Overview
Open Enrollment at the University of Chicago will begin on **November 1, 2017** and will end **November 15, 2017**. All new elections and changes made during this period will take effect **January 1, 2018**.

Open Enrollment Information Sessions:
Attend an **Open Enrollment Information Session** to learn more about your 2018 benefits and for assistance with the enrollment process.

- November 2, 2017 at 6054 S. Drexel from Noon – 1 pm
- November 7, 2017 at 6054 S. Drexel from Noon – 1 pm
- November 14, 2017 at 6054 S. Drexel from Noon – 1 pm

Open Enrollment Support:
Benefit Specialists will be available to answer your questions and provide assistance throughout the Open Enrollment period. Benefit Specialists are available 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 9, 2017 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 2017 deductions will default to $0 for calendar year 2018 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 2017 elections will automatically continue for calendar year 2018.
- To leave Open Enrollment 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 the Open Enrollment deadline, 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. If this is your first time logging into Workday, click the **Let’s get started!** button.

2. Select the **Cloud** icon and select **Inbox** from the dropdown list.

3. 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.

4. Select desired **Benefit Plan** by using the radio buttons under the **Elect/Waive** column.
5. For each plan where you have selected Elect, click the Coverage column to enter for whom this coverage will apply.

6. 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).

v. Click the Continue button.

7. 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 2018 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.

i. Click the Continue button.

If you enrolled in another medical plan you will not be able to elect contributions to an HSA.
8. You will now be prompted to elect your Spending Account (healthcare and dependent care FSAs) for 2018. Your deductions will default to $0 for 2018 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>Spending Account Elections</th>
<th>2 items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Plan</td>
<td>*Elect / Waive</td>
</tr>
<tr>
<td>Healthcare FSA - WageWorks</td>
<td>Elect</td>
</tr>
<tr>
<td></td>
<td>Waive</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></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.

9. 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.

<table>
<thead>
<tr>
<th>Insurance Elections</th>
<th>9 items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supplemental Life Insurance - Sun Life (Employee)</td>
<td>Elect</td>
</tr>
<tr>
<td></td>
<td>Waive</td>
</tr>
</tbody>
</table>

If Evidence of Insurability is required; you will be contacted through US mail by Sun Life. Coverage will not become effective until Evidence of Insurability is approved by Sun Life.
Quick Reference Guide: Open Enrollment

10. 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.

<table>
<thead>
<tr>
<th>Insurance Elections</th>
<th>Benefit Plan</th>
<th>*Elect / Waive</th>
<th>Coverage Level</th>
<th>Covers Dependents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic Life Insurance - Spouse Life</td>
<td>Elect</td>
<td>X: Salary</td>
<td>1X Salary</td>
<td>Yes</td>
</tr>
<tr>
<td>Supplemental Life Insurance - Employer</td>
<td>Elect</td>
<td>7X Salary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spouse Life Insurance - Spouse</td>
<td>Elect</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

i. Click the Continue button.

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

11. 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.

iii. Click the Continue button.

Please Note:
If you are currently enrolled in SRP and make no changes, your current contributions will automatically continue for 2018.
12. You will now be asked to verify, update, or add Beneficiary/Beneficiaries for your elected life 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 or Vanguard directly to elect beneficiaries for your retirement plans.
   iv. Click the Continue button.

13. 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.

14. Review the final statement regarding benefit elections and click the I Agree check box to accept the terms.
   i. Click the Submit button.

15. 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, 2017) by clicking the Benefits Worklet and selecting the Change Open Enrollment task.
Enrolling in or making changes to your long-term disability, long-term care, or commuter benefit coverages can be done at any time throughout the year. To elect or change your elections for 2018 for Long-Term Disability (LTD), Commuter Benefits, or Long-Term Care Insurance 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](http://wageworks.com).

**Long Term Care – Genworth** –
Contact Genworth via phone at (800) 416-3624 or online at [genworth.com/groupltc](http://genworth.com/groupltc), and enter group id: UChicago and code: groupltc.