Employee Self-Service Guide

Sample Employee Open Enrollment Communication and Instruction

ADP Benefits & Talent Solutions
Overview

Open Enrollment Communication

ADP has provided a sample template for communicating Open Enrollment information to your employees. Keep in mind that Employee Self Service contains an Enrollment wizard that walks employees through Open Enrollment.

Please customize this template for your company where you find text that is formatted as follows:

* Indicates areas where you may refer to the website in a different way. Please change the text, if appropriate.
** Indicates areas where you may need to enter your company-specific information.

You can also place customized instructions on the Home page, which allows you to provide your employees with additional information and directions. To customize instructions, click the Configure homepage icon.

Here you can select Add New Tile to add a customized tile for your upcoming Open Enrollment.
Sample Communication

Dear Employee,

We are excited to announce the start of Open Enrollment on the Employee Self Service* website.

This letter explains what you need to do to complete your enrollments. The Open Enrollment period will last <<ENTER DURATION>>, starting <<ENTER DATE>> and ending <<ENTER DATE>>. All changes to your benefits must be completed by <<ENTER TIME and DATE>>. The changes that you make to your benefits will take effect on <<ENTER BENEFIT EFFECTIVE DATE**>>.

Log in to Workforce Now to access the Employee Self-Service* website.

https://workforcenow.adp.com

Enter your User ID and password, and then click Sign In.

Note: If this is your first time logging in, click Create account. If you are unsure of the registration code, please contact your HR team.
Upon logging in, you will be presented with a pop-up showing important information about this Open Enrollment period. You can click **Enroll Now** or **Remind Me Later**.

**Note:** This pop-up is displayed each time you log in during the Open Enrollment period. 24-hours after submitting your selections the pop-up will no longer display.

Select **Enroll Now** will bring you to the Myself – Benefits – Enrollments screen where you can click **Start Enrollment**.
You will be taken to the **Welcome Note**. Please review all information on this page, as there are often important details regarding your Open Enrollment options. Click **Next** after reviewing the Welcome Note to move to **Manage Dependents**.

The **Manage Dependents** page is where you can add/view/edit your dependent and beneficiaries. Select “**Add dependent or beneficiary**” to add a new dependent/beneficiary. You would use the **3-dot** action icon to view/edit an existing dependent/beneficiary.
Click Next to proceed to **Surveys**.

The **Survey** screen will prompt *only* if applicable based on the settings within the enrollment profile itself. If any tobacco attestation is required you must acknowledge the attestation (“I agree that all the information provided about my dependents and my tobacco usage is true and correct”) in order for **Next** to be available and allow you to continue to the **Select Benefits** page.
The Help Me Choose step in the employee self-service wizard is where Decision Support (powered by Nayya) is located. It’s an optional feature allowing you to walk through an interview-based questionnaire about health, lifestyle, and financial information to provide recommendations for the best benefit plan offerings, suited specifically for you. The responses you fill out are only between you and Nayya. Your employer will not be able to view any of the responses. On average, the Decision Support process will take around 13 minutes to complete.
The next step is Select Benefits. You will see the plans that have been recommended by Nayya and plans that have already been selected.

You can continue to make enrollment changes outside of the recommendations. There are badges on each enrollment card, shown below, that display your enrollment status. (i.e. Selected = Enrolled, Recommended = part of recommendation)
Employee Self Service is split up into three sections: Action Required, Selected Plans and Eligible Benefits.

- **Action Required**—These are items that need to be reviewed to move forward. These plans could require a beneficiary to be designated or a waive reason to be provided.

- **Selected Plans**—These are benefit plans that you are already enrolled in and can make changes to. This section also displays any enrollments that are pending additional approval.
• **Eligible Benefits** – *These are other benefit plans that are available for you to enroll in. If you select a benefit plan in the eligible benefits section, the enrollment will be moved to the Enrolled Benefits section.*

![Open Enrollment](image)

**Waive benefit** should only display for benefit plan types that require a waive reason. Employees should only select **Waive benefit** if you do not want to continue enrollment in a benefit or are not enrolled currently and a waive reason is required.

If you chose to **waive** a benefit, you will be required to select a **Waive Reason**.

![Waive Benefit](image)
View all plans will allow the employee to view the plans that are available in that plan grouping.

Eligible Plans
You're eligible to enroll in the following plans.

Medical
Multiple available options
You have 3 benefit options available to choose from. See what is right for you.

While enrolling in a plan, please be sure to indicate which dependents should be covered in the Covered Individuals section, if applicable. Then proceed with your enrollment.

Available Plans

Medical
Select the plan that meets your needs and add the dependents you want to cover.

Your company requires you to enter a reason to waive this coverage.

Covered Individuals

John Snow (You)
Sally Snow (Spouse)

4 Plans Available - Plan comparison

Aetna Choice PPO
(1 individual selected)
Provider
Aetna Inc.

Select plan

Employer cost per paycheck $245.90
Your cost per paycheck $112.52

RC HDHP
(1 individual selected)

Value benefit Back

Note: The coverage level for your enrollment (Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family) is driven by which dependents you enroll.
When you choose to enroll in a plan, it will display the Per Paycheck cost for the employee and employer.

**Confirm details** may include some additional information needed (i.e. PCP-ID).

Review your enrollment, costs, and covered individuals carefully before clicking on Confirm. Once confirmed, you will receive a confirmation message that you are now enrolled and the enrollment will be displayed under Selected Plans.
Voluntary Life Elections and Beneficiaries:
When you elect Voluntary Life, you will also need to designate your beneficiaries. Start by clicking View all plans, and then choose the amount of coverage you want to elect from the drop down.

If the amount selected is over the Guarantee Issue amount, additional approval will be required, and you will be asked to complete Evidence of Insurability (EOI) and submit it to your employer. Your full election amount will not be approved until this process is completed. Next you will want to enter your beneficiary designation. Including Primary and Secondary, if applicable. All beneficiary delegation percentages combined must equal 100% for each category (Primary or Secondary).

Click Confirm details and review your selection and beneficiary delegations.
Then click **Confirm** to continue with your enrollment elections.

**Confirm Details**

**Guardian Life: BT - Voluntary Life**

**Covered Individual**
- **You**

**Coverage**
- **Total Annual Coverage Amount:** $240,000.00

**Beneficiaries**
- **Sally Snow (Spouse)**
- **Primary (100.00%)**

**Per Paycheck Costs**
- **Employee Cost:** $0.00
- **Your Cost:** $17.50

[Back] [Confirm]

Continue through each step until all elections are complete and all tasks under the **Action Required** section are addressed. When ready to proceed to the Summary page, click **Next** to proceed to **Review and Submit** step.

**Open Enrollment**

**Select Benefits**

- **46 days left to enroll**
- **Effective: October 1, 2022**
  - **Employee cost per paycheck:** $553.26
  - **Your cost per paycheck:** $293.17

**Selected Plans**

You are enrolled in the following plans. You can make changes until the enrollment period closes.

- **Medical**
  - **Aetna Choice PPO**
  - **Effective: October 1, 2022**
  - **Who is covered?**
  - **You and Sally Snow**
  - **Per Paycheck:** $253.17

[Finish later] [Back] [Next]
Review all of your selections/changes. When you have confirmed them, click **Submit Enrollment**. Note that your benefit elections will not be processed until you click **Submit Enrollment**. If you click **Save for later** instead, these enrollments will not be submitted to your HR team until you fully submit the enrollment changes.

There will be a pop-up confirming your submission notating the date and time of submission. Please ensure you receive the confirmation note indicating your elections have been submitted.
If you would like to make additional changes or modifications during the Open Enrollment Period, you may log in and navigate to **Myself > Benefits > Enrollments** and click the **Manage Enrollment** option in the Open Enrollment box. This will bring you back to the beginning of the profile to make any desired election changes.

You may also navigate by finding the **My Benefits** tile on the homepage and select **Manage**. The tile will also reflect the “Submitted” status with the date and time of submission.