Open Enrollment 2022

All Employees

October 2021

Due to periodic system improvements and your evolving role within the system, the screenshots in this training may be different from what you will see when you log in to Workday HCM.
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What Is This Guide and How to Use It?

Open Enrollment will take place between October 25, and November 8 in Workday. During this time you can enroll, edit or waive plans. If you have already submitted your benefit elections, you will have until the last day of Open Enrollment, to make any edits. Simply click on the benefits application on the Workday home page, and click Change Open Enrollment.

Prior to beginning, please gather your official documents to enroll your new dependents. This includes official marriage licenses, birth certificates, and court or official documents that prove legal guardianship.

Additional information includes dependents’ dates of birth, social security numbers, and addresses for dependents not residing with you.

You should also determine your beneficiary designations for life insurance. This can include individuals, charities, and or trust. You must include their legal name, contact information, and date of birth.

If official documentation is not available, you may provide provisional documents. Contact the HR Service Center for information about provisional documentation. Please note, provisional documentation must be submitted within 5 days of submitting your forms.

You will see all the plans available to you based on your eligibility rules, and your page may look different than the one presented in this QRG.
Launch Open Enrollment

1. In your Workday Inbox, find the Open Enrollment Change task to get started.
   A. Click on the inbox icon in the upper-right corner.
   B. Select the task titled, “Open Enrollment Change” from your inbox. You will see the task in the window to the right of your inbox.
   C. Click Let’s Get Started.

2. New in this Open Enrollment, you will be able to view and edit all of your available plans on one page. This will allow you to make updates to only the benefits you wish to change and in any order, you wish to change them. Click Enroll to select a plan or Manage to edit an existing plan.
Enrolling or Managing a Plan

1. The grid will display all available plans within the tile:
   A. The first column allows you to select or waive a plan.
   B. The second column will display the name of the benefit plan available to you.
   C. The third column will display your contribution per pay period.
   D. The fourth column will display USC’s contribution per pay period.
   E. The last column will include any plan details.

2. After you select a plan, click Confirm and Continue.

3. Select the applicable Coverage.
Adding a New Dependent

1. **Click Add New Dependent** to include others under your plan coverage.

2. Include the dependent’s full legal **Name**.
3. Include the dependent’s **Relationship** to you, **Date of Birth**, and **Gender**.
4. If applicable, **check the Allow Duplicate Name box** to indicate multiple dependents with the same name.
5. **Provide a National ID (Social Security Number)** for your dependent.

6. If the dependent does not reside with you, **update** to add their **current address**.

7. **Click Save** to confirm your dependent’s information.
Flexible Spending Accounts

1. You will also be able to enroll in a Flexible Spending Account. You can choose a Healthcare and or, a Dependent Care account. Click Enroll or Manage to begin.  
   A. A healthcare account can be used for medical expenses,  
   B. A dependent care account is used for dependent care expenses.

2. Click to Select or Waive the available plan.

3. Click Confirm and Continue.
4. Enter the appropriate Contribution Amount per paycheck.
5. Click Save.
Disability Plans

1. You will also be asked to enroll in a disability plan. Please note, basic disability insurance is mandatory in California and cannot be waived. Choose one of the disability plans available to you and click Enroll or Manage.

2. Click to Select or Waive the available plan.

3. Click Confirm and Continue.
4. If you have enrolled in the USC Basic Disability Plan, you can also choose to enroll in the USC Supplemental Disability plan.

You will not be able to select this option if you have enrolled in the California State Plan.
1. Review the different life insurance plans available to you including any supplementary insurances available. Click Manage or Enroll.

**Note**
Please note that you may have some plans which are automatically offered to you at no cost. No action is required, however, please designate a beneficiary.

2. Click to Select or Waive the available plan.
3. Click Confirm and Continue.
4. Enter the appropriate Coverage Increment.

Note: If you select an amount that is more than 3x your salary you will be asked to submit evidence of insurability.

5. To add a Beneficiary, Click the Plus Symbol.
6. Select Add New Beneficiary or Trust.
7. **Enter** the Beneficiary’s Relationship, Date of Birth, and Gender.

8. If applicable, **check** the Allow Duplicate Name box to indicate multiple Beneficiaries with the same name.

9. **Enter** the Beneficiary’s Legal Name, Contact Information, and National ID.

10. You can have multiple beneficiaries.
    
    **A.** Primary beneficiaries are the individuals that would potentially receive the payout on your insurance.
    
    **B.** Secondary beneficiaries will not receive funds if the primary beneficiaries are living.
    
    **C.** After you have selected your beneficiaries, enter the percentage amount. The percentage must add up to 100%.
Additional Benefits

1. Review the additional benefits fields and enroll or waive if applicable. Please note, you may have an automatic spousal surcharge. A spousal surcharge is added when your spouse is eligible for benefits under their employer, but you chose to enroll them as a dependent. If this does not apply, click manage to waive the spousal charge. In addition, you may have to edit your medical plan selection to remove the spousal surcharge. Click on the medical tile and review your plan selection.

Note
1. **Click Review and Sign.**

2. At the top of the page, you will be able to view your projected total cost per paycheck. Review your enrolled plans, coverage, and associated cost.
3. Attach any documents that are required. If a new dependent is added please include a copy of their official documents. If official documentation is not available, you may provide a provisional document. Contact the HR Service Center for information about provisional documentation.

4. Read the description carefully, and **click I accept**.

5. **Click Submit** to confirm your selections.
6. On the next page, **click View 2022 Benefits Statement** and click print to download a pdf copy of your submitted Open Enrollment process. We recommend that you download a pdf copy of your enrollment as this can be used as proof that you submitted your enrollment selections if there is a problem with your enrollment.
Summary

1. **Launch Open Enrollment**
   1. Click the Inbox Icon.
   2. Select Open Enrollment Change.
   3. Click Let’s Get Started.

2. **Enrolling or Managing a Medical Plan**
   1. Click Enroll or Manage.
   2. Select or Waive the appropriate plans.
   3. Select Coverage.
   4. Add Dependents, if applicable.

3. **Flexible Spending Accounts**
   1. Review and select a healthcare and/or dependent care option.
   2. Enter the appropriate Contribution Amount per paycheck.

4. **Disability Plans**
   1. Select the applicable Disability Plan.

5. **Life Insurance Plans**
   1. Review the different life insurance plans available to you including any supplementary insurances available
   2. Enter the appropriate Coverage Increment.
   3. Add Beneficiary(ies)

6. **Additional Benefits**
   1. Review and enroll or manage Additional Benefits

7. **View Summary**
   1. Click Review and Sign
   2. Review your selected information, cost, and attach any required documents.
   3. Click I Accept and Submit.

For more information, contact HR Service Center at uschr@usc.edu or (213) 821-8100.