

EMPLOYEE SELF-SERVICE GUIDE

Sample Employee Open Enrollment Communication and Instruction

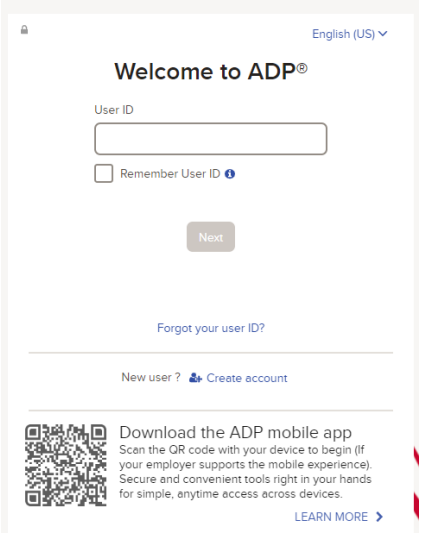
Always Designing for People®

Dear Employee,

We are excited to announce the start of Open Enrollment on the *Employee Self Service** website.

This letter explains what you need to do to complete your enrollments. The Open Enrollment period will last ***<<ENTER DURATION>>***, starting ***<<ENTER DATE>>*** and ending ***<<ENTER DATE>>***. All changes to your benefits must be completed by ***<<ENTER TIME and DATE>>***. The changes that you make to your benefits will take effect on ***<<ENTER BENEFIT EFFECTIVE DATE**>>***.

Log in to Workforce Now to access the Employee Self-Service* website.
https://workforcenow.adp.com

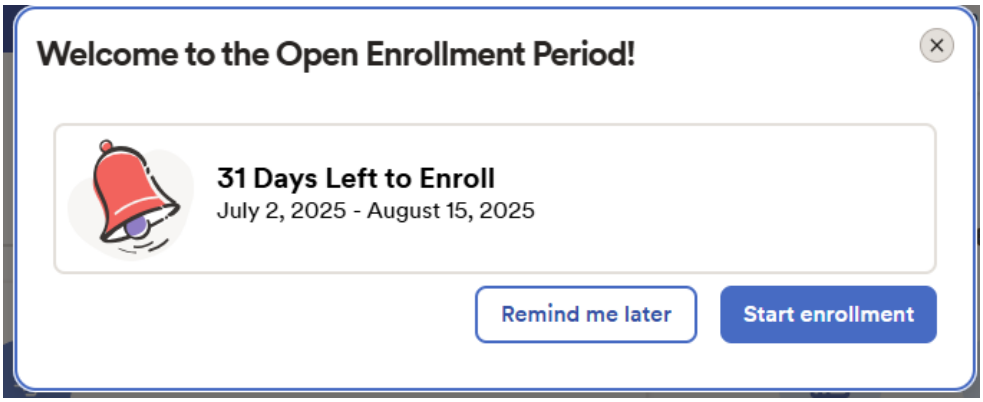


Enter your User ID and password, and then click **Sign In**.

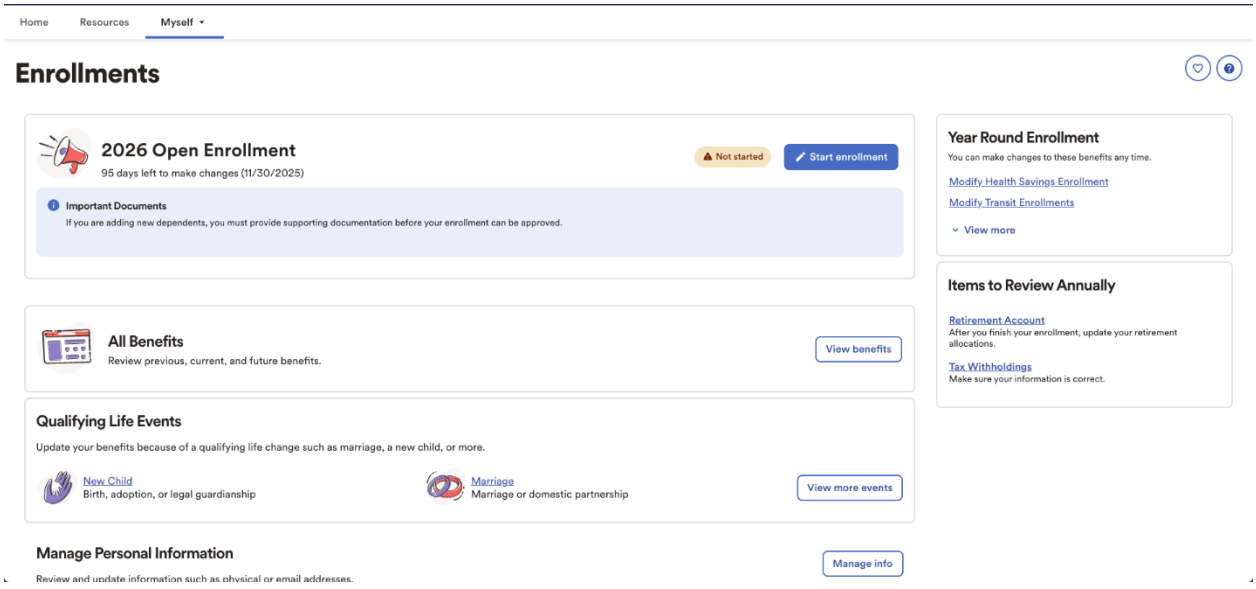
Note: If this is your first time logging in, click **Create account**. If you are unsure of the registration code, please contact your HR team.

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Upon logging in, you will be presented with a pop-up showing important information about this Open Enrollment period. You can click **Start Enrollment** or **Remind Me Later**.
Note: *This pop-up is displayed each time you log in during the Open Enrollment period. 24-hours after submitting your selections the pop-up will no longer display.*

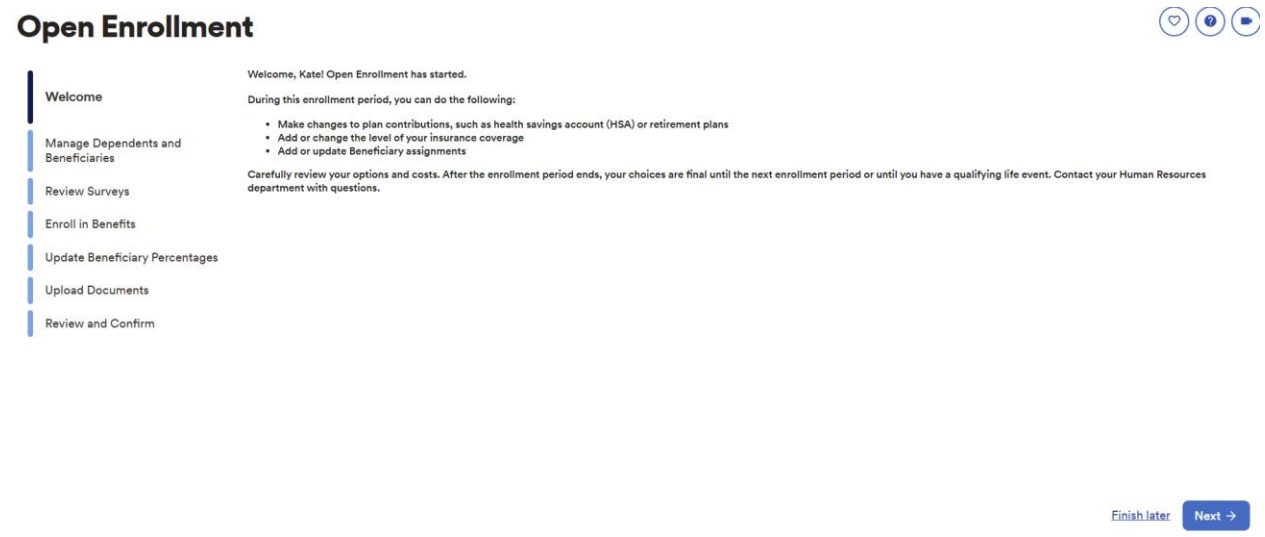


Select **Start enrollment** will bring you to the Myself – Benefits – Enrollments screen where you can click **Start Enrollment**.



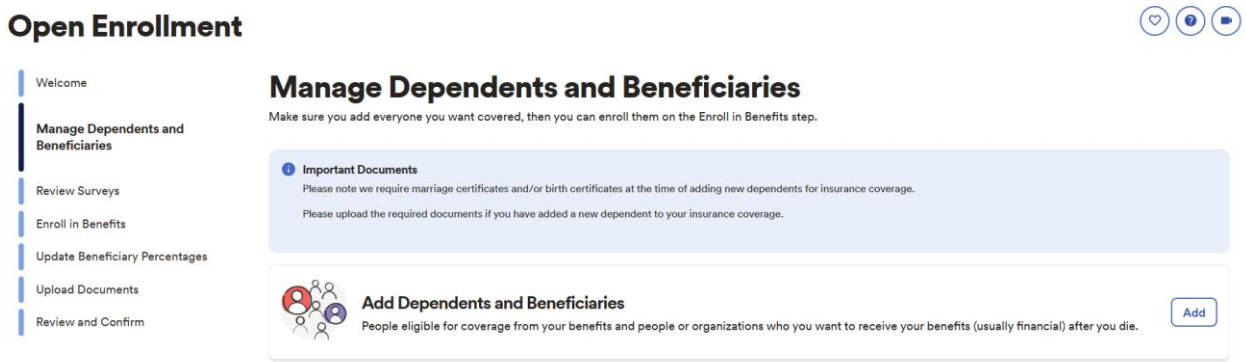
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You will be taken to the ***Welcome Note***. Please review all the information on this page, as there are often important details regarding your Open Enrollment options. Click **Next** after reviewing the Welcome Note to move to **Manage Dependents and Beneficiaries.**



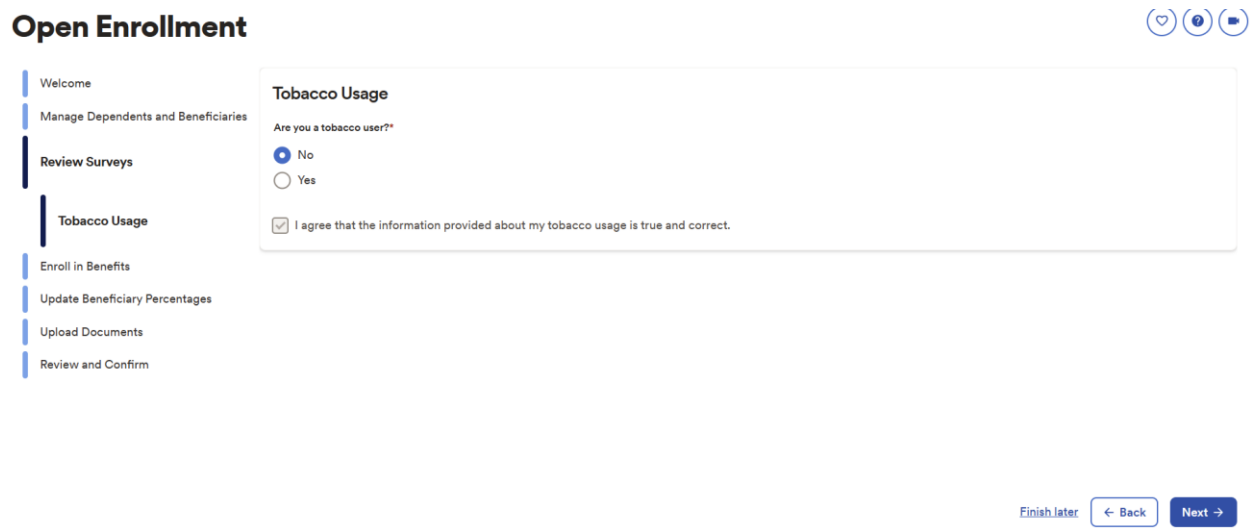
The **Manage Dependents and Beneficiaries** page is where you can add, view and edit your dependent and beneficiaries.

Select "**Add**" to add a new dependent/beneficiary.



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A **Survey** screen will prompt ***only*** if applicable based on the settings within the enrollment event itself. If any tobacco attestation is required, you must acknowledge the attestation ("I agree that all the information provided about my tobacco usage is true and correct") in order for **Next** to be available and allow you to continue to **Enroll in Benefits** page.

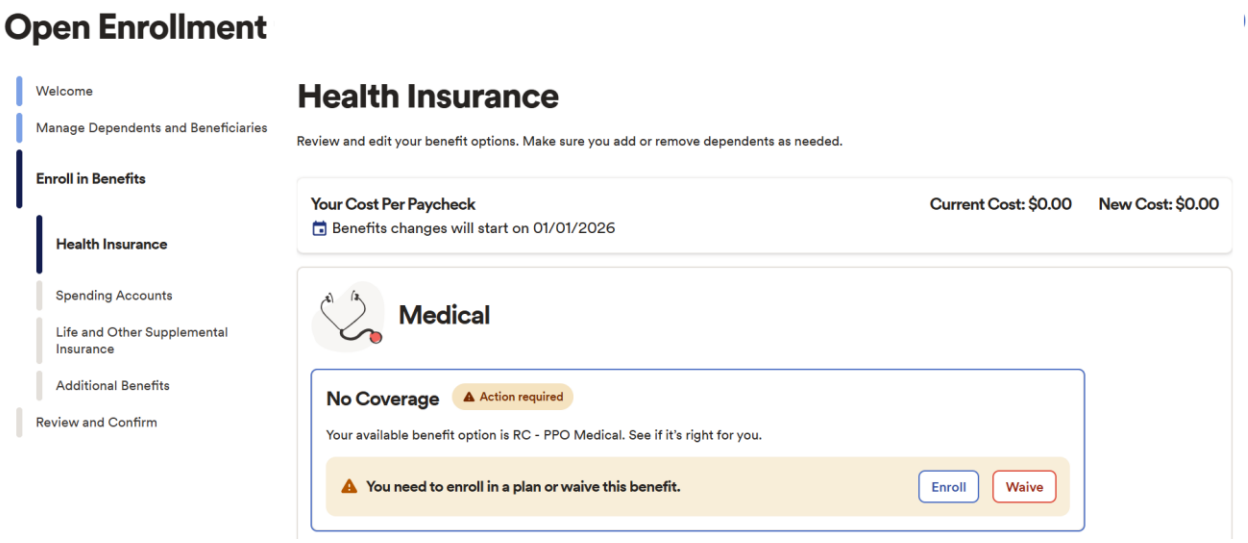


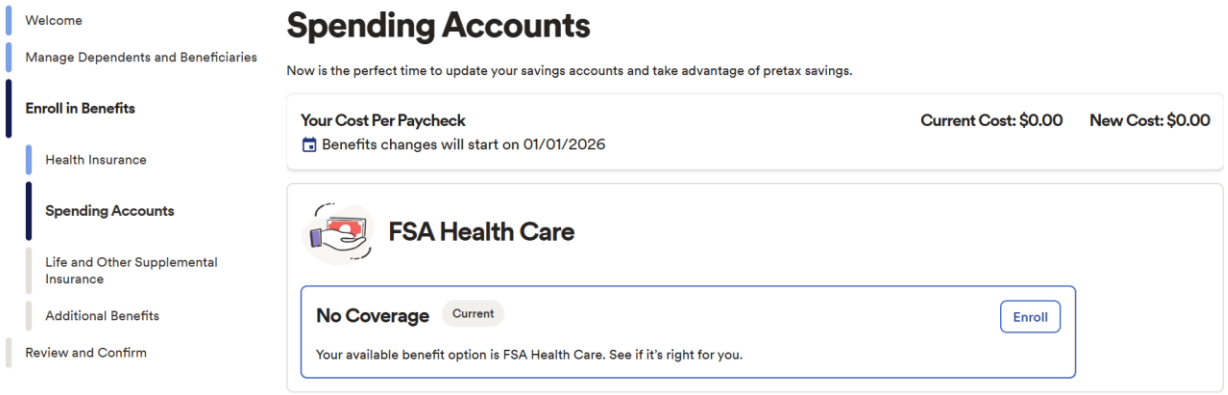
Note: If you are age 55 and over you will be prompted for a survey to certify if you are enrolled in Medicare. If you are enrolled in Medicare, you will no longer be eligible to contribute to a Health Savings Account.

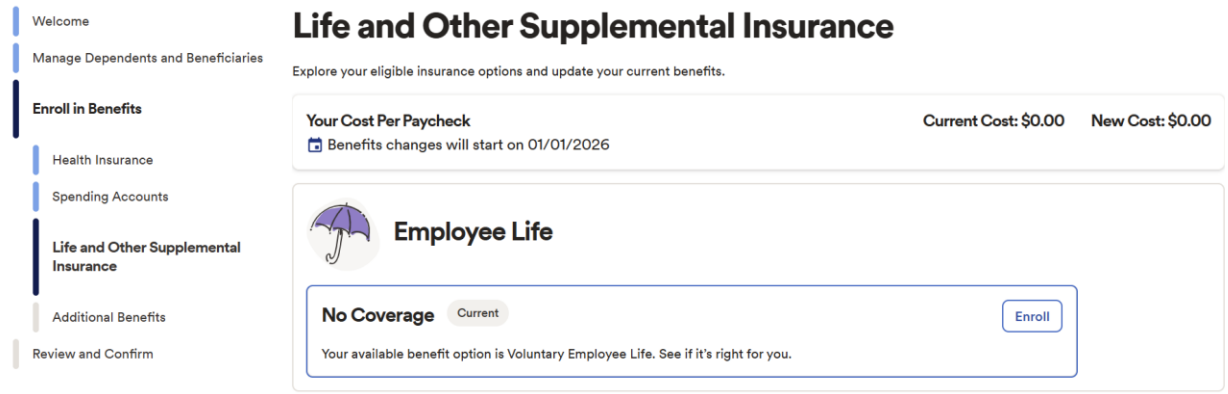
Enroll in Benefits step is presented in sub steps of Health Insurance, Spending Accounts, Life and Other Supplemental Insurance, and Additional Benefits.

- Health Insurance includes plan types Medical, Dental, Vision, Prescription
- Spending Accounts include plan types of HSA, FSA Health, FSA Dependent, HRA, MSA, Spending (Other)
- Life and Other Supplemental Insurance include plan types of Life, AD&D, LTD, STD, Critical Illness, Hospital, Accident, Cancer
- Additional Benefits include plan types Parking, Transit, Van Pool, Retirement, Custom

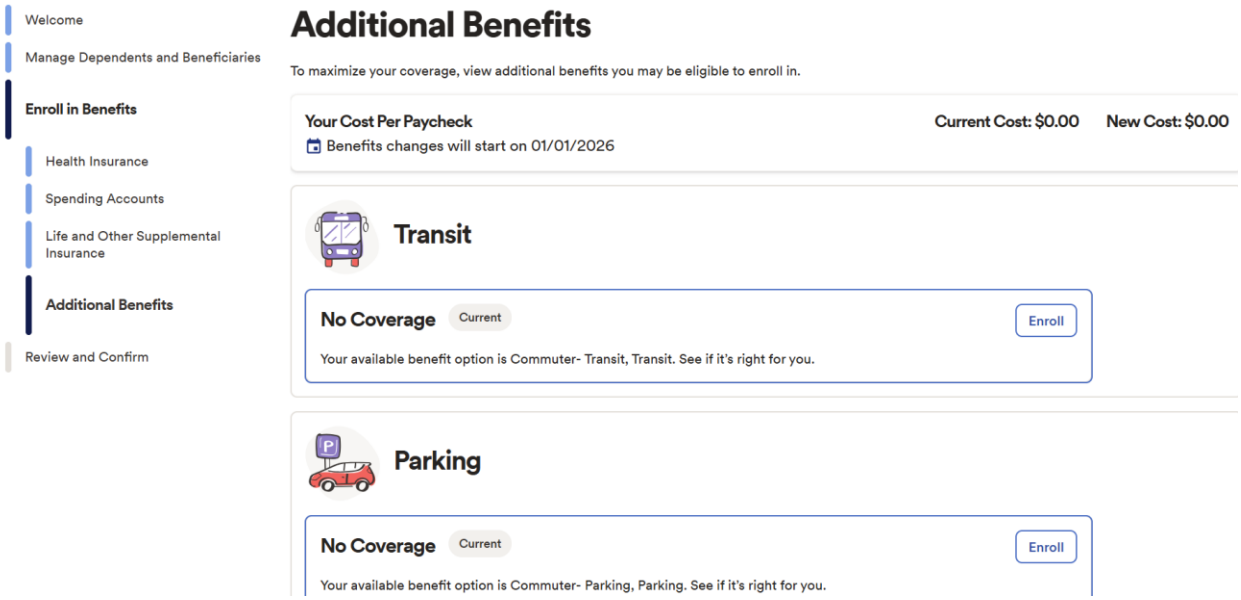
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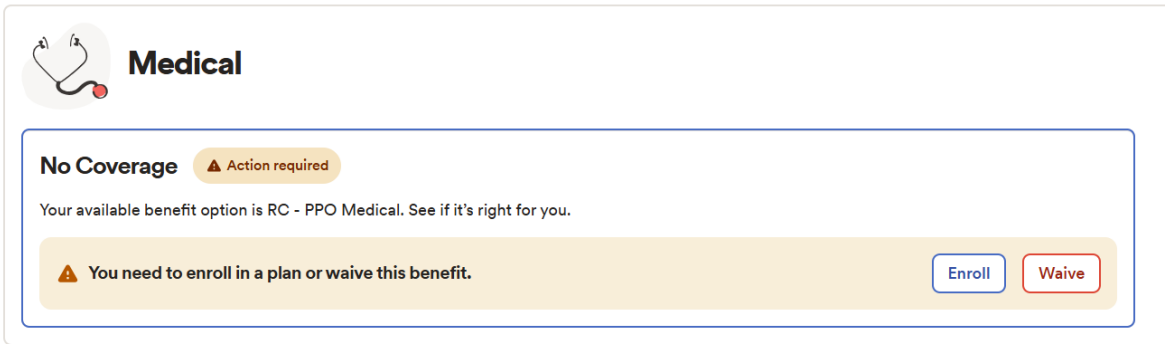


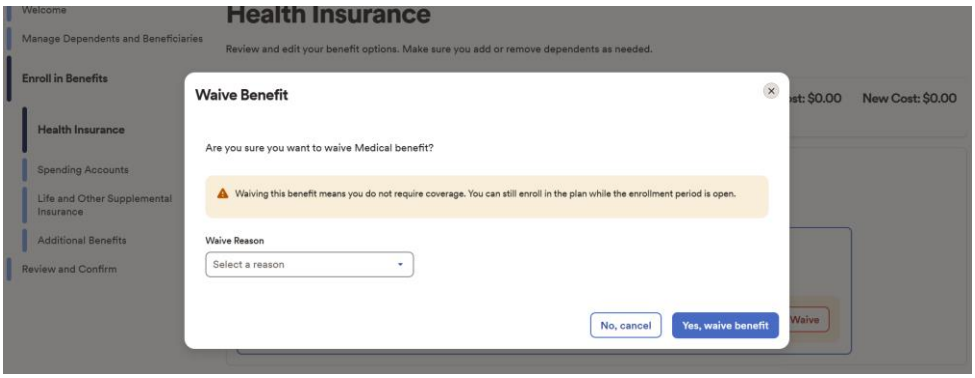
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Waive should only display for benefit plan types that require a waive reason. Employees should only select **Waive** if you do not want to continue enrollment in a benefit or are not enrolled currently and a waive reason is required.

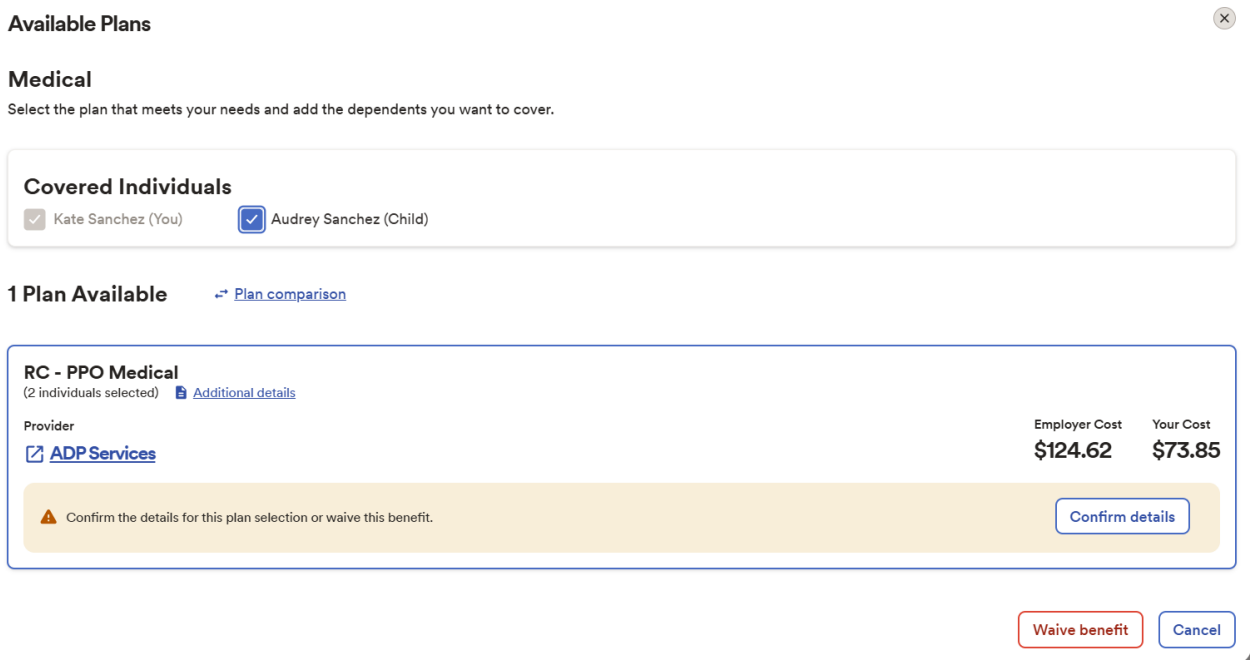
If you choose to ***waive*** a benefit, you will be required to select a **Waive Reason**.



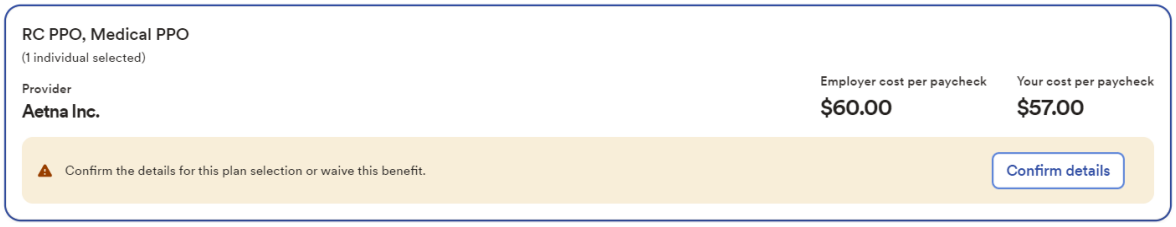


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While enrolling in a plan, please be sure to indicate which dependents should be covered in the **Covered Individuals** section, if applicable. Then proceed with your enrollment.

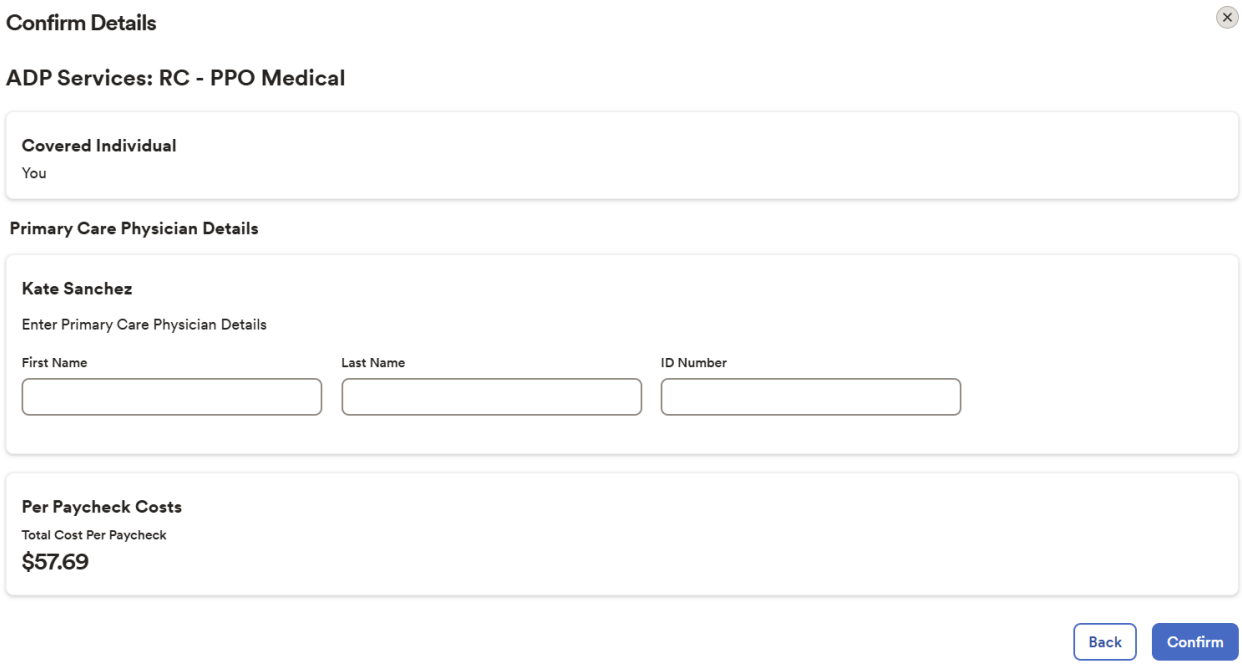


Note: The coverage level for your enrollment (Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family) is driven by which dependents you enroll.
When you choose to enroll in a plan, it will display the **Per Paycheck** cost for the employee and employer.



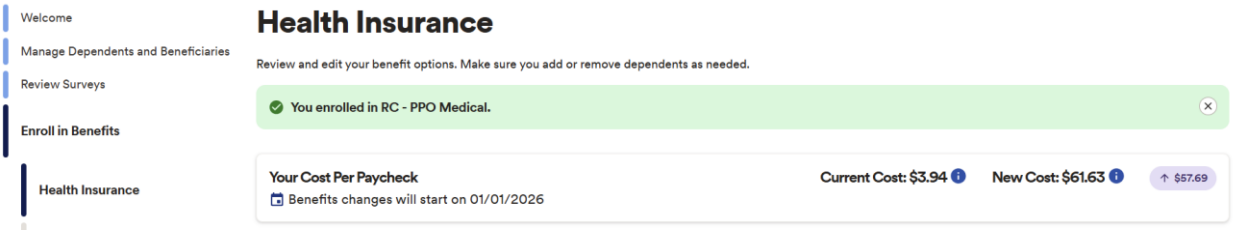
Confirm details may include some additional information needed (i.e. PCP-ID).

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Review your enrollment, costs, and covered individuals carefully before clicking on **Confirm**.

Once confimed, you will receive a confirmation message that you are now enrolled.

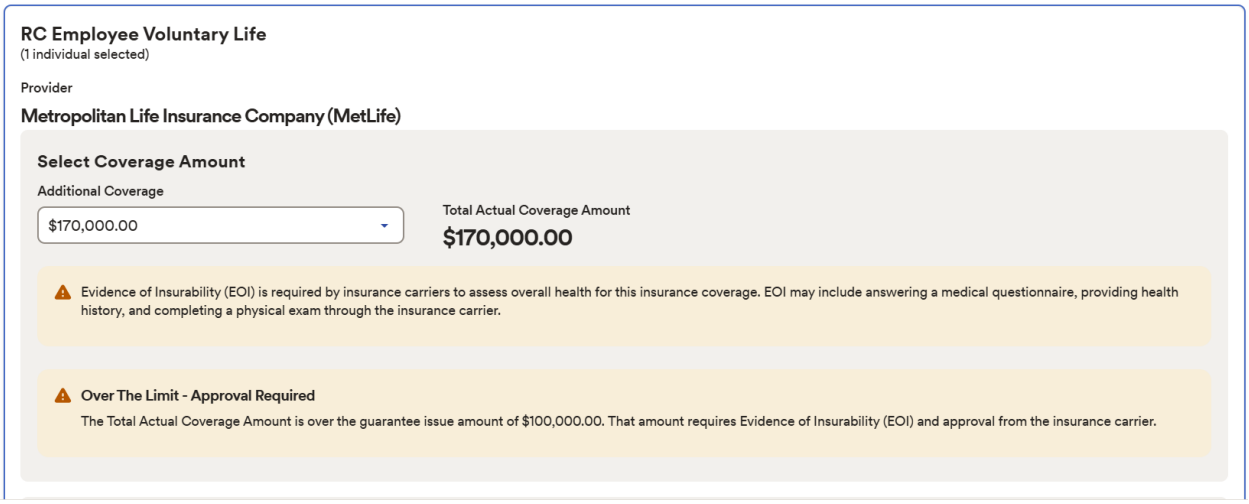


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Voluntary Life Elections and Beneficiaries:

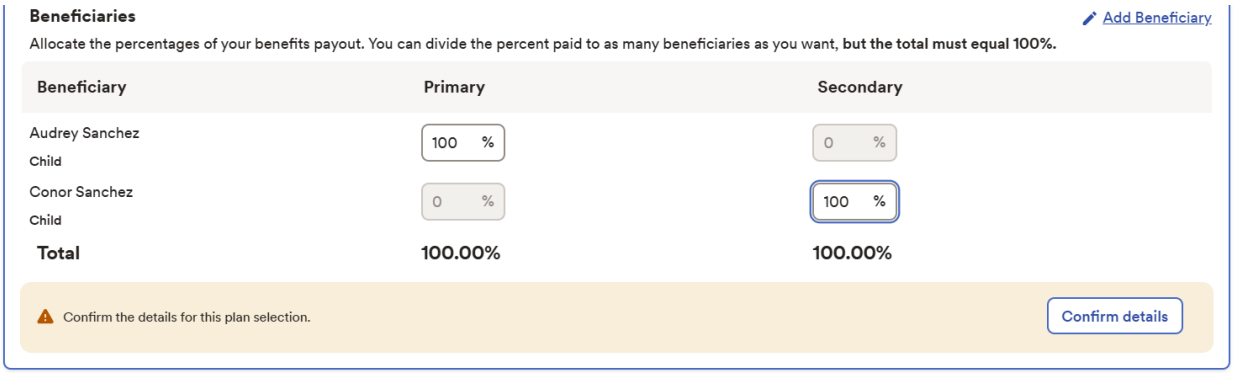
When you elect Voluntary Life, you will also need to designate your beneficiaries. Start by clicking **Enroll** and then choose the amount of coverage you want to elect from the drop down.

1 Plan Available



If the amount selected is over the Guarantee Issue amount, additional approval will be required, and you will be asked to complete **Evidence of Insurability** (EOI) and submit it to your employer. Your full election amount will not be approved until this process is completed.

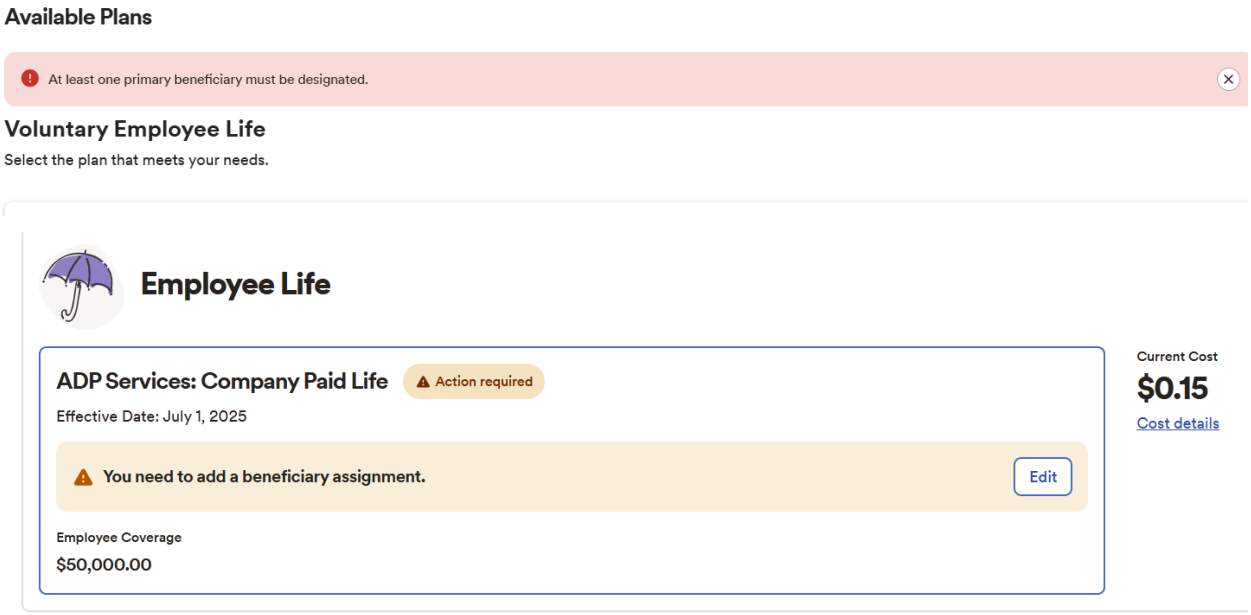
Next you will want to enter your beneficiary designation. Including **Primary** and **Secondary**, if applicable. All beneficiary delegation percentages combined must equal 100% for each category (Primary or Secondary).



Click **Confirm details.**

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Note: During enrollment you may need to take actions if the plans are set to **require** a beneficiary designation.

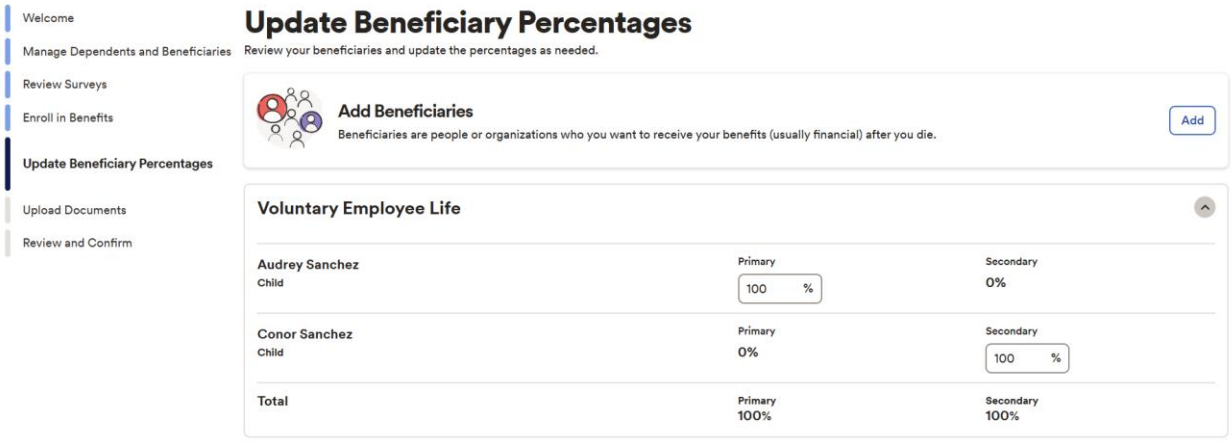


Review coverage and beneficiary designations and **Confirm**.



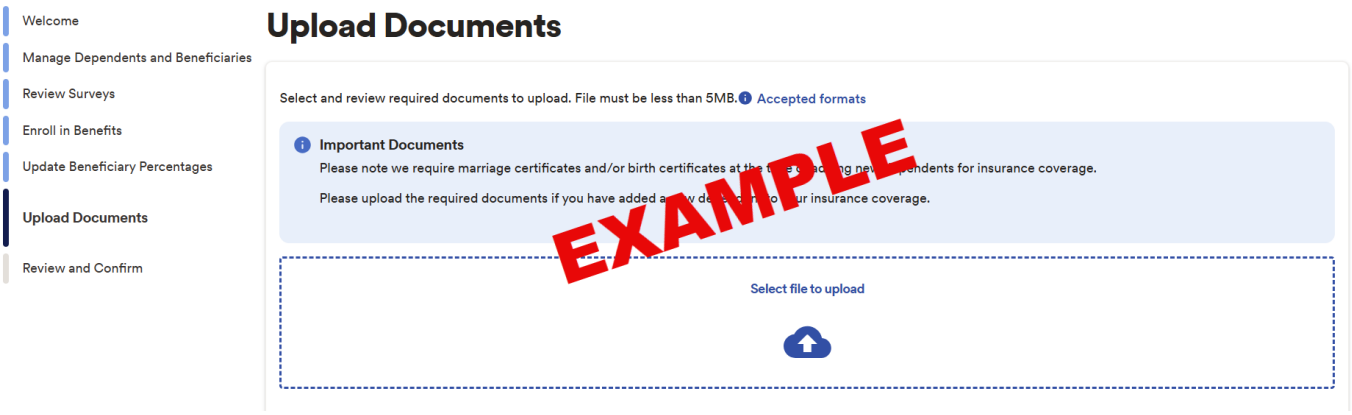
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Update Beneficiary Percentages step includes all plan types where beneficiary designations can be provided. Allowing employees to view and edit assigned beneficiaries in one place.



Continue through each sub step completing all your benefit enrollment elections.

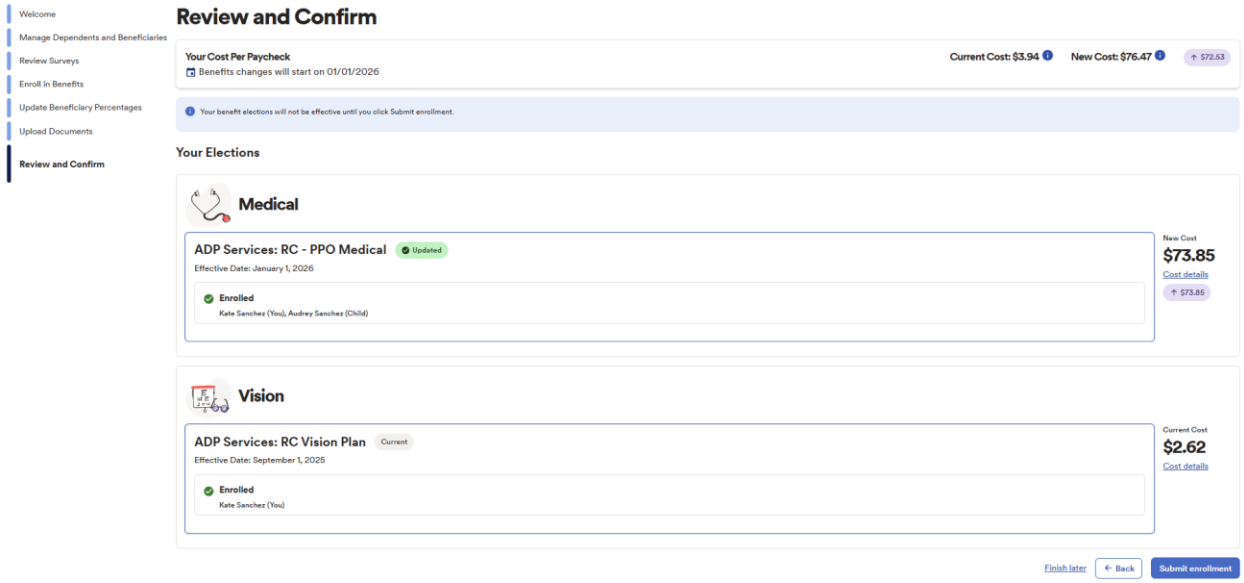
Upload Documents will only be displayed if your Practitioner is requesting documents to be uploaded and returned during your enrollment elections.



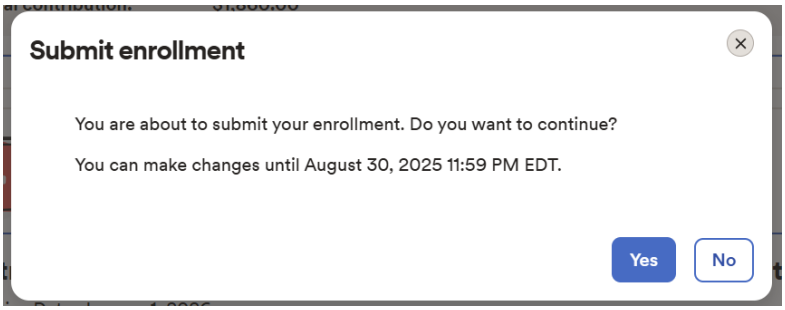
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Review and Confirm

Review all your selections/changes. When you have confirmed them, click **Submit enrollment**. Note that your benefit elections will not be processed until you click **Submit Enrollment.**
Note: If you click Finish later, your enrollments will just be saved. You will need to return to complete your enrollment elections and submit to your HR team.

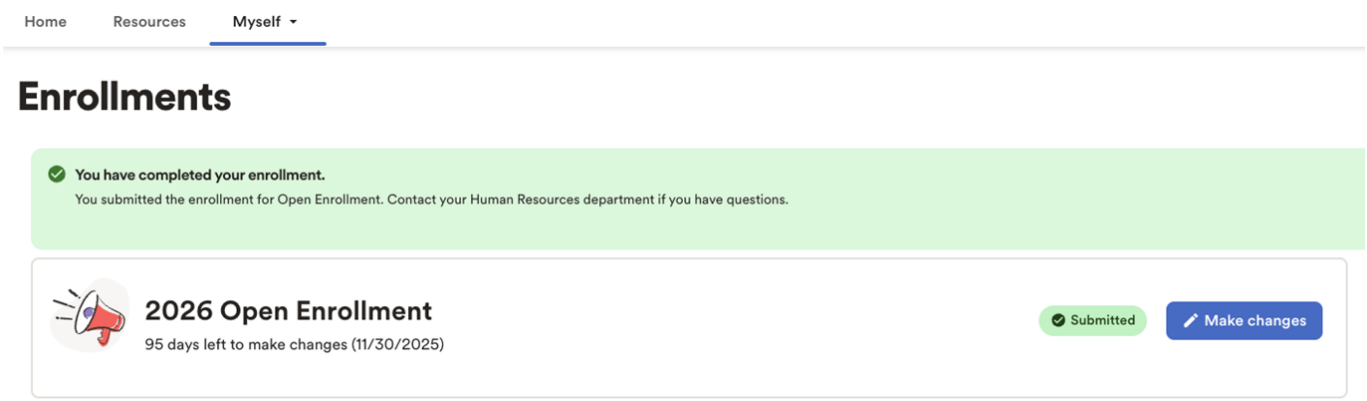


There will be a pop-up confirming your submission, you must select **Yes**.



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Please ensure you receive the confirmation note indicating your elections have been submitted.



If you would like to make additional changes or modifications during the Open Enrollment Period, you may log in and navigate to **Myself > Benefits > Enrollments** and click the **Make Changes** in the Open Enrollment box. This will bring you back to the beginning of the enrollment event to make any desired election changes.

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