



The Navigating Open Enrollment 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.

Optional: Review Existing Benefits

From your Home page:

1. Navigate to the Workday Menu and select **Apps**
2. Click **View All Apps** link.
3. Choose **Benefits** from the menu on the left-hand side of your screen.
4. In the Benefits window, the following items will be available for review:
5. **Change** (Benefits, Dependents, 1095-C Printing Election),
6. **View** (My ACA Forms, Benefit Elections, Benefit Elections as of Date),
7. **External Links** (Institution Specific)
8. **Current Cost** (Employee Specific).

Start Open Enrollment Change Task

From your **Home** page:

1. Select the **Inbox** icon (Top, Right-Hand Side).
2. Choose the **Open Enrollment Change** task.
3. Click on **Let's Get Started**.
4. In the **Open Enrollment** dashboard, you will see **Health Care** and **Accounts** options.

Review Available Health Care & Account Options

Note: Each institution has different plans and options. If you need help, contact your Human Resources office for assistance and further information.

From the **Open Enrollment** dashboard, review each **Health Care** and **Account** option:

1. To review **Health Care** and **Account Options**, select **Enroll or Manage**
2. You will be prompted to **Select** or **Waive** the options/plans available to you. For accounts such as **Healthcare FSA** and **Dependent Care FSA**, skip to Step 6.
3. Select **Confirm and Continue**
4. To make changes concerning **Dependents**, please consult your institution's Human Resources and institution-specific policies and procedures.
5. Under **Plans Available**, you will be able to choose from **Select** or **Waive**.

Note: If you select **Waive**, you will be returned to the **Open Enrollment** dashboard.

6. On this form, you must enter an amount **Per Paycheck** or amount **Annually**.
7. Once you are satisfied with your selection, select **Save**. You will then be returned to the **Open Enrollment** dashboard.

Attach Supporting Documents

To add attachments, if required by your organization:

1. Select **Review and Sign**.
2. Choose **Select Files** or drag and drop file(s) into the **Attachments** area.
3. Enter comments, as needed.
4. Select **Upload** to attach documents.

Complete Your Enrollment

1. Select **Review and Sign** to complete your enrollment.
2. Scroll to the bottom of the page. Select **I Accept** to confirm your electronic signature, if required.
3. Enter comments, as needed.
4. Select **Submit**. A confirmation page will display.
5. Select **View 20** Benefits Statement** to view your benefits statement.
6. Select the PDF icon to generate a PDF version for your records.
7. Select **Done** to complete the task.