# Complete Open Enrollment

## Overview

This job aid outlines the activities for an Employee to complete or change Open Enrollment benefit elections during the Open Enrollment time period

**Prerequisites:** Open Enrollment has been launched for the Texas A&M University System

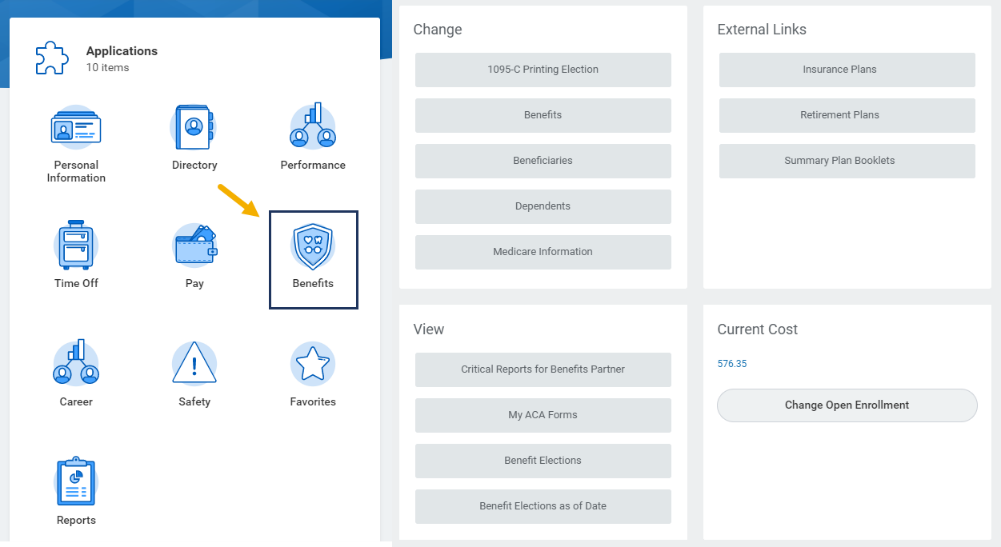
**Important Information:**

* The use of the term *Employee* can be interchanged with the term *Retiree* for this job aid
* Open Enrollment does not allow a Retiree to change Medical plans. If you are a Retiree who needs to add, drop, or change to/from A&M Care plan, the 65 PLUS plan or RAAMP plan as part of Open Enrollment, please contact your Benefits Partner so that an Alternate Open Enrollment can be initiated for you
* New Dependents must first be added in Workday as a Dependent, prior to adding them to any benefit elections
* Spending accounts are set up on a yearly basis. If you need to continue a spending account, you will need to re-elect the benefit and complete the Open Enrollment task each year to continue
* **REMEMBER:** You may be prompted to complete your Open Enrollment task again after completing it, if you experience a life event such as Birth or Marriage and initiate a Change Benefits for Life Event business with an effective date prior to September 1, or if your position changes (including scheduled hours, term months or pay frequency)

### Review Current Benefit Elections

As a best practice, Employees should review their benefit elections in Workday prior to completing Open Enrollment

1. Click the **Benefits** worklet on your Workday Home page and select **Benefit Elections**

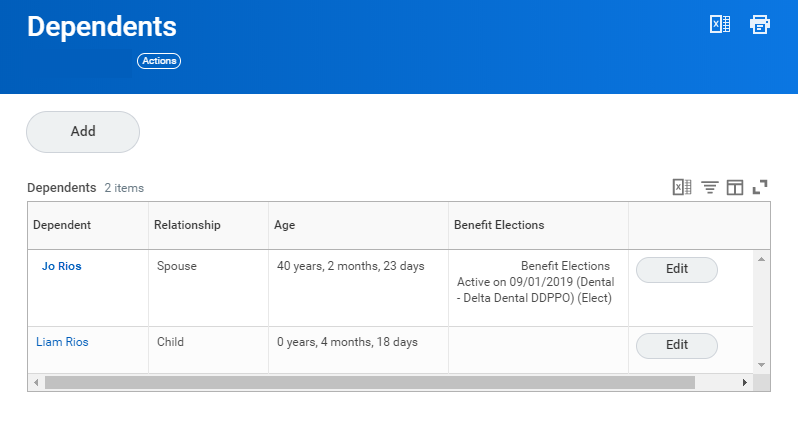
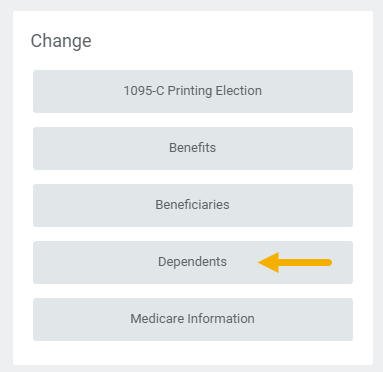


1. Click **OK**
2. Review your benefit elections and make note of any changes you may want to make
3. Return to the Workday Home page and follow the instructions provided in the next section of this job aid

### Review Dependents Listed in Workday (If applicable)

Prior to completing your Open Enrollment, you should review your Dependents in Workday to ensure that all Dependents who need coverage are listed. You will not be able to add coverage to anyone who does not exist as a Dependent in Workday

1. Click on the **Benefits** worklet on your Workday Home page
2. In the Change menu, click **Dependents**. View the Dependents already listed in Workday and determine if any should be added



**Note:** You may have Dependents listed that you may not want / need to provide benefits coverage. When you are making your elections for Benefits, you will uncheck the box next to that person’s name if they need to be removed from coverage

1. Add Dependents as needed. If you need to add a Dependent, click **Add** and complete the requested information

**Note**: You can refer to the *Add Coverage to Your New Dependent* job aid for detailed information on adding and editing Dependents

#### Up Next

You will receive a To Do in Workday that provides a link to HRConnect Legacy to upload required Dependent documentation

You are now ready to complete your Open Enrollment. The next section will guide you through this process

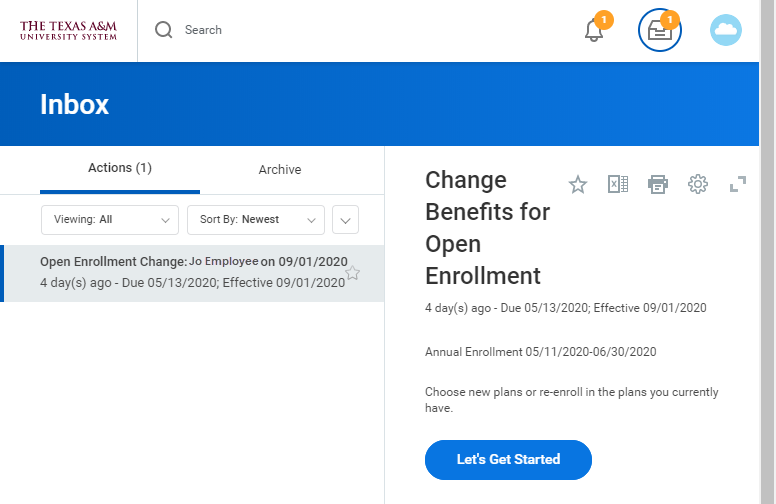
### Complete Open Enrollment Change Task

This section will take you through the various steps to review and edit your benefit elections. You can complete your benefit elections in any order; however, within this job aid we will take you through the options sequentially. Some of the elections may not apply to you, so feel free to skip those if you want

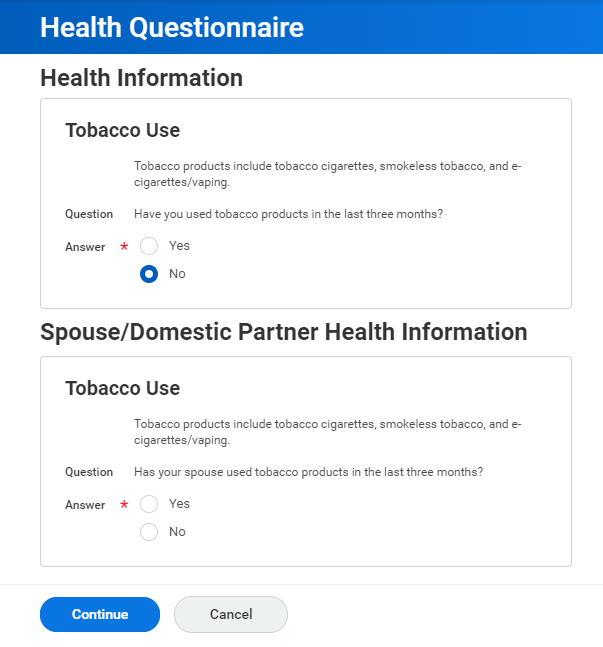
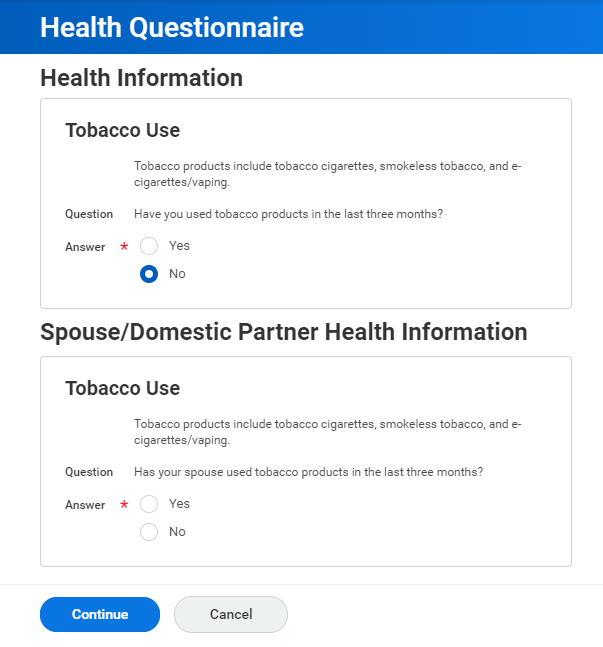
**IMPORTANT:** Please be sure to read the instructions in Workday carefully. These instructions provide you with detailed information regarding your options and restrictions you need to know. This job aid will guide you through the process. However, it ***does not replace*** the detailed directions provided to you by System Benefits Administration.

#### Getting Started

Navigate to your Workday inbox and click the “Open Enrollment Change” task. You will then click the **Let’s Get Started** button



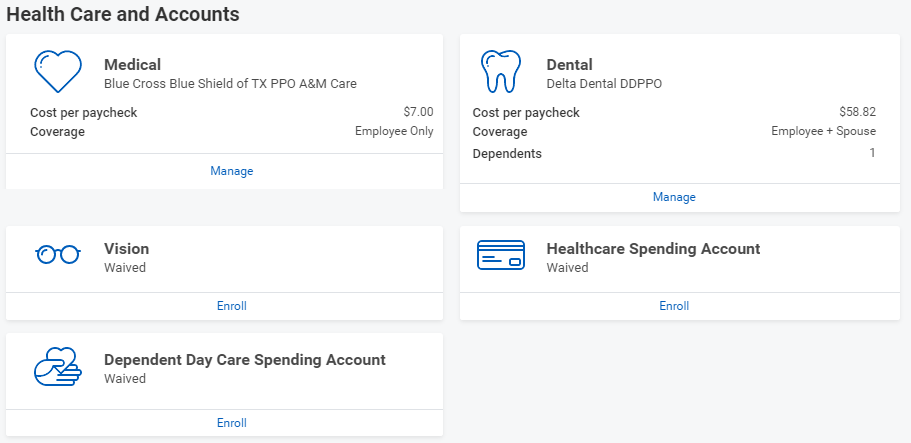
You will first need to complete the **Health Questionnaire** regarding tobacco usage. If you have a Spouse, you will complete the information for them as well. Then click **Continue** to move forward to your **Annual Enrollment** **Summary** page

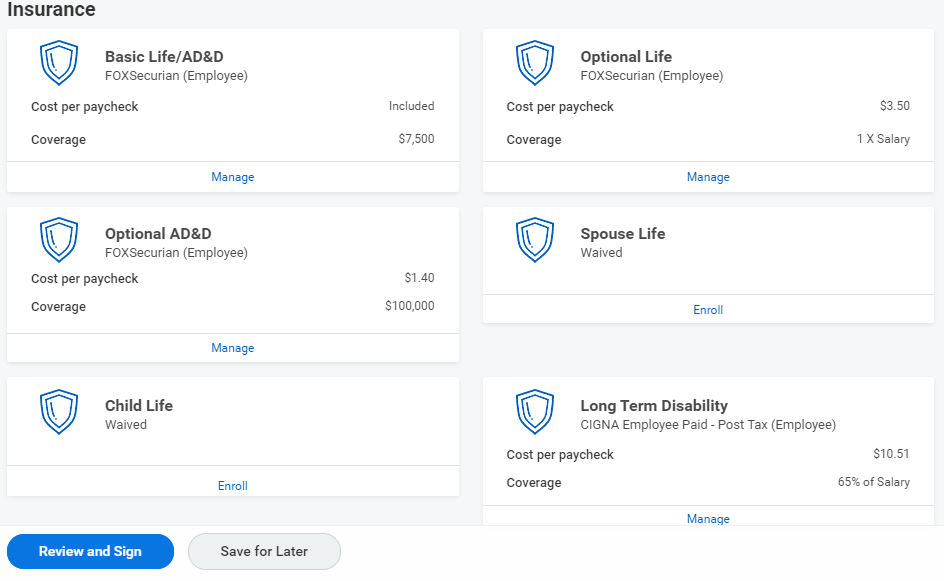


**IMPORTANT:** Tobacco use includes vaping and e-cigarette use, as well as smokeless tobacco and cigarette use

#### Annual Enrollment Summary

From this page you can view the coverages available to you under the sections **Health Care and Accounts** and **Insurance**. You can review and edit any one of those elections, in any order.





The Hartford (Employee)

The Hartford (Employee)

The Hartford (Employee)

**REMEMBER:** Spending accounts are set up on a yearly basis. You will need to re-elect this benefit each year

**No changes to your benefits?** If you are *not* making any changes to elections, you can click **Review and Sign** to view the summary of your elections, click the **I Accept** checkbox, then click **Submit** tocomplete the process

#### Healthcare and Accounts

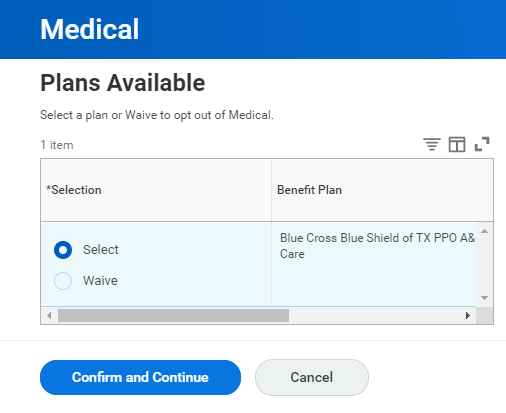
You can navigate your benefit elections in any order. To begin each section you will click on **Manage / Enroll**. Those who have had previous coverage would see the **Manage** link. Others who are electing coverages for the first time will see the **Enroll** link. **IMPORTANT:** Be sure and read all instructions provided on the screen

##### Medical

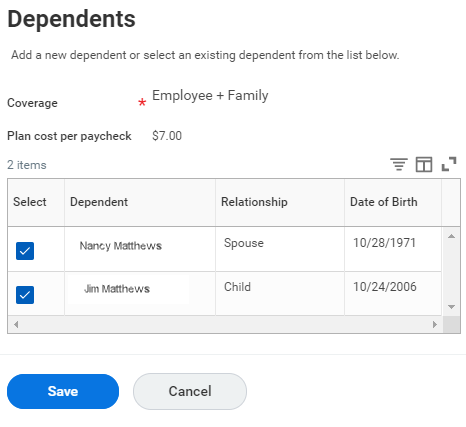
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



1. Click **Confirm and Continue**
2. Review your Dependents enrolled in this plan on the next page. Select or deselect Dependents as needed to enroll in or remove coverage

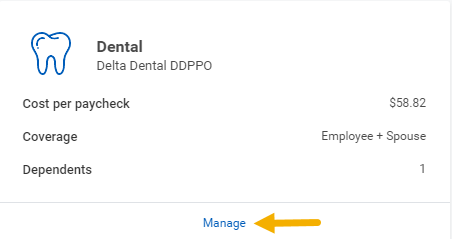


**CAUTION!!** If you have not yet set up your Dependents in Workday, you will not be able to add coverage for them. Click **Cancel** and return to your Workday Home page. Go back to the Review Dependents Listed in Workday section of this job aid for guidance. *Do NOT continue until you have updated your Dependents in Workday*

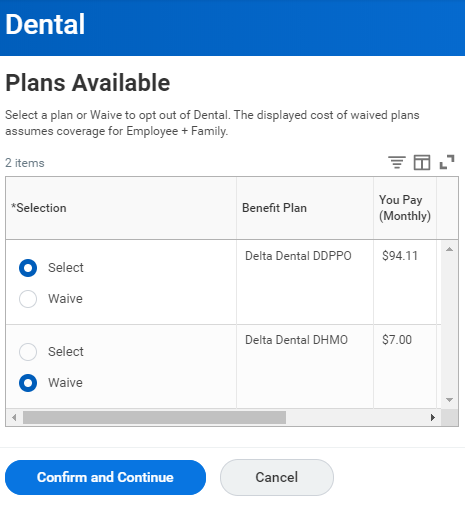
1. Click **Save** to return to your Annual Enrollment Summarypage

##### Dental

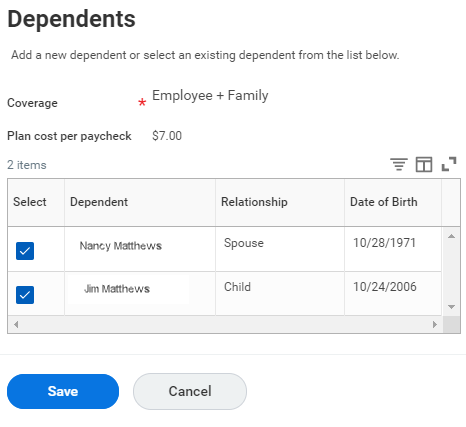
1. Click **Manage /** **Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



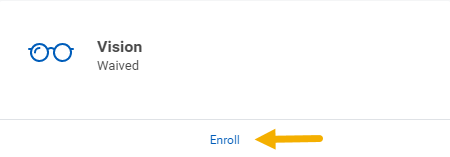
1. Click **Confirm and Continue**
2. Review your Dependents enrolled in this plan on the next page. Select or deselect Dependents as needed to enroll in or remove coverage



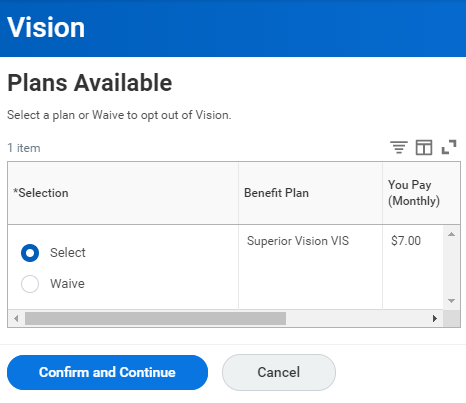
1. Click **Save** to return to your Annual Enrollment Summary page

##### Vision

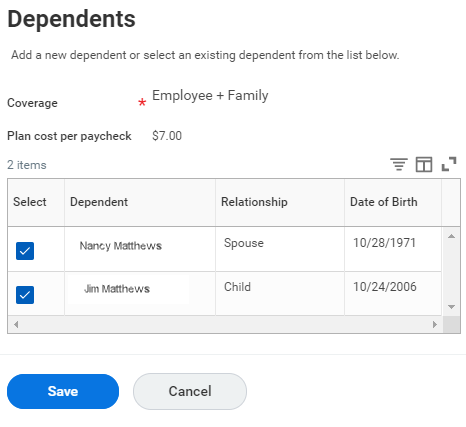
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



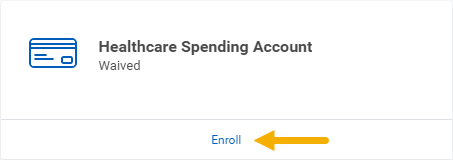
1. Click **Confirm and Continue**
2. Review your Dependents enrolled in this plan on the next page. Select or deselect Dependents as needed to enroll in or remove coverage



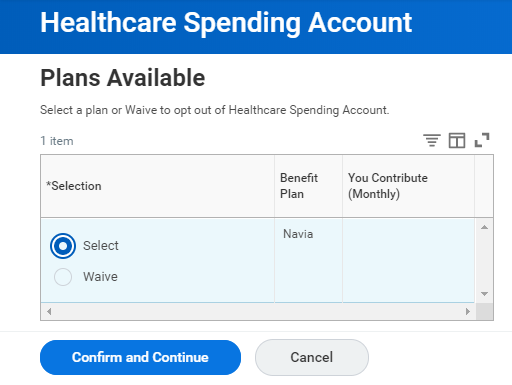
1. Click **Save** to return to your Annual Enrollment Summary page

##### Healthcare Spending Account

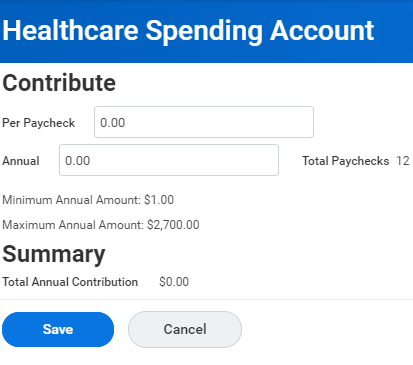
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed.



1. Click **Confirm and Continue**
2. Enter the sum you wish to contribute either per paycheck ***OR*** Annually. Verify that you enter that information in the appropriate field

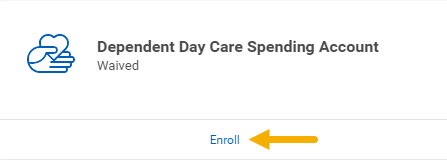


**Note:** It is recommended that you enter the sum annually so it automatically calculates per paycheck

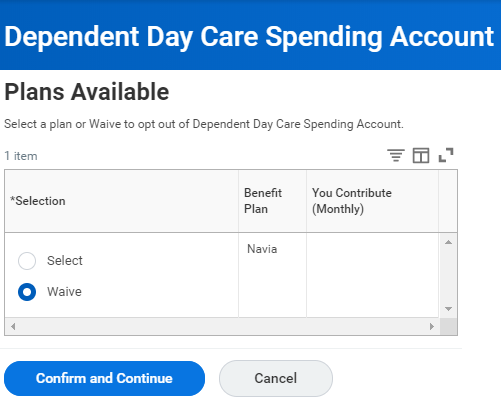
1. Click **Save** to return to your Annual Enrollment Summary page

##### Dependent Day Care Spending Account

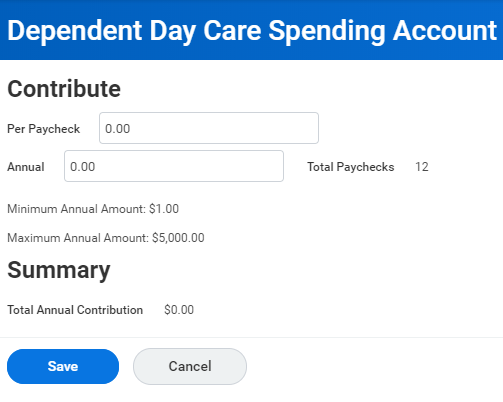
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



1. Click **Confirm and Continue**
2. Enter the sum you wish to contribute either per paycheck ***OR*** Annually. Verify that you enter that information in the appropriate field



**Note:** It is recommended that you enter the sum annually so it automatically calculates per paycheck

1. Click **Save** to return to your Annual Enrollment Summary page

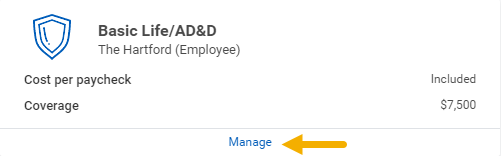
#### Insurance

This section will guide you through electing your life insurance and long term disability plan elections

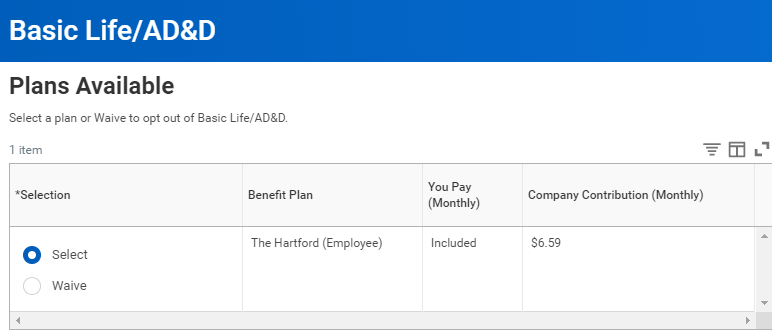
**Note:** As of September 2020, The Hartford is our life insurance vendor

##### Basic Life/AD&D

1. Click **Manage /** **Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed

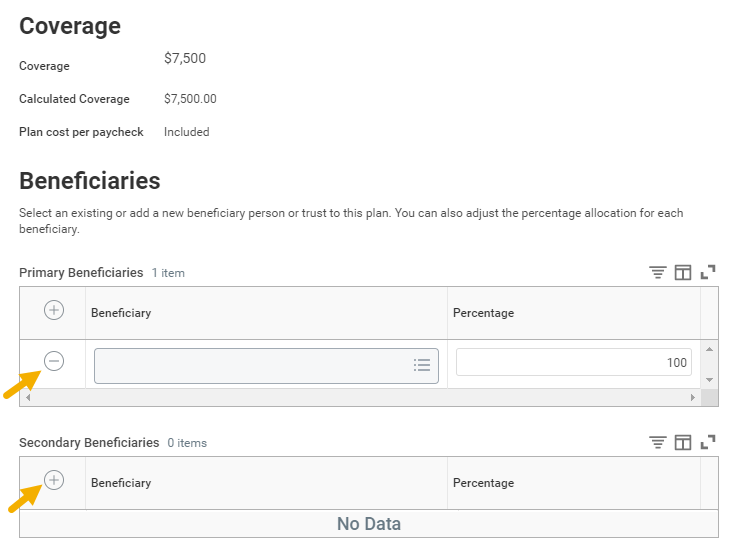


1. Review / edit Beneficiaries for this plan

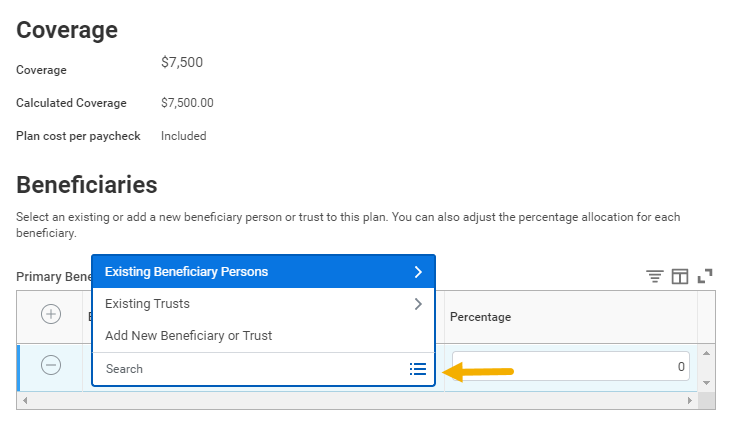
**Note:** If the Beneficiaries listed on the plan are correct, move to the next section of this job aid, otherwise follow the next steps for editing your Beneficiaries

###### **Edit Beneficiaries**

1. Remove or add Beneficiaries as needed by clicking the plus or minus icons



1. To identify a Beneficiary, start by clicking the prompt icon

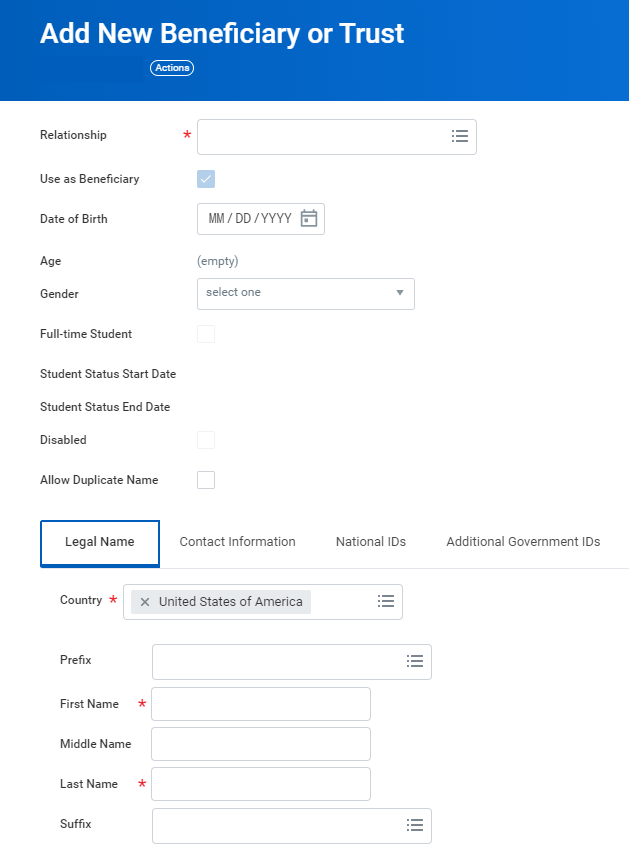


* Select Existing Beneficiary Persons if the Beneficiary is already listed in Workday. Choose the Beneficiary from the options listed

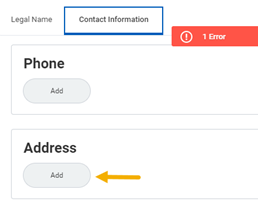
Or

* Select Add New Beneficiary or Trust to add a Beneficiary or Trust not yet listed in Workday. Indicate whether this will be a New Beneficiary or New Trust. Click Continue

1. Fill out all required fields requested and Click **OK**



**Be Advised**: An address will be required to complete the process



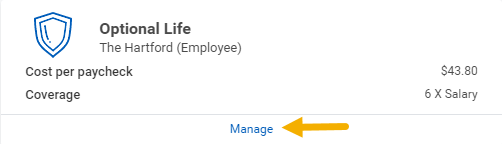
**Notes:**

* When adding multiple Beneficiaries to one policy, you will need to determine the percentage you would like distributed to each Beneficiary
* The combined distribution needs to total 100%

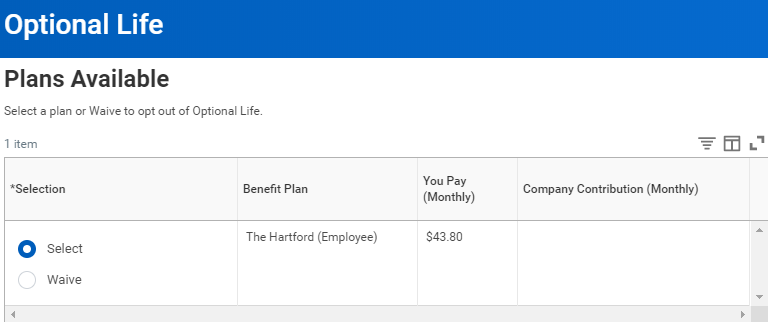
1. Click **Save** when you are finished creating and / or editing Beneficiaries to return to the Annual Enrollment Summary page

##### Optional Life

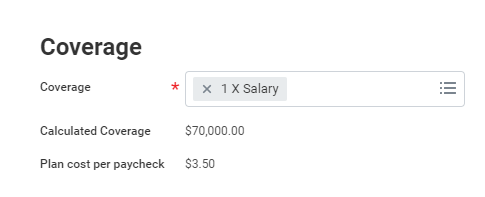
1. Click **Manage /** **Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



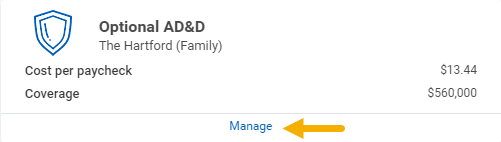
1. Click **Confirm and Continue**
2. Select desired options for coverage



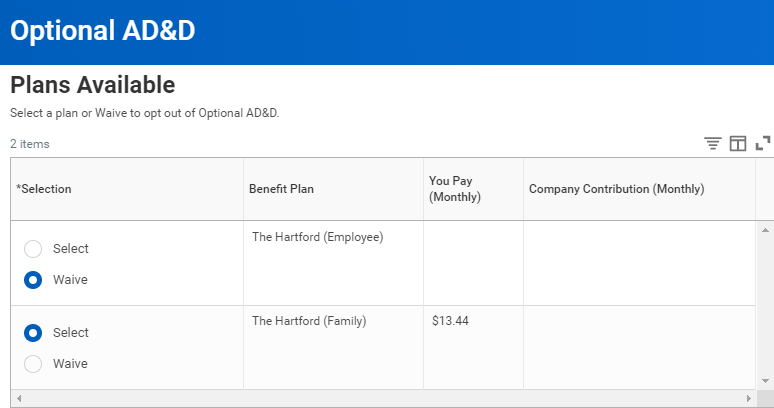
1. Review your Beneficiaries. Follow the steps provided in the ***Edit Beneficiaries*** section on page 8, if necessary
2. Click **Save** to return to the Annual Enrollment Summary page

##### Optional AD&D

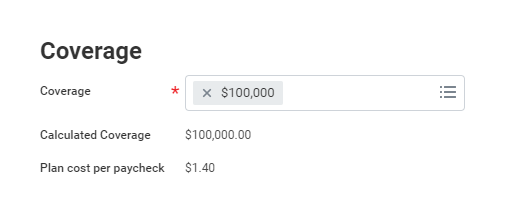
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



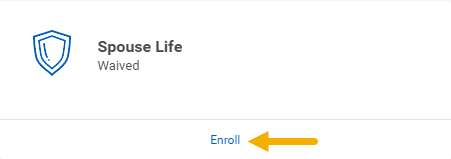
1. Click **Confirm and Continue**
2. Select the desired options for coverage



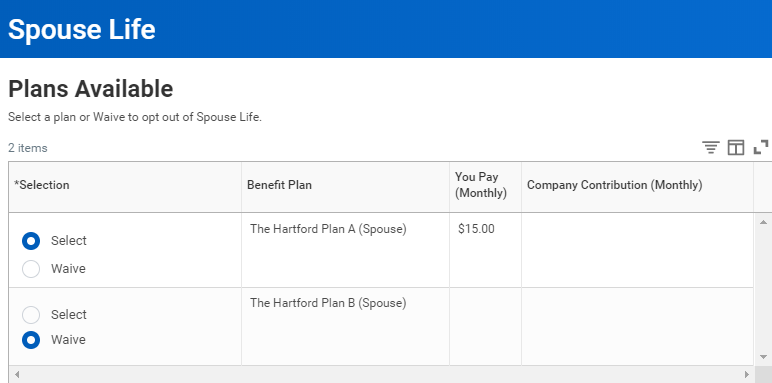
1. Review your Beneficiaries. Follow the steps provided in the *Edit Beneficiaries* section on page 9, if necessary
2. Click **Save** to return to the Annual Enrollment Summary page

##### Spouse Life

1. Click **Manage /** **Enroll** to begin



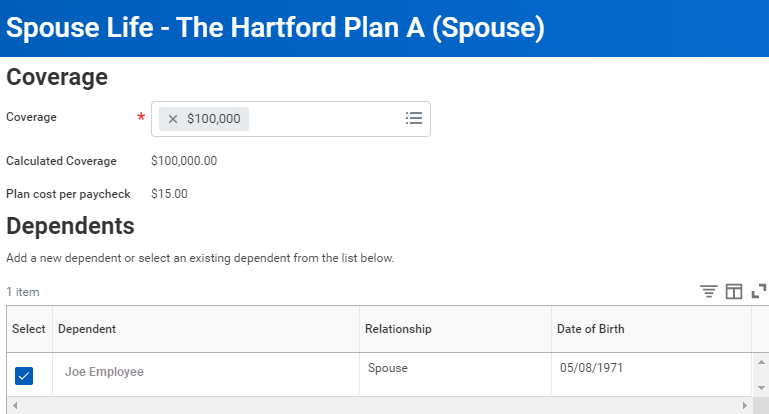
1. You will see your available plans listed. **Select** or **Waive** as needed



1. Click **Confirm and Continue**
2. Select your desired option for coverage



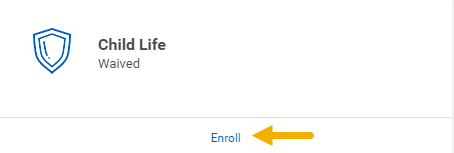
1. Review your Dependent. Follow the steps provided in the *Review Dependents Listed in Workday* sectionon page 2, if necessary



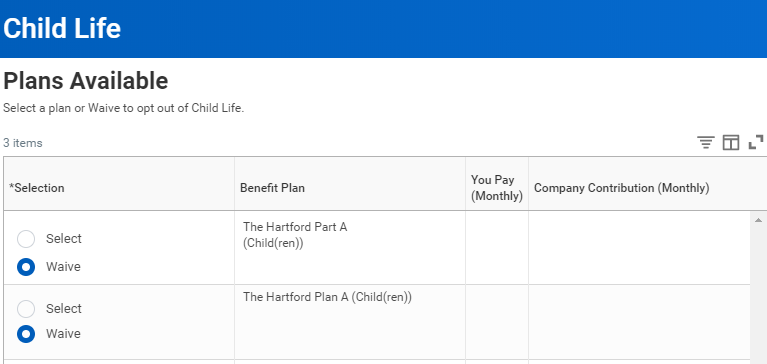
1. Click **Save** to return to the Annual Enrollment Summary page

##### Child Life

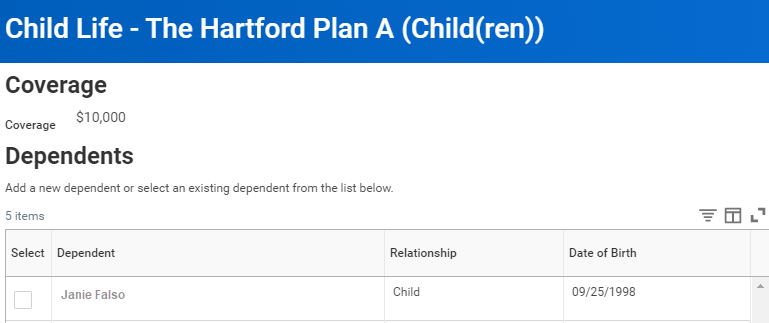
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



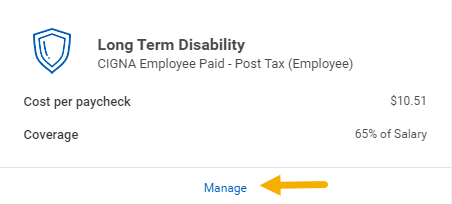
1. Click **Confirm and Continue**
2. Review your Dependents. Follow the steps provided in the *Review Dependents Listed in Workday* sectionon page 2, if necessary



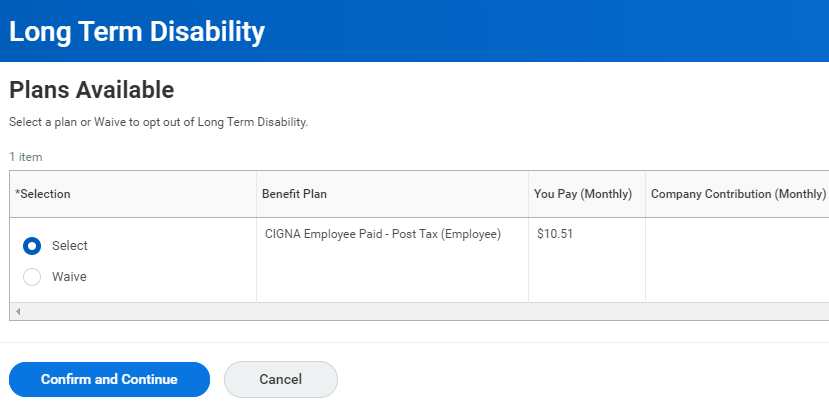
1. Click **Save** to return to the Annual Enrollment Summary page

##### Long Term Disability

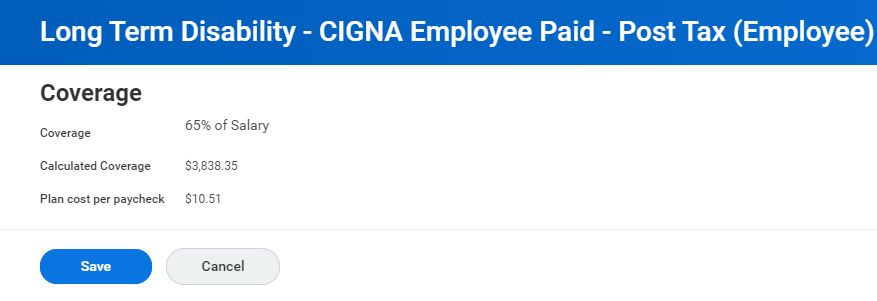
1. Click **Manage / Enroll** to begin



1. You will see your available plans listed. **Select** or **Waive** as needed



1. Click **Confirm and Continue**
2. Review your coverage details



1. Click **Save** to return to the Annual Enrollment Summary page

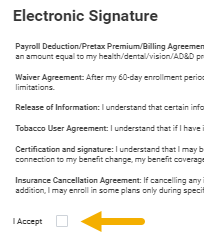
#### Finished Making Your Elections?

If you are finished making your elections, it is time to finalize your Open Enrollment

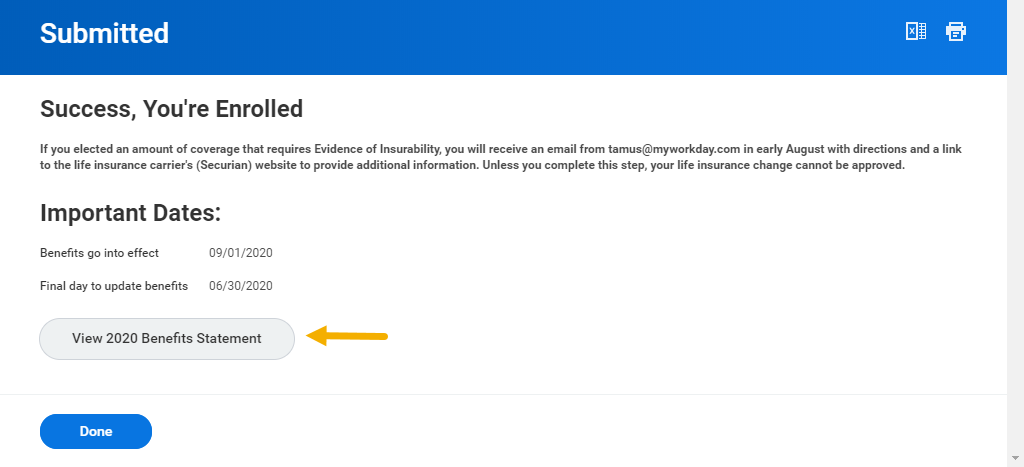
1. Click **Review and Sign** on the Annual Enrollment Summary page and review your changes to confirm that they are correct

**Note:** If you need to make changes click on **Cancel** to return to the Annual Enrollment Summary page

1. Check the **I Accept** checkbox



1. Click **Submit**



1. From the **Submitted** page, you have the option to view your benefits statement by clicking the **View 2020 Benefits Statement** button
2. Click **Print** if you would like to print the information or click **Done**

This completes the **Open Enrollment Change** business process