

2017 Annual Benefits Enrollment: Detailed Instructions

Important

The deadline for all 2017 Annual Enrollment benefit and flexible spending changes is
December 15, 2016 at 11:59 p.m.

Changes made will take effect January 1, 2017

Retirement Savings is not part of Annual Benefits Enrollment

You can make changes by visiting the [TIAA website](#) any time, or by calling the Yale line at (855) 250-5424, Monday - Friday, 8 am - 10 pm, and Saturday, 9 am - 6 pm

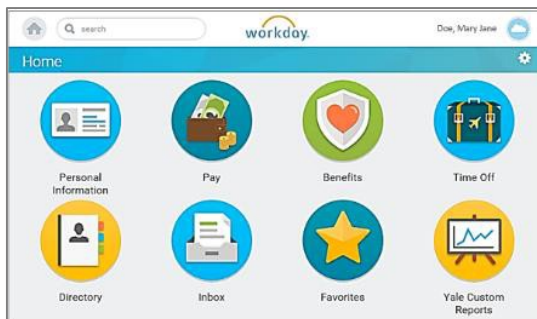
If you need additional information, please visit the [HR Benefits website](#), the [2017 Annual Enrollment website](#), or contact the [Employee Service Center](#).

Topics covered in this guide:

- [Login to Workday](#)
- [Start Your Annual Enrollment](#)
- [Health Care Elections](#)
- [Health Savings Election](#)
- [Spending Account Elections](#)
- [Life Insurance Elections](#)
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Login to Workday

1. Visit **It's Your Yale**: <http://your.yale.edu/>
2. Click **Workday** (*top center*)
3. **Login to CAS** with your NetID and Password
4. The **Workday home page** opens:



NOTE: At any time, you can click the Workday logo at the top of the page to return to the home page.



Start Your Annual Enrollment

1. From the Home page click, the **Inbox** worklet to open your Inbox. 
2. Click the **Open Enrollment** item. 
3. Click the  arrows (*top right*) to expand the size of the window.

See: [How to submit your elections](#) on page 3.

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Health Care Elections

1. Make your Health Care Elections, choosing **Elect** or **Waive**.
2. For each Health Care Election, your current **Coverage** is displayed. To change Coverage, click on the Coverage field, click on the **Prompt**  icon to display choices and select the appropriate Coverage.
3. Click the **Enroll Dependents** field to add your dependent(s). (If you pick **Employee** coverage, this option is not available.) Click the **Prompt**  icon and click **Existing Dependents** to select your dependent. If your dependents have not yet been entered in Workday, select **Add My Dependent from Enrollment**, and follow the subsequent steps.
4. Indicate if you'd like to **Use your new dependent as a beneficiary?**
5. Click **OK**.
6. Type in your new dependent's **Name, Address, Personal** and **Contact Information**.

Note: Fields marked * are required.

7. **National IDs:** If you have a Social Security Number (SSN) or Individual Taxpayer ID number (ITIN) click **Add** top open these fields.

NOTE: If you click **Add** and don't enter information, you need to click **Remove**, to close this section before you can continue to the next screen.

8. Click **OK** to return to the Health Care Elections screen to review additional benefit plan options. If applicable, repeat steps 1-7 for other dependents and for other plans, including medical, dental and vision.
9. Click **Continue**.

Note: If you encounter an error that you cannot resolve, contact the [Employee Services Center](#).

Clicking **Cancel** will not cancel the process as a whole, but rather exit out of the current screen.

10. If you enrolled a new dependent but did not enter a Social Security Number (SSN), you will be prompted to enter a (SSN). If you do not have the SSN (such as for a newborn), select **Reason ID is Not Available**, and enter a supporting comment.

NOTE: You must supply an SSN for your dependent within six months of entering that dependent in Workday. To add it later, see the instructions for how to [Edit a Dependent's Demographic Information](#).

11. Click **Continue** (or click **Go Back** to make changes).

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Visit the Annual Enrollment website for more information about [medical](#), [dental](#) and [vision](#) plans.

Health Savings Elections

1. If you've elected the Aetna Smart Care Plan, elect (or waive) the Health Savings Account and complete the appropriate fields under **Contribution Range (Annual)**.
Note: Only salaried employees are eligible for the Aetna Smart Care Plan and the optional Health Savings Account.
2. Click **Continue** (or click **Go Back** to make changes).




Spending Account Elections

1. If eligible, elect (or waive) Flexible Spending Accounts (Healthcare and/or Dependent Care) and complete the appropriate fields under **Contributions**.
Note: View [Benefits Eligibility Requirements](#) to see if you are eligible.
2. Click **Continue** (or click **Go Back** to make changes).

Automatic Reimbursement

To select "auto reimbursement," you must do so on the [Your Spending Account website](#) or by calling YSA at 203-432-5552 **press menu option #6**.

Life Insurance Elections

1. If eligible, elect (or waive) the Life Insurance Benefit Plans that appear and complete the appropriate fields under **Coverage Level**.
Note: View [Benefits Eligibility Requirements](#) to see if you are eligible.
The **Coverage Level** may be pre-populated based on the **Benefit Plan** you elect.
2. Click **Continue** (or click **Go Back** to make changes).
3. If applicable, add or remove a **Beneficiary** by using the **Plus**  or **Minus**  icons.
4. If you are adding a **Beneficiary**, click the **Prompt** icon  and select the appropriate person. If your beneficiary has not yet been entered in Workday, click **Create** and enter their information.
Note: Fields marked * are required.
5. Click **OK**.
6. Indicate if the person will be a **Primary** or **Contingent** beneficiary, along with their percentage distribution.
7. Click **Continue** (or click **Go Back** to make changes).

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Process Your Annual Enrollment Elections

1. Click the **Continue** button to move through the screens after you review and make your selections.

NOTE: The **Waived Coverages** heading on the Benefit Elections Review Screen must be clicked to see what you are waiving.

2. If your benefit elections are correct on the Benefit Elections Review screen, check the **I Agree** check box.

(you may have to scroll down)

3. Click **Submit**. **Your changes will not be recorded or processed until you click **Submit** on the last screen.**
4. Click **Done** to exit.


Button Choices at the bottom of each screen




- **Continue:** To move to the next screen.
- **Save for Later:** To save the changes you've made and come back to the form at a later time.
- **Go Back:** To go back to a prior screen.
- **Cancel:** To remove any changes you made during the current session.
- **Submit:** The Continue button changes to Submit on the very last screen. **You must click *Submit on the last screen, or your changes will not be processed.***

View Submitted Benefit Changes

To review your annual enrollment submissions, prior to the deadline, follow these instructions:

1. Click the **Profile** cloud icon  in the upper right corner and click **Inbox**.
2. Select the **Archive** tab, then click the **Open Enrollment** item in the left panel.

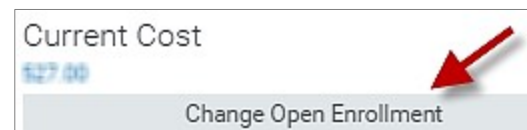


3. Click the  expand arrows (top right) to expand the size of the window you're viewing.

Make Changes to What You've Elected for 2017

To view or make changes to your 2017 Annual Enrollment elections:

1. Click the **Benefits** worklet.
2. Click **Change Open Enrollment** in the **Current Cost** box.



Add Beneficiary

If you wish to add another beneficiary and/or change the distribution percentage outside of a benefit event

1. Click the **Workday logo** (top of page) to get back to the home page
2. Click the **Benefits** worklet
3. In the **Change** box select **Benefits**
4. Select **Insurance/LTD/Beneficiary Change**
5. Enter the **Benefit Event Date**, then click **Submit**.


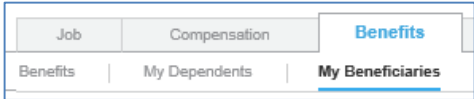
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- Follow instructions for [Life Insurance Elections](#) listed above.


Add Dependents

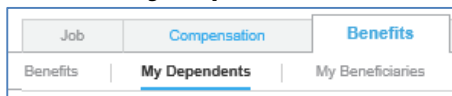
Dependents can be added during the enrollment process. refer to the [Health Care Elections](#) instructions listed above.

Edit a Beneficiary's Demographic Information

- If you wish to edit the demographic information for one of your beneficiaries, click the **Profile** cloud icon  in the upper right corner and click on **View Profile**.
 - Click the **Benefits** tab.
 - Click the **My Beneficiaries** sub-tab.
- 
- Click **Edit** for the beneficiary whose information you wish to update.
 - To add a Social Security Number, click **Add** in the National IDs field.


Edit a Dependent's Demographic Information

- If you wish to edit the demographic information for one of your dependents, click the **Profile** cloud icon  in the upper right corner and click on **View Profile**.
- Click the **Benefits** tab.
- Click the **My Dependents** sub-tab.




- Click **Edit** for the dependent whose information you wish to update.
- To add a Social Security Number, click **Add** in the National IDs field.

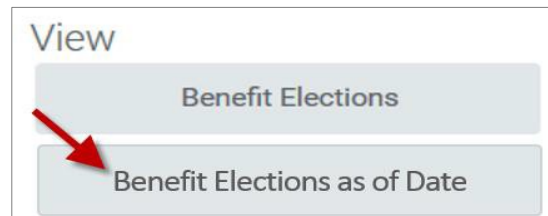
View Current (2016) Benefit Elections

- On the Workday home page, click the **Benefits** worklet: 
- In the **View box**, click **Benefit Elections**. (you may have to scroll down).

View Benefit Elections after 12/15/16

Once you make a change to your benefit elections you will have the option to view your benefits as of a specific date.

- On the Workday home page, click the **Benefits** worklet: 
- In the **View box** (you may have to scroll down), click **Benefit Elections as of Date**.






- Enter the date** and click **OK**.

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Printing Information

Whenever you see either a printer icon or a print button you have the ability to print the information displayed.

1. Click the print button  or the printer icon .
2. Your benefit information will be converted into a PDF file. Depending upon the browser you are using, the PDF will appear at the bottom of the browser with the PDF icon and file name  that you can click on to open it, or you will see a pop-up window that offers the option to save or open the file.
3. Once open, you can print the PDF file.

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