



# Navigating Open Enrollment for Mobile App



*The Navigating Open Enrollment for Mobile App tip sheet is for all employees.*

## Open Enrollment Steps

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your Inbox.

**Note:** Manager approval may be required to complete open enrollment tasks.

## Select Your Benefits

From your Home page:

1. Select the **Inbox** icon.
2. Choose the **Open Enrollment Change** task.
3. Select **Let's Get Started** and answer the Health Questionnaire for Tobacco Use and select **Save**
4. The Benefits page displays. Choose a category.
5. For each category, select or waive your choice. Your current elections will default.
6. Select **Details** to review plan information and contact information for the provider.
7. Select **Edit** to modify your coverage, if needed.

## Add or Modify Dependents

If you elect or modify a benefit plan during open enrollment, you can add dependents or modify existing dependents.

1. Choose your new benefit election or select the **Edit** link for an existing benefit election.
1. Select **Add New Dependent** and complete the configured questions. You can also add or remove an existing dependent from the plan by selecting or clearing the checkbox. Complete all required information before moving on to the next step.
2. Select **Save**.

## Add Group Life Insurance

**Note:** Depending on your organization's policy, you may need to complete a physical examination to qualify for life insurance during open enrollment. Ask your HR or benefits representative for additional information.

From the **Insurance and Retirement** section, select each category to open your enrollment options.

1. Select or waive each insurance election. For existing elections, select **Edit** to modify your coverage as needed.

**Note:** To elect a Health Savings Account (HSA), you must first elect a High Deductible Health Plan (HDHP).

8. Return to the **Health Care and Accounts** section.
9. Choose **Enroll** to enroll in the Health Savings Account.
10. Choose **Select** or **Waive** for the Health Savings Account election.
11. Enter the amount you want to contribute.
12. Select **Confirm and Continue**.

## Add Group Life Insurance

### Designate Life Insurance Beneficiaries

From the Insurance and Retirement section, select each category to open your enrollment options.

1. For new enrollments, select the benefit option from the **Insurance** section. Select **Details** to view the plan description or provider website. Select the option to enroll. For current enrollments, select **Edit** to modify your beneficiaries.
2. Select the **Percentage Amount** field to view and modify your beneficiary percentages and coverage amounts. Your primary beneficiary and contingent beneficiaries must add up to 100%.
3. Select the **Edit** icon to add a new beneficiary.
4. Select existing beneficiaries or add a new beneficiary. To add a new beneficiary, select **Add Beneficiary** or **Add Trust**. To remove an existing beneficiary, clear the checkbox next to that beneficiary.
5. Select **Save** and enter the percentage of benefits for each beneficiary.
6. Select **Save**.

## Add Additional Benefits

You can select optional benefits in the Additional Benefits section, such as employee assistance or legal assistance insurance. You can select or waive coverage for each category.

## Complete Your Enrollment

1. Select **View Summary**.
2. Scroll down to review your benefit elections and upload any required documentation in the **Attachments** section.
3. Select the **I Accept** checkbox to confirm your electronic signature, if needed.
4. Select **Submit**. A confirmation page displays.
5. Select **Close** to return to your **Inbox**. Optionally, select the **View 2023 Benefits Statement** button to view confirmation of your submitted elections.

Depending on your organization's policy and local, state, and federal laws, you may need to complete a physical examination to qualify for life insurance during open enrollment. Ask your HR or benefits representative for additional information.

From the Insurance and Retirement section:

1. Choose **Manage** or **Enroll** to update or add Basic Group Life insurance.
2. Choose **Select** or **Waive** for each insurance election and modify your coverage levels, as needed.
3. Select **Confirm and Continue**.

## Designate Life Insurance Beneficiaries

If your life insurance plan requires beneficiaries, the option to add primary and secondary beneficiaries will appear. In this case, you will need to designate one or more beneficiaries for each plan.

From the Beneficiaries section:

1. Select the **Add Row** icon to add a beneficiary.
2. In the Beneficiary field, select the **prompt** icon to select from existing beneficiaries. Or select **Create > Add New Beneficiary or Trust** to add a new beneficiary. To remove a beneficiary, locate the beneficiary and select the **Remove Row** icon next to the name.
3. In the Percentage column, enter the percentage of benefits for each beneficiary.

4. Select **Save**.

## Add Additional Benefits

You can elect optional benefits in the Additional Benefits section, such as employee assistance or legal assistance.

From the Additional Benefits section:

1. Choose **Manage** or **Enroll** for each additional benefit you would like to enroll in.
2. Choose **Select** or **Waive** for each benefit plan, as needed.
3. Select **Confirm and Continue**.
4. Review your elections for accuracy. Notice your monthly cost at the top of the screen.
5. Confirm that your coverage information is accurate.
6. Select **Save**.

## Attach Supporting Documents

To add attachments, if required by your organization:

1. Select the **Review and Sign** button.
2. Drag and drop the file in the Attachments area, or choose **Select files** to find the file, then 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 to complete your enrollment.
2. Scroll to the bottom of the page. Select the **I Accept** checkbox to confirm your electronic signature, if required.
3. Enter comments, as needed.
4. Select **Submit**. A confirmation page displays.
5. Optionally, select the **View 2023 Benefits Statement** button to view the benefits statement.
6. Select the **PDF** icon to generate a PDF version for your records.
7. Select **Done** to complete the task.