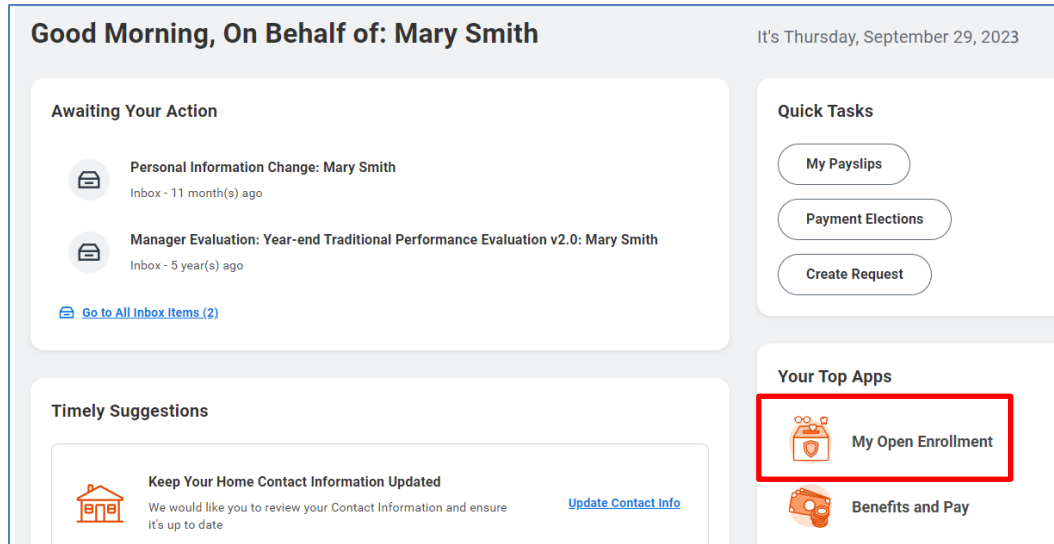


## Selecting Your Benefits

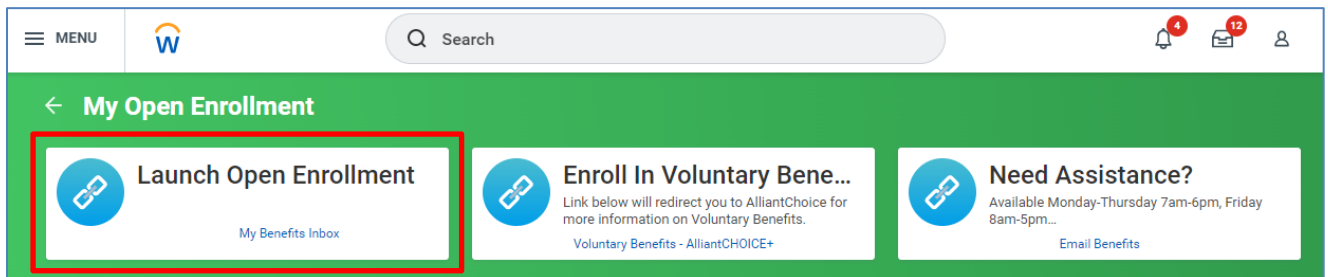
When it is time for open enrollment, you will receive an Open Enrollment task in your Workday Inbox. To complete your open enrollment:

1. Go to your Workday homepage and click on your **My Open Enrollment** icon



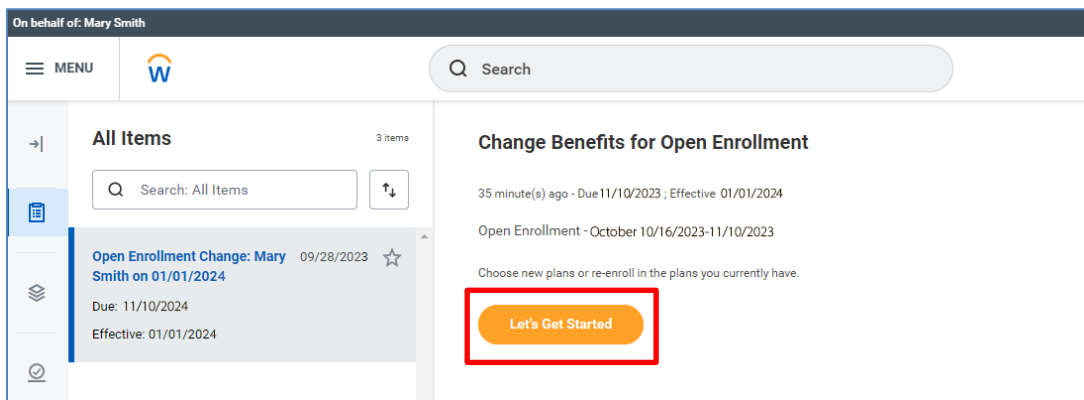
The screenshot shows the Workday homepage for Mary Smith on Thursday, September 29, 2023. The page is titled "Good Morning, On Behalf of: Mary Smith". It features several sections: "Awaiting Your Action" with two items: "Personal Information Change: Mary Smith" (Inbox - 11 month(s) ago) and "Manager Evaluation: Year-end Traditional Performance Evaluation v2.0: Mary Smith" (Inbox - 5 year(s) ago). There is a link "Go to All Inbox Items (2)". "Quick Tasks" includes "My Payslips", "Payment Elections", and "Create Request". "Timely Suggestions" includes "Keep Your Home Contact Information Updated" with a link "Update Contact Info". "Your Top Apps" includes "My Open Enrollment" (highlighted with a red box) and "Benefits and Pay".

2. Click on the first tab called **Launch Open Enrollment**.



The screenshot shows the "My Open Enrollment" page. It has a green header with a back arrow and the text "My Open Enrollment". Below the header are three cards: "Launch Open Enrollment" (highlighted with a red box) with a sub-link "My Benefits Inbox", "Enroll In Voluntary Bene..." with a sub-link "Voluntary Benefits - AlliantCHOICE+", and "Need Assistance?" with a sub-link "Email Benefits".

3. Click on **Let's Get Started**



The screenshot shows the "Open Enrollment Change" task for Mary Smith. The task is titled "Open Enrollment Change: Mary Smith on 01/01/2024" and is due on 11/10/2024, effective on 01/01/2024. The task details include "Change Benefits for Open Enrollment", "35 minute(s) ago - Due 11/10/2023; Effective 01/01/2024", and "Open Enrollment - October 10/16/2023-11/10/2023". The task instructions are "Choose new plans or re-enroll in the plans you currently have." and there is a "Let's Get Started" button (highlighted with a red box).

- Each benefit type is listed separately. Click on **Manage** to change an existing benefit or add a dependent, Click on **Enroll** to elect or re-enroll for the next benefit year. Please note that Health Savings Accounts, Flexible Spending and Dependent Care reset to zero every year.

**Health Care and Accounts**

Benefit Type	Plan Name	Cost (Monthly)	Coverage	Action
Medical	Kaiser Permanente HMO SMC	\$102.78	Employee	Manage
Dental	Delta Dental DHMO	\$4.50	Employee	Manage
Vision	Vision Service Plan	Included	Employee	Manage
Health Savings Account	Waived			Enroll

- Modify your level of coverage as needed on any eligible plan by clicking on **Manage/Enroll**.

## Adding Dependents

From the Benefit Plan:

- Click the appropriate benefit plan you wish to add/remove a dependent (see step 4 above).
- Select the new plan or click **Confirm & Continue** to remain with the current Aetna/Kaiser plan.

**Plans Available**

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

6 items

*Selection	Benefit Plan Details	You Pay (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Aetna HDHP SMC	Included	\$0.00
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Aetna HMO AVN - SMC	Included	\$0.00
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Aetna HMO SMC	Included	\$0.00
<input type="radio"/> Select	Aetna PPO OAMC -	Included	\$0.00

**Confirm and Continue** Cancel

8. Select the name of the dependent you wish to include or click the **Add New Dependent** icon to create a new dependent.

### Dependents

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

Coverage \* Employee + 1

Plan cost (Monthly) \$343.30

**Add New Dependent**

2 items

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Jane Doe	Spouse	09/04/1997
<input type="checkbox"/>	John Doe Jr	Child	10/01/2019

**Save** Cancel

9. Complete all required fields for your new dependent and click **Save**.  
If you add new dependents, you need to attach proof of eligibility before submitting your enrollment.  
See instructions on [Attaching Supporting Documents](#).

### Add My Dependent From Enrollment

#### Name

Country \*

Prefix

**First Name** \*

Middle Name

Last Name \*

Suffix

#### Personal Information

Relationship \*

Date of Birth \*

Age 11 years, 9 months, 29 days

Gender \*

Citizenship Status

Full-time Student

Student Status Start Date

**Save** Cancel

# Open Enrollment Instructions



## Modifying Dependents



Click on the **My Open Enrollment Icon**

1. Under Benefits, click on Dependents.

The screenshot shows the Workday Open Enrollment dashboard. On the right side, under the 'Benefits' section, the 'Dependents' link is highlighted with a red box. Other visible elements include 'Benefit Highlights' with various insurance options, 'Open Enrollment At A Glance' with 'What's New' and 'HealthCare Plan Rates', and 'How to Complete Open Enrollment' instructions.

2. Click on **Edit** next to the dependent you wish to update. (Please note this is to update demographic data for existing dependents. Please follow the proper process to add/create new dependents).

The screenshot shows the 'Dependents' page for Mary Smith. There is an 'Add' button at the top. Below it, a table lists one dependent:

Dependent	Relationship	Age	
Jane Smith	Child	16 years, 9 months, 28 days	<b>Edit</b>

The 'Edit' button for Jane Smith is highlighted with a red box.

3. Update the necessary fields and click **Submit**.

The screenshot shows the 'Dependent Options' and 'Dependent Personal Information' form. The 'Submit' button at the bottom left is highlighted with a red box. The form includes fields for 'Effective Date & Reason' and 'Dependent Personal Information'.

**Dependent Options**

Effective Date & Reason

Effective Date \*  
10/03/2019

Reason

**Dependent Personal Information**

Legal Name

Legal Name \*  
Jane Doe

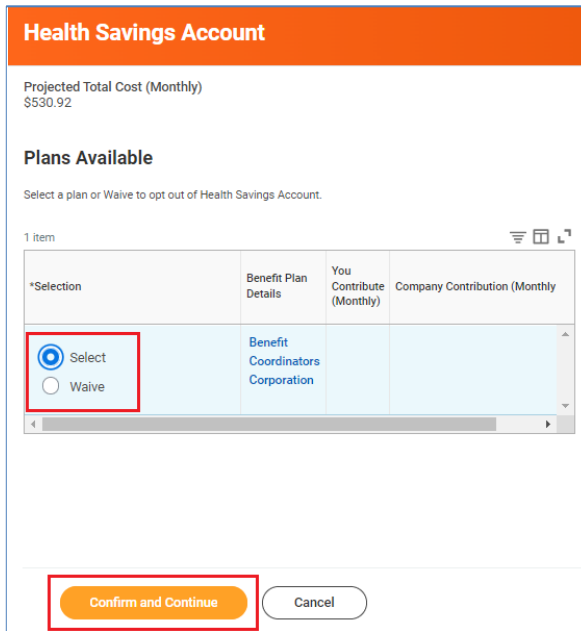
Gender

**Submit** Save for Later Cancel

## Adding the Health Savings Election

Click on **Enroll** on the Health Savings Election tile/icon. Depending on your elections from the previous screen, you may or may not be eligible for this plan. To be eligible, you need to be enrolled in a High Deductible Health Plan.

1. Click on **Select** to enroll and click **Confirm & Continue**.



**Health Savings Account**

Projected Total Cost (Monthly)  
\$530.92

**Plans Available**

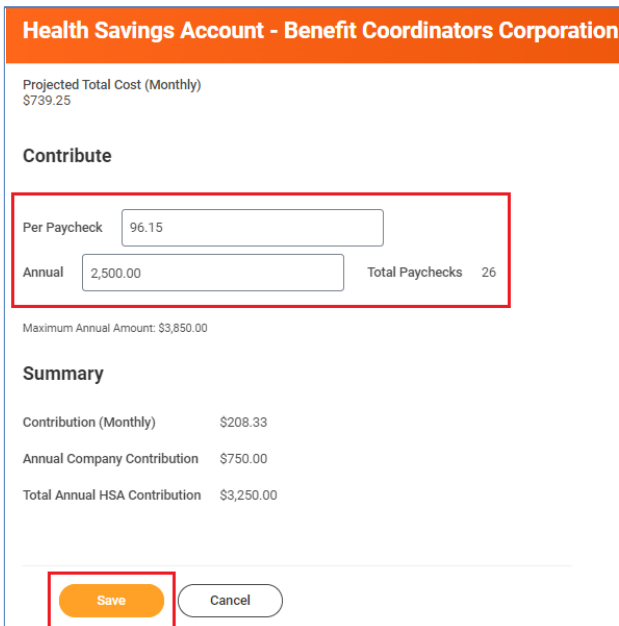
Select a plan or Waive to opt out of Health Savings Account.

1 item

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Benefit Coordinators Corporation		

**Confirm and Continue** **Cancel**

2. Enter in the annual or per paycheck amount you wish to have deducted and click **Save**.



**Health Savings Account - Benefit Coordinators Corporation**

Projected Total Cost (Monthly)  
\$739.25

**Contribute**

Per Paycheck

Annual  Total Paychecks 26

Maximum Annual Amount: \$3,850.00

**Summary**

Contribution (Monthly)	\$208.33
Annual Company Contribution	\$750.00
Total Annual HSA Contribution	\$3,250.00

**Save** **Cancel**

## Adding a Flexible Spending Account

Click on **Enroll** on the Health Care FSA or Dependent Care tile/icon. To be eligible for the limited Health Flexible Spending Plan, you need to be enrolled in a High Deductible Health Plan. Dependent Care does not require enrollment in a Medical plan.

1. Click **Select** for the plan you wish to enroll in and click on **Confirm & Continue**.

**Health Care FSA**

Projected Total Cost (Monthly)  
\$94.83

**Plans Available**

Select a plan or Waive to opt out of Health Care FSA.

2 Items

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Benefit Coordinators Corporation Limited		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Benefit Coordinators Corporation Traditional	\$83.33	

**Confirm and Continue** Cancel

2. Enter in the annual or per paycheck amount you wish to have deducted and click **Save**

**Health Care FSA - Benefit Coordinators Corporation Traditional**

Projected Total Cost (Monthly)  
\$94.83

**Contribute**

Per Paycheck

Annual  Total Paychecks 26

Minimum Annual Amount: \$26.00  
Maximum Annual Amount: \$2,850.00

**Summary**

Contribution (Monthly) \$83.33  
Total Annual Contribution \$1,000.00

**Save** Cancel


## Adding Group Life Insurance

If you enroll or increase any of your Additional Life Insurance Coverage, you are required to complete a physical examination and submit it directly to The Standard.

Click on the Additional Life tile/icon

1. Click on **Manage/Enroll** on the **Additional Life** tile/icon
2. Choose either **Select** or **Waive** coverage and click **Confirm & Continue**.

*Selection	Benefit Plan Details	You Pay (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	The Standard (Employee)	\$20.00	

3. Click on the dropdown menu icon  to view available coverage. Click on the coverage amount you would like to request then select a beneficiary.

Calculated Coverage \$250,000.00

Coverage \*

Plan cost (Monthly)

Beneficiaries

Select an existing or add a n

Primary Beneficiaries 0

Secondary Beneficiaries

Save Cancel

## Designating Beneficiaries

Next, under the Life Insurance tiles/icons designate your beneficiaries for your life insurance plans. Please note Basic Life, Additional Life and AD&D beneficiaries must be designated separately under each benefit.

1. Click the **+ sign** under primary beneficiary to add a new beneficiary or the **- sign** to remove a beneficiary. Click on the percentage amounts and update the allocation and click Save to complete the request. Please note all beneficiary changes made in Open Enrollment will not be effective until January 1st following the open enrollment period.

**Additional Life - The Standard (Employee)**

Projected Total Cost (Monthly)  
\$47.50

**Coverage**

Your guaranteed coverage amount for Additional Life - The Standard (Employee) is \$1. Submit your Evidence of Insurability to The Standard to be considered for the coverage amount of \$150,000.

Calculated Coverage \$150,000.00

Coverage \*

Plan cost (Monthly) \$36.00

**Beneficiaries**

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 2 Items

Beneficiary	Percentage
<input type="button" value="x"/> Michael Smith <input type="button" value="⋮"/>	<input type="text" value="50"/>
<input type="button" value="x"/> Jane Smith <input type="button" value="⋮"/>	<input type="text" value="50"/>

## Adding Additional Savings

To Enroll or change your existing 457 Deferred Compensation election click on **Manage** on the 457 tile/icon

1. **Select** Deferred Compensation plan you wish to enroll into or change and click **Confirm & Continue**.

**457**

Projected Total Cost (Monthly)  
\$47.50

**Plans Available**

Select a plan or Waive to opt out of 457.

2 Items

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Empower Roth (Post-Tax)		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Empower Traditional (Pre-Tax)		



# Open Enrollment Instructions



- Click on the arrow under Contribution Type to designate deduction type, a percentage or flat \$ amount. Then enter the amount you wish to elect and click **Save**. Please note all changes are effective until January 1st following the open enrollment period.

### 457 - Empower Traditional (Pre-Tax)

Projected Total Cost (Monthly)  
\$47.50

**Contribute**

Enter how much you want to contribute as an amount or a percentage.

Contribution Type \*

select one

Amount

Percentage

**Retirement Savings Instructions**

Provider Website <http://www.massmutual.com/>

**General Instructions**


The County's 457 Deferred Compensation Plan offers employees an...  
ment savings plan with a variety of investment options, investment e...  
lated services. There are two voluntary Deferred Compensation plans

## Adding Additional Benefits

The additional benefits section is where you can elect to enroll in Remotiv (formerly Financial Soundings.)


- Click **Enroll** on the Remotiv (formerly Financial Soundings) icon/tile.

### Additional Benefits



**Employee Assistance Program**  
Claremont

Manage



**Remotiv (formerly Financial Soundings)**  
Waived

Enroll

2. Click **Select** to enroll then click on **Confirm & Continue**.

### Retirement Readiness

Projected Total Cost (Monthly)  
\$739.25

#### Plans Available

Select a plan or Waive to opt out of Retirement Readiness.

1 item

*Selection	Benefit Plan Details
<input checked="" type="radio"/> Select <input type="radio"/> Waive	San Mateo County - Remotiv

#### Additional Benefits Instructions

##### General Instructions

###### Retirement Readiness

This is a retirement readiness program which provides a personalized assessment of your estimated retirement benefits, taking into account your SamCERA pension and the County's Deferred Compensation Plan with Mass Mutual to help you determine how to best prepare for retirement by showing you:

- Where you are today
- Where you want to be in the future
- What steps to take to get you closer to your goals

Each report is personalized based on your individual situation. Reports are mailed out the second quarter of the new benefit plan year.

**Confirm and Continue** Cancel

3. Click **Save** to return to the main Open Enrollment Screen.

### Retirement Readiness - San Mateo County - Remotiv

Projected Total Cost (Monthly)  
\$739.25

#### Coverage

You will be enrolled in this plan.

#### Additional Benefits Instructions

##### General Instructions

###### Retirement Readiness

This is a retirement readiness program which provides a personalized assessment of your estimated retirement benefits, taking into account your SamCERA pension and the County's Deferred Compensation Plan with Mass Mutual to help you determine how to best prepare for retirement by showing you:

- Where you are today
- Where you want to be in the future
- What steps to take to get you closer to your goals

Each report is personalized based on your individual situation. Reports are mailed out the second quarter of the new benefit plan year.

**Save** Cancel

## Completing Your Enrollment

Benefit changes will not be reflected unless they are reviewed and finalized.

1. Click on Review & Sign at the bottom of the election screen.

Open Enrollment - January

Projected Total Cost (Monthly)  
\$739.25

**Your Retirement Readiness changes have been updated, but not submitted**  
Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

### Health Care and Accounts

Plan	Cost (Monthly)	Coverage	Dependents
<b>Medical</b> Kaiser Permanente HDHP SMC	\$82.92	Employee	
<b>Dental</b> Cigna PPO Management w/ \$4000 Orthodontia	\$104.64	Employee + Family	5
<b>Vision</b> Vision Service Plan Buy-Up	\$15.98	Employee + Family	5

**Review and Sign** **Save for Later**

2. Scroll down to the bottom of the review page to attach any supporting documentation and check the **I Agree** checkbox to complete your electronic signature. Supporting documentation may include marriage or birth certificates for newly added dependents.

Attachments

Drop files here  
or  
**Select files**

### Electronic Signature

LEGAL NOTICE: Please Read

When you check the "I AGREE" checkbox, you acknowledge and agree to be legally bound to the following:

1. You have carefully read and reviewed the above listed benefit selections and each one is accurate.
2. You understand that your benefit elections are legal and binding transactions and that your benefit elections come at the price indicated when you made your selection. You further understand that you your pay and you authorize your employer to make such deductions. If for any reason your employer is unable to or inadvertently fails to make the correct deductions, you acknowledge you are still liable for your share of the cost of the premium.
3. You understand that if you are married, your dependent Spousal Coverage Elsewhere selection is legally binding.
4. You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

**I Agree**

**Submit** **Save for Later** **Cancel**

# Open Enrollment Instructions



## Did you submit your Open Enrollment and want to make changes?



1. Go to your Workday homepage and click on your **My Open Enrollment** icon

The screenshot shows the Workday homepage for Mary Smith. At the top, it says "Good Morning, On Behalf of: Mary Smith" and "It's Thursday, September 29, 2023". There are three main sections: "Awaiting Your Action" with two items (Personal Information Change and Manager Evaluation), "Timely Suggestions" with a "Keep Your Home Contact Information Updated" suggestion, and "Quick Tasks" with buttons for "My Payslips", "Payment Elections", and "Create Request". On the right, "Your Top Apps" section has "My Open Enrollment" and "Benefits and Pay" buttons, with "My Open Enrollment" highlighted by a red box.

2. Under Benefits, click on Change Open Enrollment. Don't forget to repeat the "Complete your Open Enrollment" steps to save additional changes.

The screenshot shows the "Open Enrollment" page. At the top, there are three cards: "Launch Open Enrollment", "Enroll in Voluntary Benefits", and "Need Assistance?". Below these are three columns: "Benefit Highlights" (listing Claremont EAP, Nationwide Pet Insurance, MetLife: Auto & Home, MetLife: Legal Plans, Travelers Home Insurance, and AlliantChoice Voluntary Benefits), "Open Enrollment At A Glance" (with "What's New" and "HealthCare Plan Rates" sections), and "How to Complete Open Enrollment" (with a "Change Open Enrollment" button highlighted by a red box). The "Benefits" section on the right shows "Current Cost" as 976.09 and includes a "Change Open Enrollment" button.