

Open Enrollment Quick Guide

This Quick Guide will help you make changes in Workday when completing your Open Enrollment event. If you still have questions after following the steps below please reach out to benefits@okta.com.

(Note: The screenshots in this guide may differ slightly from what you see, but the steps should be substantially the same.)





Making Open Enrollment Changes:

- 1) Log in to your Workday app from your Okta dashboard. Then, navigate to your **Workday Inbox** at the top right hand corner of the page. Locate the **Open Enrollment Change** task in your Workday inbox and click into the task.



- 2) Click **Let's Get Started**
- 3) View and select your benefit plan option by selecting "**Manage**" or "**Enroll**" at the bottom of each displayed benefit box.

Health Care and Accounts

<div>Medical Blue Shield EPO</div> <div><div>Cost per paycheck</div><div>\$160.00</div></div> <div><div>Coverage</div><div>Employee + Spouse</div></div> <div><div>Dependents</div><div>1</div></div> <div>Manage</div>	<div></div> <div><div>Cost per pa</div></div> <div><div>Coverage</div></div> <div><div>Dependents</div></div>
<div><div>Health Savings Account Waived</div><div>Enroll</div></div>	<div></div>

Note: You will see more benefit plans displayed on your open enrollment screen than the screenshot above.

Open Enrollment Quick Guide

- 4) After selecting **Manage or Enroll**, you will be brought to a second page that will display all your enrollment options for the selected benefit.

Plans Available

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for Employee + Spouse.

3 items



*Selection	Benefit Plan	You Pay (Semi-monthly)	Company Contribution (Semi-monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Blue Shield EPO	\$160.00	\$601.87
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Blue Shield HDHP with HSA	\$57.50	\$591.64
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Blue Shield PPO	\$175.00	\$684.90

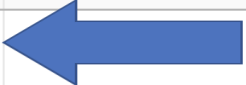
- 5) From the Plans Available page, you can select, waive or change your plan options.

If you choose to waive coverage, select waive for each benefit displayed, and select **“Confirm and Continue”** at the bottom of the screen.

If you wish to modify or add eligible dependents to your benefit, **“Select”** the benefit plan of your choice, click **“Confirm and Continue”** at the bottom of the page. A skip to #6.

To add a new dependent, skip to #7.

- 6) To add a listed dependent to your benefit, select the check box next to their name.
To remove a listed dependent, uncheck the box next to their name.

Select	Dependent	Relationship
<input checked="" type="checkbox"/>		Spouse

Open Enrollment Quick Guide

- 7) Click **Add New Dependent**. If the dependent you're looking to add is already an existing beneficiary or emergency contact, select **Use an Existing Beneficiary or Emergency Contact**. To add a new dependent, select **Create Dependent**. Select **OK** to continue.

Make Your New Dependent a Beneficiary: Check the box next to **Use as Beneficiary** to use this dependent as a beneficiary. Checking the box does not add your dependent as a beneficiary. Beneficiaries are assigned later in the enrollment process.

Dependents

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

Coverage * Employee Only

Plan cost per paycheck \$50.00

Add New Dependent



1 item

Add My Dependent From Enrollment

☐ Use an Existing Beneficiary or Emergency Contact

☒ Create Dependent

Use as Beneficiary ☐

If you have already entered a dependent as a beneficiary or emergency contact, choose that person from the drop down menu, then enter details on the next page. If the dependent is already on record, click Cancel and choose the person from enrollment.

To enroll a new person as your eligible dependent, click the OK button at the bottom of the page. You will be taken to a screen to enter details.

OK Cancel

- 8) Fill in the name and personal information on your dependent on the following page. After adding your new dependent, click **Save** at the bottom of the screen.

Search

Need Help?

Add My Dependent From Enrollment

Name

Country * United States of America

Prefix

First Name * Shirley

Middle Name

Last Name * Shepherd

Suffix

Personal Information

Relationship * Spouse

Date of Birth * 09/11/1938

Age * 82 years, 11 months, 14 days

Gender * Female

Citizenship Status

Full-time Student ☐

Student Status Start Date

Student Status End Date

Disabled ☐

☐ Allow Duplicate Name

Save Cancel

One dependent with the same name.

Open Enrollment Quick Guide

- 9) The new dependent will appear on the benefit plan screen. Place a checkmark next to the dependent you wish to add to the plan. Select **Save** to return to the enrollment page and continue making changes to your other benefit options. Repeat steps 3-8.

Medical - Blue Shield of California PPO

Projected Total Cost Per Paycheck
\$160.00

Dependents

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

Coverage ★ Employee + Spouse

Plan cost per paycheck \$160.00

Add New Dependent

1 item

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Shirley Shepherd	Spouse	09/11/1938

You have dependents covered under your health care plan without a Social Security Number. Enter their Social Security Number (SSN) or Reason SSN is Not Available if you don't have access to their number at this time.

Save

Cancel

Health Care Instructions

General Instructions

MAKING CHANGES TO YOUR OKTA BENEFITS ELECTIONS:

You have 31 days from the qualified family status change to enroll the new family member or to make any permitted plan changes (for example, 31 days from the date of marriage or date your child is born or newly adopted).

Enrollment is not automatic. You will be unable to make changes to your benefits elections until the next open enrollment if you do not complete your enrollment changes within the 31-day period in which your family member becomes eligible for Okta benefits.

Need Help Choosing Your Benefits?


- Rightway is an in-depth navigational resource to help you select your 2021 healthcare plan and verify your doctors are in the network. To learn more about Rightway, check out this [video](#). Contact Rightway using the Rightway app on your Okta dashboard.
- Visit [rewards.okta.com](#) for detailed information regarding our benefit offerings and what's new in 2021.

Enrolling Dependents - Click into the enroll dependents box next to each plan to add dependents to a plan. You should always check existing dependents first, and use add dependents only if your dependent does not exist in Workday yet. You may only enroll a spouse, domestic partner, child, or child of domestic partner. Parents, siblings, friends, relatives, members of church, fraternal, or social organizations are not eligible.

- 10) Once you make your choices, review the cost for the plans and the coverage levels for accuracy.

- 11) Once you selected ALL of your benefits, click **REVIEW AND SIGN**

Health Care and Accounts



Medical


Blue Shield EPO

Cost per paycheck \$160.00

Coverage Employee + Spouse

Dependents 1

Manage




Denta

Metlife

Cost per paycheck

Coverage


Dependents



Health Savings Account

Waived

Review and Sign




Health





Waived

Save for Later

Open Enrollment Quick Guide

12) Review your selections, accept the electronic signature disclaimer and click **SUBMIT**



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View Summary

Projected Total Cost Per Paycheck
\$50.00

- **Evidence of Insurability** - if applicable, you will see a section below indicating the plans where your election will be reduced to the guaranteed issue amount until your evidence of insurability is received and approved.
- **Elected Coverages** - carefully review your elected benefit plans, begin dates, coverage, dependents, beneficiaries, and costs. Click the Go Back button to make changes if necessary.
- **Waived Coverages** - click this section to review the benefit plans you waived.
- **Beneficiary Designations** - review and confirm.
- **Attachments** - there are no requirements for you to attach anything.
- **Electronic Signature** - review the LEGAL NOTICE and click I Agree (or Save for Later or Go Back).
- **Submit** (you will be able to print your Elections Confirmation on the next page).

Turn off the new tables view ☒

Selected Benefits 10 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Blue Shield EPO						
Dental	01/01/2019	01/01/2019	Employee Only			Included
MetLife PDP Plus						

Submit

Cancel

01/01/2019


01/01/2019





Employee Only

Included

Vision Service Plan (VSP) VSP

13) Your elections have been submitted. Click “**VIEW 2022 BENEFITS STATEMENT**” to review your selections again or click “**DONE**”



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Submitted

You've submitted your elections.

Important Dates:

Benefits go into effect 01/01/2022

Final day to update benefits 10/15/2021

View 2022 Benefits Statement

Done

14) The Open Enrollment task will remain open through Monday, November 15, 2021. While the task is open you may make updates to your submitted task by clicking on the Benefits

Open Enrollment Quick Guide

icon on the Workday home screen, then Change Open Enrollment. Follow all of the relevant steps above and remember to Review and Sign then click Submit.