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 <u>benefits@okta.com</u>*.*

(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.

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

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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)
● Select ○ Waive	Blue Shield EPO	$160.00	$601.87
○ Select ● Waive	Blue Shield HDHP with HSA	$57.50	$591.64
○ Select ● Waive	Blue Shield PPO	$175.00	$684.90
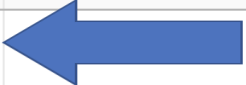
5) From the Plans Available page, you can select, waive or change your plan options.

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
☑		Spouse

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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.

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.

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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.

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**

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

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

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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.