

## Open Enrollment Instructions

Prior to making open enrollment elections, ensure that your contacts (people that you designate as beneficiaries and/or dependents) are entered and up-to-date. Select **Myself > Personal > Contacts** to add or edit contact information.

Depending on the Open Enrollment configuration for the plan, you may have the option to make new elections or remain enrolled in your current benefit plan. You will only have the option to remain enrolled if you have a status of Not Started. If for any reason an Open Enrollment session is reopened (that was already completed via passive enrollment), you will need to then complete a new election. Electing passive enrollment bypasses all other election options and opens the Confirmation page immediately.

### **To verify, add, or change beneficiaries and dependents:**

1. From **Myself**, select **Open Enrollment**. The **Open Enrollment** page appears.

**Note:**

If your benefits administrator configured passive enrollment, you will have two options: **Make New Elections** or **Stay Enrolled in Current Benefit Plans**. If you select the **Stay Enrolled in Current Benefit Plans** option, the **Confirmation** page then appears.

2. Select the **Description** link of the applicable open enrollment session. The **About Open Enrollment** page appears.
3. From the **About Open Enrollment** page, review the open enrollment session information.
4. Select **Next**. The **Verify Beneficiary and Dependent Information** page appears.
5. View summary information.
6. To edit information about a beneficiary or dependent, select the **Name** link. The **Add/Change Contact** page appears. Edit the information, as needed. Select **Save**. The **Verify Beneficiary and Dependent Information** page appears. Select **Next**.
7. To add a beneficiary or dependent, from the **Verify Beneficiary and Dependent Information** page, select the **Add** button (+). The **Add/Change Contact** page appears. Enter contact information, as needed. Required fields are indicated by a red dot. If you plan to enroll the dependent in medical, dental, or vision coverage, remember to check the **Dependent** box. Select **Save**. The **Verify Beneficiary and Dependent Information** page appears. Select **Next**.

**Note:**

If you are adding a new dependent that has not been covered before, please send supporting documentation (for example, marriage certificate or birth certificate) to Human Resources.

### **To enroll in a plan:**

#### **Notes:**

- A separate page appears for each type of benefit option (medical, dental, and vision). You will see only the medical plans for which you are eligible.
- Evidence of insurability (EOI) may be required for life insurance plans. A message will appear stating that evidence of insurability is required for amounts surpassing what the company has configured as the guaranteed issue amount for a particular plan.

1. Select or decline plan(s).

#### **Note:**

Select the Draft button to enter and save information now and then continue the election at a later time. When you return to complete your elections, the About Open Enrollment page appears.

2. Depending on how the deduction/benefit plans are configured, additional fields may appear. Complete the following:
  - Enter a flat amount or percent, if applicable. An amount appears based on the plan configuration as well as employee pay frequency.
  - Select a benefit option such as employee only, employee plus one, or family, if applicable. Enter additional required information (for example, you may need to enroll dependents and enter dependent information).
  - Enter additional information.
    - For a medical plan type, you may be required to enter physician information.
    - For a flexible spending plan type, you may be required to enter a goal amount. Once the amount is reached, the deduction is stopped.
    - For a plan configuration with beneficiaries, you may be required to enroll applicable beneficiary information as well as percentages for primary and secondary beneficiaries. Primary beneficiaries must total 100%; secondary beneficiaries must total 100%. Depending upon the plan configuration, when you decline a plan, you may be required to enter a decline reason; a disclaimer message may appear.
3. Select Next.

### **To review and submit elections:**

1. From the Confirm Your Changes page, scroll down to view your new elections. Review the selected and declined benefit type and plan details including covered family members, plan beneficiaries, and cost information.
2. Select Back to return to the applicable page to make any changes, if needed.
3. Select Draft to continue the election at a later time or select Submit to complete your elections now. If you select Submit, you cannot make any changes without the assistance of your Benefits Administrator. You can print the Confirm Your Changes page. If you select OK, the Confirmation page appears.
4. Select Print to print a summary of your elections.
5. Select Close.

---

This presentation and content are for Ultimate Software use only. No part of this presentation or content may be reproduced in any form or by any means or stored in a database or retrieval system without the prior written authorization of The Ultimate Software Group, Inc. Information in this presentation and content are subject to change without notice. The presentation and content are confidential information of The Ultimate Software Group, Inc.

© 2013 The Ultimate Software Group, Inc.

UltiPro® is a registered trademark of The Ultimate Software Group, Inc.

All other company and product names referenced herein are the trademarks or registered trademarks of their respective holders.

#### Liability/Disclaimer

The Ultimate Software Group, Inc. makes no representation or warranties with respect to the accuracy or completeness of the presentation or content and specifically disclaims any responsibility or representation for other vendor's software. Ultimate Software is not responsible for any alterations or modifications by others to the presentation or content. The terms and conditions of the license, Intersourcing, SaaS, or other agreement regarding the software or services provided by Ultimate Software, which is the subject of the documentation contained herein, govern this presentation or content. All company, organization, person, and event references are fictional. Any resemblance to actual companies, organizations, persons, and events is entirely coincidental.