

Open Enrollment Help Guide

Retiree benefits continue from year to year. **You only need to complete Open Enrollment in Workday if you are making changes.** If you waived a plan in the past, you may **not** enroll now.

Log in to Workday

Use the information mailed to you to log in to the system.

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 - Retiree**. You will return to the Let's Get Started enrollment screen. The updates you've made so far will be saved.

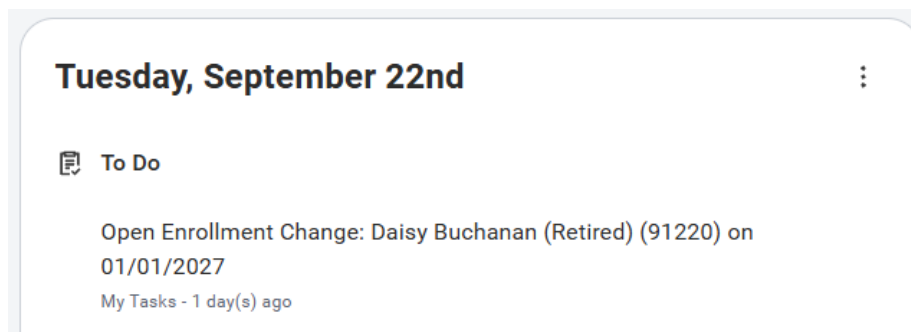
Errors

If you see an error message at top right, click on it to see how to fix the error.

Access Open Enrollment

From your Workday Home page:

1. View your **To Do** box. Select the **Open Enrollment Change** task with your name.



2. Select **Let's Get Started**.

Update Medical Insurance

If you are enrolled in medical, you may add a new dependent or waive (cancel coverage). If you waived medical in the past, you may not enroll now. If you cancel coverage, you will not be able to re-enroll later.

1. Select **Manage** if updates are needed. The options shown are based on your eligibility. If you and your dependents are eligible for different plans, you will see the Retiree Medical* box for your dependent(s), as shown in the sample below.

Health Care



Medical
UnitedHealthcare (UHC) PPO
Retiree Medicare Advantage...

Cost (Monthly) \$737.95

Coverage Retiree & Spouse -
1 Medicare (Retiree...

Manage > 



Retiree Medical*
UMR (UnitedHealthcare) PPO
Retiree Split Non-Medicare

Cost (Monthly) Included

Coverage Spouse Only - No
Medicare

Dependents 1

Manage > 

2. You will see options to **Select** or **Waive** one or more medical benefit plans.
3. Select **Confirm and Continue** and select the dependent(s) you want to cover, if any.
4. Select **Save**.

Add Dependents

During Open Enrollment, you can add new dependents. After selecting Confirm and Continue in the previous step:

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

Select	Dependent	Relationship	Date of Birth
☒	Tom Buchanan	Spouse	06/12/1957

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

Add New Dependent

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

3. Select the **Use as Beneficiary** checkbox if you want to use this dependent as a life insurance 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.

Enroll Dependents

From the Dependents section for medical and dental elections:

1. Next to the name of your dependents, select the **checkbox**, as shown below. If you and your dependents are in separate medical plans, be careful to enroll your dependent in the correct medical plan.

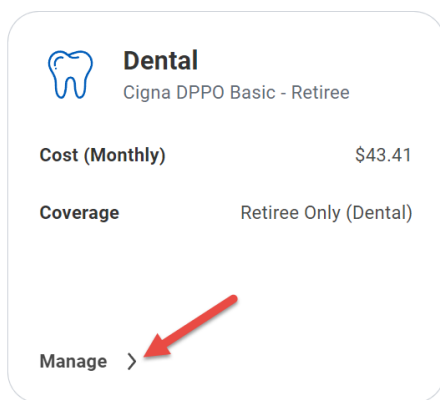
Select	Dependent	Relationship	Date of Birth
☒	Tom Buchanan	Spouse	06/12/1957

2. Select **Save**.

Update Dental Insurance

If you are enrolled in dental, you may change your plan type, add a new dependent, or waive (cancel coverage). If you waived dental in the past, you may not enroll now. If you cancel coverage, you will not be able to re-enroll later.

1. Select **Manage** to update your current dental elections.



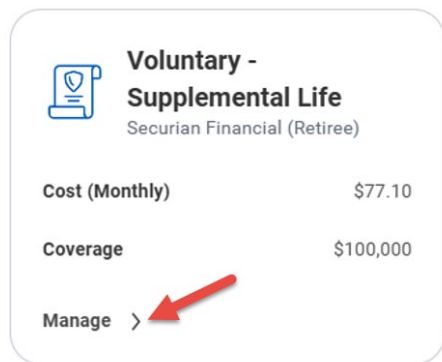
2. You will see options to **Select** or **Waive** one or more dental plans.
3. Select **Confirm and Continue** and select the dependent(s) you want to cover, if any.
4. Select **Save**.

Update Supplemental Life Insurance

If you are enrolled in supplemental life insurance, you may decrease your benefit amount or waive your enrollment. Increases to the benefit amount are not permitted. If you waived life insurance in the past, you will not see the option and may not enroll now. If you cancel coverage, you will not be able to re-enroll later.

1. Choose **Manage** to update supplemental life insurance.

Insurance



2. Select **Waive** if you want to cancel your coverage.
3. Select **Confirm and Continue** to review or reduce your coverage level, as needed.
4. Select **Save**.

Designate Life Insurance Beneficiaries

You may designate one or more beneficiaries for each plan.

From the Beneficiaries section:

1. Select the **Add Row** icon (+ symbol) to add a primary or secondary beneficiary.
2. In the Beneficiary field, select the **prompt** icon (3 lines) to choose from existing beneficiaries. Or select **Add New Beneficiary or Trust** to add a new beneficiary then enter their information. To remove a beneficiary, locate the beneficiary, and select the **Remove Row** icon (- symbol) next to the name.
3. In the Percentage column, enter the percentage of benefits for each beneficiary, as shown below. Make sure the percentage allocation for all beneficiaries totals 100%.

The screenshot shows a table titled "Primary Beneficiaries" with "1 item". The table has two columns: "Beneficiary" and "Percentage". The first row contains "Tom Buchanan" in the Beneficiary column and "100" in the Percentage column. There are plus and minus icons in the left margin of the table.

	Beneficiary	Percentage
	Tom Buchanan	100

4. Select **Save**.

Attach Dependent Verification Documents

If you are adding new dependents, you will be required to upload dependent verification documents (photo or PDF). See www.pinellas.gov/dependent-verification-proof.

1. Select the **Review and Sign** button.
2. Drag and drop the dependent verification file in the Attachments area, or choose **Select files**, to locate and select the file you want to attach.
3. Enter comments, as needed.
4. Select **Upload** to attach additional documents.

Complete Your Enrollment

1. Select the **Review and Sign** button.
2. Review your information.
3. Scroll down to the bottom of the View Summary page and select the **I Accept** checkbox, as shown in the image below, to confirm your electronic signature. Enter comments, as needed.

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:

1. You understand that your benefit elections are legal and binding transactions.
2. You understand that if you are married, your dependent Spousal Coverage Elsewhere selection is legally binding.
3. You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

I Accept ☐

4. Select **Submit**. A confirmation page displays.
5. Select the **Print** button. From the Export Document pop-up, select **Download**. The statement saves to your device as a PDF document that you can open and print.

Domestic Partner Affidavits

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. Notarization is not required. Read the affidavit, check the **I Agree** box, and select **Submit**. Your Open Enrollment will not be finalized until the affidavit has been submitted.