Selecting an Open Enrollment Session

Select a session on the Open Enrollment page. You can view the description, session open date, session close date, status, date last modified, and last modified by information for each open enrollment session.
Prior to making open enrollment elections, ensure that your contacts (people that you designate as beneficiaries and/or dependents) are entered and up-to-date. Select Myself > Personal > Contacts to add or edit contact information.

Depending on the Open Enrollment configuration for the plan, you may have the option to make new elections or remain enrolled in your current benefit plan. You will only have the option to remain enrolled if you have status of Not Started. If for any reason an Open Enrollment session is reopened (that was already completed via passive enrollment), you will need to then complete a new election. Electing passive enrollment bypasses all other election options and opens the Confirmation page immediately.
You may also be able to access and change elections after you have submitted until the Open Enrollment session is closed, depending on your company configuration. When you access an election you’ve already submitted, the Confirmation page appears with a Modify Election button.

To select an open enrollment session:

1. From Myself, select Open Enrollment. The Open Enrollment page appears.
2. Select the Description link of the applicable open enrollment session.
   - If passive enrollment is configured for the plan, the Open Enrollment page opens with the option to make a new election, or stay enrolled in the current benefit plan.
     - If you select to make a new election, the About Open Enrollment page appears.
     - If you select to stay enrolled in your current benefit plan, the Confirmation page appears.
   - If passive enrollment is not configured for the plan, the About Open Enrollment page appears.
Entering Open Enrollment Information

The About Open Enrollments page is the starting point for making open enrollment elections. A welcome message displays information applicable to this session. The Draft button allows you to enter and save some information now and continue the election at a later time. The About Open Enrollment page may also display the number of days remaining in the session.

![Image of About Open Enrollment page]

To begin open enrollment elections:
1. From the About Open Enrollment page, review the open enrollment session information.
2. Select Next. The Verify Beneficiary and Dependent Information page appears.
Verifying Beneficiaries and Dependents

Verify information about employee beneficiaries and dependents on the Verify Beneficiary and Dependent Information page. This page includes summary information for each contact name, relationship, and designation.

**Hint:**
If you are unable to add or change information on this page, or do not have an Add, Edit, or Delete button available to you, it may be due to how your company has configured the system. Please contact your company’s system administrator for more details.

To verify, add, or change beneficiaries and dependents:

1. View summary information.
2. To edit information about a beneficiary or dependent, from the Verify Beneficiary and Dependent Information page, select the Name link. The Add/Change Contact page appears. Edit the information, as needed. Select Save. The Verify Beneficiary and Dependent Information page appears. Select Next.
3. To add a beneficiary or dependent, from the Verify Beneficiary and Dependent Information page, select Add. The Add/Change Contact page appears. Enter contact information, as needed. Select Save. The Verify Beneficiary and Dependent Information page appears. Select Next.
Enrolling in a Plan

Depending on the benefit plan and deduction/benefit type, you may select one or more benefit plans.

The Current Plan section displays deduction/benefit plans in which you are enrolled for the deduction/benefit type as of the current system date.

The Steps section displays the About Life Events or About Open Enrollment and Confirm Your Changes steps. A Verify Beneficiary and Dependent Information step also appears, if applicable. In addition, when only a single plan can be selected for the deduction/benefit type, all plans appear on one Select a Plan page.

Evidence of insurability (EOI) may be required for life insurance plans. A message will appear stating that evidence of insurability is required for amounts surpassing what the company has configured as the guaranteed issue amount for a particular plan. The maximum benefit amount that can be elected will be displayed.

When multiple plans can be selected for the deduction/benefit type, each plan appears on separate pages. You must select or decline each plan. For example, for the Flexible Spending Account plan type, you may select or decline dependent care or health care.

Based on the valid dependent relationships configured by your company for the Open Enrollment plan, only those dependents that match the relationship configured for the plan will appear for enrollment. For example, while you may have "spouse", "child", and "brother" configured as dependents in your Contacts, the plan you are enrolling in may only have spouse and child configured as valid dependent relationships for enrollment into the plan.

If the plan includes benefit options, the options may be displayed in alphabetical order or by employee option cost in ascending order, depending upon your company configuration.
Deferred Compensation

Select a Plan
Use the options below to choose or decline a plan.
For more information, please contact your Benefits Administrator.

I decline the 401K Def Comp $ Contribution plan.

401K Def Comp $ Contribution
$600.00 Biweekly
Amount Per Pay Period

Goal Amount
Goal amount 16,500.00 $600.00 per pay check*

Enroll Beneficiaries

<table>
<thead>
<tr>
<th>Name</th>
<th>Primary</th>
<th>Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Megan Walbel</td>
<td>100.00</td>
<td>0.00 %</td>
</tr>
</tbody>
</table>
### Dental

Select a Plan

Use the options below to choose or decline a plan. You may choose either the Dental PPO or Dental HMO plan.

- I decline Dental plans.

#### Dental HMO Plan

<table>
<thead>
<tr>
<th>Options</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee + Spouse</td>
<td>$20.00</td>
</tr>
<tr>
<td>Employee Only</td>
<td>$12.50</td>
</tr>
<tr>
<td>Family</td>
<td>$40.00</td>
</tr>
<tr>
<td>None</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

#### Dental PPO Plan

$12.50 Biweekly

<table>
<thead>
<tr>
<th>Options</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee + Spouse</td>
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<td>$40.00</td>
</tr>
<tr>
<td>None</td>
<td>$0.00</td>
</tr>
</tbody>
</table>
To enroll in a plan:

1. Select or decline plan(s).

   Note:
   Select the Draft button to enter and save information now and then continue the election at a later time. When you return to complete your elections, the About Life Events or About Open Enrollment page appears.

2. Depending on how the deduction/benefit plans are configured, additional fields may appear. Complete the following:
   - Enter a flat amount or percent, if applicable. UltiPro displays an amount based on the plan configuration as well as employee pay frequency.
   - Select a benefit option such as employee only, employee plus one, or family, if applicable. Enter additional required information (for example, you may need to enroll dependents and enter dependent information).
   - Enter additional information.
For a medical plan type, you may be required to enter physician information.

For a flexible spending plan type, you may be required to enter a goal amount. Once the amount is reached, the deduction is stopped.

For a plan configuration with beneficiaries, you may be required to enroll applicable beneficiary information as well as percentages for primary and secondary beneficiaries.

**Note:**
Primary beneficiaries must total 100%; secondary beneficiaries must total 100%.

Depending upon the plan configuration, when you decline a plan, you may be required to enter a decline reason; a disclaimer message may appear.

3. Select the dependents to be enrolled in the plan.

4. Select Next.

**Reviewing and Submitting Elections**

Review the election information on the Confirm Your Changes page. This page contains personal information as well as benefits selected and declined. You can compare current benefits to the newly selected benefits. Selected plan details include covered family members, pay period cost, and beneficiaries, when applicable.
To review and submit elections:

1. From the Confirm Your Changes page, review the selected and declined benefit type and plan details including covered family members, plan beneficiaries, and cost information.
2. Return to the applicable page to make any changes, if needed.
3. Select Draft to continue the election at a later time or select Submit to complete your elections now. If you select Submit, you cannot make any changes without the assistance of your Benefits Administrator. You can print the Confirm Your Changes page. If you select OK, the Confirmation page appears.
4. Select Print to print a summary of your elections.
5. Select Close.