

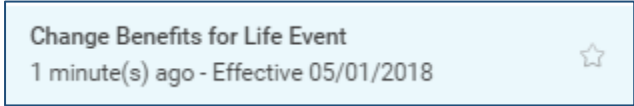
Benefits – The Employee Election Process - Medical Center Staff

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.

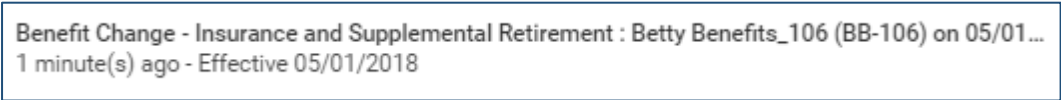
Benefit elections occur in a two-step process as eligibility for some benefit plans in the second step depend on being enrolled in certain plans in the first part. A good example is eligibility for the correct life and disability options depends on the election of VRS Hybrid or ORP Plan 2.

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 3: Medical Center Staff

Part 1

Health Care Elections

- Employees can only choose one medical plan and one dental plan
- Dependents can be added 'on the fly', if necessary

Health Care Elections 6 items

Benefit Plan	*Elect / Waive	Enroll Dependents	Coverage	Employee Cost (Biweekly (Benefits))	Employer Contribution (Biweekly (Benefits))
Medical - Aetna POS - Basic Health	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
Medical - Aetna POS - Choice Health	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		Employee Only	\$63.50	\$201.00
Medical - Aetna POS - Value Health	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
Dental - United Concordia DPO - Basic	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
Dental - United Concordia DPO - Enhanced	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		× Employee Only	\$5.25	\$10.88
Vision - Davis Vision VIS	<input type="radio"/> Elect <input checked="" type="radio"/> Waive				
				68.75	211.88

Benefits – The Employee Election Process

Health Savings Election - HSA

- Employees can only elect an HSA plan if a basic health plan is elected – this employee elected Choice Health and therefore is not eligible for the HSA.

Health Savings Election 1 item

Benefit Plan	*Elect / Waive	Contribution Range (Annual)
Health Savings Account - Chard Snyder	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Your number of remaining payroll deductions for the year 1 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

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
- If the employee attempts to elect the Limited FSA plan without electing a corresponding basic health plan, a warning error will appear on the screen and not let the employee proceed in the election process until the plan is waived.

Benefits – The Employee Election Process

Cross Plan Dependencies 1 item

Alert

Warning

Message

Must elect a Medical - Aetna POS - Basic Health when electing a Limited FSA - Chard Snyder.

Spending Account Elections 3 items

Benefit Plan	*Elect / Waive	Contributions	Supporting Information
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
Limited 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? 1,000.00 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) \$2,500.00

Benefits – The Employee Election Process

Retirement Savings Elections – Mandatory Retirement

- Employees are required to choose a mandatory retirement plan

Retirement Savings Elections 2 items

Benefit Plan	*Elect / Waive	Employer Contribution
Retirement Plan - Fidelity - MCRP 4 PCT	<input type="radio"/> Elect <input checked="" type="radio"/> Waive	Percent 4
Retirement Plan - TIAA - MCRP 4 PCT	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent 4

Electronic Signature Text

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

Benefits – The Employee Election Process

Part 2

Insurance Elections

- Plans are auto-enrolled as applicable
- Supplemental insurance plans are available for election These plans are presented as electable options based on the mandatory retirement election made in Part 1 of the election process
- A couple things to note in this screenshot:
 - The calculated coverage amount for the supplemental life plan is not showing because this is a test employee with no compensation*
 - The flex credit plan is showing as waived because this is a test employee but new employees who are eligible will be auto-enrolled in the flex credit plan*

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		\$25,000.00		\$1.33
Supplemental Life - The Standard - Life AD&D - ORP - MED (Employee)	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	1 X Salary				
Spouse Life - The Standard - ORP - MED (1_Spouse)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					
Child Life - The Standard - ORP - MED (Children)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					
Flex Credit - UVA Med Center (Employee)	<input type="radio"/> Elect <input checked="" type="radio"/> Waive					
					0	1.33

Benefits – The Employee Election Process

Retirement Savings Elections – Supplemental Retirement and Cash Match

- Employees can choose different types and vendors for 403(b) plans
- If the employee chooses to contribute to a 403(b) plan, he or she must also elect a cash match plan, and vice versa
- Note that since this is a medical center employee, the cash match and 403(b) plan names include the letters MED

Retirement Savings Elections 6 items



Benefit Plan	*Elect / Waive	Employee Contribution	Allowed Employee Contribution
401(a) - Fidelity - Cash Match MED	<input checked="" type="radio"/> Elect <input type="radio"/> Waive		
401(a) - TIAA - Cash Match MED	<input type="radio"/> Elect <input checked="" type="radio"/> Waive		
403(b) MED - 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) MED - TIAA - UVA	<input checked="" type="radio"/> Elect <input type="radio"/> Waive	Percent <input type="text" value="0"/> Amount (Biweekly (Benefits)) <input type="text" value="200.00"/>	Percentage Maximum 100 Amount Maximum (Biweekly (Benefits)) \$5,000,000.00
403(b) Roth MED - 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 MED - 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

Benefits – The Employee Election Process

Beneficiary Designations

- The plans below require a beneficiary designation; click the plus icon to add a row

Beneficiary Designations 2 items

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

Electronic Signature Text

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