Completing Your Open Enrollment - Mobile (Employee)

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 on a mobile device.

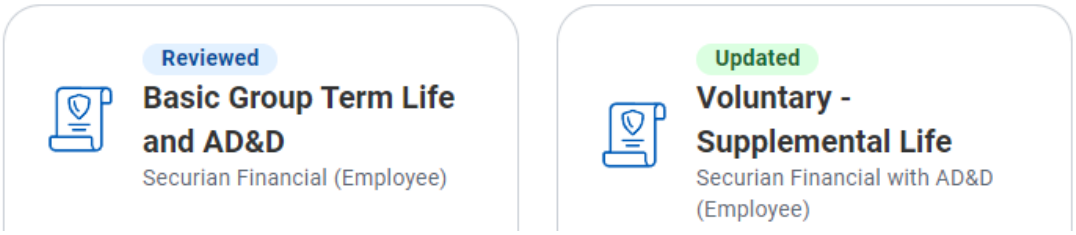
NOTE: Be sure to scroll down to review all the information before clicking on **Review and Sign**.

The benefit selections are divided into sections:

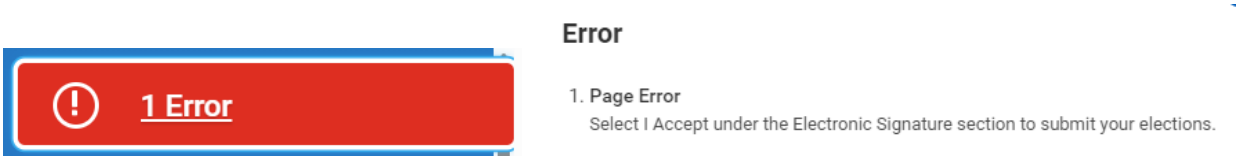
- **Health Care and Accounts** – Medical, Dental, Voluntary Accident and Hospital, Health Savings Account (HSA) and Flexible Savings Accounts (FSA).
- **Insurance and Retirement** – Basic Life, Supplemental Life, Spouse Life, Child Life, Voluntary Critical Illness, Short-Term Disability, Long-Term Disability, 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).

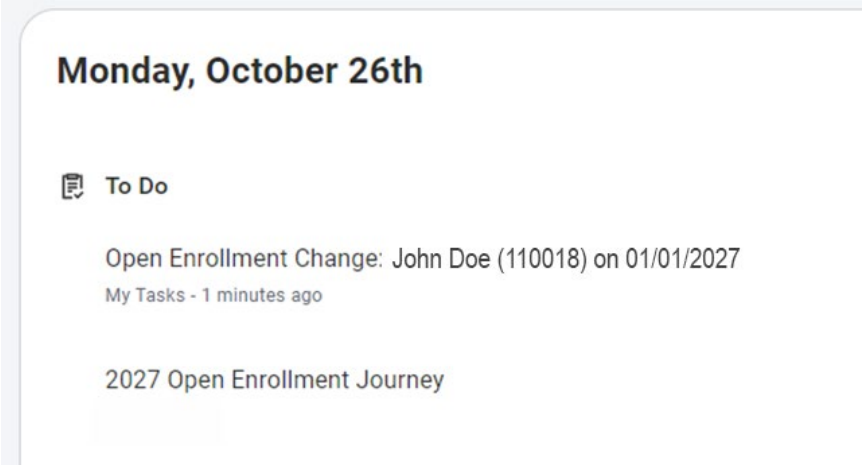
How to Make Changes or Come Back Later

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 **Menu** at the bottom, select **Benefits and Pay** from the Personal menu, 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.

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.



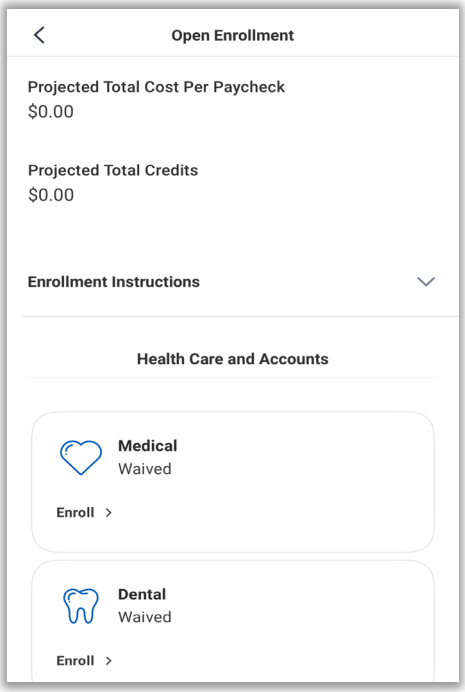
2. Alternatively, go to the **My Tasks** inbox on the bottom to locate Open Enrollment and select **Let's Get Started**.

Tobacco

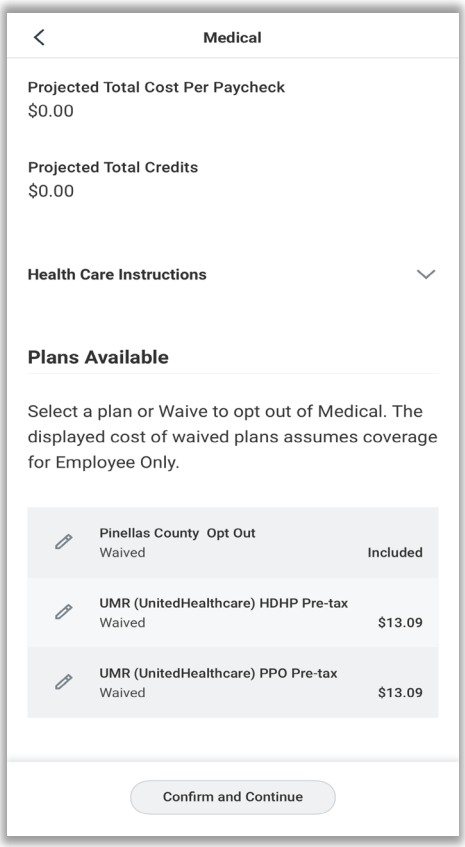
Complete the tobacco use question and select **Continue**. Select **Continue** again to proceed with benefits selection.

Select Your Benefit Plans

1. The Open Enrollment page displays, as shown below. Scroll down to review the benefit plan types.

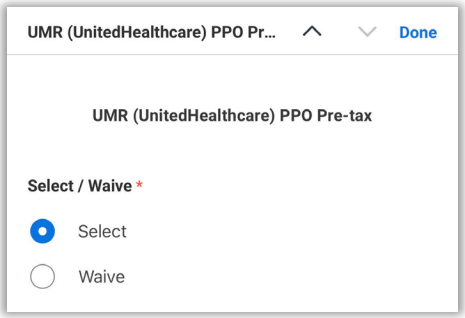


2. Select the plan you wish to enroll in to manage your elections. Expand the **Health Care Instructions** section and select **View More** if needed to view plan information and details.



NOTE: Depending on your phone's screen size, part of the plan name may be cut off and you'll need to click on it for full details.

3. Select the **Edit** icon, then **Select** or **Waive** your coverage plans, if needed, then select **Done** and **Confirm and Continue**. See an example below for medical coverage.



OPT OUT: If you want to opt out of medical coverage as noted below, be sure to select Pinellas County Opt Out (do not waive all 3 options):

a. UMR High Deductible Health Plan with Health Savings Account (HSA)

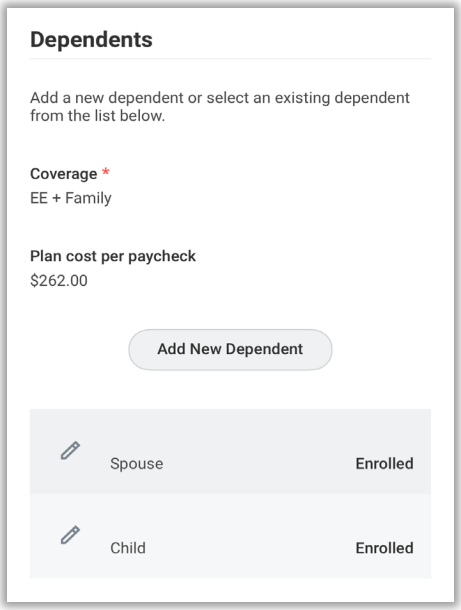
b. UMR PPO Plan

c. Pinellas County Opt Out: 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.

Enroll Dependents

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

1. For an existing dependent, scroll down to select their name, click the **Select** checkbox, and select **Done**.



2. For a new dependent, select **Add a New Dependent**, **Create Dependent**, **Next**, then enter their name, birth date, etc.
3. Select **Save**.

NOTE: Dependent verification documentation is required for all newly added dependents. 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.

Other Benefits (Dental, Voluntary Benefits, HSA, FSA, Life Insurance, Disability, 457b Deferred Compensation)

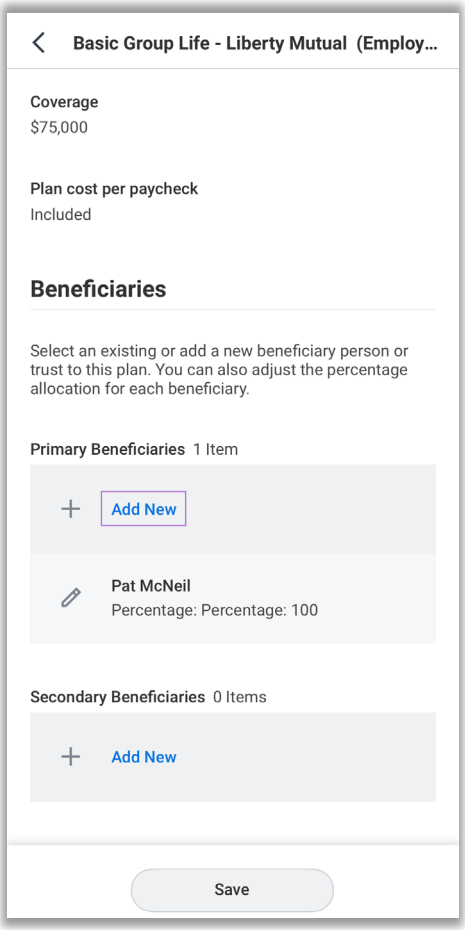
Continue to scroll down the page to enroll in the rest of your benefits, such as dental, life insurance and additional voluntary benefits.

For new enrollments, select **Enroll**, then the Edit icon and the plan name to review the plan description or provider website. For current enrollments, select **Manage**.

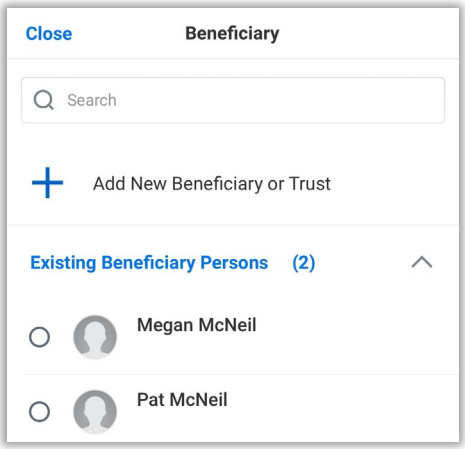
Enroll in Life Insurance and Designate Beneficiaries

From the Insurance and Retirement section, you can **Enroll** or **Manage** each benefit life insurance plan to open your enrollment options and manage coverage levels and beneficiaries. You may purchase Supplemental Life, Spouse Life, or Child Life. 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. 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.

1. After you select your life insurance coverage level, select **Confirm and Continue**.
2. Scroll down to the Beneficiaries section. For existing beneficiaries, select the **Edit** Icon, then use the **Percentage** field to view and modify your beneficiary percentages amounts. Your primary beneficiary and secondary beneficiaries must add up to 100%. Select **Done**.



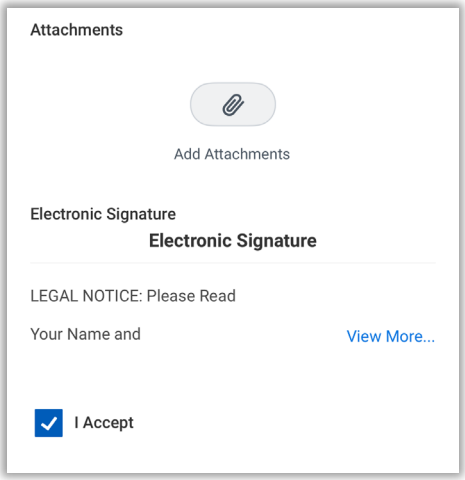
3. Select **Add New** to add a new beneficiary, as shown in the image above.
4. In the Beneficiary prompt, you can select **Add New Beneficiary or Trust**, or choose an existing beneficiary or trust, as shown in the image below. To remove an existing beneficiary, select the **Edit** icon next to their name and select **Delete**.



5. After entering the information, select **Done**.
6. Enter the percentage of benefits for each beneficiary.
7. Select **Done**, then **Save**.

Complete Your Enrollment

1. After you have updated all your benefit plans, Select **Review and Sign** at the bottom of the page.
2. Scroll down to review your benefit elections and upload any required documentation in the Attachments section. You can either take a photo or choose a photo from your phone's photo library.
3. Select the **I Accept** checkbox to confirm your electronic signature, as shown in the image below.



4. Select **Submit**. A confirmation page displays.
5. Select **Done** to return to My Tasks. Optionally, select the **View Benefits Statement** button to view a confirmation of your submitted elections. If you view your statement, choose the back button in the upper left hand corner of your screen to return to the previous page and select **Done**. If you click the **Back to Event** button, you will be returned to the enrollment screen and will need to go through the Review and Sign process again.

NOTE: To save or print your Benefits Statement, you must be on the desktop version of Workday.

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.

Questions/Assistance

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