2020 OPEN ENROLLMENT CHECKLIST

☐ **Review your current benefit elections**
  o Log into USFWorks through myUSF, click the Benefits worklet and choose View Benefit Elections
  o From the top right corner, choose to print your benefits elections

☐ **Download and review the 2020 Benefits Guide**

☐ **Review your current Flexible Spending Account Elections** vs. your actual expenses to help you decide whether you need to make any changes to your contributions
  o Flexible Spending Accounts (FSAs) require annual re-enrollment should you wish to continue these benefits for the upcoming plan year. The 2020 maximum annual election amounts are $2,700 per employee for the Healthcare FSA and $5,000 per household for the Dependent Care FSA.
  o **NOTE:** Childcare subsidy funds are added to employees’ Dependent Care FSAs through BASIC Pacific. Total childcare subsidy and Dependent Care FSA contributions may not exceed $5,000 per household in 2019 and 2020. Reimbursement requests must meet the IRS criteria for qualified dependent care expenses.

☐ **Gather required documentation**
  o If you are enrolling a new dependent, you must upload the supporting documentation. For example, if adding a spouse, you must upload your marriage certificate. For any eligible children, upload a birth certificate. Failure to provide documentation can delay your enrollment

☐ **Print the Open Enrollment Job Aid**

☐ **You are ready to begin**
  o Log into USFWorks via myUSF
  o Go to your Inbox
  o Select Open Enrollment task

☐ **Health Care Elections** screen will appear.
  o Make your changes (if applicable) then click **Continue**
    - If adding a dependent, click into the Coverage box and select the appropriate tier level (i.e., Employee Only, Employee Plus One, Employee Plus Family)
    - Next, click on the **Enroll Dependents** box and select **Existing Dependents** if one exists or click on “**Add my dependent from enrollment**” to add a new dependent
    - Select “**Create Dependent**” and click next
    - Complete dependent information, click **Ok**
    - Dependent will then appear in plan you want to add that dependent into
    - Click **Continue** to move to the next screen
    - Enter Social Security number for new dependent
    - **NOTE:** If you are electing the Medical Waiver plan or re-enrolling, you will receive another task in your inbox to certify your election
  o Click **Continue** to move to next benefit plan
2020 OPEN ENROLLMENT CHECKLIST

☐ **Spending Account Elections** screen will appear. If not enrolling, click the Continue button to the next benefit plan screen
  - If electing Dependent Care FSA, enter how much you want to contribute for plan year 2020. Maximum allowed is $5,000
  - If electing Health Care FSA, enter how much you want to continue for plan year 2020. Maximum allowed is $2,700
    o Click **Continue** to move to the next benefit plan

☐ **Insurance Plan Elections** screen will appear. If not making changes or enrolling, click the Continue button to the next benefit plan screen
  - If electing Voluntary Term Life coverage by more than $40,000 or enrolling for the first time, you will be required to complete an Evidence of Insurability (EOI) form. Above this page, there is a link to the form.
    o Click **Continue** to move to the next benefit plan

☐ **Beneficiary Designation** screen will appear. Please enter your beneficiaries.
  - Click on the “+” symbol
  - Click inside the beneficiary box and select “Beneficiary Persons”. If no beneficiary names appear, then click on “Create”
  - Click on either “Add Beneficiary” or “Add Beneficiary Using Existing Contact”
  - Complete all required fields to add your beneficiary information
  - To the right of the screen select primary or secondary beneficiaries and the percentage
    o Click **OK**

☐ **Retirement Savings Elections** screen will appear. No changes are necessary. Click on Continue button to the next benefit plan screen
  - Note: If enrolled in the 403(b) plan, you will not see it during Open Enrollment
    o Click **Continue** to move to the next benefit plan

☐ **Additional Benefits Elections** screen will appear.
  - No changes allowed. Click **OK**

☐ **Summary page** will appear
  - **Note:** upload supporting documentation if a dependent was added

☐ Review all benefits along with electronic signature language
☐ Once reviewed, check the “I Agree” button then click “Submit”
☐ Print your benefit summary page for future reference