Workday Quick Reference Guide: Open Enrollment

Overview

Every year you have the opportunity to change your benefits during Open Enrollment.

The Benefits Office launches an Open Enrollment event in Workday in October of every year for benefits effective January 1st.

What can I do during Open Enrollment?

1. Change your medical/dental plan
2. Review your dependents:
   - Have you had family changes? Did you get married? Divorced? Need to add your child to Dental?
   - You must verify that *only* qualifying dependents are listed on your benefit plans: spouse, domestic partner, and children.
   - If you don't remove an ineligible dependent, you may be required to reimburse any expenses incurred while the dependent was ineligible.
3. Enroll in a tax-saving Flexible Spending Account for the next year:
   - MERP for medical expenses
   - DCAP for child and elder care expenses
   - TRP for transit and parking expenses.
4. Enroll/increase your Supplemental Life Insurance.

For more details about open enrollment and benefit changes for next year, Multco.us/openenrollment.

Benefit Staff Contact Info

Email	employee.benefits@multco.us
Phone	503-988-3477
Fax	503-988-6257
Address	501 SE Hawthorne Blvd, Portland OR 97214 3rd Floor, Suite 320 next to the elevators
Hours	Monday through Friday - 7:30 AM to 5:00 PM

Open Enrollment

Open enrollment is your one-time a year opportunity, *outside of new hire and mid-year life events,* to make benefit changes.

Explore the Open Enrollment page to find out what's changing.

Review your Benefits for next year

While you aren't required to participate in Open Enrollment, it is important to go to the Workday Open Enrollment Event to verify your benefits for next year. If you see something wrong, let the Benefits Office know ASAP.
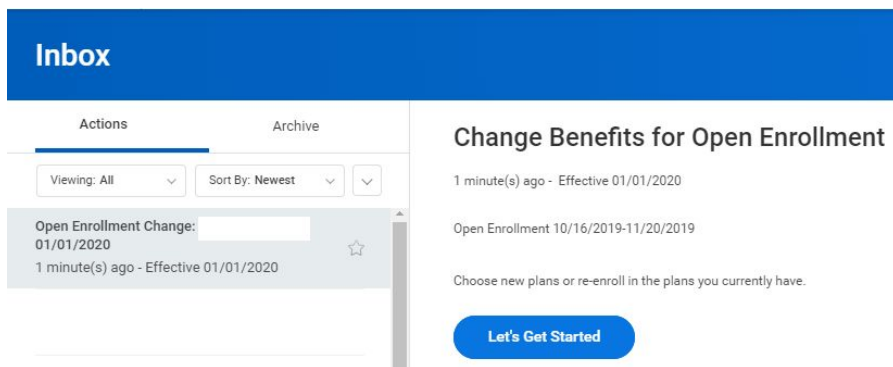
If you don't make any changes, your current benefits will continue into the next year - OR - if there are plan changes, you will be moved into the new corresponding plan.

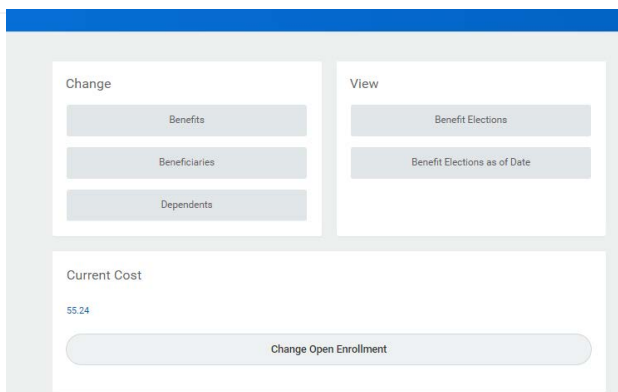|	
To start, navigate to Workday after Open Enrollment launches.	
Access through your Workday Inbox. Click Let's Get Started	
You must start Open Enrollment through your inbox. After you've submitted your benefits, you will see an option in your Benefits Worklet to Change Open Enrollment throughout the Open Enrollment period.	

The Open Enrollment Overview page displays all of your eligible benefit plans as of January 1st.

The top right hand corner of the Open Enrollment has Projected Total Cost Per Paycheck. This is the total cost of **all** plans you are enrolled in for January 1st and will update with each additional plan you enroll in.

Projected Total Cost Per Paycheck
$21.60

Projected Total Credits
$0.00

Open Enrollment

Projected Total Cost Per Paycheck
$21.60

Projected Total Credits
$0.00

Health Care and Accounts

Medical
Kaiser Permanente HMO 10/20 - FT

Cost per paycheck $18.50

Coverage   Employee Only

Manage

Dental
Kaiser Permanente DHMO 15 Dental - FT

Cost per paycheck $3.10

Coverage   Employee Only

Manage

MERP - Medical FSA
Waived

Enroll

DCAP - Dependent Care FSA
Waived

Enroll

TRP - Transit (FSA)
Waived

Enroll

TRP - Parking (FSA)
Waived

Enroll

Insurance

Basic Life
The Standard 1x Salary <250K (Employee)

Cost per paycheck   Included

Coverage   1 X Salary

Manage

Supplemental Life
Waived

Enroll

Supplemental Spouse Life
Waived

Enroll

Click Manage to make changes to a plan.	Manage
Click Enroll to enroll in a plan effective January 1st.	Enroll

The Open Enrollment Overview page is broken up into three sections:

Health Care and Accounts
Insurance
Additional Benefits

Health Care and Accounts

Change your Medical/Dental Plans

To change your Medical plan, select Manage.	**Health Care and Accounts** **Medical** Kaiser Permanente HMO 10/20 - FT Cost per paycheck $18.50 Coverage Employee Only Manage

The Plans Available screen will have all the plans you are eligible to enroll in.

Check the County's Open Enrollment site if you want to learn about the differences between plans.

Select which plan you would like to change to, or leave as is to remain in the same plan.

Medical

Plans Available

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

5 items

*Selection	Benefit Plan	You Pay (Semimonthly)	Company Contribution (Semimonthly)	Credits (Semimonthly)
● Select / ○ Waive	Kaiser Permanente HMO 10/20 - FT	$18.50	$351.54	
○ Select / ● Waive	Moda PPO 400 - FT	$29.44	$363.12	
○ Select / ● Waive	Moda PPO Major Medical - FT	Included	$189.57	$25.00
○ Select / ● Waive	Multnomah County ACA Integrated Opt-outPlan	Included	$0.00	$125.00
○ Select / ● Waive	Multnomah County Non ACA Integrated Opt-outPlan	Included	$0.00	$125.00

Hit Confirm and Continue

Confirm and Continue

In the next Dependents screen you can add or remove any qualifying family members to your plan.

Medical - Kaiser Permanente HMO 10/20

Dependents

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

Coverage   *   ✕ Employee Only ···

Plan cost per paycheck $18.50

Add New Dependent

1 item

Select	Dependent	Relationship	Date of Birth
☐		Domestic Partner	

To add a Dependent that is not listed, click Add New Dependent

Add New Dependent

If you want this dependent as a possible beneficiary for your life insurance benefits, select the Use As Beneficiary button.

Then OK.

Add My Dependent From Enrollment
(Actions)

Use as Beneficiary   ☑

Click Ok to add a dependents.

Be sure to add a Social Security number by ADD National IDs

OK   Cancel

Enter in all required fields for your new dependent, including their social security number under National IDs.

Add My Dependent From Enrollment

Name

Country * × United States of America

Prefix

First Name *

Middle Name

Last Name *

Suffix

Allow Duplicate Name ☐

Check this box only when there is more than one dependent with the same name.

Personal Information

Relationship *

Date of Birth * MM / DD / YYYY

Age (empty)

Gender * select one ▾

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.
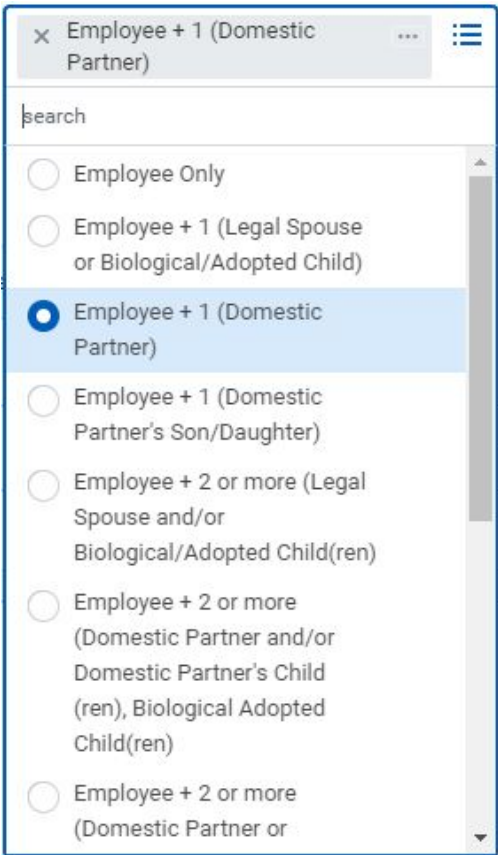
Add

Address

Phone & Email

Hit Save

Save

Select the appropriate Coverage based on the selected dependents.	☒ Employee + 1 (Domestic Partner) ... ☰ search ○ Employee Only ○ Employee + 1 (Legal Spouse or Biological/Adopted Child) ● Employee + 1 (Domestic Partner) ○ Employee + 1 (Domestic Partner's Son/Daughter) ○ Employee + 2 or more (Legal Spouse and/or Biological/Adopted Child(ren) ○ Employee + 2 or more (Domestic Partner and/or Domestic Partner's Child (ren), Biological Adopted Child(ren) ○ Employee + 2 or more (Domestic Partner or
Be sure that the new dependent is selected.	Select ☑
Hit Save	Save

Enroll in Flexible Spending Accounts

To enroll in Flexible Spending Account, click Enroll on the plan you'd like. Note: You must enroll in Flexible Spending Accounts every year. Current year enrollment does NOT carry over from your current plan (if applicable)	**MERP - Medical FSA** Waived Enroll
In the next Plans Available screen, click the radio button for Select.	**MERP - Medical FSA** **Plans Available** Select a plan or you can waive to opt out of MERP - Medical FSA. 1 item *Selection / Benefit Plan / You Contribute (Semimonthly) / Company Contribution (Semimonthly) ◉ Select — PacificSource Administrators ○ Waive
Click Confirm and Continue	**Confirm and Continue**
You can enter the dollar amount that you'd like to contribute to your MERP account by paycheck, or by total Annual amount and Workday will automatically calculate the per paycheck amount.	**MERP - Medical FSA - PacificSource** **Contribute** Per Paycheck 0.00 Annual 0.00 Total Annual Contribution $0.00 Minimum Annual Amount: $240.00 Maximum Annual Amount: $2,700.00
Click Save	**Save**
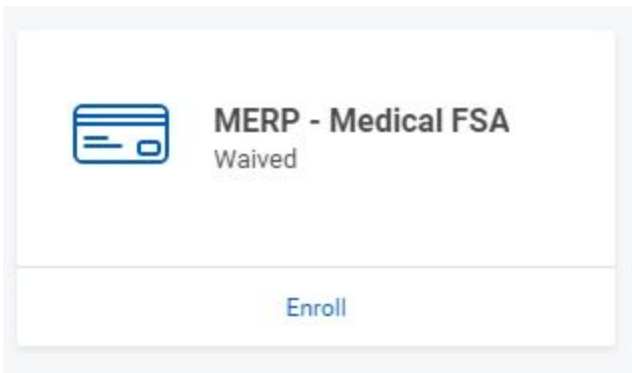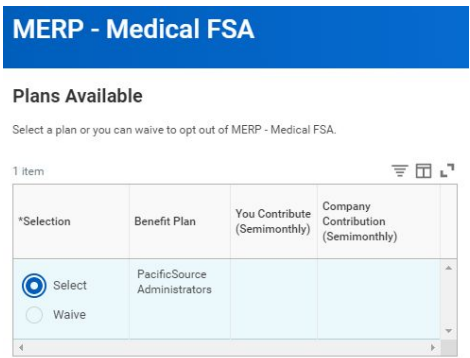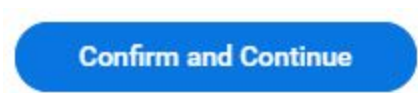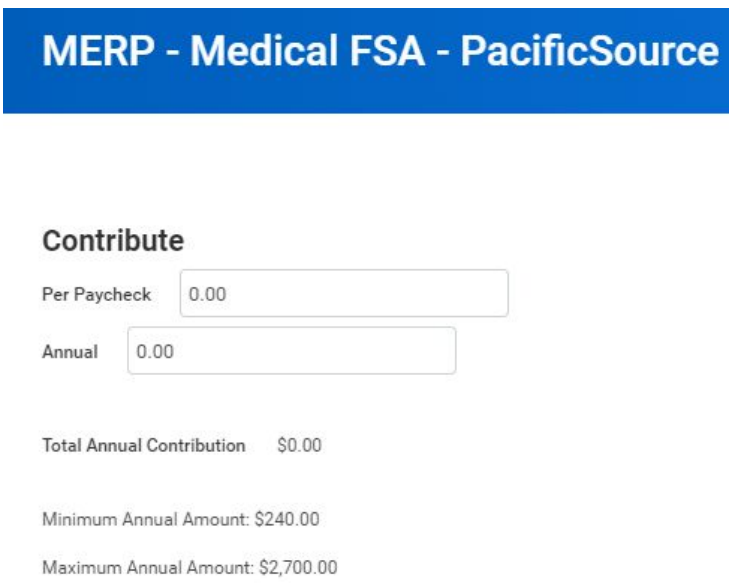
Every time you make a change to a plan in your Open Enrollment task, there will be a pop-up reminding you that there is another step - Review and Sign - to complete your changes.	✓ Your MERP - Medical FSA changes have been updated, ✕ but not submitted Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.
Follow these same steps to enroll in DCAP and TRP accounts.	**DCAP - Dependent Care FSA** Waived Enroll **TRP - Parking (FSA)** Waived Enroll

Insurance

Add Beneficiaries

To review or add beneficiaries to your Basic Life insurance plan, click Manage.	
Since this is County-paid plan, you are automatically enrolled and cannot make any changes in the Plans Available screen.	
Click Confirm and Continue	

Insurance

If you have already added beneficiaries, they will appear here.

You can make adjustments to Percentage amounts, add, and remove beneficiaries using this screen.

Basic Life - The Standard 1x Salary <250K (Employee)

Coverage

Coverage   1 X Salary

Calculated Coverage

Plan cost per paycheck   Included

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 2 items

	Beneficiary	Percentage
⊖	✕ ··· ☰	50
⊖	✕ ··· ☰	50

Secondary Beneficiaries 0 items

	Beneficiary	Percentage
	No Data	

To add a Beneficiary, click on the + button under Primary Beneficiaries.

Primary Beneficiaries 0 items

Beneficiary

Add Row

Then click the menu button to display drop down options.

You may have Existing Beneficiary Persons if you have Dependents.

If not, Add New Beneficiary.

Existing Beneficiary Persons   >

Existing Trusts   >

Add New Beneficiary or Trust

search

Select Add New Beneficiary or Add New Trust.

Hit Continue.

Add New Beneficiary or Trust

(Actions)

A beneficiary is the person or entity you name in a life insurance policy to receive this benefit. A trust is an arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries.

Would you like to add a new beneficiary or trust?

🔘 Add New Beneficiary

⚪ Add New Trust

(**Continue**)   (Cancel)

Enter all new Beneficiary or Trust information.

Hit OK.

Add New Beneficiary or Trust

Actions

| Relationship | * | | ☰ |

Use as Beneficiary ☑

Date of Birth MM / DD / YYYY 📅

Age (empty)

Gender select one ▼

Full-time Student ☐

Student Status Start Date

Student Status End Date

Disabled ☐

Allow Duplicate Name ☐

Legal Name | Contact Information | National IDs | Additional Government IDs

Country * ✕ United States of America [↗] ☰

Prefix ☰

First Name *
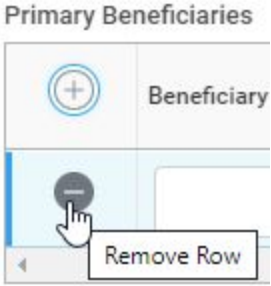
Middle Name

Last Name *

Suffix ☰

OK   Cancel

Assign a Percentage to the new Beneficiary. Remember: the Percentage has to equal 100.	Percentage 50 50
To remove a Beneficiary, click on the - button under Primary Beneficiaries	Primary Beneficiaries Beneficiary Remove Row
Hit Save	Save

Enroll in Supplemental Life Insurance

Click Enroll on Supplemental Life and/ or Supplemental Spouse Life or Supplemental Domestic Partner Life. If you are already enrolled in the plan and would like to increase/decrease your coverage, Select Manage.	**Supplemental Life** Waived Enroll
Hit Select on the Benefit plan to enroll. Hit Waive on the Benefit plan to cancel. Hit Confirm and Continue to change your plan.	**Supplemental Life** **Plans Available** Select a plan or you can waive to opt out of Supplemental Life. 1 item *Selection / Benefit Plan / You Pay (Semimonthly) ○ Select — The Standard (Employee) ○ Waive **Confirm and Continue**　Cancel
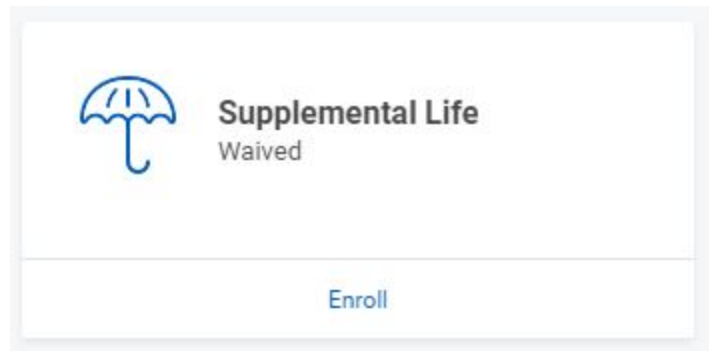
Choose the amount of Supplemental life insurance you want to enroll in by clicking on the Coverage.

After selecting, a message will display letting you know if you need to submit an Evidence of Insurability (medical questionnaire) to the Standard insurance company to get an approval for the requested coverage.

You will receive a separate message with the link with this questionnaire.

Coverage

Coverage		× $50,000	

Your guaranteed coverage amount for Supplemental Life - The Standard (Employee) is $0. Submit your Evidence of Insurability to The Standard to be considered for the coverage amount of $50,000. Your election will be waived if you are denied coverage.

Calculated Coverage $50,000.00

Plan cost per paycheck $2.25

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		

Follow these same steps to enroll in Supplemental Spouse Life and Supplemental Domestic Partner Life.

Supplemental Spouse Life
Waived

Enroll

Supplemental Domestic Partner Life
The Standard (Domestic Partner)

Cost per paycheck $4.25

Coverage $50,000

Manage

Hit Save

Save

Enroll in Optional Short Term Disability

Click Enroll on Optional Short Term Disability. If you are already enrolled in the plan and would like to view or end coverage, Select Manage.	**Optional Short Term Disability** Waived Enroll
Select the plan(s) you would like to enroll in. Buy Up: Only available to Local 88 and MCCDA members who make more than $60,667 per year. You must enroll in the Class 11 plan in order to enroll in the Buy Up plan. Find more details on our Optional Short Term Disability page.	**Optional Short Term Disability** **Plans Available** Select a plan or you can waive to opt out of Optional Short Term Disability. 2 items See table below
Click Save.	**Save**

Plans Available

*Selection	Benefit Plan	You Pay (Semimonthly)	Company Contribution (Semimonthly)
◯ Select ● Waive	The Standard Buy Up (Employee)		
● Select ◯ Waive	The Standard Class 11 (Employee)		

Confirm and Continue   Cancel

Additional Benefits

Feel free to explore details about your additional benefits.	**EAP** Reliant Behavioral Health Cost per paycheck — Included Manage
Since most of these are County-paid plans, you are automatically enrolled and cannot make any changes in the Plans Available screens.	**EAP** **Plans Available** Select a plan or you can waive to opt out of EAP. 1 item

Plans Available table:

*Selection	Benefit Plan	You Pay (Semimonthly)	Company Contribution (Semimonthly)
Select	Reliant Behavioral Health	Included	$0.84
Waive			

Confirm and Continue   **Cancel**

Review and Sign

Once you've finished your review or completed making all your changes, hit Review and Sign.	**Review and Sign**
Carefully review all Selected Benefits, Coverage, and Costs.	**View Summary** Projected Total Cost Per Paycheck $38.10 — Projected Total Credits $0.00. Carefully review your benefit changes before submitting. Scroll down to confirm your plans and coverage levels, agree to terms, and submit your elections. Questions? Employee.benefits@multco.us or 503-988-3477. Selected Benefits 12 items. Medical Kaiser Permanente HMO 10/20 - FT, 01/01/2019, 01/01/2019, Employee Only, $18.50. Dental Kaiser Permanente DHMO 15 Dental - FT, 01/01/2019, 01/01/2019, Employee Only, $3.10. Submit / Save for Later / Cancel
Scroll down to the Electronic Signature. You must accept the agreement to continue. Hit Submit.	**Electronic Signature** By signing below, I hereby certify the information furnished is true, complete and accurate. I authorize Multnomah County to reduce my wages for the required cost shares, including imputed income, if applicable, in accordance with my Union contract or County Personnel Rules for the coverage I have elected. I Accept ☑ Submit / Save for Later / Cancel
You can view, download and save, and print a copy of your selections from the submission page by clicking View Benefits Statement. This is accessible throughout the Open Enrollment period- see next page.	**You've submitted your elections.** Your benefit enrollment change has been processed. Review under Benefits in your Benefits worklet. **Important Dates:** Benefits go into effect — 01/01/2022. Final day to update benefits — 10/12/2021. View 2022 Benefits Statement

Additional Changes

You can make any changes to your benefits until the end of Open Enrollment.

To update or view previous changes, find your Open Enrollment message in the inbox archive and click "Let's Get Started" or select 'Change Open Enrollment' in your Benefits Worklet (see pg. 3).

You can Review and Sign again, accept agreement, and View Benefits Statement any time until Open Enrollment closes.

Troubleshooting Error Messages

For more error messages, clicking on the red box will pop up an explanation of the error.

⊙ 1 Error   View All

Many times it is because you missed a required field.

Error

1. Page Error
   At least one address is required for beneficiaries or dependents.

Page Error Reason Code:
When adding a new dependent, your must select a Reason (under Effective Date).

Error

1. Page Error
   - Reason Code is missing   (Dependent Event)

Beneficiary Percentage Error:
Appears when you have not added the desired percentage of the benefit you want the beneficiary(ies) to receive (i.e 100%).

Error

1. Primary Percentage / Contingent Percentage (Row 2 Column 7)
   One of the following options must be selected:
   Primary Percentage
   Contingent Percentage

Page Error:
Scroll down to hit the "I Agree" under Electronic Signature before hitting Submit.

Error

1. Page Error
   Your electronic signature is required before you can submit your benefit elections.

Reason ID Missing:
When adding a dependent, a social security number is required, or you need to add a reason the ID is not available, ie: "Have not received SSN yet."

Errors

1. Identifier ID Entered / Reason ID is Not Available (Row 1 Column 4)
   One of the following options must be selected:
   Identifier ID Entered
   Reason ID is Not Available

Event Previously Submitted Notification: When changing a benefit, there may be more information Benefits needs from you. Click OK to view comments and reply back with the required information.

Change Benefit Elections Event Previously Submitted Notification (Actions)

Glossary - Benefits Terminology

SAP	Workday	Definition
Action	**Business Process**	Activity taken to complete a benefits transaction.
	Active Employee	An employee who is currently employed and has benefits due to their employment. Retirees are not active employees.
Benefits Staff	**Benefits Partner**	Benefits department employees who are experts in all the benefits options, policies, and procedures within Workday to inform and assist employees.
Deferred Comp	**Deferred Comp or Retirement Benefits**	Will see Voya on pay stubs and will be viewable on an employee's benefits tab along with PERS.
Enrollment Event Rule	**Enrollment Event Rule**	Defines coverage start and end dates, waiting periods, coverage increase limits, Evidence of Insurability requirements, and other coverage rules and conditions. This ensures that the benefits process presents only the options for which each employee is eligible based on the event type. Defined at the benefit group, enrollment event, and benefit type levels.
Benefit Coverage Type	**Benefit Coverage Type**	A type of benefits coverage. For example, you can define Medical, Dental, Vision, Group Term Life, Long Term Disability, and Short Term Disability benefit coverage types. Each type can contain one or more specific benefit plans. You can set rules for benefit elections at the benefit coverage type level. For example, you can restrict an employee to selecting only one plan of a specific coverage type. You can also specify which coverage types are available for employee election during which benefit events.
Default coverage	**Benefit Defaulting Rule**	Identifies the benefit plans, coverage targets, and coverage amounts that employees receive by default when they do not complete an enrollment event.
Life Event	**Benefit Event Type**	An event in the employee's life that gives the employee the opportunity to change benefit elections. These include staffing changes (for example, getting hired or promoted) but also "life events," for example, getting married or having a new child.
Benefit Event Rules	**Benefit Event Rules**	These rules specify coverage increase limits, EOI requirements, waiting periods, and other rules and conditions of enrollment for benefits enrollment events.
Bargaining Unit	**Benefit Group**	Identifies workers who qualify for similar benefit plans and elections. Workday builds benefit groups dynamically based on

		eligibility rules that control group membership; all workers who meet the criteria specified in a group's eligibility rules are automatically assigned to that group. For example, you can create benefit groups by defining eligibility rules that assign executive management staff to one group, salaried employees to a second group, and hourly employees to a third group.
Benefit Plan	**Benefit Plan**	Defines the following: The coverage levels or amounts available to employees enrolling in an insurance, health care, defined contribution, or spending account plan. The target populations for a plan (for example, employee, employee + spouse, or employee + children). Eligibility for benefits, including which benefit groups are eligible for the plan. Restrictions on the age of covered dependents. Plan rates and costs.
N/A	**Benefit Validation**	Restricts the coverage options available to workers under a specific benefit plan. For example, you can restrict the maximum age of dependents covered under a plan or the maximum and minimum coverage amounts.
Tier Level	**Coverage Target**	Defines whether a specific health care plan or insurance plan can be used by only the employee or also by the employee's dependents, entire family, spouse, and so on.
N/A	**Cross Plan Dependency**	Limits the coverage options available to workers during an enrollment event based on their choice of other benefit plans and coverage amounts. For example, you can limit coverage in a specific plan to a percentage of the total coverage in one or more other benefit plans.
Multiplier-Based Coverage	**Multiplier-Based Coverage**	Insurance coverage based on multiples of salary, for example, 1x, 2x, 3x, 4x, 5x, or 6x salary.
Open Enrollment	**Open Enrollment Event**	A type of enrollment event. This event controls the benefits open enrollment process. Unlike benefit event enrollment, which is triggered by a life event or job change, an open enrollment event applies to an entire employee population.
Vendor	**Provider**	An organization contracted with to provide services to employees of Multnomah County e.g., Kaiser, Moda, Unum, VSP, RBH, Standard
N/A	**To Do**	Something requiring in workers inbox or Benefit Partners Inbox
N/A	**Event Date**	The date that triggers when benefits become eligible. IMPORTANT! eg., benefits become effective the first of the month following the event date.
N/A	**Evidence of Insurability (EOI)**	This is a medical questionnaire that is required by the insurance provider (The Standard) if you apply for Supplemental Life Insurance outside of your new hire eligibility or above a certain dollar amount. You fill this out on an external webpage. Workday will send you a notice with this link when it is required.

N/A	Notification	A notice to a worker but not necessarily anything that requires action
N/A	Passive Event	Passive event is when an employee's dependent ages off the plan e.g., 26 years old. Passive events result from the passage of time rather than from a specific change to employee data. Workday automatically processes this event. No human intervention necessary. For example, you can set up a passive event to track and manage benefit eligibility for employees dependents who reach the age of 26 . Based on the event rules, Workday automatically searches for employees turning 26 and generates an enrollment event to terminate the dependent and send Cobra notices.
PERS	PERS	No change

Benefits Data Visibility

Only you and the Benefits Office staff can see your personal benefits information. The Benefits Office staff members maintain an extremely high level of confidentiality that will continue in Workday. Your manager cannot see your selection of benefits plans, dependents, etc.

Workday allows you to see your benefits changes faster, see elections by their effective date, and you can submit required information to a third party vendor quickly and conveniently.