

Quick Reference Guide: *Open Enrollment***Overview**

Open Enrollment at the University of Chicago will begin on **November 1, 2018** and will end **November 15, 2018**. All new elections and changes made during this period will take effect **January 1, 2019**.

Open Enrollment Information Sessions:

Attend an **Open Enrollment Information Session** to learn more about your 2019 benefits and for assistance with the enrollment process. All sessions will be held at 6054 S. Drexel, Room 144.

- November 1, 2018 from Noon-1pm
- November 6, 2018 from Noon-1pm
- November 13, 2018 from Noon-1pm
- November 15, 2018 from Noon-1pm

Open Enrollment Support:

Benefit Specialists will be available to answer your questions and provide assistance throughout the Open Enrollment period, Monday through Friday from 8:30 am to 4:30 pm by phone at 773-702-9634 and email benefits@uchicago.edu.

Benefits & Health Fair

Learn about your benefit options and ask questions of the benefits staff and plan representatives. The Benefits team will be available to provide assistance with the Open Enrollment process through Workday.

- November 8, 2018 at Ida Noyes Hall, 1212 E. 59th Street from 9 am to 4 pm

The following information is intended to support your use of Workday to complete Open Enrollment.

Keep in mind

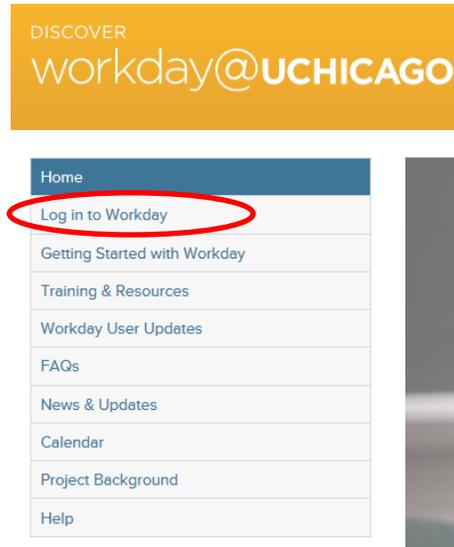
- Health and Dependent Care Flexible Spending Accounts (FSA), Health Savings Account (HSA), and 457(b) elections require you to re-enroll during Open Enrollment. **Your 2018 deductions will default to \$0 for calendar year 2019 unless you re-enroll.**
- If you do not want to change any of your **other** current benefit elections you **do not** have to take action. Your 2018 elections will automatically continue for calendar year 2019.
- To leave your Open Enrollment event in Workday and return at a later time to finish your changes, you may click **Save for Later** at the bottom of the page.

Information & Documentation Needed

- CNet ID and password
- Open Enrollment Guide available at <http://humanresources.uchicago.edu/benefits/>
- When adding new dependents, proof of relationship documentation must be scanned, uploaded and attached at the end of your elections in Workday (e.g. Birth or Marriage Certificate).
- If you do not submit the required information by November 15, 2018, your dependent will be considered ineligible and his/her coverage will not be processed.

Logging Into Workday:

1. Visit workday.uchicago.edu and locate **Log in to Workday** on the left side of the screen.



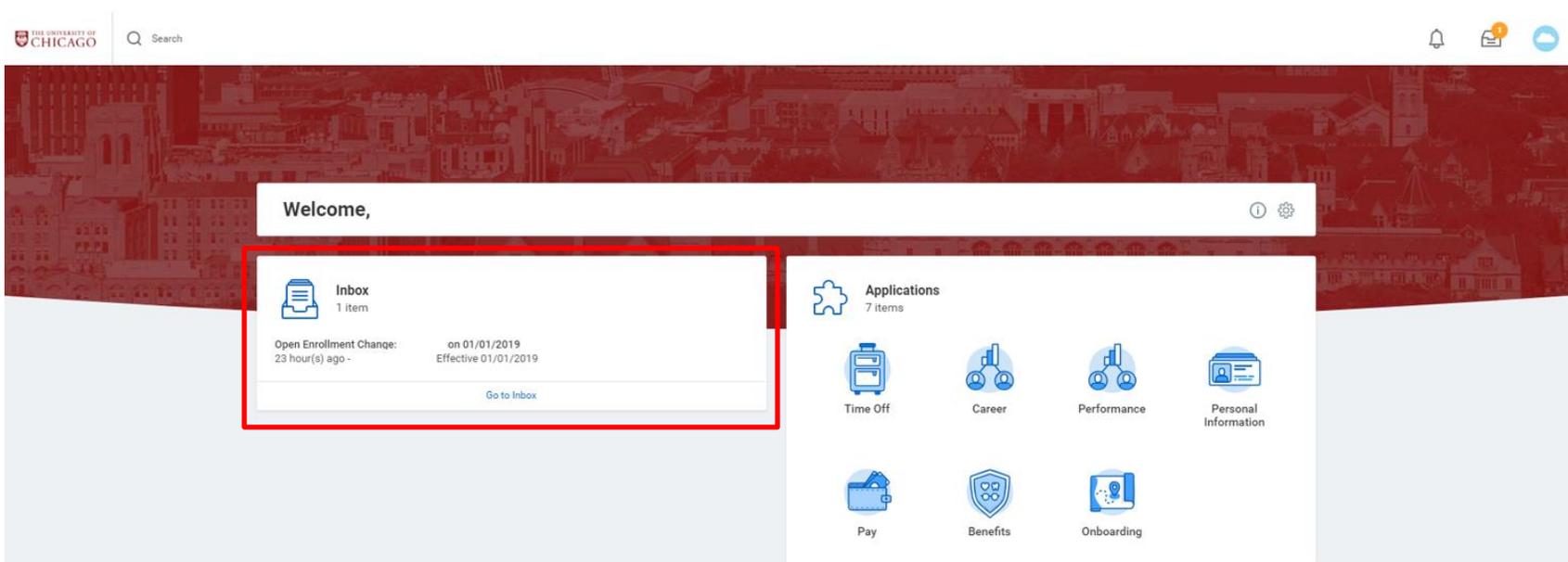
2. Enter your CNet ID and password, click **Login**.



If you don't have a CNet ID, or can't remember it, please go to <http://cnet.uchicago.edu>.

Open Enrollment Steps:

1. Select the **Change Benefits for Open Enrollment** task from the Inbox; you may use the **Expand** icon  for a full screen view of the task.



2. Select desired **Benefit Plan** by using the radio buttons under the ***Elect/Waive** column.

Health Care Elections 8 items

	Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
	Medical - Blue Cross Blue Shield of IL HDHP Maroon Savings Choice	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
	Medical - Blue Cross Blue Shield of IL HMO HMOI	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		<input type="text" value="Employee Only"/>

3. For each plan where you have selected **Elect**, click the **Coverage** column to enter for whom this coverage will apply.

Health Care Elections 8 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage
Medical - Blue Cross Blue Shield of IL HDHP Maroon Savings Choice	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - Blue Cross Blue Shield of IL HMO HMOI	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		<div style="border: 2px solid red; padding: 5px;"> <p>Employee Only</p> <p>search</p> <p><input checked="" type="radio"/> Employee Only</p> <p><input type="radio"/> Employee + Spouse</p> <p><input type="radio"/> Employee + Child(ren)</p> <p><input type="radio"/> Employee + Family</p> <p><input type="radio"/> Employee + Domestic Partner</p> <p><input type="radio"/> Employee + Domestic Partner + Child(ren)</p> <p><input type="radio"/> Employee + Civil Union Partner</p> <p><input type="radio"/> Employee + Civil Union Partner + Child(ren)</p> </div>
Medical - Blue Cross Blue Shield of IL PPO Maroon	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
Medical - University of Chicago Medicine HMO UCHP	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		

4. If anyone other than the Employee is selected under the **Coverage** column, you will need to enter the appropriate individual(s) under the **Enroll Dependents** column by selecting **Existing Dependents** or **Add Dependent**
- i. If **Existing Dependents** is selected:
 - a. Select the name of the dependent(s) you wish to add to that specific plan
 - ii. If **Add Dependent** is selected:
 - a. Use the radio buttons to indicate if the new dependent will be a **Beneficiary**.
 - b. Click **OK**  .
 - c. Under **Add Dependent** enter the **First Name**, **Last Name**, **Relationship**, **Date of Birth**, and **Gender** of the dependent you wish to add.
 - d. Under the **Address** section verify the existing information or use the **Clear Value** icon  next to the existing address to remove it and enter the **Address Line 1**, **City**, **State**, **Postal Code**, and **Type**.
 - e. Click **OK**  .

- iii. Select the **Continue** button  to move forward with the Open Enrollment process.
- iv. If you have any dependent(s) in Workday without a Social Security Number, you will be prompted to enter an **Identification Number** (Social Security Number).

Dependent IDs 1 items		
Dependent	National ID Type Name	*Identification # / Reason ID is Not Available
John Edmonds	Social Security Number (SSN)	<input type="radio"/> Identification # <input type="text"/> <input type="radio"/> Reason ID is Not Available <input type="text"/>

- v. Click the **Continue** button .

- 5. Next, if you have enrolled in the **Maroon Savings Choice** medical plan you may elect to contribute additional funds to a **Health Savings Account (HSA)**, **your deductions will default to \$0 for 2019 unless you re-enroll**. You may make any desired elections using the radio buttons to either **Elect** or **Waive** each plan. Enter desired contributions for the year or per paycheck (monthly), and the corresponding amount will adjust accordingly.

 The amount you designate for **HSA** will be deducted every pay period. **Bi-weekly employees** ignore the monthly indicator.

Health Savings Election 1 item			
Benefit Plan	*Elect / Waive	Contribution Range (Annual)	Supporting Information
Health Savings Account - HSA Bank	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Your number of remaining payroll deductions for the year 26 Your actual contributions from payroll \$0.00 How much do you want to contribute for the total year? <input type="text" value="2,000.00"/> How much do you want to contribute per paycheck (Bi-weekly)? <input type="text" value="76.92"/>	Minimum Contribution (Annual) \$1.00 Maximum Contribution (Annual) \$2,950.00 Provider Website HSA Bank

- i. Click the **Continue** button .

6. You will now be prompted to elect your **Spending Account** (healthcare and dependent care FSAs) for 2019. **Your deductions will default to \$0 for 2019 unless you re-enroll.** You may make any desired elections using the radio buttons to either **Elect** or **Waive** each plan. Enter desired contributions for the year or per paycheck (monthly), and the corresponding amount will adjust accordingly.

 The amount you designate for **FSA** will be deducted every pay period. **Bi-weekly employees** ignore the monthly indicator.

Spending Account Elections 2 items

Benefit Plan	*Elect / Waive	Contributions
Healthcare FSA - WageWorks	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Your number of remaining payroll deductions for the year 26 Your actual contributions from payroll \$0.00 How much do you want to contribute for the total year? <input type="text" value="1,000.00"/> How much do you want to contribute per paycheck (Bi-weekly)? <input type="text" value="38.46"/>

 If you enroll in the Maroon Savings Choice medical plan, you are not eligible to enroll in the Healthcare FSA.

- i. Click the **Continue** button .

7. You will now be prompted to review your **Life Insurance** elections. You may make any desired changes using the radio buttons to either **Elect** or **Waive** each plan.

- i. Enter the **Coverage Level** using the **Prompt** icon .

Insurance Elections 9 items

Supplemental Life Insurance - Sun Life (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text" value="X 4 X Salary"/>
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 If Evidence of Insurability is required; you will be contacted through US mail by Sun Life. Coverage will not become effective until

- 8. If you elect Spouse Life, Child Life and Family Personal Accident Insurance, you will need to select the dependents for whom you are electing coverage.

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents
Basic Life Insurance - Sun Life To a Maximum of \$50,000 (Employee)	<input type="radio"/> Elect <input type="radio"/> Waive	1 X Salary	
Supplemental Life Insurance - Sun Life (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	7 X Salary	
Spouse Life Insurance - Sun Life (Spouse)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	x \$100,000	<input type="text"/>

Please note:
Spouse Life Insurance is limited to 100% of the Employee's total coverage in Basic Life Insurance and Supplemental Life Insurance.

- i. Click the **Continue** button .

- 9. You will now be asked to review your retirement savings elections.
 - i. You may select a contribution by **Percent** or **Monthly Amount**.
 - ii. If electing multiple retirement plan vendors, designate your **Contribution Allocation** (must total 100%)

 The amount you designate for SRP will be deducted every pay period. **Bi-weekly employees** ignore the monthly indicator.

Benefit Coverage Type: Supplemental Retirement Plan

Employee Contribution - Percent	<input type="text" value="0"/>
Employee Contribution - Amount (Monthly)	<input type="text" value="500.00"/>

Benefit Plan	Employee Contribution Allocation	Calculated Contribution
Supplemental Retirement Plan - TIAA	<input type="text" value="50"/>	Percent: 0 Amount (Monthly): \$250.00
Supplemental Retirement Plan - Vanguard	<input type="text" value="50"/>	Percent: 0 Amount (Monthly): \$250.00
	100	

Please Note:
If you are currently enrolled in SRP and make no changes, your current contributions will automatically continue for 2019.

- iii. Click the **Continue** button .

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10. You will now be asked to verify, update, or add **Beneficiary/Beneficiaries** for your elected life insurance plans.
- If electing multiple plans, you may designate a different **Beneficiary** or **Beneficiaries** for each.
 - Update the **Primary Percentage** and/or **Contingent Percentage** (must total 100% for each plan).
 - Please contact TIAA or Vanguard directly to elect beneficiaries for your retirement plans.

Beneficiary Designations 2 items

Benefit Plan	Provider Website	Requires Beneficiary	Beneficiaries	
			*Beneficiary	*Primary Percentage / Contingent Percentage
Supplemental Life Insurance - Sun Life (Employee)	Sun Life	<input type="checkbox"/> +		
		<input checked="" type="checkbox"/> -	X Jon	<input checked="" type="radio"/> Primary Percentage 100 <input type="radio"/> Contingent Percentage 0

- Click the **Continue** button .

11. The **Additional Benefits Elections** page displays benefits that are provided by the University at **no cost** to employees: Staff and Faculty Assistance Program and Business Travel Accident Insurance.

- No action is required on your part, click the Continue button .

12. Review the final statement regarding benefit elections and click the **I Agree** check box Agree to accept the terms.

- Click the **Submit** button .

13. Once you have verified your elections, it is important that you print your confirmation statement for your records. To do so, click **Print**. You **do not** need to return a signed copy of the printed confirmation statement to the Benefits office.



Once your elections have been submitted, the Open Enrollment task will no longer appear in your inbox. However, you may continue to access and modify your elections until the close of Open Enrollment (**November 15, 2018**) by clicking the **Benefits Worklet** and select the **Change Open Enrollment** task.

Current Cost	
116.63	
Change Open Enrollment	

Enrolling in or making changes to your long-term disability or commuter benefit coverages can be done at any time throughout the year. To elect or change your elections for 2019 for Long-Term Disability (LTD) or Commuter Benefits, please refer to the following guidance.

Long Term Disability –

Please refer to the Quick Reference Guide found at, workday.uchicago.edu/page/quick-reference-guides-videos-employees.

Commuter Benefits – WageWorks –

Contact WageWorks via phone at (877) 924-3967 or online at wageworks.com.