2021 OPEN ENROLLMENT CHECKLIST

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

➤ Download and review the 2021 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 for 2021
  □ Flexible Spending Accounts (FSAs) require annual re-enrollment should you wish to continue these benefits for the upcoming plan year. The 2021 maximum annual election amounts are $2,750 per employee for the Healthcare FSA and $5,000 per household for the Dependent Care FSA.
  □ NOTE: Childcare subsidy funds are added to employees’ Dependent Care FSAs through BASIC. Total combined childcare subsidy and Dependent Care FSA contributions may not exceed $5,000 per household in 2020 and 2021. Reimbursement requests must meet the IRS criteria for qualified dependent care expenses.

➤ Gather required documentation
  □ 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
  □ Log into USFWorks via myUSF
  □ Go to your Inbox
  □ Select Open Enrollment task

➤ Open Enrollment Elections screen will appear.
  □ Each block on the screen represents a healthcare benefit (Medical, Dental, Vision) an insurance benefit (Voluntary Life, Voluntary AD&D), or a retirement benefit (403a, 403b)
  □ Each healthcare benefit block will indicate cost per paycheck (pay period), type of coverage and the number of dependents.
  □ The bottom of each block contains a link to either manage or enroll in a benefit.
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☐ Click Manage or Enroll to make changes to enrollment.

☐ 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 **Add Dependents** button and select **Existing Dependents** if one exists or click on “Add my dependent from enrollment” to add a new dependent
  • **New this year:** If adding a new dependent, you will need to “tag” them to each of your healthcare plans (medical, dental, vision)
  • **NOTE:** If you are electing the Medical Waiver plan or re-enrolling, you will receive another task in your inbox to certify your election

➤ **Spending Account Elections**
  ☐ If electing Dependent Care FSA, enter how much you want to contribute for plan year 2021. Maximum allowed is $5,000
  ☐ If electing Health Care FSA, enter how much you want to continue for plan year 2021. Maximum allowed is $2,750

➤ **Insurance Plan Elections**
  ☐ 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.
  ☐ **EOI form**

➤ **Beneficiary Designation for Insurance Plans (now required)**
  ☐ Beneficiaries are not the same as a dependent. A beneficiary is the person(s) or LLC that will receive the insurance funds should something happen to you.
  ☐ You may have multiple primary and/or secondary beneficiaries.

➤ **Retirement Savings Elections**
  ☐ Note: You will only be able to review your retirement elections during the open enrollment process. To make changes to your retirement elections, please log into retirement@work

➤ **Additional Benefits Elections**
  ☐ No action is required.

➤ **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”

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