Workday Open Enrollment: Reviewing and Updating Your Benefit Elections

Use this guide to review, update and submit your benefit elections in Workday during the open enrollment period.

Before You Begin:

☐ Review the open enrollment materials available on the website to make informed decisions about your benefit plans.

☐ Gather **Social Security numbers for dependents** on your plans.

☐ Start early so you have time to contact HR if you need assistance.

Key Terms:

Benefit Elections: The selections you make for your benefits, including enrolling in, changing, or waiving coverage.

Submit Elections By: The deadline by which you must complete and submit your benefit elections.

Accessing Open Enrollment in Workday

1. Access the **Open Enrollment Change Benefits** task using one of the following methods:
    - From your **Workday task inbox**: Select **Open Enrollment Change > Let's Get Started**.
    - From the **Global Navigation Sidebar**: Select **Employee Self Service** > **Benefits and Pay**. Under **Benefit Event: Open Enrollment**, select **Enroll > Let's Get Started.**

    Note: If you have dependents in Workday who do not currently have a Social Security number on file, you will be prompted to enter that information. Once completed, select **Continue**.
2. The **Open Enrollment** dashboard will appear. Here, you can review enrollment instructions and an overview of your current benefits.

Reviewing and Updating Your Benefit Elections

1. Review your current benefit elections.
2. To make or update an election, select **Enroll** or **Manage** on the applicable benefit (e.g., Medical, Dental, Vision, or Insurance plans).
3. Review the **General Instructions** provided and then choose **Select** on the **Benefit Plan** and then select **Confirm and Continue** at the bottom of the screen.

4. Follow the prompts and then select **Save** to complete your selection for the benefit plan.

   Note: Depending on the benefit selected, you may be prompted to add a new dependent or select an existing dependent for coverage.

   - **To add a dependent:** Select **Add New Dependent** and complete the required information. Once added, select the checkbox next to their name to include them in this benefit.
   - **To remove a dependent from this benefit:** Uncheck the box next to their name. This removes them from coverage under this benefit but does not delete their dependent record from Workday.
   - **To select Employee Only coverage:** Uncheck all dependents listed so that only you, the employee, are covered under this benefit.

5. Repeat this process for each benefit you wish to update or enroll in.

   Tip: For **HSA** plans, if you wish to maximize the annual contribution, you can enter that amount in the **Annual** field, and the **Per Paycheck** amount will automatically calculate. Don't forget, the **employer contribution** amount is included in the total annual maximum amount.

6. If you no longer wish to be enrolled in a benefit plan, select **Manage,** then select **Waive** and **Confirm and Continue.**

7. Review or add **beneficiary** information for all applicable **life insurance plans**. You will not be able to submit the open enrollment task if you have not assigned a beneficiary to your life insurance plans.

   Tip: To add yourself as a beneficiary for dependent life insurance plans, select **Add New Beneficiary** and then select the Relationship option **Other** and then proceed with entering your information.

8. If you need additional time to review your options, select **Save for Later.** Be sure to return to the Open Enrollment task and submit by November 22.

9. Once you have completed all desired benefit elections, select **Review and Sign**.

   Note: An **Additional Changes** box may appear, identifying other changes that must be completed before you can submit your elections. Review and complete before continuing.

Reviewing and Submitting Your Elections

1. The **View Summary** page will appear. You can verify your **Projected Total Cost (Semimonthly)** at the top of the screen**.**

Note: Medical rates displayed include the $25 per paycheck wellness credit. If you did not complete the physician screening requirement in 2026, $25 will be added beginning with the Jan. 15, 2027 paycheck.

2. Carefully review your benefit elections and scroll to the bottom of the page.
3. Under the **Electronic Signature** section, select **I Accept**, then click **Submit.**
4. A confirmation message should appear once your submission is complete.
5. If you selected a Voluntary or Dependent Life Insurance plan that requires **Evidence of Insurability**, navigate to your Task Inbox and complete the To Do task.
    - The Evidence of Insurability form can be found on the open enrollment website.
6. If you need to make edits to your open enrollment elections after you have submitted, you can still do before the period closes. From the **Global Navigation Sidebar**: Select **Employee Self Service** > **Benefits and Pay**. Under **Benefit Event: Open Enrollment**, select **Edit.**

Important Reminder: Be sure to complete and submit your benefit elections by the Open Enrollment deadline, November 22. Elections saved for later are not considered submitted.