Workday Instructions for Open Enrollment 2018

1. Log into Workday:

2. Select your Inbox from the top-right corner of the screen:

   - If displayed, the pop-up menu for the Workday Mobile App may need to be closed in order to view your inbox.
   - Open Enrollment elections are not available via the Workday Mobile App.
In the *Actions* section of your Inbox, select “Open Enrollment Change: 01/01/2019”:
Workday Instructions for Open Enrollment 2018

- Review the text on each step of the enrollment process for important information regarding your benefit options:

- Scroll down the page to make your healthcare elections:

  - Select the “expand” icon for a larger display area
  - Note – You must close the expansion by selecting the icon again to move on to the next step in the enrollment process
Workday Instructions for Open Enrollment 2018

- Select “Continue” at the bottom of the page to move on to the next section of your enrollment:

- You may save your progress at any point and come back to submit your elections at a later time:
Workday Instructions for Open Enrollment 2018

- Continue to review and submit your elections for each benefit plan until you have completed all 8 steps:

**Step 1: Healthcare**
- Medical
- Dental
- Vision

**Step 2: Health Savings Account**
- *Only available with the PPO Plus HSA medical plan*

**Step 3: Flexible Spending Accounts**
- Healthcare FSA
- Healthcare FSA – Limited (Only available with the PPO Plus HSA medical plan)
- Dependent Care FSA

**Step 4: Life Insurance**
- Contributory (Optional) Life Insurance
- Spouse Life Insurance

**Step 5: Retirement Savings**
- 403(b) Voluntary Pre-Tax Contribution
- 403(b) Voluntary Roth Contribution (Post-Tax)

**Step 6: Beneficiary Designations**
- Designate your life insurance beneficiaries

**Step 7: Additional Benefits**
- New – MetLaw Legal Plan
- Review the additional benefits available to you

**Step 8: Review & Submit**
- Review Your Elections
- Review the Legal Notices and check the “I Agree” box
Workday Instructions for Open Enrollment 2018

- Review your elections and select the “I Agree” box
- Click “Submit” to record your elections
- Print your Election Confirmation:
  - Once you have submitted your Open Enrollment elections, select “Print” at the bottom of the page to download your confirmation statement
**Workday Instructions for Open Enrollment 2018**

- **Need To Make a Change?:**
  - If you have submitted your elections but need to make additional edits, you can change your elections in Workday through November 9th.

- **Start at the Home page in Workday:**
  - You can get to the Home page by selecting the Workday icon in the upper-left corner of the page

  - Select the “Benefits” Worklet
Workday Instructions for Open Enrollment 2018

- Select “Change Open Enrollment” from the bottom of the page:

  - Refer to the instructions above for help submitting your election changes
Confirmation Statements:

- After November 9th, your 2019 Open Enrollment confirmation statement will be available in Workday. Follow the below steps to access your confirmation statement:

  - Click on your picture in the upper-right corner of the page
  - select “View Profile”

  - Select the “Actions” icon below your photo

  - From the “Actions” menu, hover your cursor over “Benefits” and select “View My Benefit Statement”

  - On the next page, open the “Benefit Event” drop-down menu

  - Select “Open Enrollment Change” and click “OK”

  - You will then be able to download and print your 2019 confirmation statement

Open Enrollment Assistance:

- For questions about accessing or using Workday, please contact Human Resources at ext. 2231
- For questions regarding your benefits, please call ext. 2212 or ext. 2215