

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your Workday Inbox. Open enrollment can also be accessed from the announcement on the Workday Home page.

All final selections must be made by **November 30**. Selections may be elected and modified until November 30.

Visit the UA System benefits website for details on benefits programs at benefits.uasys.edu

PREPARING FOR OPEN ENROLLMENT INFORMATION NEEDED FOR OPEN ENROLLMENT

Dependent Information

If adding new dependents to coverage, make sure you have:

- Dependent legal names, date of births, social security numbers, gender, and address (if different than your own).
- Supporting documentation for the dependent(s) such as birth certificates, marriage certificates, adoption certificates, etc.

Beneficiary Information

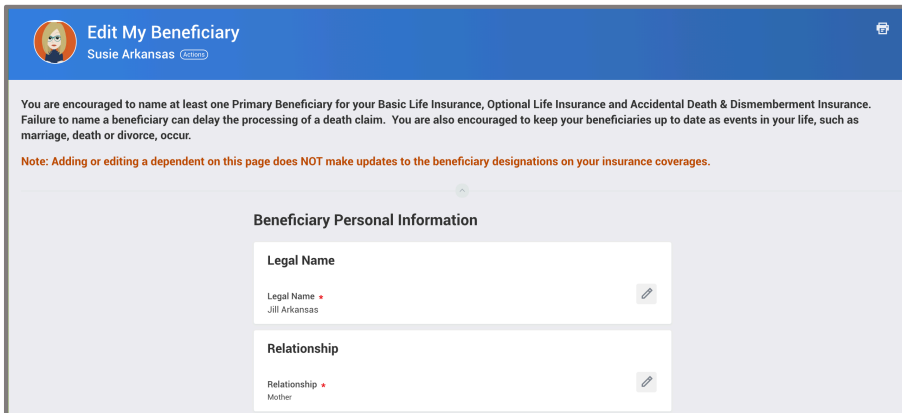
If adding new beneficiaries, make sure you have:

- Legal name, relationship, and contact information for beneficiaries.
- Trust/estate information, including name of trust, name of executor/trustee, and contact information.

Before beginning open enrollment, review your beneficiaries using the Benefits app or using the instructions that follow.

REVIEW CURRENT BENEFICIARIES

1. Click the **Profile** icon in the top right corner of the Workday home page, then click **View Profile**.
2. Click the **Actions** button under your name.
3. Hover over **Benefits**, then click **View My Beneficiaries**.
4. Click the **Add** button to add a new beneficiary or click the **Edit** button next to an existing beneficiary to make changes.
5. Complete the required fields, as indicated with a red asterisk.
6. Click **Submit**, then click **Done**.
7. Repeat steps 1 - 6 to add/edit beneficiaries as needed.



Edit My Beneficiary
Susie Arkansas

You are encouraged to name at least one Primary Beneficiary for your Basic Life Insurance, Optional Life Insurance and Accidental Death & Dismemberment Insurance. Failure to name a beneficiary can delay the processing of a death claim. You are also encouraged to keep your beneficiaries up to date as events in your life, such as marriage, death or divorce, occur.

Note: Adding or editing a dependent on this page does NOT make updates to the beneficiary designations on your insurance coverages.


Beneficiary Personal Information

Legal Name	<input type="text" value="Jill Arkansas"/>
Relationship	<input type="text" value="Mother"/>

Benefits: Navigate Open Enrollment

SELECT YOUR BENEFITS

From the Workday home page:

1. Click the **Inbox** icon. 
2. Click the **Open Enrollment Change** task.
3. Click the orange **Benefits Open Enrollment** button.
4. The Open Enrollment page will display. All currently-enrolled benefit elections will display.

TOBACCO PLEDGE

1. All employees participating in health coverage must complete the Tobacco Pledge if they do not want to be charged a tobacco surcharge in 2021. Employees not participating in UA health coverage should select the "UA System – Tobacco Pledge – Waiving UA Medical Insurance (Opting Out of Tobacco Attestation) plan. Click **Manage** in the **Tobacco Pledge** section.
2. Make the appropriate selection under Plans Available. **Select** or **Waive** each plan based on if you are enrolling in medical benefits or not.
3. Click the **Confirm and Continue** button.
4. Click the **prompt** icon and make the appropriate **Coverage** selection based on your tobacco use. Then, click **Save**.



Note: If you will not be changing any benefit plans, dependents, or beneficiaries, you may finish open enrollment after completing the Tobacco Pledge, naming beneficiaries for basic life, optional life (if elected), and AD&D insurance (if elected), and enrolling in Flexible Spending Accounts, if applicable. FSA reenrollment is required every year. Complete open enrollment by clicking **Review and Sign**.

HEALTH CARE AND ACCOUNTS

1. For each section under Health Care and Accounts (Medical, Dental, Vision), click **Manage** to update your elections. Click **Enroll** to enroll in a new benefit plan.
2. Choose **Select** or **Waive** for each election. Your current elections default.



Note: Detailed plan information, including premiums, can be found on the [UA System Benefits site](#). Be sure to select your institution at the top right.

3. Click the **Confirm and Continue** button to continue to add/modify dependents.

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage * Employee

Plan cost per paycheck \$16.00

[Add New Dependent](#)

2 items ⌵ ⌶ ⌷

Select	Dependent	Relationship	Date of Birth
<input type="checkbox"/>	Ryan Smith	Spouse	04/15/1990
<input type="checkbox"/>	John Smith	Child	08/09/2020

ADD DEPENDENTS TO COVERAGE

1. After clicking Confirm and Continue on any election, you will have the opportunity to add or remove dependents. If a dependent already exists, Workday will select them automatically. If you do not want to include an automatically-selected dependent, un-check the box next to their name in the Select column.
2. If you need to add a new dependent, click the **Add New Dependent** button.
3. The next screen will display required information and documentation about the dependent. Please gather the required information before proceeding. Click **OK**.
4. Complete the **required fields** for the dependent (marked with a red asterisk). In the **National ID** section, click the Add button to enter their Social Security number.
5. Click **Save** when done.
6. Continue steps 2-5 to add all needed dependents. Click **Save** when done.



Note: Required documentation for added dependents must be uploaded after all enrollments are made and clicking the **Review and Sign** button. Enrollments and changes submitted without proper documentation are not valid and will not be processed.

ENROLL/MANAGE HEALTH SAVINGS AND SPENDING ACCOUNTS

Three different health accounts are offered, including Flexible Spending Accounts (FSA), Dependent Care Flexible Spending Accounts (DCFSA) and Health Savings Accounts (HSA).

Health Savings Accounts (HSA)

- Participants must be enrolled in a high-deductible healthcare plan (HDHP) to be eligible to participate.

Flexible Spending Accounts (FSA) and Dependent Care Flexible Spending Accounts (DCFSA)

- Contribution elections do not roll over from the previous year – they must be elected each year.
- You cannot be enrolled in a HDHP and participate in a Healthcare FSA.

1. Click **Enroll** or **Manage** under the HSA or FSA account you would like to enroll in or manage.
2. Click **Select** to elect a plan.
3. Click the **Confirm and Continue** button.
4. Enter an amount in either the **Per Paycheck** field OR the **Annual** field.
5. Click **Save** when done.
6. Repeat steps 1-5 for any additional accounts.

LIFE INSURANCE, RETIREMENT, AND ADDITIONAL BENEFITS

ENROLL/MANAGE LIFE INSURANCE


The UA System offers a variety of life insurances and coverages for employees to enroll in. In the **Insurance and Retirement** section:


1. Click **Enroll** or **Manage** under the insurance you would like to enroll in or manage.
2. Choose **Select** or **Waive** for each insurance election.
3. Click the **Confirm and Continue** button.
4. Click the **prompt** icon to select or modify coverages levels.
5. Click **Save**.

New enrollments or increases in optional life or dependent life insurance will be subject to Evidence of Insurability (EOI) through the completion of a Statement of Health to The Standard. This form is linked on the open enrollment final submission page.

DESIGNATE LIFE INSURANCE BENEFICIARIES

At least one primary beneficiary must be designated for Basic Life, Optional Life, and Accidental Death & Dismemberment Insurance.

1. In the Beneficiaries section, click the **Add Row**  icon to add a beneficiary.

2. Click the **prompt** icon in the Beneficiary field to select from a list of existing beneficiaries. Or, select **Add New Beneficiary or Trust** to add a new beneficiary. To remove a beneficiary, click the **Remove Row**  icon next to that beneficiary.
3. Enter the percentage of benefits for each beneficiary in the **Percentage** column.
4. Click **Save**.

MANAGE RETIREMENT CONTRIBUTIONS

403(b) Employee Required Contribution

Benefits-eligible employees are required to contribute to the UA retirement plan. The same provider (TIAA or Fidelity) must be elected for both required and voluntary contributions.

1. Choose **Select** for the retirement provider you would like to elect and **Waive** for the other one.
2. Click the **Confirm and Continue** button.
3. Enter the **Contribution (%)** as indicated in the minimum and maximum percentage fields.
4. Click **Save**.

403(b) Employee Voluntary Contribution

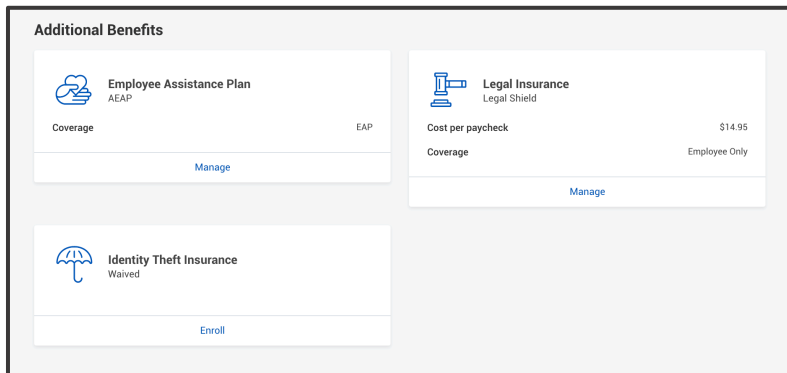
The same provider (TIAA or Fidelity) must be elected for both required and voluntary contributions.

1. Choose **Select** for the retirement provider and plan you would like to elect and **Waive** for the other ones.
2. Click the **Confirm and Continue** button.
3. Enter the **Contribution (%)** you wish to contribute.
4. Click **Save**.

ADD ADDITIONAL BENEFITS

The Additional Benefits section is where you can elect optional benefits such as legal assistance and identity theft protection.

1. In the Additional Benefits section, click **Manage** or **Enroll** for each additional benefit you would like to enroll in or manage.
2. Choose **Select** or **Waive** for each insurance election.
3. Click the **Confirm and Continue** button.
4. Click the **prompt** icon to select or modify coverages levels.
5. Click **Save**.



COMPLETE OPEN ENROLLMENT

Once all enrollments and modifications have been made:

1. Click the **Review and Sign** button.
2. Review the information in the **Benefits Election Review** section. Gather any needed documentation if a new dependent was added. Save the link for Evidence of Insurability, if needed.
3. Review your elected benefits, coverages, and cost in the **Selected Benefits** section, waived benefits in the **Waived Benefits** section, and **Total Benefits Cost**.
4. If adding a new dependent, upload the required documentation listed above in the **Attachments** section.
5. Select the **I Agree** box to indicate your electronic signature. If you are not ready to submit, you can click Save for Later and return at a later time. Open enrollment must be submitted by **November 30**.
6. Click **Submit**.
7. You will receive a confirmation email that your submission has been received.

MAKING MODIFICATIONS AFTER SUBMISSION

Changes can be made to your open enrollment selections and coverages until 11:59 p.m. CST on November 30. To revisit open enrollment after submitting it, visit the Workday home page and click on the open enrollment announcement.

