

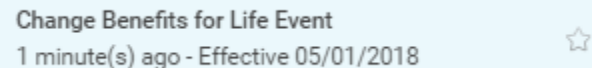
## Benefits – The Employee Election Process - Housestaff

### Employee Workday Inbox Events for Benefit Elections

The employee will receive a Workday inbox action for any business processes that result in a benefit plan eligibility change. In most cases, the employee will receive two separate inbox items in order to complete the benefit elections process.

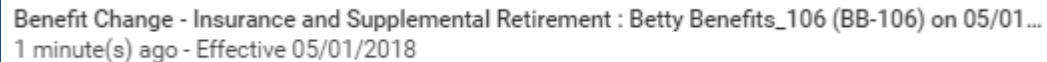
Benefit elections occur in a two-step process as eligibility for some benefit plans in the second step depend on being enrolled in certain plans in the first part. A good example is eligibility for the correct life and disability options depends on the election of VRS Hybrid or ORP Plan 2.

**Part 1** of the benefit election process will present to the employee an inbox message similar to this:



Change Benefits for Life Event  
1 minute(s) ago - Effective 05/01/2018

**Part 2** of the benefit election process will present to the employee an inbox message similar to this:



Benefit Change - Insurance and Supplemental Retirement : Betty Benefits\_106 (BB-106) on 05/01...  
1 minute(s) ago - Effective 05/01/2018

### The Benefit Election Process

**Part 1** of the benefits election process includes the following plan types depending on eligibility: medical, dental, vision, HSA, FSA, mandatory retirement, life insurance, additional benefits.

**Part 2** of the benefits election process includes the following plan types depending on eligibility: insurance/disability, supplemental retirement

## Benefits – The Employee Election Process

### Example 1: Housestaff

#### Part 1

#### Health Care Elections

- Value Health is a default option, but the option to choose Choice Health is available
- Dental and Vision are auto-enrolled without the option to waive. The employee must choose the coverage targets

Health Care Elections 4 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage	Employee Cost (Biweekly (Benefits))	Employer Contribution (Biweekly (Benefits))
Medical HS - Aetna POS - Housestaff Choice Health	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
Medical HS - Aetna POS - Housestaff Value Health	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		Employee Only	\$22.75	\$209.00
Dental HS - United Concordia DPO - Housestaff - Basic	<input checked="" type="radio"/> Elect <input type="radio"/> Waive				
Vision HS - Davis Vision VIS - Housestaff	<input checked="" type="radio"/> Elect <input type="radio"/> Waive				
				22.75	209.00

#### Spending Account Elections - FSA

- FSA plans are waived by default with the option to elect
- Employees are encouraged to choose a yearly amount to guarantee they reach that amount
- Note the different biweekly amounts. Frequencies are indicated in parenthesis. The 'Biweekly' frequency is 26 weeks/the 'Biweekly (Benefits)' frequency is 24 weeks. The employee will see the applicable deduction on the paycheck based on how many pay periods this deduction is taken

# Benefits – The Employee Election Process

Spending Account Elections 2 items



Benefit Plan	*Elect / Waive	Contributions	Supporting Information
Health Care FSA - Chard Snyder	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Your number of remaining payroll deductions for the year 15  Your estimated contributions made this year 0.00  How much do you want to contribute for the total year? <input type="text" value="1,000.00"/>  <b>How much do you want to contribute per paycheck (Biweekly)?</b> <input type="text" value="66.67"/>  Your contribution (Biweekly (Benefits)) \$72.23	Minimum Contribution (Annual) \$120.00  Maximum Contribution (Annual) \$2,500.00
Dependent Care FSA - Chard Snyder	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 15  Your estimated contributions made this year 0.00  How much do you want to contribute for the total year? 0.00  How much do you want to contribute per paycheck (Biweekly)? 0.00  Your contribution (Biweekly (Benefits)) \$0.00	Minimum Contribution (Annual) \$120.00  Maximum Contribution (Annual) \$5,000.00

### Additional Benefits Elections

- Housestaff are eligible for the meal card plan based on the work address being in Charlottesville

# Benefits – The Employee Election Process

Additional Benefits Elections 1 item 🏠 ↗

Benefit Plan	*Elect / Waive	Coverage	Amount (Biweekly (Benefits))	Percent	Employee Cost (Biweekly (Benefits))	Employer Contribution (Biweekly (Benefits))
Meal Card Plan - Morrison's	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text" value="x Employee"/>	<input type="text" value="20.00"/>	0	\$20.00	
					20.00	0

**Electronic Signature Text**

- As applicable for the type of employee and the company; employee must choose the 'I Agree' checkbox

**Part 2**

**Insurance Elections**

- Some plans are auto-enrolled; others are optional; errors will display if any plan dependency rules are not followed

Insurance Elections 5 items 🏠 ↗

Benefit Plan	*Elect / Waive	Coverage Level	Covers Dependents	Calculated Coverage	Employee Cost (Biweekly (Benefits))	Employer Contribution (Biweekly (Benefits))
Basic Life - The Standard - Life AD&D - ORP MED (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	1 X Salary		\$57,000.00		\$3.02
Supplemental Life - The Standard - Life AD&D - ORP - MED (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	<input type="text" value="2 X Salary"/>		\$114,000.00	\$3.59	

*(Screen shot continued below)*

# Benefits – The Employee Election Process

Spouse Life - The Standard - ORP - MED (1_Spouse)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$50,000	\$50,000.00	\$1.58	
Child Life - The Standard - ORP - MED (Children)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	\$10,000	\$10,000.00	\$0.59	
Long Term Disability HS - Unum - MED - Housestaff (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	70% of Salary	\$4,000.00		\$12.54
				5.76	15.56

### Retirement Elections

- The 'Ex' in the plan name means no cash match option is available

Retirement Savings Elections 4 items

Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
403(b) Ex - Fidelity - UVA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="5"/>  Amount (Biweekly (Benefits)) <input type="text" value="0.00"/>	Percentage Maximum 100  Amount Maximum (Biweekly (Benefits)) \$5,000,000.00
403(b) Ex - TIAA - UVA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0  Amount (Biweekly (Benefits)) 0.00	Percentage Maximum 100  Amount Maximum (Biweekly (Benefits)) \$5,000,000.00
403(b) Roth Ex - Fidelity - UVA	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 0  Amount (Biweekly (Benefits)) 0.00	Percentage Maximum 100  Amount Maximum (Biweekly (Benefits)) \$5,000,000.00
403(b) Roth Ex - TIAA - UVA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="0"/>  Amount (Biweekly (Benefits)) <input type="text" value="100.00"/>	Percentage Maximum 100  Amount Maximum (Biweekly (Benefits)) \$5,000,000.00

# Benefits – The Employee Election Process

## Beneficiary Designations

- Beneficiaries can be added 'on the fly' if none already exist; note that these plans require beneficiaries

Beneficiary Designations 2 items

Benefit Plan	Requires Beneficiary			Beneficiaries
Basic Life - The Standard - Life AD&D - ORP MED (Employee)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	*Primary Percentage / Contingent Percentage
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="radio"/> Primary Percentage <input type="text" value="0"/> <input type="radio"/> Contingent Percentage <input type="text" value="0"/>
Supplemental Life - The Standard - Life AD&D - ORP - MED (Employee)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

← Create

- Add Beneficiary
- Add Beneficiary Using Existing Contact
- Add Trust

search

- Once beneficiaries are added, the employee must enter the percent allocation

**Beneficiaries**

\*Primary Percentage / Contingent Percentage

Primary Percentage

Contingent Percentage

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Primary Percentage

Contingent Percentage

## Electronic Signature Text

- As applicable for the type of employee and the company; employee must choose the 'I Agree' checkbox