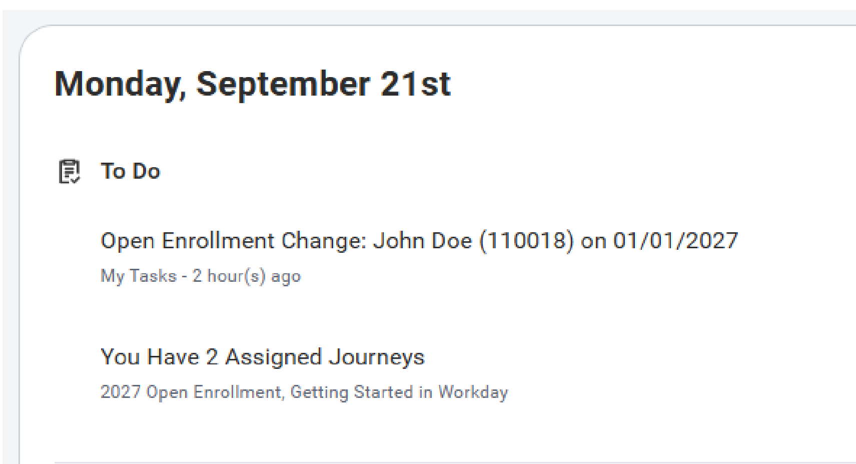
Start Open Enrollment

During the enrollment period, you can access Open Enrollment in 2 areas of Workday:

1. On the homepage, view the **To Do** box which lists Open Enrollment tasks. We recommend selecting the Journey:

- The **Open Enrollment Journey** guide provides helpful benefit articles, videos, and information outlining the new year's benefit changes. The final step of the Journey allows you to complete your enrollment.

- If you wish to skip straight to updating your enrollments, choose the **Open Enrollment Change** task with your name.



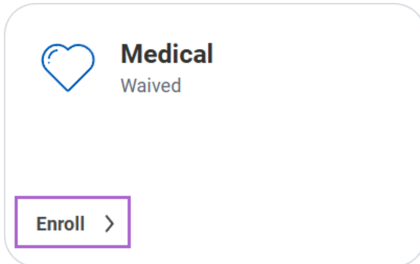
2. Alternatively, go to the **My Tasks** inbox in the upper right-hand corner to locate Open Enrollment and select **Let's Get Started**.

Tobacco

Complete the tobacco use question and select **Continue**. Select **Continue** again to proceed with benefits selection.

Select Your Medical Benefits

1. In the Health Care and Accounts section, select **Enroll** to choose your medical elections, as shown below:



2. Choose **Select** or **Waive** for each medical election.

NOTE: If you are enrolled in other qualified medical coverage, you may "opt out" of Pinellas County's medical plan coverage and receive a $98 monthly stipend. If you Opt Out, you will receive a required **Opt Out Affidavit** in your My Tasks inbox to complete after you submit your enrollment.

3. Select **Confirm and Continue**.

Enroll Dependents

If you select or modify a benefit plan during Open Enrollment, you can also enroll dependents. After selecting **Confirm and Continue** in the previous step:

1. If a dependent already exists, Workday lists them automatically, as shown below:

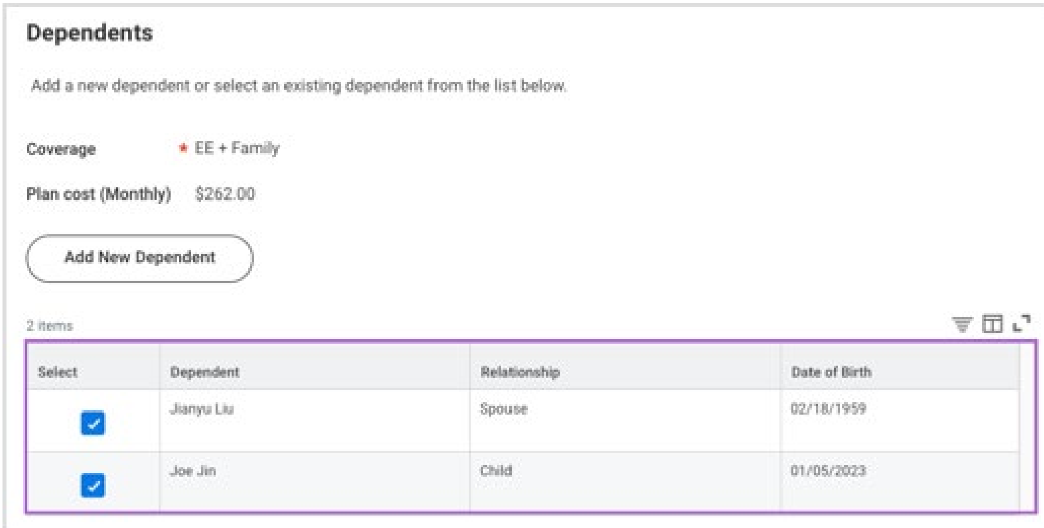
2. To add a new dependent, select the **Add New Dependent** button.

3. Select the **Use as Beneficiary** checkbox if you want to use this dependent as a beneficiary and select **OK**.

4. Complete all required information and select **Save**.

NOTE: If you enroll a Domestic Partner, you will receive a required **Domestic Partner Affidavit** in your My Tasks inbox to complete after you submit your enrollment.

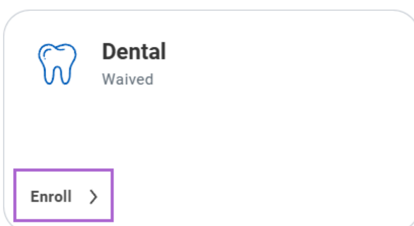
5. Once you have added any necessary dependents, check the box(es) next to the dependents you wish to cover on the medical plan, and click **Save**.



NOTE: [Dependent verification documentation]() is required for all newly added dependents.

Select Your Dental Benefits

1. In the Health Care and Accounts section, select **Enroll** in the Dental tile, as shown below:



2. Choose **Select** or **Waive** for each dental election.

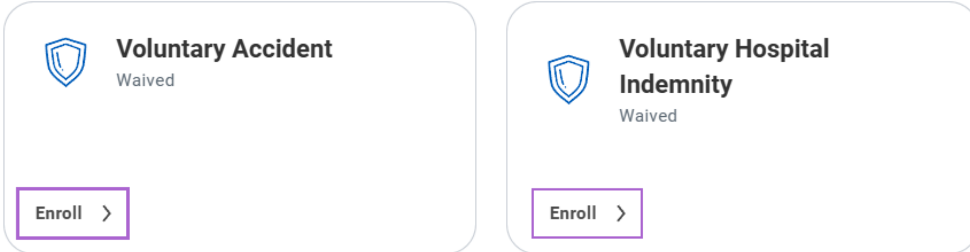
3. Select **Confirm and Continue**.

4. Choose the dependents you wish to cover on the dental plan by clicking the box next to their names and click **Save**.

Select Voluntary Accident and Hospital Indemnity Plans

If you wish, you can enroll in the Accident and/or Hospital Indemnity plans.

1. In the Health Care and Accounts section, select **Enroll** for the benefit plan as shown:



2. Choose **Select** for the plan lever desired or choose **Waive**, then click **Confirm and Continue**.

3. Choose dependents if applicable, and click **Save**.

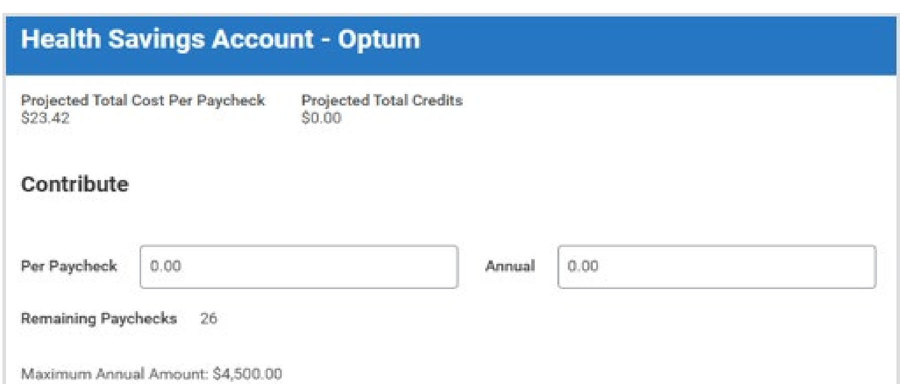
Select Health Savings Account (HSA)

If you enrolled in the High Deductible Health Plan, you must enroll in the Health Savings Account (HSA) to receive the employer funding.

1. In the Health Care and Accounts section, select **Enroll** to enroll in the HSA, as shown below:

2. Choose **Select** for the HSA election and **Confirm and Continue**.

3. Enter the amount you want to contribute, although this is not required. You can either enter a per paycheck amount or an annual amount. Please note: While the maximum Annual Amount is displayed on the screen as seen in the image below, this includes the County's contribution. To determine the maximum you can contribute, subtract the County's contribution ($500 for single or $1,200 for family) from the maximum displayed.



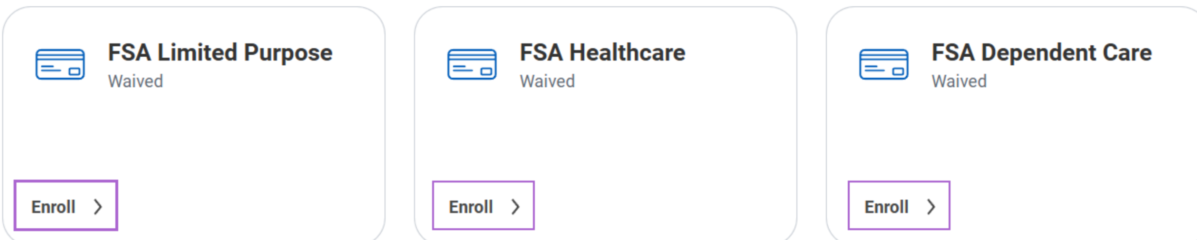
4. Select **Save**.

Select Flexible Spending Account (FSA)

If you enrolled in the Preferred Provider Organization medical plan, Opt Out plan, or you waived medical coverage, you may enroll in a Flexible Spending Account (FSA). If you enrolled in the High Deductible Health Plan and you want to enroll in FSA as well, you can only enroll in a Limited Purpose FSA. Keep in mind that you can only use Limited Purpose FSA to pay for vision and dental expenses until you meet your medical deductible, so calculate your estimated expenses carefully.

You may want to sign up for a Dependent Care FSA if you pay for work-related child care or adult care and your expenses add up to at least $260 in a calendar year.

1. In the Health Care and Accounts section, for each applicable FSA account, click on **Enroll**, then **Select**. Enter either the per paycheck amount or the annual amount for each applicable account, then click **Save**.



Basic Group Term Life and AD&D

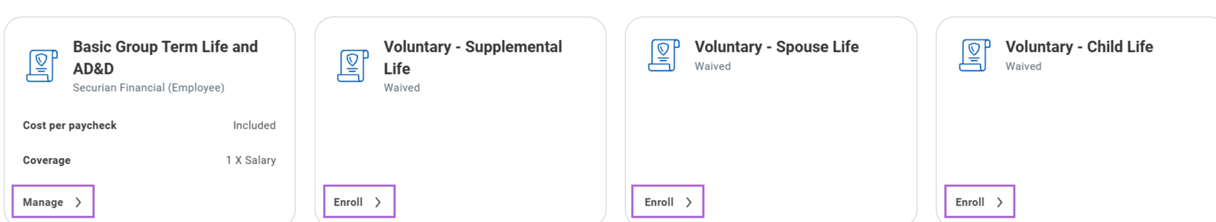
Basic Group Term Life and Accidental Death & Dismemberment is automatically included at no cost. No selection is necessary.

Add Supplemental Life Insurance

You may purchase supplemental life, spouse life or child life. If you request more than the guaranteed issue benefit amount, you will receive a **To Do** task after you complete enrollment with Evidence of Insurability instructions.

Supplemental coverage is paid to your beneficiaries and may be purchased in addition to the basic coverage provided by Pinellas County. With Spouse Life and Child Life, you receive the benefit if the person dies. Spouse Life rates vary according to their age.

1. In the Insurance and Retirement section, select **Enroll** or **Manage** to add or update supplemental life insurance, as shown below:



2. Choose **Select** or **Waive** for each benefit plan and modify your coverage levels, as needed.

3. Select **Confirm and Continue**.

Designate Life Insurance Beneficiaries

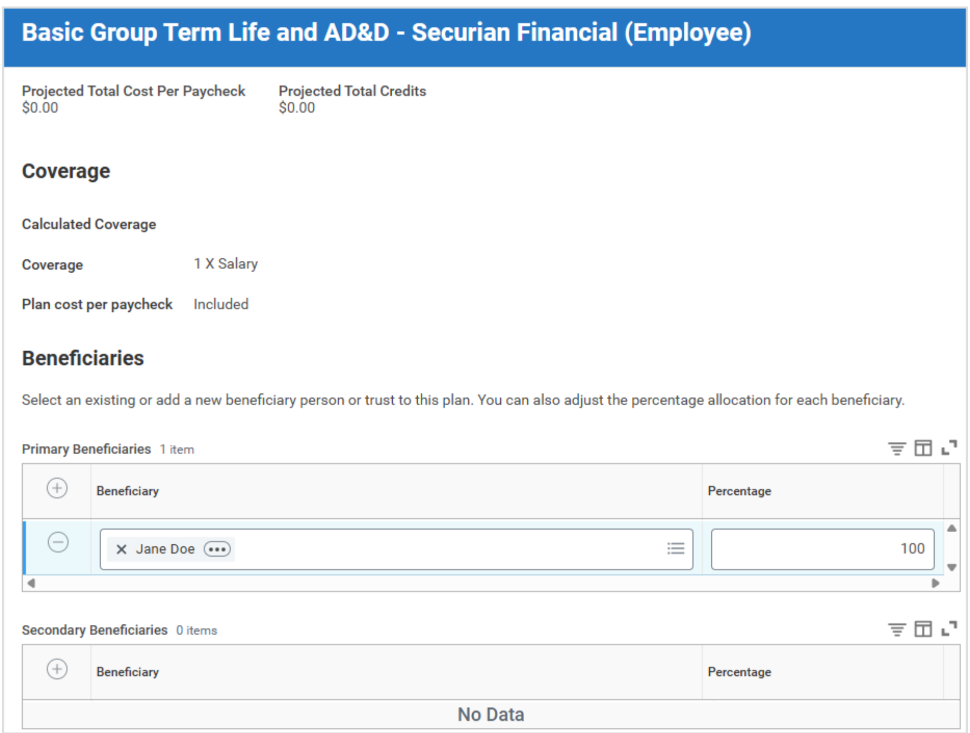
You may designate one or more beneficiaries for each plan.

From the Beneficiaries section:

1. Select the **Add Row** icon to add a primary or secondary beneficiary. Select the **Remove Row** icon to remove a beneficiary or if you accidentally added a blank row.

2. In the Beneficiary field, select the **prompt** icon to choose from existing beneficiaries. Or select **Create** > **Add New Beneficiary or Trust** to add a new beneficiary. To remove a beneficiary, locate the beneficiary, and select the **Remove Row** icon next to the name.

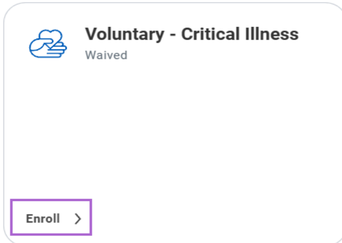
3. In the Percentage column, enter the percentage of benefits for each beneficiary, as shown in the image below. Make sure the percentage allocation for all beneficiaries totals 100%.



4. Select **Save**.

Select Voluntary Critical Illness

1. In the Insurance and Retirement section, select **Enroll** in the Voluntary – Critical Illness tile as shown below:



2. Choose **Select** or **Waive** for each benefit plan, as needed.

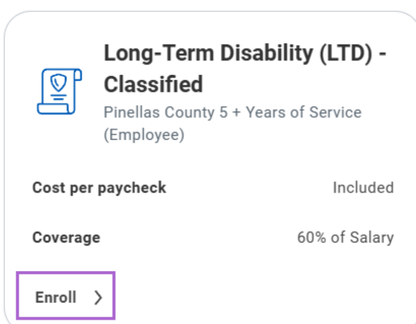
3. Select **Confirm and Continue**.

4. If you have selected a plan that covers dependents, place a check box next to the name of the dependents you wish to cover, then click **Save**.

Short-Term and Long-Term Disability

Short-Term Disability is automatically included for all permanent employees working at least 20 hours per week, at no cost. If you are an exempt employee or a classified employee with more than 5 years of continuous service, Long-Term Disability is automatically included at no cost. If you are a classified employee between 1 – 5 years of service, you may enroll in Long-Term Disability by submitting Evidence of Insurability.

1. In the Insurance and Retirement section, choose **Enroll** in the Long-Term Disability (LTD) – Classified box as shown below:



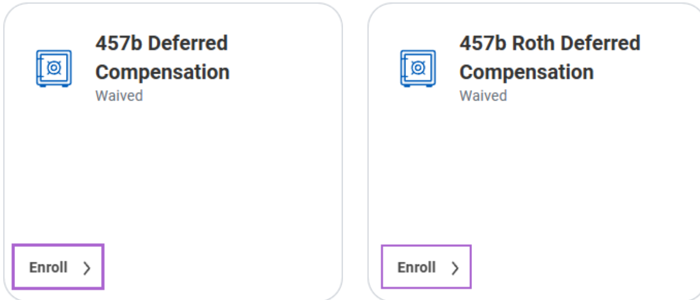
2. Choose **Select** or **Waive**.

3. Note the instructions regarding the **Evidence of Insurability** form. (This can be submitted now or after your Open Enrollment selections are finalized.)

4. Select **Save**.

Enroll or Manage a 457b Deferred Compensation Account

1. In the Insurance and Retirement section, choose **Manage** or **Enroll** for either the 457 (pre-tax) or 457 Roth (post-tax), or both. You may enroll with multiple providers, if desired.



2. Choose **Select** or **Waive** for each provider, as needed.
3. Select **Confirm and Continue**.
4. Designate your contribution type: amount or percentage.
5. Enter your per paycheck contribution.
6. Click **Save.**
7. Repeat steps for each of your selected providers, as needed.

NOTE: Beneficiaries will be handled with the deferred compensation vendor directly.

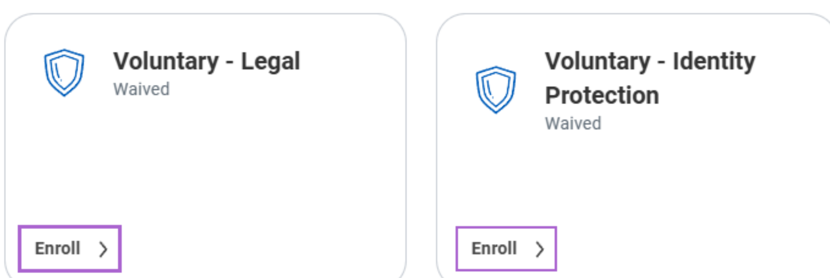
Employee Assistance Program (EAP)

The Employee Assistance Program (EAP) is automatically provided, and no selection is necessary.

Select Voluntary Legal and Identify Protection

You can elect optional benefits such as legal assistance or identity protection.

1. In the Additional Benefits section, choose **Manage** or **Enroll** for each additional benefit you would like to update or enroll in.



2. Choose **Select** or **Waive** for each voluntary benefit plan, as needed.
3. Select **Confirm and Continue**. Select coverage level, if required.
4. Select **Save**.

Complete Your Enrollment

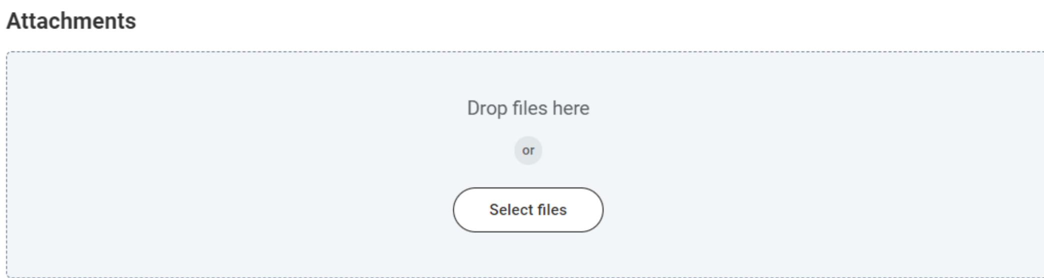
NOTE: If you are adding new dependents, you will be required to attach dependent verification documents before the end of the Open Enrollment period.

1. After you have made all your enrollment selections, click the **Review and Sign** button.

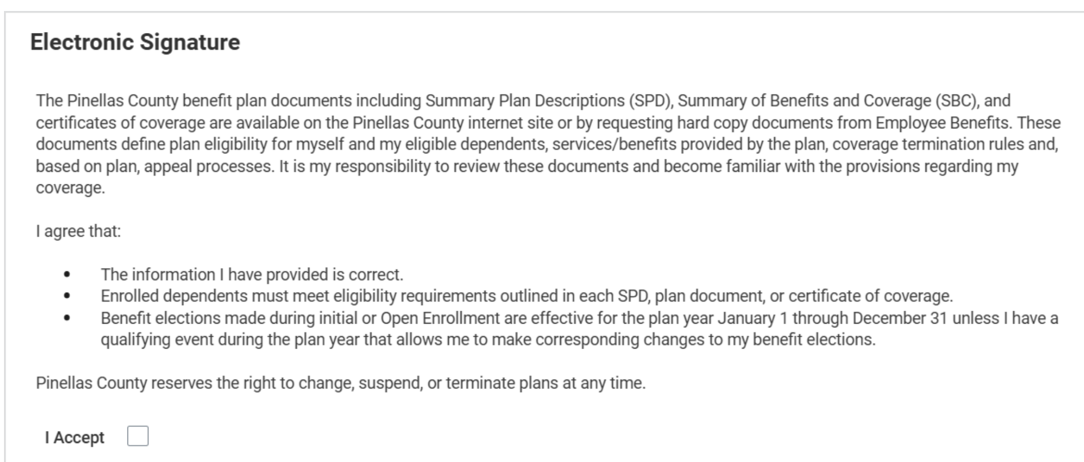
2. Carefully review all of your selections. If you would like to make changes, click **Cancel** and you will be returned to the selection screen. Once you have verified that all your selections are correct, click **Review and Sign**.

3. Note any important **Messages.**

4. Drag and drop any required dependent verification file in the Attachments area, or choose **Select files** to locate and select the file you want to attach. Enter comments about the attachment, if needed. To attach additional documents, select **Upload.**



5. Read the Electronic Signature section and click the **I Accept** checkbox:



6. Click **Submit**.

7. A confirmation page displays.

8. Select the **View Benefits Statement** button to view and print the benefits statement.

You have completed your enrollment! If needed, see *How to Make Changes or Come Back Later*.

Opt Out and Domestic Partner Affidavits

1. If you elected to Opt Out of medical, you will receive an **Opt Out Affidavit** in your My Tasks Inbox after you submit your Open Enrollment.

2. If you elected to enroll a Domestic Partner, you will receive a **Domestic Partner Affidavit** in your My Tasks inbox after you submit your Open Enrollment.

3. Read the affidavit and check the **I Agree** box.

4. Click **Submit**.

5. Your Open Enrollment will not be finalized until the Affidavit has been submitted.

Supplemental Life Insurance Evidence of Insurability

If you elected employee supplemental life insurance or spouse life insurance above the guaranteed issue amount, you will receive a task to submit evidence of insurability.

1. In your My Tasks inbox, see the **Review Documents** task regarding evidence of insurability.

2. Once you have completed the steps, click **Submit.**

3. Once the Benefits teams receives notice from the insurance carrier that your evidence of insurability has been approved, your benefit amount will be updated and premiums will be adjusted as necessary.

Questions/Assistance

For questions about benefit plan offerings or further assistance with enrollment, please reach out to Employee Benefits at (727) 464-3367, option 1.