**Benefits: Navigate Open Enrollment for Desktop**

**OPEN ENROLLMENT STEPS**

Once a year, open enrollment allows you to update your benefit elections. During this period, you will receive a task in your **Inbox**. You may make your elections and it is possible to change your elections up to the Open Enrollment end date. Open Enrollment is also a good reminder to update any emergency contact and dependent information in Workday prior to electing your benefits for the next year. You may update your dependent information in the **Benefits** app on your Workday home screen. Be sure to view the **Benefit Guide** on **BEN** for more information about plans. To complete your open enrollment:

**SELECT YOUR BENEFITS**

From your Home page:

1. Click the **Inbox** icon 📪.
2. Click the **Open Enrollment Change** task.
3. Review the help text at the top of the page for important information. Each section will include specific help text for the section.
4. Under the **Health Information** section, answer the **Tobacco Use** question before proceeding. Workday will default to your current selection.
5. Select **Elect** or **Waive** for each Health Care Election choice, including Medical, MERP, Dental, Vision, and all other listed Benefit Plans. Workday will default to your current elections.
6. Modify your elections and **Enroll Dependents** if needed, then click **Continue**. To add or modify **Dependents**, see the Dependents section below.

![Health Care Plan Dependencies](image)

**Note:** At any time you may click **Go Back** at the bottom of the screen to go back to the previous screen. You may also click **Save for Later** to save your current selection progress and return to your **Inbox**. You may resume by going to your **Inbox** and clicking on the **Open Enrollment** task.
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**ADD DEPENDENTS**

If you elect or modify a benefit plan during open enrollment, you can also add dependents.

From the Change Benefits for Open Enrollment – Health Care Elections grid:

1. Click the **prompt** icon in the **Enroll Dependents** column.
2. Select **Existing Dependents** to add an existing dependent or **Add My Dependent From Enrollment** to add a new dependent. Complete all required information. You will also have the option to use your new dependent as a beneficiary.

**Note:** Workday selects a coverage automatically, based on who you cover for your plan.
MODIFY DEPENDENTS

From the Change Benefits for Open Enrollment – Health Care Elections grid:

1. Click the **prompt** icon in the Enroll Dependent field.
2. Select **Existing Dependents**.
3. Select the dependent you want to add to the plan.
4. Click the **X** next to a dependent’s name to remove them from the plan.
INFORMATION FOR ELECTING MERP

Does your spouse have group medical coverage available from their employer? Are you currently paying the Supplemental Spousal Premium? If your answer is “YES” to either of these questions, the Medical Expense Reimbursement Program (MERP) could be a good option for you! More information about MERP can be found on BEN under the HR Portal.

You qualify for MERP if:

- You have access to your Spouse’s group medical coverage.
- Your Spouse’s group medical coverage does not include an HSA, is not through Medicare, Tricare, or an individual plan.
- You are currently enrolled in a Baptist Medical Plan or are a new employee

*For current employees, only you and your dependents currently covered by a Baptist group health plan are eligible to be enrolled in MERP*

Eligibility information for MERP:

<table>
<thead>
<tr>
<th>If you elect medical coverage for:</th>
<th>You are eligible to elect this MERP plan</th>
<th>You may choose the MERP Plan to cover:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Only</td>
<td>MERP - J &amp; K (If Elected Medical - Employee Only)</td>
<td>Spouse Only, Child(ren) Only, or Spouse &amp; Child(ren) Only</td>
</tr>
<tr>
<td>Employee + Child(ren)</td>
<td>MERP - J &amp; K - Spouse Only (If Elected Medical - Employee + Children)</td>
<td>Spouse Only</td>
</tr>
<tr>
<td>Waive medical coverage</td>
<td>MERP - J &amp; K - All Coverages (If Waived Medical)</td>
<td>Employee Only, Employee + Spouse, Employee + Child(ren), Family</td>
</tr>
<tr>
<td>Family</td>
<td>You would not be eligible for MERP</td>
<td></td>
</tr>
<tr>
<td>Employee + Spouse</td>
<td>You would not be eligible for MERP</td>
<td></td>
</tr>
</tbody>
</table>

To elect MERP:

1. Verify you have selected a qualifying medical plan or have waived all medical plan coverage
2. Elect the MERP plan that applies to you.
3. Under the Coverage field prompt icon ☑️, choose who you would like the MERP plan to cover.
4. After choosing coverage, on the Enroll Dependents field prompt icon ☑️ choose your dependent(s) to add
   If you choose Employee Only coverage for MERP you will not need to select Dependents.
ADD THE HEALTH SAVINGS ELECTION

The next step after Medical elections displays the Health Savings Election information. If you chose a HDHP plan you are eligible for a HSA. If you did not select a HDHP plan, you are not eligible for a HSA and may click **Continue** to bypass this section.

From the Change Benefits for Open Enrollment – Health Savings Account Plan Dependencies section:

1. Select **Elect** or **Waive** for the Health Savings election.
2. Enter the dollar amount you want to contribute either by year, or by paycheck. These amounts will automatically calculate. If you attempt to contribute over the maximum amount set by the IRS, you will receive an error.
3. Click **Continue** when finished with this section.

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>% Elect / Waive</th>
<th>Contribution Range (Annual)</th>
<th>Supporting Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>HSA - WageWorks</td>
<td>Elect</td>
<td>Your number of remaining payroll deductions for the year 25</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Waive</td>
<td>How much do you want to contribute for the total year? 0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>How much do you want to contribute per paycheck (Bi-weekly)? 0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maximum Contribution (Annual) $3,500.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Provider Website WageWorks</td>
<td></td>
</tr>
</tbody>
</table>
ADD THE SPENDING ACCOUNT (FSA) ELECTION

The next step after HSA elections displays the Spending Account (FSA) information. Review the help text at the top of the screen for more information about the available spending account plans.

1. Select **Elect** or **Waive** for plans listed.
2. Enter the dollar amount you want to contribute either by year, or by paycheck. These amounts will automatically calculate. If you attempt to contribute over the maximum amount set by the IRS, you will receive an error.
3. Click **Continue** when finished with this section.
ADD GROUP LIFE INSURANCE

From the Change Benefits for Open Enrollment – Insurance Plan Dependencies and Coverage Limitations section:

1. Select **Elect** or **Waive** for each insurance election and modify your Coverage Levels, as needed.
2. If selecting coverage for your Spouse or Child(ren), select your **Coverage Level** and **Dependent(s)**.

3. Click **Continue** when finished with this section.

**Note:** If both you and your spouse are Baptist Health employees, you are not eligible for double coverage.
DESIGNATE LIFE INSURANCE BENEFICIARIES

To add beneficiaries to your life insurance plan(s) follow the steps below. Beneficiaries may also be changed at any time throughout the year.

From the Change Benefits for Open Enrollment – Beneficiary Designations section:

1. Click the Add Row icon to add a beneficiary.

2. Click the prompt icon in the Beneficiary field to select from a list of existing beneficiaries. Or, select Create to add a new beneficiary. To remove a beneficiary, click the Remove Row icon next to that beneficiary.

3. Enter the percentage of benefits for each beneficiary in the Primary Percentage / Contingent Percentage column. Your primary beneficiary and contingent beneficiaries must add up to 100%.

4. Click Continue when finished with this section.
ADD ADDITIONAL BENEFITS

The additional benefits section is where you can elect options such as Identity Theft protection.

From the Change Benefits for Open Enrollment – Additional Benefits Elections section:

1. Review your elections for accuracy. Notice your monthly cost in the upper-right corner.
2. Scroll down and confirm that your coverage information is accurate.
3. Click **Continue** when finished with this section to continue to the summary.
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**COMPLETE YOUR ENROLLMENT**

1. Review your elections on the summary screen. This will show your **Elected Coverages**, **Waived Coverages**, and **Beneficiary Designations**.
2. After reviewing your information and the **Electronic Signature**, select the **I Agree** checkbox to confirm your electronic signature.

![Electronic Signature](image)

3. Click **Submit** and a confirmation page displays.
4. You may click **Print** to generate a PDF version for your records or click **Done** to complete the task.

**EDITING YOUR ENROLLMENT AFTER SUBMITTING**

1. To edit your Open Enrollment elections after submitting, **but before the end date**, click on the **Benefits** app on your **Home screen**.
2. Under the **Current Cost** section, click the button **Change Open Enrollment**.
3. Click **OK** on the **Event Previously Submitted Notification** screen to begin.
4. Step through the **Open Enrollment** screens and edit your elections as needed.
5. You must complete the **Electronic Signature** and click **Submit** to apply your changes.

**Note:** After the Open Enrollment end date you are not able to edit or make changes to your elections during the next year unless you have a qualifying event.