


2026 Open Enrollment Checklist

- ☐ Download and review the 2026 Benefits Guide, available under 'Quick Links' on the [Benefits homepage](#).
- ☐ Download and review the [Open Enrollment Job Aid](#) and [Open Enrollment page](#) on myUSF.
- ☐ Review your current benefit elections by logging in to [USFWorks](#). From the homepage, click *Benefits and Pay -> Benefits -> Benefit Elections*.
- ☐ Gather required documentation (i.e. birth certificate, marriage certificate, State of CA RDP certificate, etc.).
- ☐ Start your enrollment by logging in to [USFWorks](#) and opening your Open Enrollment task, which you can find under *Awaiting Your Action* on the homepage or in your USFWorks inbox .
- ☐ If adding a new Dependent, ensure that the box next to their name is checked on each plan in which you wish to enroll them.
- ☐ Review your selected option for the Medical Spousal Surcharge to ensure it is correct. It is required to select the appropriate option.
 1. If you need to amend the selected option, go into the Medical Spousal Surcharge card, click **Select** (not Waive) and *Confirm and Continue*. On the next page, select the appropriate option, and then click *Save*.
- ☐ Enroll in Healthcare Flexible Spending Account (FSA), if applicable.
- ☐ Enroll in Dependent Care FSA, if applicable.
- ☐ Apply for the Childcare Subsidy, if applicable, by submitting a new [application form](#).
- ☐ Ensure you designate a Beneficiary(ies) for your life insurance plans, if you have not done so already (*required*).
- ☐ If enrolling in the Medical Waiver Plan, for Medical, select the University of San Francisco Waiver option.
 1. Once you have submitted your Open Enrollment task, you will receive a Medical Waiver Attestation task in your USFWorks inbox that you must submit.
- ☐ Please remember to **submit your Open Enrollment task**. To do so:
 1. Click on the *Review and Sign* button.
 2. On the next page, check the box next to *I Accept*
 3. **Then click on the Submit button**. If you do not click on *Submit*, your task will **not** be processed.
 4. You will then be able to download a benefits statement for your review.