Overview
Open Enrollment at the University of Chicago will begin October 30, 2020 and will end November 13, 2020. All new elections and changes made during this period will take effect January 1, 2021.

Open Enrollment Information Sessions:
Learn about your 2021 benefits by attending a virtual Open Enrollment Information Session via Zoom. Sessions will be held on November 3, 10, and 12 at Noon.

To register visit the 2021 Open Enrollment Website.

Open Enrollment Support:
Benefits Specialists are available to answer your questions and provide assistance throughout the Open Enrollment period, Monday through Friday from 8:30 a.m. to 4:30 p.m. by phone at (773)702-9634 and email benefits@uchicago.edu.

Virtual Benefits and Health Fair
New for 2021! Beginning October 30, 2020 visit the Virtual Benefits and Health Fair for information and resources that can enhance your wellbeing.

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

Keep in mind
- Take Action! 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 2020 deductions will default to $0 for calendar year 2021 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 2020 elections will automatically continue for calendar year 2021.
- 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 13, 2020, your dependent will be considered ineligible and his/her coverage will not be processed.
Quick Reference Guide: Open Enrollment

Logging Into Workday:

1. Visit workday.uchicago.edu and locate Log in to Workday, either in the list on the left side of the screen, or the button on the right side of the screen below the photograph.

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

💡 If you can't remember your CNET ID and password, 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.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Enroll Dependents</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - Blue Cross Blue Shield PPO Maroon Plan</td>
<td>Elect</td>
<td></td>
<td>Employee Only</td>
</tr>
<tr>
<td>Medical - University of Chicago Health Plan HMO UCHP</td>
<td>Elect, Waive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental - MetLife DCP Copy</td>
<td>Elect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental - MetLife DEN PPO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Benefit Plan</th>
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<th>Enroll Dependents</th>
<th>Coverage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medical - Blue Cross Blue Shield PPO Maroon Plan</td>
<td>Elect</td>
<td></td>
<td>Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family, Employee + Domestic Partner, Employee + Domestic Partner + Child(ren), Employee + Civil Union Partner, Employee + Civil Union Partner + Child(ren), Search, Employee Only</td>
</tr>
<tr>
<td>Medical - University of Chicago Health Plan HMO UCHP</td>
<td>Elect, Waive</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental - MetLife DCP Copy</td>
<td>Elect</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dental - MetLife DEN PPO</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 My Dependent From Enrollment**.

   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 My Dependent From Enrollment** is selected:
      a. Use the radio buttons to indicate if the new dependent will be a **Beneficiary**.
      b. Click **OK**.
      c. Under **Add My Dependent From Enrollment** 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**.

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**Add My Dependent From Enrollment**

*Stephanie O’Connor*  
*34 second(s) ago · Effective 01/01/2021*

- Use an Existing Beneficiary or Emergency Contact
- Create Dependent

**Add My Dependent From Enrollment**

*34 second(s) ago · Effective 01/01/2021*

- **Name**
  - [ ] Create Dependent
  - [ ] Use as Beneficiary

- **Personal Information**
  - **Date of Birth**
  - **Age**
  - **Gender**
  - **Citizenship Status**
  - **Full-time Student**
  - **Disabled**

- **Address**
  - **Address Line 1**
  - **City**
  - **State**
  - **Postal Code**
  - **Type**

- **National IDs**
  - [ ] Allow Duplicate Name

- **Phone & Email**
  - [ ] Send Invitations
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).

<table>
<thead>
<tr>
<th>Dependent</th>
<th>National ID Type Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Dependent</td>
<td>Social Security Number (SSN)</td>
</tr>
</tbody>
</table>

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 2021 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.
6. You will now be prompted to elect your Spending Account (healthcare and dependent care FSAs) for 2021. Your deductions will default to $0 for 2021 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.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Elect / Waive</th>
<th>Contributions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare FSA - WageWorks</td>
<td></td>
<td>Your number of remaining payroll deductions for the year 26</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Your actual contributions from payroll $0.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute for the total year? 1,000.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute per paycheck (Bi-weekly)? 38.46</td>
</tr>
</tbody>
</table>

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

(Continue)
If you enrolled in another medical plan you will not be able to elect contributions to an HSA.

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.

If Evidence of Insurability is required; you will be contacted through US mail by Sun Life. Coverage will not become effective until your Evidence of Insurability is approved by Sun Life.
NEW THIS YEAR: The Insurance step of Open Enrollment 2021 will display your current Long-Term Disability (LTD) insurance election. Changes to your LTD election can be made at any time throughout the year, but must be made separately from your Open Enrollment elections. To elect or change your LTD insurance elections, please follow the instructions in the Quick Reference Guide Long-Term Disability found under Managing Your Employee Record in Workday.

Insurance Plan Dependencies and Coverage Limitations

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Coverage Level</th>
<th>Covers Dependents</th>
<th>Calculated Coverage</th>
<th>Employee Cost (Monthly)</th>
<th>Employer Contribution (Monthly)</th>
<th>Provider Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Accident Insurance - Sun Life (Family)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Sun Life</td>
</tr>
<tr>
<td>Basic Long Term Disability Insurance - Sun Life (Only Employee Paid Coverage Displays) (Employee)</td>
<td></td>
<td>60% of Salary</td>
<td></td>
<td>$3,800.00</td>
<td>$14.69</td>
<td></td>
<td>Sun Life</td>
</tr>
<tr>
<td>Optional Long Term Disability Insurance - Sun Life (Only Employee Paid Coverage Displays) (Employee)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Sun Life</td>
</tr>
</tbody>
</table>
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**.

Please note:

Spouse Life Insurance is limited to 100% of the Employee’s total coverage in Basic Life Insurance and Supplemental Life Insurance.

Please Note:

If you are currently enrolled in SRP and make no changes, your current contributions will automatically continue for 2021.

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

ii. Click the **Continue** button
**NEW THIS YEAR:** The Retirement Savings step of Open Enrollment 2021 will display your Contributory Retirement Plan (CRP) or Retirement Income Plan for Employees (ERIP) Mandatory contributions. If you are eligible for CRP, you are automatically enrolled with a mandatory contribution of 5%. If you are eligible for ERIP, you are automatically enrolled with a mandatory contribution of 3%. You cannot make changes to these elections. Changes can only be made for the following plans: ERIP – Voluntary, Supplemental Retirement Plan (SRP), 457(b) Deferred Compensation Plan, and SRP Catch-Up.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Employee Contribution</th>
<th>Allowed Employee Contribution</th>
<th>Employer Contribution</th>
<th>Provider Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Retirement Income Plan - TIAA 3% Mandatory EE (4% ER)</td>
<td>Elect</td>
<td>Percent 3</td>
<td>Percentage Maximum 3</td>
<td></td>
<td>TIAA</td>
</tr>
<tr>
<td>Employee Retirement Income Plan - TIAA Enrolled in ERIP and under 130K</td>
<td>Elect</td>
<td>Percent 1</td>
<td>Percent Maximum 1</td>
<td>Percent Maximum 2</td>
<td>TIAA</td>
</tr>
<tr>
<td>Employee Retirement Income Plan - Voluntary - TIAA</td>
<td>Elect</td>
<td>Percent 2</td>
<td>Percentage Minimum 1</td>
<td>Percentage Maximum 2</td>
<td>TIAA</td>
</tr>
<tr>
<td>Supplemental Retirement Plan - TIAA</td>
<td>Elect</td>
<td>Percent 1</td>
<td>Percentage Maximum 100</td>
<td>Amount Maximum (Monthly) $19,590.00</td>
<td>TIAA</td>
</tr>
</tbody>
</table>
10. You will now be asked to verify, update, or add **Beneficiary/Beneficiaries** for your elected insurance plans.
   i. If electing multiple plans, you may designate a different **Beneficiary** or **Beneficiaries** for each.
   ii. Update the **Primary Percentage** and/or **Contingent Percentage** (must total 100% for each plan).
   iii. Please contact **TIAA** directly to elect beneficiaries for your retirement plans.

iv. 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.

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

   ![Beneficiary Designations Table](image)

   ![Beneficiary Designations Table](image)
12. Review the final statement regarding benefit elections and click the **I Agree** check box to accept the terms.

   i. Click the **Submit** button

**Electronic Signature**

I hereby apply for participation in the University of Chicago's benefits plan(s) for those benefits for which I am or may become eligible under the terms and conditions of said plan and any present or future amendments thereto, and subject to acceptance of my enrollment.

By selecting the I AGREE button, you certify that:

- You authorize the University of Chicago to deduct from your earnings the required contributions, if any, toward the cost of the plan(s); and
- You cannot change any of your elections for medical, dental, vision, or health and/or dependent care flexible spending accounts until the next open enrollment period, unless you have a qualified life event. Proof of the life event is required and must be submitted within 31 days of the life event effective date.

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 13, 2020).

1. After logging into Workday, select the **Benefits** application from the home screen.

2. Click on the **Change Open Enrollment** button at the bottom of the page.
3. Once you read the notification, click **OK** to begin making your elections. Any changes you make will have to be submitted again. If you do not **resubmit**, the changes will be disregarded and the previous submission will remain in effect.

**Change Open Enrollment**

**Event PreviouslySubmitted Notification**

| Initiated On | 10/06/2020 |
| Submit Elections By | 11/13/2020 |
| Event Date | 01/01/2021 |

**Important Information!**

Please note that this enrollment event was previously submitted and/or closed. Any changes you make now to your benefit elections will have to be submitted again. If you do not resubmit, the changes will be disregarded and the previous submission will remain in effect.
After Open Enrollment is finalized (after November 13, 2020), you can view your benefit elections for 2021 by following these steps:

1. Log into Workday and select the Benefits application from the home screen.

2. Under View, click on Benefit Elections as of Date (you may need to scroll down to find this).

3. Type in 01/01/2021 to the View As Of prompt box.
Quick Reference Guide: Open Enrollment

OR

1. Click on the Cloud icon in the top right corner and click [Your Name] View Profile.

2. Click the Actions button under your name on the left, hover over Benefits, then click View My Benefit Statement.
3. In the Benefit Event prompt box, choose **Open Enrollment Change: [Your Name] on 01/01/2021 – FINALIZED** and click **OK**.

4. Click the **Print** button at the bottom of the screen to save the confirmation for your records.

*The Benefit Statement is only available after Open Enrollment 2021 has been closed and finalized. You will not find this event in the dropdown until after November 13, 2020.*
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 2021 for Long-Term Disability (LTD) or Commuter Benefits, please refer to the following guidance.

**Long Term Disability** –

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