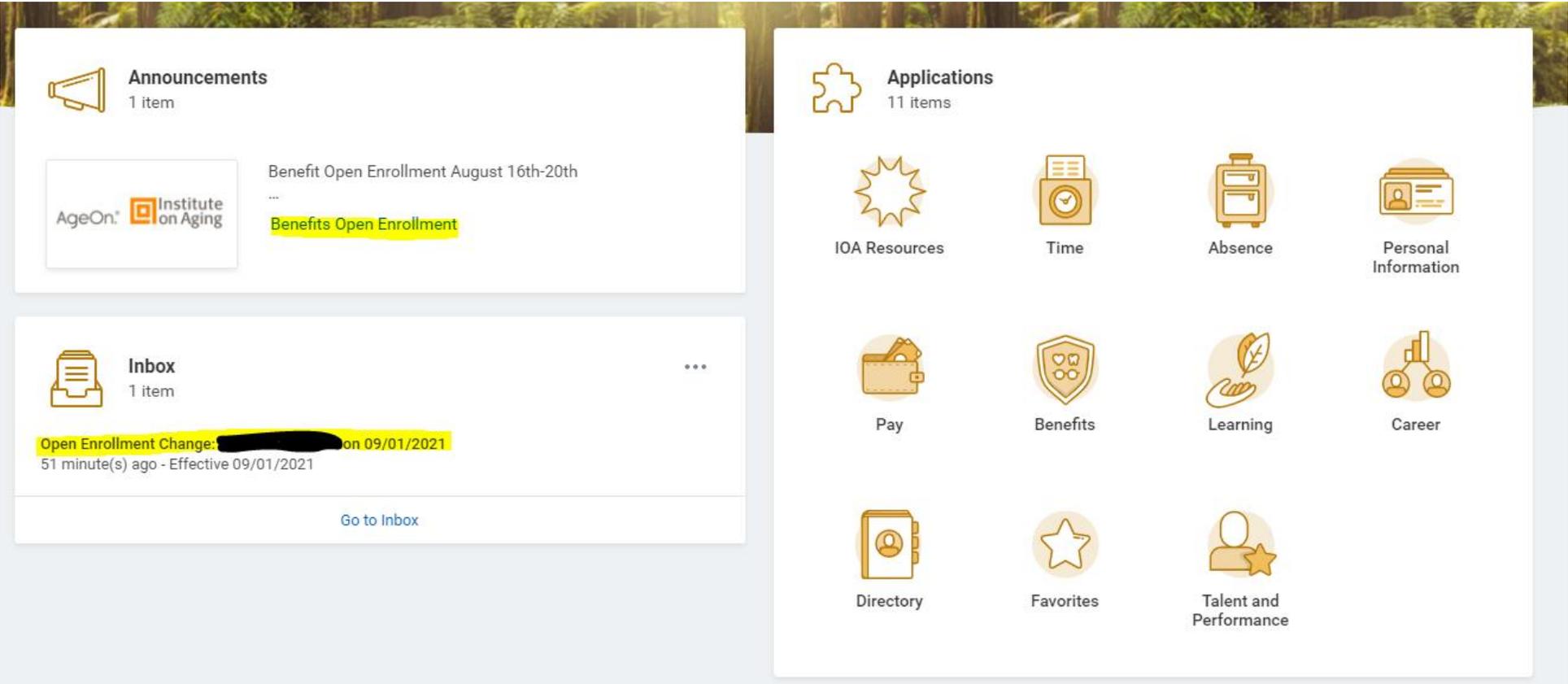


**Open Enrollment User Guide:**

1. Below is a screen shot of what it will look like when you are on your home page in Workday. You can start your benefit election enrollment by clicking “**Open Enrollment Change: your name on 07/01/2022**” in your Inbox.



2. Click on “Let’s Get Started”

## Change Benefits for Open Enrollment

55 minute(s) ago - Effective 09/01/2021

Open Enrollment

Choose new plans or re-enroll in the plans you currently have.

[Let's Get Started](#)

3. You will then be brought to all of your enrollment options. To Enroll in a benefit click “Enroll” in the type of benefit you are interestd in.



**Medical**  
Waived

[Enroll](#)

4. Choose the plan you are interested in by click on the “**Select Button**”. You will notice the benefit plans, your cost, company’s contribution, and plan details on this page. Once you’ve selected your plan click “**Confirm and Continue**”

## Plans Available

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for Employee Only.

3 items



*Selection	Benefit Plan	You Pay (Bi-Weekly)	Company Contribution (Bi-Weekly)	Plan Details
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Kaiser HMO	\$59.19	\$236.74	<a href="#">Kaiser Permanente Benefr</a>
<input checked="" type="radio"/> Select <input type="radio"/> Waive	United Health Care PPO Base	\$63.24	\$252.99	
<input type="radio"/> Select <input checked="" type="radio"/> Waive	United Health Care PPO Buy-Up	\$111.47	\$252.99	

**Confirm and Continue**

Cancel

\*please note cost are not accurate to our open enrollment, this is just a guide. True cost will be reflected in Workday.

5. You will be defaulted to Employee Only coverage level. If you would like to add a dependent click on “Add New Dependent”

## Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage \* Employee Only

Plan cost (Bi-Weekly) \$63.24

Add New Dependent

6. I would recommend clicking the “Use as Beneficiary” check box so you can later add this family member as a beneficiary to any plan.

### Add My Dependent From Enrollment

Use as Beneficiary



Enter the information for any children or dependents you would like included in your IOA benefits package. For each of your dependents, you will be asked to upload proof of identification.

Visit the IOA Benefits Portal for more information:

- [ioaging.mybenefits.life](https://ioaging.mybenefits.life)
- Key: ioaging

\*please note cost are not accurate to our open enrollment, this is just a guide. True cost will be reflected in Workday.

7. Please provide information on your Dependent for all required fields (indicated with a red star). Then click "Save"

## Add My Dependent From Enrollment

### Name

Country \*

Prefix

First Name \*

Middle Name

Last Name \*

Suffix

### Personal Information

Relationship \*

Date of Birth \*

Age (empty)

Gender \*

Citizenship Status

Full-time Student

Student Status Start Date

Student Status End Date

Disabled

### National IDs

Click the Add button to enter one or more National Identifiers for this dependent.

### Address

Use Existing Address

Country \*

Address Line 1 \*

Address Line 2

City \*

State \*

Postal Code \*

County

### Phone & Email

Country Phone Code United States of America (+1)

Phone Number (669) 225-4782

Phone Extension

Email Address

8. Your coverage will change to include the Dependent you added. If you want to add another dependent repeat steps 5-7 until all dependents are added. Please note after you add a dependent once they will be available to select for your other plans by checking the select box (turns blue with a check mark once selected). Once you've added all dependents click "Save" at the bottom of the page.

## Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage

\* Employee + Spouse

Plan cost (Bi-Weekly) \$385.03

Add New Dependent

1 item



Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	test Person	Spouse	03/03/1980

\*please note cost are not accurate to our open enrollment, this is just a guide. True cost will be reflected in Workday.

9. Please add a beneficiary to your Basic Life and AD&D plan by clicking “**Manage**”. This plan is provided free of charge to all employees so you will already be enrolled in the plan. Then click “**Confirm and Continue**”

### Insurance

**Basic Life and AD&D**  
Mutual of Omaha (Employee)

Cost (Bi-Weekly)	Included
Coverage	1 X Salary

**Manage**

### Plans Available

1 item



**Confirm and Continue**

Cancel

10. Add your beneficiaries by clicking the plus sign.

## Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 0 items



 Beneficiary	Percentage
No Data	

Secondary Beneficiaries 0 items

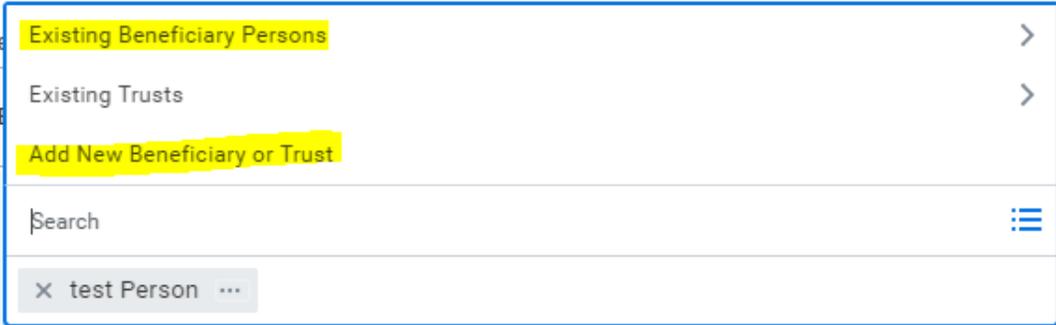


 Beneficiary	Percentage
No Data	

11. You can choose from Existing Beneficiary Persons if you added beneficiaries during the enrollment process or choose Add New Beneficiary or Trust if you want to add someone new. Once you add the person change the percentage to what you would like it to be. Please note it needs to add up to 100%

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries



Existing Beneficiary Persons >

Existing Trusts >

Add New Beneficiary or Trust

Search

X test Person ...

Beneficiary	Percentage
	<input type="text" value="0"/>

12. After you have completed all the enrollments you want click **“Review and Sign”**



13. You will be brought to a review page that shows you your selected benefits and what you have waived. Once review click the check box **“I accept”** then **“Submit”**.

Projected Total Cost (Bi-Weekly)  
\$385.03

You're almost there! Review your benefits elections below, and click "Submit" when you're done.

Turn on the new tables view

Selected Benefits 5 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Medical United Health Care PPO Base	09/01/2021	09/01/2021	Employee + Spouse	test Person		\$327.34

Waived Benefits 14 items

Dental	Waived
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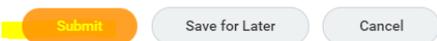
## Electronic Signature

### Legal Notice: Please Read

Your name and Password are considered your "Electronic Signature" and will serve as your confirmation of the accuracy of the information being submitted. When you check the "I Agree" checkbox, you are certifying that:

- You understand and approve the enrollment as indicated above. You hereby authorize the company to deduct from your earnings the amount of your premiums or other contributions (if any) for the benefit options elected above.
- You understand and acknowledge that under the Internal Revenue Code regulations rules, you may not change your benefit elections during the calendar year unless you experience a qualified change in status.
- You understand that you will not pay income tax or FICA tax on my medical, dental, vision, and Flexible Spending Account contributions. These benefits are paid through the Flexible Benefits Plan on a pre-tax basis.
- Company-provided life insurance that exceeds \$50,000 may be subject to imputed income.
- Each year, during the annual enrollment period, you will have the option to change certain coverages whether or not you have had a qualified change in status event during the calendar year.
- If you decline medical insurance enrollment for yourself or your dependents, including your spouse, because of other medical insurance coverage, you may in the future be able to enroll yourself or your dependents in this plan, provided you request enrollment within 31 days after your other coverage ends. In addition, if you have a new spouse or dependent as a result of marriage, birth, or adoption, you may be able to enroll yourself, your spouse and your dependents, provided you request enrollment within 31 days after the marriage, birth or adoption.

I Accept



14. You know you've successfully enrolled when you are brought to the below page. You can also view your benefit statement by clicking "[View 2021 Benefit Statement](#)". You do not have to do anything on this page it is for your reference only.

## Success, You're Enrolled

Congratulations! You've signed up for your IOA benefits.

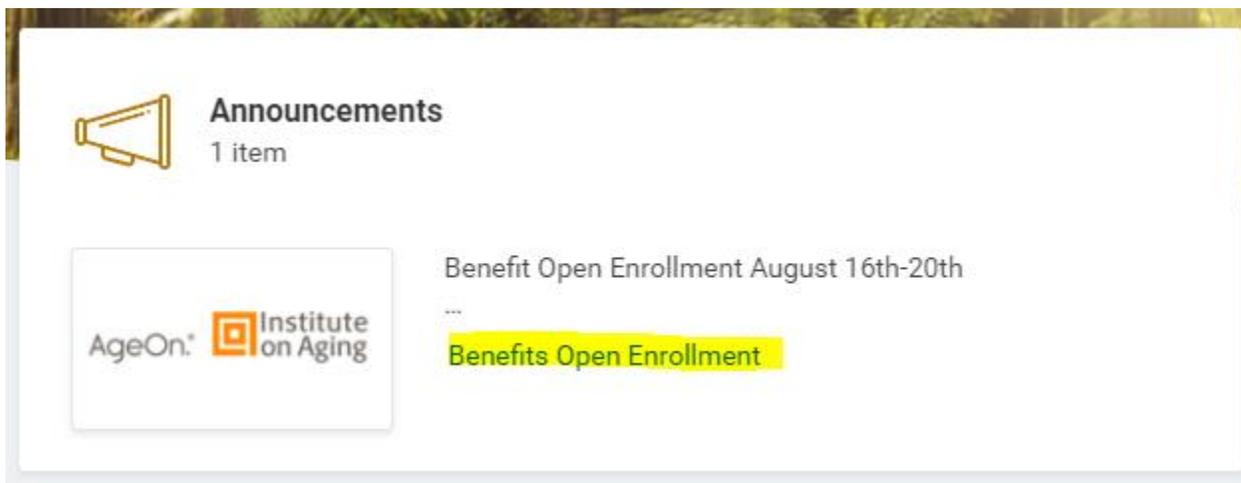
### Important Dates:

Benefits go into effect 09/01/2021

Final day to update benefits 08/20/2021

[View 2021 Benefits Statement](#)

15. If you realized you need to edit your benefits after you have submitted you can go to the "[Benefits Open Enrollment](#)" hyperlink under Announcements on your home page.



 **Announcements**  
1 item

 Benefit Open Enrollment August 16th-20th  
...  
[Benefits Open Enrollment](#)

16. Then click on “Continue” and follow steps 3-13 again.

## Open Enrollment 2021

Submit Elections By 08/20/2021

Status Submitted



If you have any questions on how to make elections in Workday please email [HRAdmin@ioaging.org](mailto:HRAdmin@ioaging.org)