Benefit Open Enrollment Job Aid

Open Enrollment Dates: *Complete your Open Enrollment benefit elections between* ***October 26, 2026, and November 6, 2026, 11:59 pm PST****, to ensure coverage for the new plan year effective January 1, 2027.*

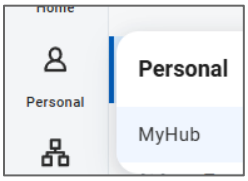
FSA Enrollment: *You need to opt in to these accounts each year if you wish to participate.*

Qualifying Life Event (QLE): *If you do not complete your benefit enrollment during Open Enrollment, your next opportunity to enroll or make changes to your benefits will be during the next Open Enrollment, unless you experience a QLE as the birth of a child, marriage, or loss/gain of coverage.*

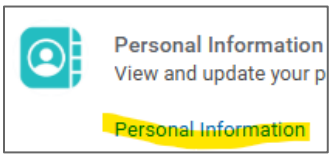
Before You Begin:

Ensure your personal and benefit information is up to date before starting your enrollment:

1. To **review your personal information** in Workday, navigate to **MyHub** on the homepage located under the **Personal App** in the top left corner of the page.



2. Select **Personal Information**.



3. Review your contact information by clicking **Addresses** under the **View** column.



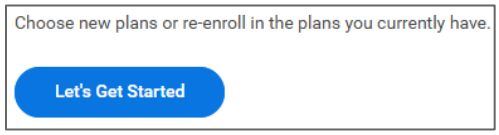
4. If any contact information is outdated, please update it before completing Open Enrollment, as certain changes can impact specific plan eligibility.
5. To **review your current Benefit Elections**, navigate to the search bar and type “Benefit Elections”.



6. No changes will be made in this app; please navigate back to the Workday Home Page to begin Open Enrollment.

Start Open Enrollment:

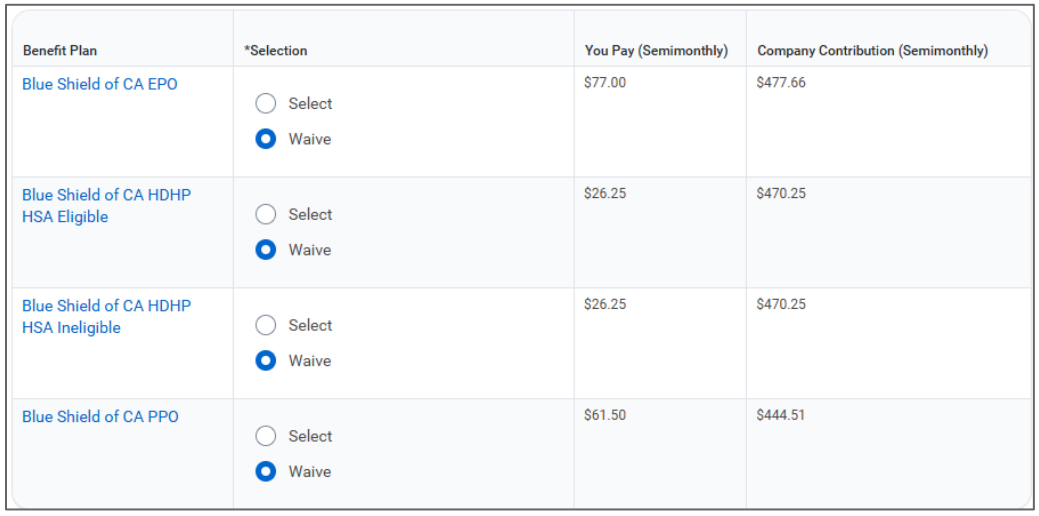
1. From your Workday homepage, navigate to your tasks and select the **Open Enrollment Change** task. You can also access this task in the Timely Suggestions area of the Workday landing page.
2. Click **Let's Get Started**.



3. Each benefit plan will now be displayed on the enrollment screen. To opt-in to a benefit plan, select **Enroll** or **Manage** on the plan's card:



4. On the next screen, click "**Select**" next to the specific coverage you want to enroll in and then click **Confirm and Continue** at the bottom of the page.



Benefit Plan	*Selection	You Pay (Semimonthly)	Company Contribution (Semimonthly)
Blue Shield of CA EPO	Select / Waive	$77.00	$477.66
Blue Shield of CA HDHP HSA Eligible	Select / Waive	$26.25	$470.25
Blue Shield of CA HDHP HSA Ineligible	Select / Waive	$26.25	$470.25
Blue Shield of CA PPO	Select / Waive	$61.50	$444.51

5. **Add Dependents:** If the plan allows dependent coverage, you will be prompted to add dependent(s).

   If you do not need to add dependents, click **Save** and skip to instruction **#14**:



Or

6. Click **OK**



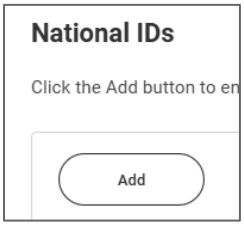
7. On the **Add Dependent** page, complete all required fields (marked with a *) and any optional fields.

8. After completing the name and personal information portions at the top of the page, scroll and ensure that the address and phone number are entered for the new dependent.

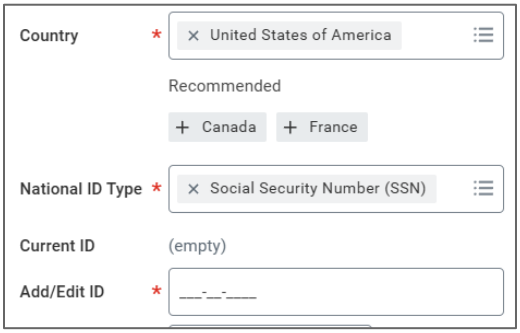


Note**: At least one address must be added for each dependent. If the dependent shares your address, select **Use Existing Address and select your address.

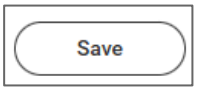
9. Next, select the **Add** button under the **National ID** heading:



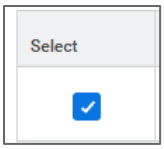
10. Enter the Social Security Number information.

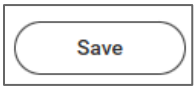


11. Click **Save**

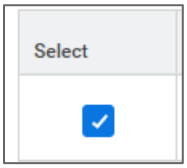


12. Repeat steps 5-12 for each dependent.
13. When all dependents are added, make sure that those you want covered under this plan are selected with a check mark. Then click **Save.**





14. Continue this enrollment process for each plan type by selecting **Enroll** or **Manage** on each plan card. If you added dependents to a previous plan, they will appear as options for enrolling in other plans. Select the check box next to include them in each enrollment:

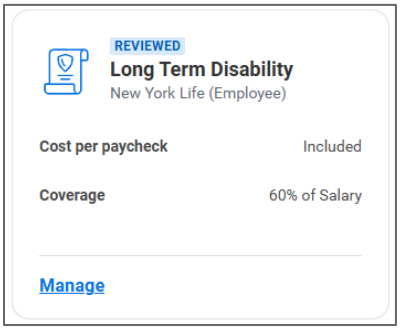


15. Your **Projected Total Cost** at the top of the page will update as you make your elections. This amount is the total of all your elections enrolled so far.



16. Some plans are dependent upon enrollment in other plans (e.g., the Health Savings Account (HSA) requires enrollment in a High Deductible Health Plan). If you are not eligible to enroll, the plan will appear **greyed out** with an explanation of why you are not eligible.

17. You will be automatically enrolled in the University-paid plans. These plans will display as Manage rather than Enroll:



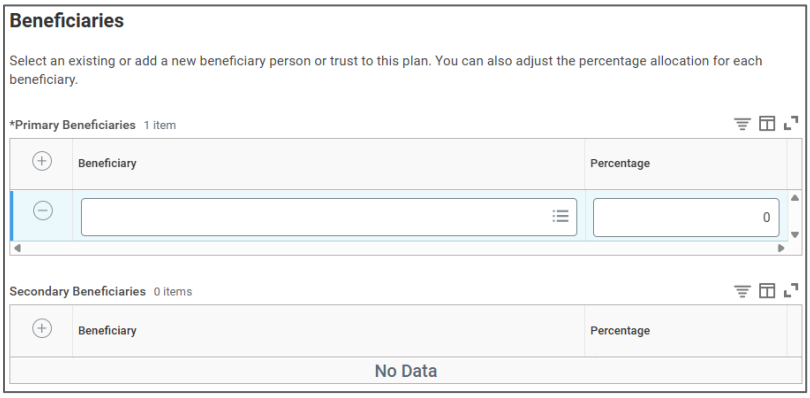
These plans can be viewed, but they cannot be changed:

Benefit Plan	*Selection	You Pay (Semimonthly)	Company Contribution (Semimonthly)
New York Life (Employee)	Select Waive	Included	$3.80

18. Beneficiaries are required for the University-paid Basic Life and Basic AD&D insurance plans. To assign beneficiaries, select **Manage** or **Enroll** on the applicable plan. If not automatically enrolled, select your plan and then select **Confirm and Continue**.

a. Under Beneficiaries, select the ⊕ icon to add a beneficiary for either the **Primary Beneficiary, Secondary Beneficiary**, or both.

Note: Select the ⊖ icon to remove an existing beneficiary.



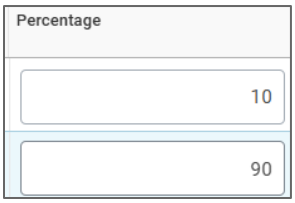
b. In the search field, choose **Add New Beneficiary or Trust**. On the pop-up, select **Add New Beneficiary**. Select **Continue**.

c. Select the applicable **Relationship**.

d. Under the **Legal Name** tab, enter the required fields – **First & Last Name**.

e. Under the **Contact Information** tab, enter an address. Choose the **Usage** type. Select **Ok**.

f. Back on the main screen, assign a **Percentage** amount (must total 100% across all beneficiaries).

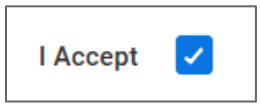


g. Select **Save**.

19. After making your plan selections, select **Review and Sign**.



20. **Review your elections carefully**, read the legal notice, and select **I Accept** at the bottom of the page. Then select **Submit**.





21. View your submitted elections by selecting **View 2027 Benefit Statement**.

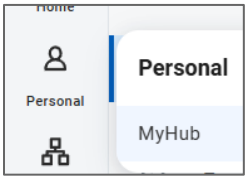


22. To print your elections, select **Print** in the bottom left-hand corner, then click **Download**.

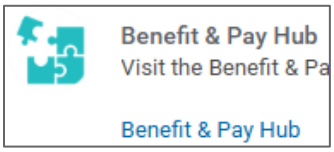


To change your previously submitted Open Enrollment Elections:

1. From the Workday homepage, navigate to **MyHub** under the **Personal App** in the top left corner of the page.



2. Click **Benefit and Pay Hub** to navigate to your benefit elections.



3. You should see your submitted Open Enrollment elections under the Needs Attention header, click **Edit** to make changes to your submitted elections. Don't forget to submit any changes before the deadline of 11/6!

