Benefits: Open Enrollment 2020

This is your opportunity to make any benefit plan changes for the 2020 calendar year. For example, you can add/drop a dependent, increase your existing voluntary life insurance by $40,000 without completing an Evidence of Insurability (EOI) form, and/or enroll in the Flexible Spending Account. Open Enrollment is accessible from your USFWorks dashboard.

*NOTE: Open Enrollment will not be accessible in USFWorks after November 8th, 2019 so plan your enrollment carefully. Please contact USF HR or a Benefits Representative if you have further questions at benefits@usfca.edu or dial (415) 422-2442.

**OPEN ENROLLMENT**

1. Log on to USFWorks through myUSF

2. Go to your Inbox where you will see the Open Enrollment Change email

3. Select Open Enrollment task

**HEALTHCARE ELECTIONS**

Health Care Elections screen will appear.

1. Make changes (if applicable) then click **Continue**
   a. 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)
   b. Next, click on the Enroll Dependents box, select Existing Dependents if one exists or click on “Add my dependent from enrollment” to add a new dependent
   c. Select “Create Dependent”, click **Next**
   d. Complete dependent information, click **OK**
   e. Dependent will then appear in plan you want to add that dependent into
   f. Click **Continue** to move to the next screen
   g. Enter Social Security number for new dependent
Benefits: Open Enrollment 2020

NOTE: If you are electing the Medical Waiver plan or re-enrolling, you will receive another task in your inbox to certify your election.

2. Click Continue to move to next benefit plan

SPENDING ACCOUNT ELECTIONS

Spending Account Elections screen will appear. If not enrolling, click the Continue button to the next benefit plan screen.

1. If electing Dependent Care FSA, enter how much you want to contribute for plan year 2020. Maximum allowed is $5,000
2. If electing Health Care FSA, enter how much you want to continue for plan year 2020. Maximum allowed is $2,700

INSURANCE PLAN ELECTIONS

If not making changes or enrolling, click the Continue button to the next benefit plan screen.

a. 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. The EOI form link is at the top of the page.

b. Beneficiary Designation screen will appear.

1. ADD a Beneficiary

a. Identify the Benefit Plan to which the beneficiary will be assigned.
b. Click the Plus/Addition symbol
c. Click the Search key to add a new Beneficiary Person or Trust existing in the employee profile or Create a Beneficiary Person or Trust. If using an existing Beneficiary Person or Trust, skip step D.
**Benefits: Open Enrollment 2020**

**Faculty and Staff**

2. **Create a Beneficiary**

Click the appropriate beneficiary option to Create a Beneficiary Person or Trust [new beneficiary, new trust, or beneficiary identified as an existing contact].

2. **Create Beneficiary**

Click the appropriate beneficiary option to Create a Beneficiary Person or Trust [new beneficiary, new trust, or beneficiary identified as an existing contact].

**Note:** Beneficiaries will require Legal Name [First and Last], Relationship, Country, and Contact Information [address], to complete a beneficiary designation in Workday.

**Note:** Trust Beneficiary Designations will require Trust Name, Trustee Name [First and Last]. Additionally, Trust ID, Trust Date, and Contact Information [address and phone number] for Trustee may be provided for ease of administration.

3. **Allocations** for Primary and/or Contingent Beneficiary

a. Type Primary and/or Contingent Percentage in for each beneficiary by plan (e.g., Basic Life & AD&D, Voluntary Term Life).
Benefits: Open Enrollment 2020

Note: Primary Percentages MUST total 100%. You may also add additional beneficiaries to whom you may allocate Contingent Percentage totaling 100%. You may NOT designate the same beneficiary more than once within a single benefit plan.

b. Click Continue

RETIREMENT SAVINGS ELECTIONS

1. Retirement Savings Elections screen will appear. No changes are necessary.
   a. Note: If enrolled in the 403(b) plan, you will not see it during Open Enrollment

2. Click Continue to move to the next benefit plan

ADDITIONAL BENEFITS ELECTIONS

1. Additional Benefits Elections screen will appear.
   a. No changes allowed. Click OK

SUMMARY PAGE

1. Summary page will appear
   a. Note: upload supporting documentation if a dependent was added

2. Review all benefits along with electronic signature language

3. Once reviewed, complete electronic signature “I Agree” check box
4. Click Submit

5. Print your benefits summary page for future reference

*Congratulations*

You have completed your 2020 benefits enrollment.