Workday Quick Reference Guide: Open Enrollment

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Overview

INITIATOR: Multnomah County Employee Benefits Team
REASON: To change, continue, or re-enroll in benefits during the annual Open Enrollment period.

Every year you have the opportunity to change your benefits during Open Enrollment. The Benefits Office launches an **Open Enrollment event in Workday** in October of every year where changes to benefits will be effective **January 1st** of next year.

What Can I Do During Open Enrollment?

1. Change your medical/dental plan.
2. Review your dependents:
   ○ Have you had family changes? Did you get married? Divorced? Need to add your child to Dental?
   ○ You must verify that *only* qualifying dependents are listed on your benefit plans: spouse, domestic partner, and children etc.
   ○ If you don't remove an ineligible dependent, you may be required to reimburse any expenses incurred while the dependent was ineligible.
3. Enroll in a tax-saving Flexible Spending Account for the next year:
   ○ MERP for medical expenses
   ○ DCAP for child and elder care expenses
   ○ TRP for transit and parking expenses.
4. Enroll/increase your Supplemental Life Insurance.

For more details about open enrollment and benefit changes for next year please visit: www.multco.us/openenrollment

Benefit Staff Contact Information

- **Email:** employee.benefits@multco.us
- **Phone number:** 503-988-3477
- **Fax number:** 503-988-6257
- **Office Address:** 501 SE Hawthorne Blvd, Portland OR 97214 3rd Floor, Suite 300
- **Office Hours:** Tuesday - Thursday, 7:30 am to 5:00 pm

Open Enrollment Journey

About the Journey:

You'll find an Open Enrollment Journey on your [Workday homepage](#) under Awaiting Your Action, or in [Notifications](#) to give you helpful tips and resources for Open Enrollment this year.

The Open Enrollment Journey is optional, if you would like to access your Open Enrollment directly, you can click on the Open Enrollment Benefit Event through either step below:
- Through your [Workday homepage](#) under Awaiting Your Action
- Open Enrollment Task is also located in your [Workday Inbox](#), or
- Through the [Benefits and Pay Hub](#) in Workday (more information in the next section).

This Journey navigates you through everything you need to know about Open Enrollment, including:

- **Helpful resources:** Watch the **[new open enrollment video](#)** and find other materials to help you understand your benefits and make the most of Open Enrollment.
- **Benefit information:** Learn about your benefit options and make informed choices for you and your family.
- **Step-by-step guidance:** It will walk you through the enrollment process, so you know exactly what to do and when.

Complete the Journey:

1. To start your Open Enrollment Journey, navigate to your [Workday homepage](#) under Awaiting Your Action or in your [Notifications Tab](#) in Workday and click on the Open Enrollment Journey Task.

Open Enrollment Journey

Not started

You will go see the Welcome page and dates for Open Enrollment this year. Then you will Continue to move on.

2. Click on the various tabs in the navigation menu on the right side of the Open Enrollment Journey to go through helpful resources (including open enrollment video) and benefit Information to review, along with helpful links to Opt Out Affidavit and Marriage/Domestic Partner Affidavit if needed.

Open Enrollment 2025
Recommended Journey

2025 Open Enrollment Overview
All Recommended Steps

Review Benefits and Plan Ahead
All Recommended Steps

Check Dependents and Complete ...
All Recommended Steps

Review Emergency Contacts
All Recommended Steps

Consider New Coverage or Changes
All Recommended Steps

Complete Open Enrollment
All Recommended Steps

Complete Journey

1t Overview

y to make changes to your benefits
ck the Open Enrollment web page to
t - and do - during this time.

Open Enrollment Overview and Changes for 2025
External Link

3. When you are ready to access your Open Enrollment Task through the Open Enrollment Journey, you will click on the final recommended step of the Open Enrollment Journey Menu titled "Complete Open Enrollment."

Consider New Coverage or Changes
All Recommended Steps
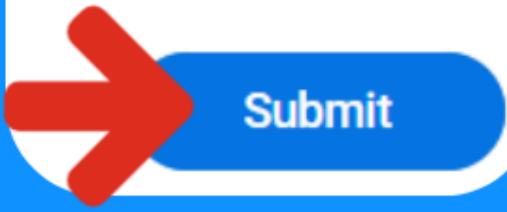
Complete Open Enrollment
All Recommended Steps

Complete Journey

4. In the "Complete Open Enrollment" Step, there is a "Finalize Your Open Enrollment" square that you will click on at the bottom page.

Recommended Steps

5. Then click on the "Open Task" link to access your Open Enrollment Event to review/make changes to your benefits and submit (more information about Open Enrollment Event in next section)
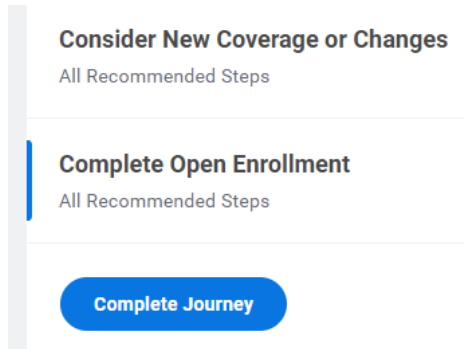
6. Once you are done with your with Open Enrollment Journey and completing/submitting Open Enrollment Event in Workday, you can click on the blue "Complete Journey" at the bottom of the navigation menu to get a "You're all done!" message.

Consider New Coverage or Changes
All Recommended Steps

Complete Open Enrollment
All Recommended Steps

Complete Journey

7. Once "Complete Journey" is clicked, your Open Enrollment Journey Task will disappear from your Workday Homepage under Awaiting Actions but will still be accessible through your Notifications in Workday.

10

Notifications

You have been assigned a new Journey
Open Enrollment 2025
1 day(s) ago

You have been assigned a new Journey

X▦   PDF   ⌐⌐

1 day(s) ago

Journey: Open Enrollment 2025
Open Enrollment for 2025 is happening from October 30th to November 20th. This is your annual chance to review and update your benefit selections for the next year.
Steps: 0 required, 16 optional

View Journey

Completing Open Enrollment

Open enrollment is your one-time a year opportunity, *outside of new hire and mid-year life events,* to make changes to your benefits.

Explore the www.multco.us/openenrollment to find out what's changing for next year.

Review Your Benefits for Next Year

While you aren't required to participate in Open Enrollment (unless you need to re-enroll in FSA plans), it is important to go to the Workday Open Enrollment Event to verify your benefits for next year. If you see something wrong, let the Benefits Office know ASAP.

If you don't make any changes, your current benefits will continue into the next year **(except FSAs, re-enrollment is required every year)** - OR - if there are plan changes, you will be moved into the new corresponding plan.

Open Enrollment Overview Page

1. To start, navigate to Workday anytime in the Open Enrollment period.

2. Access your Open Enrollment Event on the Workday homepage under Awaiting Your Action.

Awaiting Your Action

Open Enrollment Change:
My Tasks - 23 hour(s) ago

Or, through your Workday Inbox & click Let's Get Started.

Change Benefits for Open Enrollment

Open Enrollment 10/28/2024-10/29/2024

Choose new plans or re-enroll in the plans you currently have.

Let's Get Started

Or, through the Benefits and Pay Hub in Workday & click Enroll, then Let's Get Started.

Needs Attention

NOT STARTED
Benefit Event: Open Enrollment
Submit elections by October 29, 2024.

(Enroll)

Let's Get Started

3. **TIP:** After you've submitted your Open Enrollment Benefit Event, you can go back and edit or review your elections through your Benefits and Pay Hub under Needs Attention through the last day of the Open Enrollment period.

🌎 **Benefits and Pay**

Needs Attention

SUBMITTED
Benefit Event: Open Enrollment
Submit elections by

(Edit)

4. **NOTE:** The Open Enrollment Overview page displays all of your eligible benefit plans as of January 1st. The top right hand corner of the Open Enrollment has Projected Total Cost Per Paycheck. This is the total cost of all plans you are enrolled in for January 1st and will update with each additional plan you enroll in.

Projected Total Cost Per Paycheck
$141.20

Projected Total Credits
$0.00

TIP: Depending on your screen size the Open Enrollment Overview page will look a little different and you may need to scroll right or down to see all benefit plans that you are able to edit (or view-only for employer-paid plans) during Open Enrollment.

Open Enrollment

Projected Total Cost Per Paycheck
$141.20

Projected Total Credits
$0.00

∨ **Enrollment Instructions**

Important Reminder!

Your plan changes are not complete until you reach the "Review and Sign" page. There, you'll check a box to provide your digital signature and then click "Submit." Onc successfully completed the final sign and submit step, you are done with making your Open Enrollment elections.

Submit the changes you are certain about now. Then, you may come back to make additional changes through the final day of Open Enrollment.

Health Care and Accounts

Medical Moda PPO 400 - FT		**Dental** Kaiser Permanente DHMO 15 Dental - FT		**MERP - Medical FSA** Waived
Cost per paycheck	$117.58	Cost per paycheck	$6.12	
Coverage	Employee + 2 or more (Legal Spous…	Coverage	Employee + 1 (Legal Spouse or Child)	
Dependents	2	Dependents	1	
Manage		Manage		Enroll

Coverage Type Sections and Plans:

Health Care and Accounts: Medical, Dental, and FSA Plans.
> **REMEMBER:** FSA plans require re-enrollment every year you wish to participate.

Insurance: Basic (employer paid) Life, Supplemental Life, Supplemental Spouse Life, Supplemental Domestic Partner Life, Long Term Disability (employer paid), Short Term Disability (some groups are optional/self-paid and some are employer paid.
> **NOTE:** Short and Long Term Disability plans are not available for Elected Officials

Additional Benefits: HRA VEBA (for groups that have this coverage), EAP, Travel Assistance, TriMet Pass.
> **NOTE:** These additional benefits are county-paid and you are not able to edit or waive them - they're included for everyone.

5. Click Manage to make changes to a plan such as changing vendors, unenrolling, increasing coverage, adding dependents or editing beneficiaries.

Medical
Moda PPO 400 - FT

Cost per paycheck	$117.58
Coverage	Employee + 2 or more (Legal Spouse and/or Child(ren)
Dependents	2

Manage

6. Click Enroll to enroll in/apply for a plan to be effective January 1st.

MERP - Medical FSA
Waived

Enroll

7. If a plan's option is only "View", then you are automatically enrolled and there are no changes you can make to the plan. But, if you View, you can see information about the plan.

Trimet Pass
Trimet

Cost per paycheck	Included

View

Health Care and Accounts

Change your Medical/Dental Plans

1. To change your Medical or Dental plan, including adding or removing dependents from coverage, or opt out of medical coverage, select Manage.

Health Care and Accounts

Medical	
Moda PPO 400 - FT	
Cost per paycheck	$117.58
Coverage	Employee + 2 or more (Legal Spous...
Dependents	2
Manage	

Dental	
Kaiser Permanente DHMO 15 Dental - FT	
Cost per paycheck	$6.12
Coverage	Employee + 1 (Legal Spouse or Child)
Dependents	1
Manage	

2. After clicking Manage, you will see the The Plans Available screen which will have all the plans you are eligible to enroll in. Check the County's Open Enrollment site if you want to learn about the differences between plans. Select which plan you would like to change to, or ensure "select" is indicated for the plan you wish to continue next year.

Plans Available

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for Employee + 2 or more (Legal Spouse and/or Child(ren). If Employee + 2 or more (Legal Spouse and/or Child(ren) coverage isn't available, it assumes Employee Only coverage.

5 items

Benefit Plan	*Selection	You Pay (Semimonthly)	Company Contribution (Semim
Kaiser Permanente HMO 10/20 - FT	○ Select ● Waive	$70.54	$1,340.36
Moda PPO 400 - FT	● Select	$117.58	$1,450.30

There are also enrollment instructions and additional plan information on the right side of the screen to help you through enrollment.

˅ Health Care Instructions

General Instructions

Open Enrollment is the time to make benefit changes for next year!

Choose Your Medical and Dental Plans:

- Take a close look at your medical and dental plan options and costs.
- You can choose different providers for medical and dental coverage.
- Change plans, or opt out if you wish to do so.
- **IMPORTANT NOTE for Moda Health Plans:** New pharmacy benefit manager will be Moda effective 01/01/2025. Here is an FAQ with more information.

3. Click Confirm and Continue when you have Selected your plan. You will be able to add or remove dependents and see updated costs in the next step.

(**Confirm and Continue**)

4. On the dependents screen you can add or remove any qualifying family members to your plan. Be sure to remove any ex-spouses, ex-domestic partners, and any of their children who no longer qualify for coverage as your dependent.

Medical - Moda PPO 400 - FT

Projected Total Cost Per Paycheck
$141.20

Projected Total Credits
$0.00

Dependents

Add a new dependent or select an existing dependent from the list below.

Coverage   *   [× Employee + 2 or more (Legal Spouse and/or Child(ren)   ⋯   ☰]

Plan cost per paycheck $117.58

(**Add New Dependent**)

5. To add a Dependent that is not listed, click Add New Dependent

Add New Dependent

6. If you want this dependent as a possible beneficiary for your life insurance benefits, select the Use As Beneficiary button. Then OK.

Add My Dependent From Enrollment

Kristin Ford

○ Use an Existing Beneficiary or Emergency Contact

● Create Dependent

Use as Beneficiary ☐

OK

7. Enter in all required fields for your new dependent, including their social security number under National IDs (required for health plan enrollment).

Add My Dependent From Enrollment

Name

Country * ☒ United States of America ↗

Prefix

First Name *

Middle Name

Last Name *

Personal Information

Relationship * ☒ Spouse

Date of Birth 11/20/1982

Age 41 years, 11 months, 9 days

Sex (Reporting Purposes) ☒ Male

Disabled ☐

To add SSN or National ID, select Add on the Add My Dependent screen.

Add

8. Click Save when you have completed all required fields.

Save

9. Select the appropriate Coverage based on the selected dependents.

Coverage   *   ✕ Employee + 2 or more (Legal Spouse and/or Child(ren))   ☰

Search

Plan cost per paycheck

○ Employee Only

○ Employee + 1 (Legal Spouse or Child)

Add New Dependent   ○ Employee + 1 (Domestic Partner)

○ Employee + 1 (Domestic Partner's Child)

2 items

● Employee + 2 or more (Legal Spouse and/or Child(ren))

Select   Dependent

10. Be sure that any dependents you want covered for next year are selected, and any dependents that you are removing or have become ineligible are NOT selected.

Select

☑
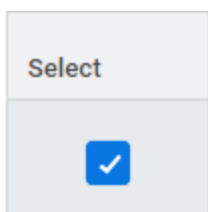
11. Click Save when you are done editing dependents on this plan.

Save

Enroll in Flexible Spending Accounts

1. To enroll in a [Flexible Spending Account](#), click Enroll on the plan you'd like.
    NOTE: You must enroll in Flexible Spending Accounts every year to participate.

    Current year enrollment does NOT carry over from your current plan (if applicable), you must re enroll every year if you would like to continue having an FSA plan.

    MERP - Medical FSA
    Waived

    Enroll

2. Select the plan you wish to enroll in. On the right side of the Plans Available screen you will find additional plan information and enrollment instruction text to guide you through enrollment.

    ## Plans Available

    Select a plan or Waive to opt out of MERP - Medical FSA.

    1 item

Benefit Plan	*Selection	You Contribute (Semimonth
PacificSource Administrator:	● Select ○ Waive	

3. Then, Confirm and Continue to advance to the Contribute step to choose your contribution amounts.

    Confirm and Continue

4. On the Contribute screen you can enter your contribution using an annual or per-paycheck amount, Click Tab for the amounts to refresh.

Contribute

Per Paycheck	100.00
Annual	2,400.00

Total Paychecks   24

Minimum Annual Amount: $240.00

Maximum Annual Amount: $3,200.00

Summary

Total Annual Contribution $2,400.00

5. Click Save when you are done with your election and contributions.

Save
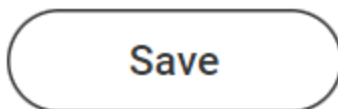
6. **NOTE:** Every time you make a change to a plan in your Open Enrollment task, there will be a pop-up reminding you that there is another step - Review and Sign - to complete your changes. Don't forget this step - skip forward to the Review and Sign section of this document to make sure you don't skip this essential step to completing your open enrollment.

Your MERP - Medical FSA changes have been updated, but not submitted

Next steps: Update another plan, or click Review and Sign once you're ready to submit your changes.

7. Follow these same steps to enroll in DCAP and TRP accounts if you would like.

DCAP - Dependent Care FSA
Waived

Enroll

NOTE: There is a TRP - Parking and a TRP - Transit plan, make sure you pick the right one! There are usually a few enrollment errors with this coverage every year. Check out the transportation FSA plan information for more details.

TRP - Transit FSA
Waived

Enroll

TRP - Parking FSA
Waived

Enroll

Insurance - Life and Disability Plans

<u>Add Beneficiaries</u>

1. To review or add beneficiaries to your Basic Life and/or Supplemental life insurance plan, click Manage on the plan you want to update.

   NOTE: Beneficiaries are managed separately on the different plans, make sure to review and update both plans if you have both kinds of coverage. Also, you are automatically the only beneficiary for Spouse or Domestic Partner life insurance. There cannot be other designated beneficiaries on those plans.

Insurance

REVIEWED **Basic Life** The Standard 1x Salary <250K (Employee)	**Supplemental Life** The Standard (Employee)
Cost per paycheck — Included	Cost per paycheck — $10.00
Coverage — 1 X Salary	Coverage — $200,000
Manage	**Manage**

2. Basic Life is a County-paid plan, you are automatically enrolled and cannot make any changes in the Plans Available screen. For Supplemental life plans, you may select or enroll on the Plans Available screen.

Basic Life

Projected Total Cost Per Paycheck $241.20 | Projected Total Credits $0.00

Plans Available

1 item

Benefit Plan	*Selection	You Pay (Semimonthly)	Compa
The Standard 1x Salary <250K (Employee)	◉ Select ○ Waive	Included	$7.16

Supplemental Life

Projected Total Cost Per Paycheck $241.20 | Projected Total Credits $0.00

Plans Available

Select a plan or Waive to opt out of Supplemental Life.

1 item

| Benefit Plan	*Selection	You Pay (Semimonthly)	Compa
The Standard (Employee)	◉ Select ○ Waive	$10.00	

3. Click Confirm and Continue to advance to the Coverage and Beneficiaries screen.

Confirm and Continue

4. If you have already added beneficiaries, they will appear here. You can make adjustments to percentage amounts, add, and remove beneficiaries using this screen.
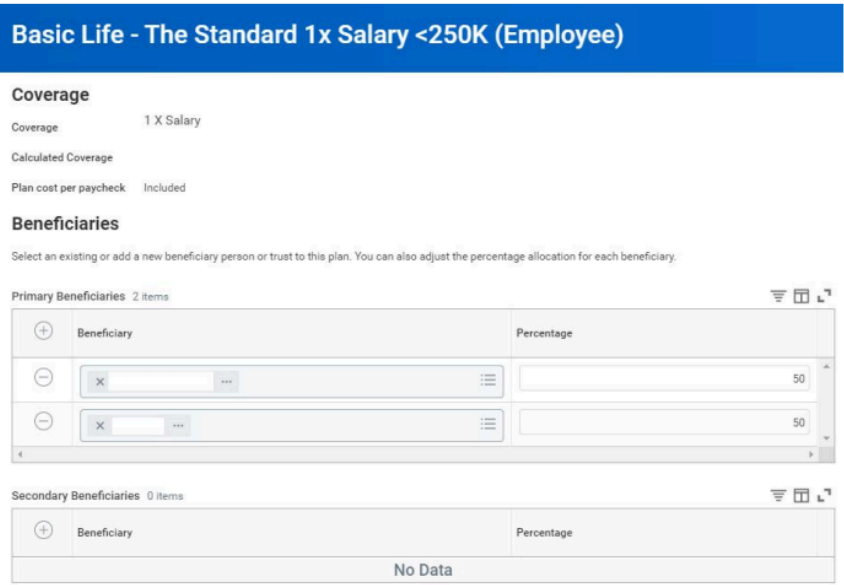
5. To add a Beneficiary, click on the + button under Primary Beneficiaries.
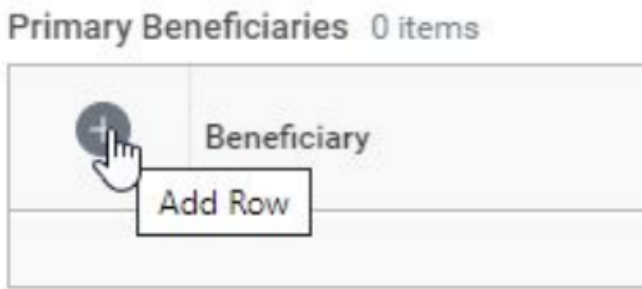
6. Then click the menu button to display drop down options. You may have Existing Beneficiary Persons if you have Dependents. If not, Add New Beneficiary
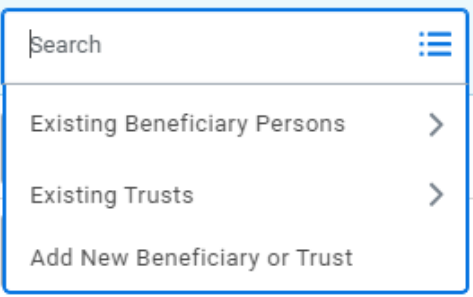
7. Select Add New Beneficiary or Add New Trust. Click Continue.

Add New Beneficiary or Trust

(Actions)

A beneficiary is the person or entity you name in a life insurance policy to receive this benefit. A trust is an arrangement that allows a third party, or trustee, to hold assets on behalf of a beneficiary or beneficiaries.

Would you like to add a new beneficiary or trust?

○ Add New Beneficiary

○ Add New Trust

(Continue)   (Cancel)

8. Enter all new Beneficiary or Trust information completing all required fields. Click OK.

Add New Beneficiary or Trust

Relationship	*		≡
Use as Beneficiary	✓		
Date of Birth	MM/DD/YYYY 📅		
Age	(empty)		
Sex (Reporting Purposes)			≡

9. Assign a Percentage to the new Beneficiary. **TIP:** the Percentage has to add up to 100 and must be whole numbers.

Percentage

75

25

10. To remove a Beneficiary, click on the - (minus) button under Primary Beneficiaries

Primary Beneficiaries
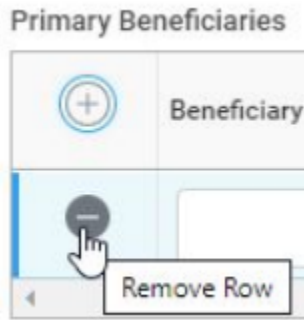

11. Click Save

Enroll, Waive, or Increase/Decrease Supplemental Life Insurance

1. Click Enroll or Manage on Supplemental Life and/or Supplemental Spouse Life or Supplemental Domestic Partner Life you are enrolling in, waiving, or updating coverage.

2. Click Select on the Benefit plan to enroll. Click Waive on the Benefit plan to cancel. Click Confirm and Continue to change your plan.
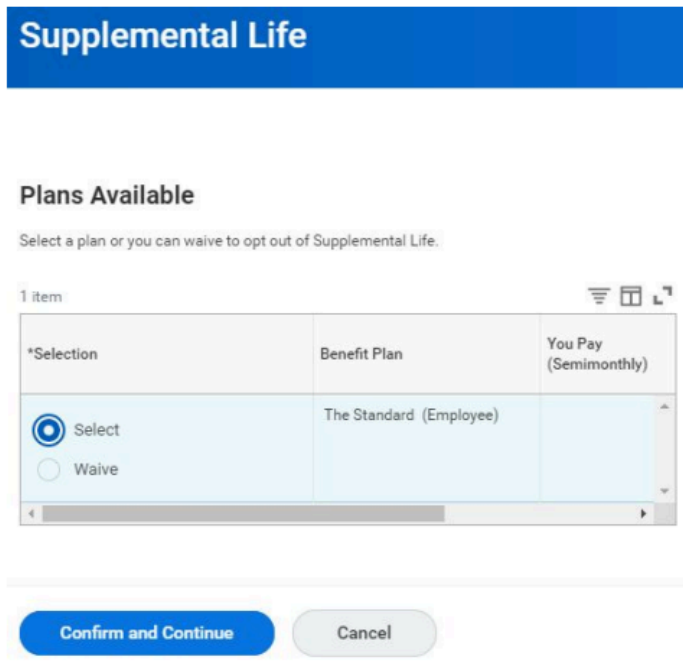
3. Choose the amount of Supplemental life insurance you want to enroll in by clicking on the Coverage. After selecting, a message will display letting you know if you need to submit an Evidence of Insurability (medical questionnaire) to the Standard insurance company to get an approval for the requested coverage. You will receive a separate message with the link with this questionnaire.

Coverage

Coverage	*	✕ $50,000

Your guaranteed coverage amount for Supplemental Life - The Standard (Employee) is $0. Submit your Evidence of Insurability to The Standard to be considered for the coverage amount of $50,000. Your election will be waived if you are denied coverage.

Calculated Coverage $50,000.00

Plan cost per paycheck $2.25

Beneficiaries

Select an existing or add a new beneficiary person or trust to this plan. You can also adjust the percentage allocation for each beneficiary.

Primary Beneficiaries 0 items

⊕	Beneficiary	Percentage
	No Data	

4. Follow these same steps to enroll, waive, or update Supplemental Spouse Life or Supplemental Domestic Partner Life.

REVIEWED
Supplemental Spouse Life
The Standard (Spouse)

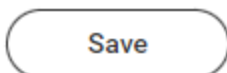| Cost per paycheck	$7.50
Coverage	$150,000

Manage

Supplemental Domestic Partner Life
Waived

Enroll

5. Click Save.

Save

Enroll in Optional Short Term Disability

1. Click Enroll on Optional Short Term Disability. If you are already enrolled in the plan and would like to view or end coverage, Select Manage.

    NOTE: This plan will not show up in your Open Enrollment benefit change if the coverage is not available to you. Some groups have county-paid Short Term Disability, and Elected Officials are not eligible for any disability plans.

2. Select the plan (or Waive if canceling coverage). Find more details on the Optional Short Term Disability page.

3. Click Save.

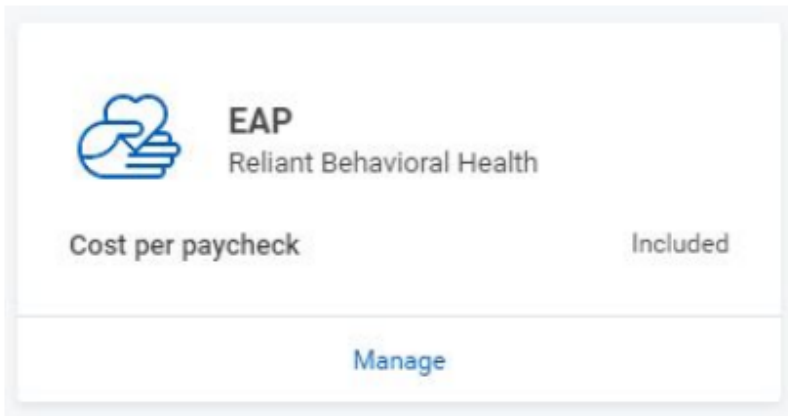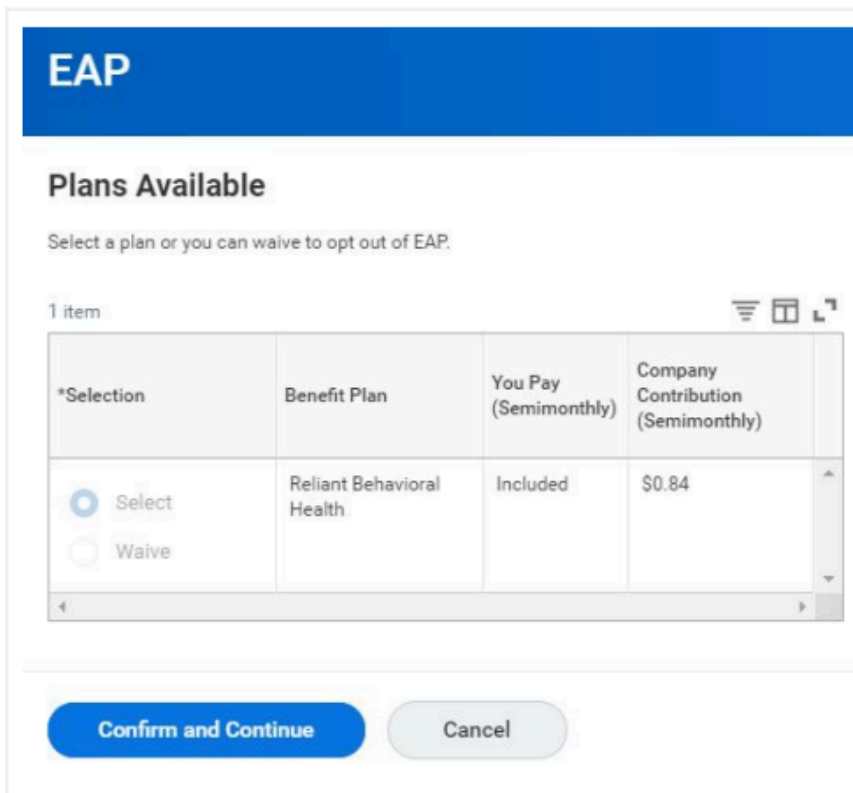# Additional Benefits

- Feel free to explore details about your additional benefits.

- Since most of these are County-paid plans, you are automatically enrolled and cannot make any changes in the Plans Available screens.
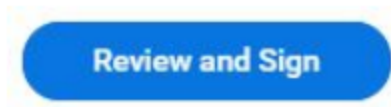
Review and Sign!

1. Once you've finished your review or completed making all your changes, click Review and Sign.

Review and Sign

2. Carefully review all Selected Benefits, Coverage, and Costs.

View Summary

Projected Total Cost Per Paycheck $38.10   Projected Total Credits $0.00

Carefully review your benefit changes before submitting.

Scroll down to confirm your plans and coverage levels, agree to terms, and submit your elections.

Questions? Employee.benefits@multco.us or 503-988-3477.

Selected Benefits 12 items

Plan	Coverage Begin Date	Deduction Begin Date	Coverage	Dependents	Beneficiaries	Cost
Medical Kaiser Permanente HMO 10/20 - FT	01/01/2019	01/01/2019	Employee Only			$18.50
Dental Kaiser Permanente DHMO 15 Dental - FT	01/01/2019	01/01/2019	Employee Only			$3.10

Submit   **Save for Later**   Cancel

3. Scroll down to the Electronic Signature. You must accept the agreement to continue. Click Submit.

Electronic Signature

By signing below, I hereby certify the information furnished is true, complete and accurate. I authorize Multnomah County to reduce my wages for the required cost shares, including imputed income, if applicable, in accordance with my Union contract or County Personnel Rules for the coverage I have elected.

I Accept ☑

Submit   **Save for Later**   Cancel

4. You can view, download and save, and print a copy of your selections from the submission page by clicking View Benefits Statement. This is accessible throughout the Open Enrollment period in the Benefits and Pay Hub - see the next section for more information. When you see the following message, you know you have successfully completed your Open Enrollment benefit event.

You've submitted your elections.

You've successfully submitted your benefit change request, which may need approval from a member of our benefits team.

If you have any questions regarding the status of your request, please don't hesitate to reach out to us.

Email: employee.benefits@multco.us - or leave a message at 503-988-3477.

Important Dates:

Benefits go into effect   01/01/2025

Final day to update benefits   10/29/2024

(View 2025 Benefits Statement)

Changes After Submitting Open Enrollment

You can make any changes to your benefits until the end of Open Enrollment.

Go to the Benefits and Pay Hub under Needs Attention through the last day of the Open Enrollment period, making changes as described in the preceding sections.

Benefits and Pay

Needs Attention

SUBMITTED

Benefit Event: Open Enrollment

Submit elections by

(Edit)

Troubleshooting Error Messages

- For error messages, clicking on the red box will pop up an explanation of the error.

- Many times it is because you missed entering information in a required field.

> **Error**
>
> 1. Page Error
>   At least one address is required for beneficiaries or dependents.

- **Page Error Reason Code:** When adding a new dependent, you must select a Reason (under Effective Date).

> **Error**
>
> 1. Page Error
>   - Reason Code is missing   (Dependent Event)

- **Beneficiary Percentage Error:** Appears when you have not added the desired percentage of the benefit you want the beneficiary(ies) to receive (i.e 100%).

> **Error**
>
> 1. Primary Percentage / Contingent Percentage (Row 2 Column 7)
>   One of the following options must be selected:
>   Primary Percentage
>   Contingent Percentage

- **Page Error:** Scroll down to hit the "I Agree" under Electronic Signature before hitting Submit.

> **Error**
>
> 1. Page Error
>   Your electronic signature is required before you can submit your benefit elections.

- **Reason ID Missing:** When adding a dependent, a social security number is required, or you need to add a reason the ID is not available, ie: "Have not received SSN yet."

Errors

1. Identifier ID Entered / Reason ID is Not Available (Row 1 Column 4)
   One of the following options must be selected:
   Identifier ID Entered
   Reason ID is Not Available

- **Event Previously Submitted Notification:** When changing a benefit, there may be more information Benefits needs from you. Click OK to view comments and reply back with the required information.

Change Benefit Elections Event Previously Submitted Notification (Actions)

Benefits Data Visibility

Only you and the Benefits Office staff can see your personal benefits information. The Benefits Office staff members maintain an extremely high level of confidentiality that will continue in Workday. Your manager cannot see your selection of benefits plans, dependents, etc.

Workday allows you to see your benefits changes faster, see elections by their effective date, and you can submit required information to a third party vendor quickly and conveniently.