Benefits: Open Enrollment

During Open Enrollment, all benefited employees will enroll/select benefits for the following plan year. Changes made during Open Enrollment will take effect on 01/01/2023.

Even if you are continuing the same coverage as the previous year, you still should review and confirm your elections. Basic Health participants must sign the HSA Terms & Conditions authorization form in order to contribute to their HSA and receive employer contribution.

If you have a life event that changes your medical/dental/vision benefits DURING OR AFTER the deadline for Open Enrollment, but BEFORE the changes that take effect January 1, 2023, you will need to RE-ENTER your Open Enrollment choices. This will come to your Workday Inbox.

The effective date for coverage is January 1, 2023.

Tasks

- Before You Begin
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- Add Dependent During Open Enrollment
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- Select/Waive Flexible Spending Account
- View Insurances
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Benefits: Open Enrollment

Benefitted Faculty, Staff & Team Members

Before You Begin

During open enrollment, you will verify/update and submit the following:

1. Modify/Elect Medical, Dental, Vision benefits: elect or waive coverage, change plans, and/or add/drop dependents.
2. Enroll in Flexible Spending / Health Savings Account.
3. Confirm beneficiaries for Life Insurance.
4. Modify long-term disability coverage, if applicable to you.

- If you are adding dependents, you will need his/her name, date of birth, and social security number.
- Your request to add your dependent will not be approved unless you attach the required documentation in Workday (see the Maintain My Worker Documents job aid) or submit your documentation to AskHR@virginia.edu within 30 days of the end of the Open Enrollment period, if you are not ready to attach it here. For a list of the required documentation, view the UVA HR Benefits Eligibility page.
- If you are adding a spouse to your medical coverage, you will also need to complete a spousal affidavit that you will receive in your Workday Inbox.
- If you open a tile and decide to not make any changes, click the Cancel button to return to the main Open Enrollment page.
- You must click on each tile you wish to change prior to selecting the Review and Sign button, which is done when you are finished updating all your plans.
- Use the Save for Later button when you are in the middle of selecting your benefits but are not ready to Review and Sign. Save for Later will prevent you from losing any changes you have selected. Make sure to go back to your Open Enrollment event to Review and Sign prior to the deadline or any changes you saved for later will be lost.

Select / Waive Medical, Dental, Vision Insurance

1. Sign into Workday by clicking on the Benefits Open Enrollment link in the Announcements.

Note: You will also have an Open Enrollment Change Inbox task and can start there by clicking on Let’s Get Started.

2. Click Continue.
3. Your choices for **Health Care and Accounts** and **Insurance** display. Click on the Manage/Enroll/View button on the tile for the plan you would like to enroll, edit/manage, or waive. If you are already enrolled in a plan, the button at the bottom of the tile will display as Manage. Otherwise, the button will display as Enroll. Click each tile you would like to enroll, edit/manage, or waive.

Note: Your plan options may be different than the ones you see above, depending on eligibility.
4. Once you click on a tile (e.g., Medical), current plans you selected or waived will display in the Selection column. If during Open Enrollment you are trying to enroll in a benefit for the first time that was previously waived, you may notice that the radio button is greyed out and set in the waived status (e.g., Insurance plans). To enroll, you will have to reach out for additional assistance to AskHR@virginia.edu.

5. To continue, click the Confirm and Continue button.

6. To add a new dependent(s), click the Add New Dependent button. Your current Coverage type will display. If you plan to add new dependent(s), go to the section on Add Dependent During Open Enrollment.

7. To remove a dependent, uncheck the checkbox in front of the name of the dependent you wish to remove.

8. You will be returned to the Health Care and Accounts page multiple times. Click on each tile you wish to enroll yourself and your dependents in by clicking the Select radio button, Confirm and Continue.

9. Continue with your elections, checking the checkbox in front of your dependents you wish to add to each plan and Save.
Add Dependent During Open Enrollment

During Open Enrollment, you can add or drop dependents from coverage for the plan year. After Open Enrollment, you can only make changes to dependents if there is a qualifying life event.

1. After selecting the Add New Dependent button and reading the below information, click OK.

2. On the ‘Add My Dependent From Enrollment’ entry screen:
   
   A. Fill in the required details regarding the dependent (First/Last Name, Relationship, Date of Birth, and gender are required).

   B. If you have a Social Security Number, under National ID’s click ‘ADD’, select USA as Country, Social
Security Number as ID type, and enter the SSN (if you do not yet have a social security number (e.g., for a newborn) you can skip this for now, but you must provide the SSN as soon as you have the number available.

C. After entering the SSN, or if you do not yet have an SSN (e.g., for a newborn child), review the Address information at the bottom of the page, make changes if necessary, and then click Save.

3. If you still need to add the Social Security Number, the Dependent Social Security Numbers section will display. Either add the SSN or if you do not have one yet, select the radio button in front of Reason SSN is Not Available and enter the reason (e.g., this is a newborn).

4. Click the Add New Dependent button again and repeat the steps to add additional dependents if you have multiple dependents to add.

5. Once you have added all your dependents, click Save. As a reminder, dependent documentation is required for newly added dependents and must be submitted within 30 days from Open Enrollment. Otherwise, the Plan will dis-enroll unsubstantiated dependents from enrolled plans.

6. Your Coverage type will change according to the number and type of dependents. You will see this immediately within the tile.

   You will see an “updated, but not submitted” confirmation.

7. If you already clicked Save after adding your first dependent and you need to add another, click the Manage button again under Medical.

8. Click Confirm and Continue.

9. Click the Add New Dependent button again and go back to Step 1 of this section.

10. On the Plans Available page, you will see your available options or existing election. Click the Confirm and Continue button to go to the Dependent page. On the Dependent page, you can review or change your dependent(s) information or coverage.

   Update each Health, Dental, or Vision tile where you are requesting dependent changes (as applicable).
Some benefit tiles are “display only” and require other steps to request changes. Please read the help text in each benefit tile for specific instructions based on each benefit plan.

11. After adding dependents to your Medical plan, click on each tile (e.g., Dental, Vision, etc.) you wish to add your dependent(s).

12. Select the checkbox in front of the name(s) of the dependent(s) you wish to add to each plan.

13. Click Save.

14. You will see an “updated, but not submitted” confirmation for each plan each time you successfully add your dependent.

Once you Submit changes to Open Enrollment and add a spouse to cover for medical benefits, you will receive an Inbox task to complete. This will be the spousal affidavit and it must be completed in order to finalize your benefit elections for Open Enrollment.

Spouses whose remote employer offers affordable health care that provides minimum value, but ALL their health options are HMOs and the spouse lives outside of the HMOs’ defined service areas, are eligible to be a dependent on the UVA employee’s health coverage. Employees who want to cover their eligible spouse on the Health Plan must complete the Spousal Affidavit.
Select / Waive Health Saving Account

If you are eligible, you can elect to enroll in a Health Savings Account (see note below outlining the eligibility requirements).

If you answer YES to any of these 8 questions, you are NOT eligible for the Health Savings Account (HSA) benefit and will need to enroll in either the Choice Health or Value Health options in the previous step.

1. Will you be enrolled in Medicaid when the HSA begins?
2. Will you be enrolled in Medicare during the current calendar year or at any time next year?
3. Will you be enrolled in another health care plan as a dependent, spouse, or subscriber that is not a high deductible health plan when the HSA begins?
4. Will you or your spouse have a balance in a Health FSA when the HSA begins?
5. Will you have received health care benefits (other than dental, vision, or preventive) from TRICARE within three months prior to the start of the HSA?
6. Are you a wage employee?
7. Do you hold a J-1 or J-2 Visa?
8. Have you already reached the IRS HSA combined household limit?

To enroll in your HSA, you must have chosen the Basic Health plan option as your medical coverage.

1. Click the Health Savings Account Enroll button.

2. Click the Select radio button and click Confirm and Continue.
3. On the **Contribute** page, enter a yearly amount in the **Annual** field. The system will calculate the amount in the Per Paycheck and Summary fields.

   Note: The minimum (if applicable) and maximum amounts will display.

4. Click **Save**.

5. You will see an “updated, but not submitted” confirmation.

   **Your Health Savings Account 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.

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**Select / Waive Flexible Spending Accounts**

You can elect or waive enrollment in a Health Care FSA, a Limited FSA, and/or Dependent Care FSA. A Limited FSA is only available to you if you have chosen Basic Health as your health plan option. A Health Care FSA is only available to you if you have not chosen Basic Health as your health plan option. Please note the minimum and maximum ranges.

1. Click on enroll in the **FSA** plan tile of your choice.
   - If you see Waived, and that is your choice, you do not need to do anything.
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- If you wish to enroll, choose the Select radio button. Additional steps for enrollment continue with Step 2 below.

2. Click Confirm and Continue.

3. Enter a yearly amount in the Annual field. The system will calculate the amount in the Per Paycheck and Summary fields.

   Note: The minimum and maximum amounts will display.

4. Click Save.

5. You will receive an “updated but not submitted” confirmation.

Your Limited 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.

View Insurances

Waived Life insurance plans display to you as view only. Plans available, or those in which you are enrolled, display as Enroll/Manage. If you wish to make a change to any life insurance policy shown as View, use the appropriate vendor sites linked on the right-side of the Workday page.

On the Plans Available app, you will see your current life benefit. Then click the Confirm and Continue button to go to the Coverage page. On the Coverage page, you can view your current life insurance coverage level.

Important Information about Standard Life Benefits in Open Enrollment

- Life insurance coverage amounts in Open Enrollment are View only.
- Beneficiaries can be updated during Open Enrollment.
- During Open Enrollment employees already enrolled in the Supplemental Employee and/or Spouse Life with The Standard may increase their current election by 1 increment (from 1 to 2 or 2 to 3 for employee, from $25k to $50k for spouse) up to the guarantee amount (up to $50k for employee, and up to $50k for spouse) without having to complete the medical Evidence of Insurability (EOI).
- To request coverage changes to your life insurance benefits, submit the Open Enrollment event and from your Workday homepage navigate to the application menu in upper left, select the Benefits shield icon, click on Change Benefits, and use the Change Life Insurance benefit event. Make your changes there.
- If you submit a Change Life Insurance request during Open Enrollment, you will need to resubmit your Open Enrollment event again to save changes.
- Requests to decrease or waive benefits are immediate. Requests to increase will be based on your current eligibility.
- Child life covers eligible dependent(s) up to age 26 for $10,000 (all eligible children are covered, and premium does not increase per child).

Open Enrollment Benefits Information and Resources

Visit the UVA HR Open Enrollment Website.
Contact the Solution Center at AskHR@virginia.edu or call 434-243-3344.
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Links are also available on the Benefits website: https://hr.virginia.edu/benefits/life-insurance.

1. Elect or Waive your selections. If the disability plan is grayed out, you do not need to do anything to continue coverage.

2. To add a Beneficiary to your Life Insurance when you are in the Standard Life program, go to Beneficiaries in the next section.

**Beneficiaries**

These steps are for Standard Life members only. VRS Life Insurance Members should login to myVRS to update or change their Life Insurance beneficiaries. From your myVRS account, click the My History drop-down menu at the top of the page, and select Life Insurance to reach the Securian Life portal. If you are a VRS Life Member, skip to the Review and Sign and View Summary section.

If you are a Standard Life Member, you will now designate primary and secondary beneficiaries to each of your life plans using the following steps.

Repeat these steps for any/all plans in which you are enrolled.

1. After clicking the Enroll/Manage button on the Standard Life tile and Confirm and Continue, you will see a Beneficiaries section.

2. To delete a beneficiary from your Life Insurance, click the minus button in front of the name.

3. To change the percentage, alter the number in the percentage column.

4. To add a new Beneficiary, click the plus button and use the prompt to click on one of the following options:
Note: To use the Existing Beneficiary Persons or Existing Trusts options, the person must already be added to your plan as a beneficiary or trusts.

**Create New Beneficiary**

If you selected to Add New Beneficiary or Trust you will see the option to choose either Add New Beneficiary or Add New Trust.

1. With the Add New Beneficiary radio button selected, click **Continue**.

2. Fill out all required information starting with Relationship.
   - Date of Birth
   - Gender
   - Legal Name
   - Click the Contact Information tab and complete as much as possible.
   
   Note: Under the Address button, **Use Existing Address** may provide options you can use if your beneficiary lives with you.

   - Click the National IDs tab to enter the Social Security Number or Government ID.

3. Click **OK**.
4. Once the new person is added, he/she will show under your **Primary Beneficiaries** to allow you to alter or add a value in the Percentage column.

5. To delete a beneficiary, click the minus sign in front of the name you wish to delete and adjust the percentages.

6. You may also add **Secondary Beneficiaries** as desired.

7. Click **Save**.

8. You will receive an “updated not submitted” confirmation.

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### Add New Beneficiary or Trust

To add a New Trust, follow these steps:

1. Select the radio button in front of **Add New Trust** and click **Continue**.
2. Fill out all required information:
   - Trust Name
   - Trust ID
   - Trust Date

3. You can also fill out Beneficiary Trustee Names and scroll down to enter the Contact Information.

4. Click **OK**.

5. The Trust will now show to edit as desired.

   Note: You must add a percentage value.

6. To delete a beneficiary, click the minus sign in front of the name you wish to delete and adjust the percentages.

7. When you are done adding and editing, click the **Save** button.

8. You will receive an “updated, but not submitted” confirmation.
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Review and Sign/View Summary

Once you are finished updating and reviewing all your plans, you will Review and Sign, View the Summary of your changes, and add any required documentation.

If you are finished, but you are not ready to Review and Sign, use the Save for Later button to save the changes you have entered thus far. Make sure to go back and Review and Sign prior to the deadline or any changes you saved for later will be lost.

Contact AskHR@virginia.edu or call 434-243-3344 with questions.

1. When you are finished updating all your plans, click the Review and Sign button.

2. If you have more benefit changes to add, click the Cancel button to add additional changes.

3. After clicking the Review and Sign button, scroll through the View Summary of your proposed elections/changes.

4. If you added a dependent which requires documentation, use the Attachments section to add your required documentation.
   - Click Select Files or drag and drop to the Drop files here section. For a list of the required documentation, view the UVA HR Benefits Eligibility page.
   - If you have multiple documents to upload, click the upload button after downloading the first document.

5. If you are happy with the elections/changes, scroll down to the Electronic Signature section and click the ‘I Accept’ checkbox.

6. Click Submit.

7. You will receive a ‘Submitted confirmation with a link to a View 2023 Benefits Statement, which shows Open Enrollment changes only.

You've submitted your elections.

A copy of your completed form is saved in your UVA HR Self-Service. To view your request, enter your User ID and Password. You can also view your request in the Benefits section of the UVA HR Self-Service.

Important Dates:
- Benefits go into effect: 01/01/2023
- Final day to update benefits: 12/14/2023

Click View 2023 Benefits Statement.

Note: The ‘View 2023 Benefits Statement’ button gives you the option to print your enrollment request, which is recommended. See the Print section below.
Print

It is a good idea to print a copy of the Benefit Elections Confirmation to keep for your records. Click Print then Download to create a PDF of the document that you can either print or save.

1. Click the View 2023 Benefits Statement button.
2. Click the Print button.
3. Click the Download button.
4. Your document displays, which allows you to Open and Print.
5. Print a copy for your records by clicking Print. This will open a PDF of the page that you can either save or print.
6. Click the Home button
7. Under Announcements it will now say ‘Congratulations! You have submitted your Open Enrollment benefits event.’

Changes Before Deadline

If the Open Enrollment period is open, you can continue to make changes to your elections. To do this:

1. Click the Menu, then Benefits Application, and click on Change Open Enrollment.
   
   You will be making changes to what has been previously submitted. Any changes made will need to be resubmitted. If you do not resubmit, the changes will be disregarded, and the previous submission will remain in effect.

2. Click the Let’s Get Started button,
3. Any missing items, such as Social Security Number, will display first.

4. Move through the same screens to elect or waive coverage, finally submitting the changes.

5. Print the new confirmation of benefit elections.

**Spousal Affidavit**

If you added a spouse as a dependent, you need to complete an affidavit. This task will come as a separate inbox item after you submit your benefit elections. Refresh your screen to receive this task if you do not see it.

1. Review the affidavit PDF by clicking on the link that will come to your Workday Inbox.

2. By clicking the “I agree” checkbox, you are verifying that your spouse is either:

   1) NOT eligible for affordable Health Benefits from his/her employer that provides minimum value, as defined by the Affordable Care Act, OR

   2) Eligible for affordable Health Benefits from his/her employer that provides minimum value, as defined by the Affordable Care Act, but none of his/her employer’s health options have in-network coverage at the spouse’s residence. Documentation from the spouse’s employer is required and can be uploaded here in the Attachments section.

3. Click Submit.

4. You will receive a submit confirmation.

If you cannot agree to this statement, please contact the Solution Center at AskHR@virginia.edu or call 434-243-3344.

**HSA Terms and Conditions**

If you elected an HSA, you need to complete the HSA Terms and Conditions authorization form. This task will come as a separate inbox item after you submit your benefit elections. Refresh your screen to receive this task if you do not see it.
1. Review the HSA Terms and Conditions PDF by clicking on the link that will come to your Workday Inbox.

2. By clicking the “I agree” checkbox for the HSA Terms and Conditions, you are confirming your eligibility for an HSA.

3. Click Submit.

4. You will receive a submit confirmation.

5. If you cannot agree to this statement, please contact the Solution Center at AskHR@virginia.edu or call 434-243-3344.