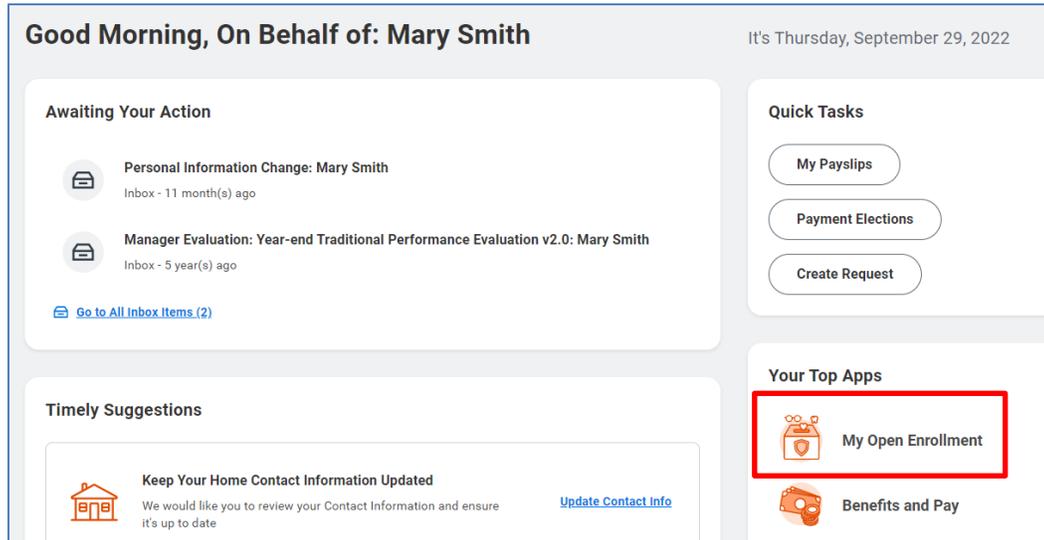


## Selecting Your Benefits

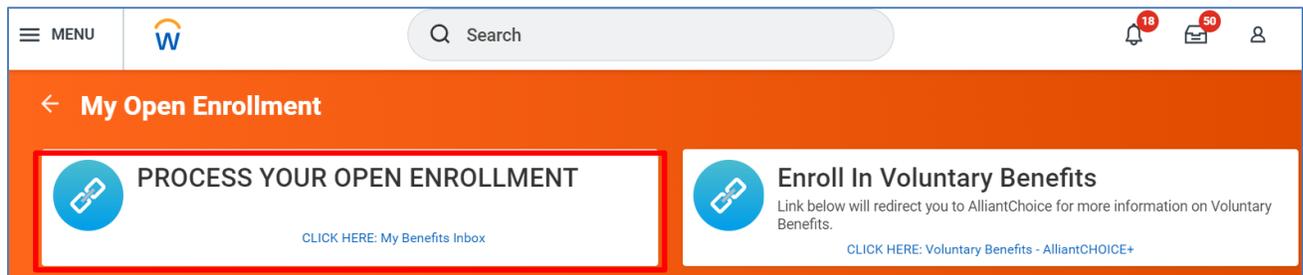
When it is time for open enrollment, you will receive an Open Enrollment task in your Workday Inbox. To complete your open enrollment:

1. Go to your Workday homepage and click on your **My Open Enrollment** icon



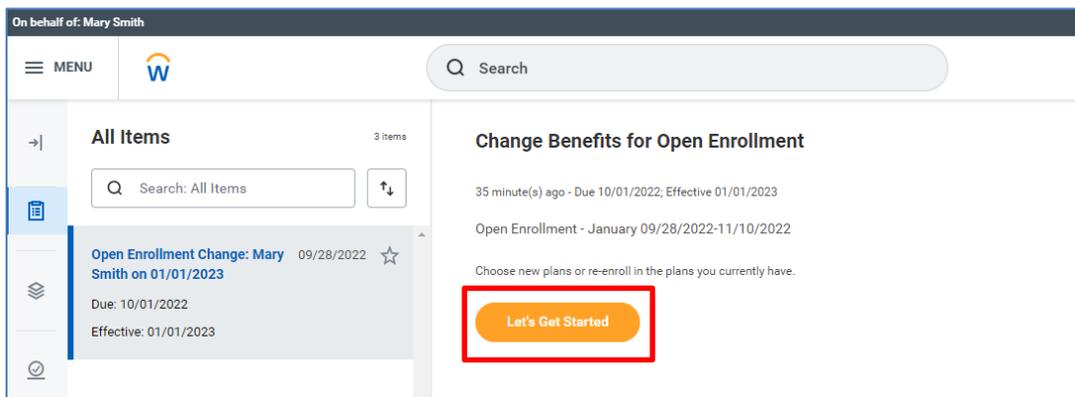
The screenshot shows the Workday homepage for Mary Smith. The header includes the greeting "Good Morning, On Behalf of: Mary Smith" and the date "It's Thursday, September 29, 2022". The main content area is divided into several sections: "Awaiting Your Action" with two items (Personal Information Change and Manager Evaluation), "Quick Tasks" with buttons for "My Payslips", "Payment Elections", and "Create Request", "Timely Suggestions" with a "Keep Your Home Contact Information Updated" notification, and "Your Top Apps" with a red box highlighting the "My Open Enrollment" app icon.

2. Click on the first tab called **Process Your Open Enrollment**.



The screenshot shows the "My Open Enrollment" page. The header includes a "MENU" button, the Workday logo, a search bar, and notification icons. The main content area has a red box highlighting the "PROCESS YOUR OPEN ENROLLMENT" tab, which includes a "CLICK HERE: My Benefits Inbox" link. Other tabs include "Enroll In Voluntary Benefits" with a "CLICK HERE: Voluntary Benefits - AlliantCHOICE+" link.

3. Click on **Let's Get Started**



The screenshot shows the "Change Benefits for Open Enrollment" page. The header includes "On behalf of: Mary Smith", a "MENU" button, the Workday logo, and a search bar. The main content area has a red box highlighting the "Let's Get Started" button. The page also displays a list of items on the left and a task card on the right with details like "35 minute(s) ago - Due 10/01/2022, Effective 01/01/2023" and "Open Enrollment - January 09/28/2022-11/10/2022".

- Each benefit type is listed separately. Click on **Manage** to change an existing benefit or add a dependent, Click on **Enroll** to elect or re-enroll for the next benefit year. Please note that Health Savings Accounts, Flexible Spending and Dependent Care reset to zero every year.

**Health Care and Accounts**

Benefit Type	Plan Name	Cost (Monthly)	Coverage	Action
Medical	Kaiser Permanente HMO SMC	\$102.78	Employee	<b>Manage</b>
Dental	Delta Dental DHMO	\$4.50	Employee	Manage
Vision	Vision Service Plan	Included	Employee	Manage
Health Savings Account	Waived			<b>Enroll</b>

- Modify your level of coverage as needed on any eligible plan by clicking on **Manage/Enroll**.

## Adding Dependents

From the Benefit Plan:

- Click the appropriate benefit plan you wish to add/remove a dependent (see step 4 above).
- Select the new plan or click **Confirm & Continue** to remain with the current Blue Shield/Kaiser plan.

**Plans Available**

Select a plan or Waive to opt out of Medical. The displayed cost of waived plans assumes coverage for Employee.

6 items

*Selection	Benefit Plan Details	You Pay (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Aetna HDHP SMC	Included	\$0.00
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Aetna HMO AVN - SMC	Included	\$0.00
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Aetna HMO SMC	Included	\$0.00
<input type="radio"/> Select	Aetna PPO OAMC -	Included	\$0.00

**Confirm and Continue** Cancel

**Health Care Instructions**

**General Instructions**

It's that time of year again - Open Enrollment! For a short time, you'll be able to make changes to your benefits, add or remove dependents and sign up for new programs. It's also the time when the County announces changes to the current plans for the upcoming year.

**Aetna is Replacing Blue Shield of California**

Beginning January 1, 2023, the County of San Mateo will replace Blue Shield with **Aetna** as a medical carrier/provider. We will no longer offer any Blue Shield medical plans. We will continue to offer all current Kaiser Permanente plans.

For information on Kaiser and Aetna, please visit the informational sites provided.

- [Kaiser HMO](#)
- [Kaiser HDHP](#)
- [Aetna \(HMO, PPO, HDHP\)](#)

All of your medical plan options provide access to quality care and cover a similar list of procedures. It's the details of how you share the cost of care - your bi-weekly contribution amount, and your co-payments and coinsurance - that differ. For detailed information please review the Employee Benefits Guides

8. Select the name of the dependent you wish to include or click the **Add New Dependent** icon to create a new dependent.

**Dependents**

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

Coverage \* Employee + 1

Plan cost (Monthly) \$343.30

**Add New Dependent**

2 items

Select	Dependent	Relationship	Date of Birth
<input checked="" type="checkbox"/>	Jane Doe	Spouse	09/04/1997
<input type="checkbox"/>	John Doe Jr	Child	10/01/2019

**Save** **Cancel**

**Health Care Instructions**

Provider Website <https://www.blueshieldca.com>

**General Instructions**

It's that time of year again – Open Enrollment! For a sh... changes to your benefits, add or remove dependents a... the time when the County announces changes to the c...

You and your family's health and well-being are import... medical benefits offer 100% coverage for preventive c... for the rare, exceptional instances when it is needed.

**Extra Help Employees**

You are eligible for the County's Kaiser High Deductible Account. The [Extra Help Benefits Guide](#) can assist you

**Regular and Extra Help/Term Employees**

You have several health plan options through the Cour... contains plan comparisons and eligibility information t...

[2019 Employee Benefits Guide \(Regular Employees\)](#)  
[2019 Limited Term Benefits Guide \(Limited Term Only\)](#)  
Regular dental care is an important part of your health... seven dental plans. You must select one of the dental...

9. Complete all required fields for your new dependent and click **Save**.  
If you add new dependents, you need to attach proof of eligibility before submitting your enrollment.  
See instructions on [Attaching Supporting Documents](#).

**Add My Dependent From Enrollment**

**Name**

Country \*

Prefix

**First Name** \*

Middle Name

Last Name \*

Suffix

**Personal Information**

Relationship \*

Date of Birth \*

Age 11 years, 9 months, 29 days

Gender \*

Citizenship Status

Full-time Student

Student Status Start Date

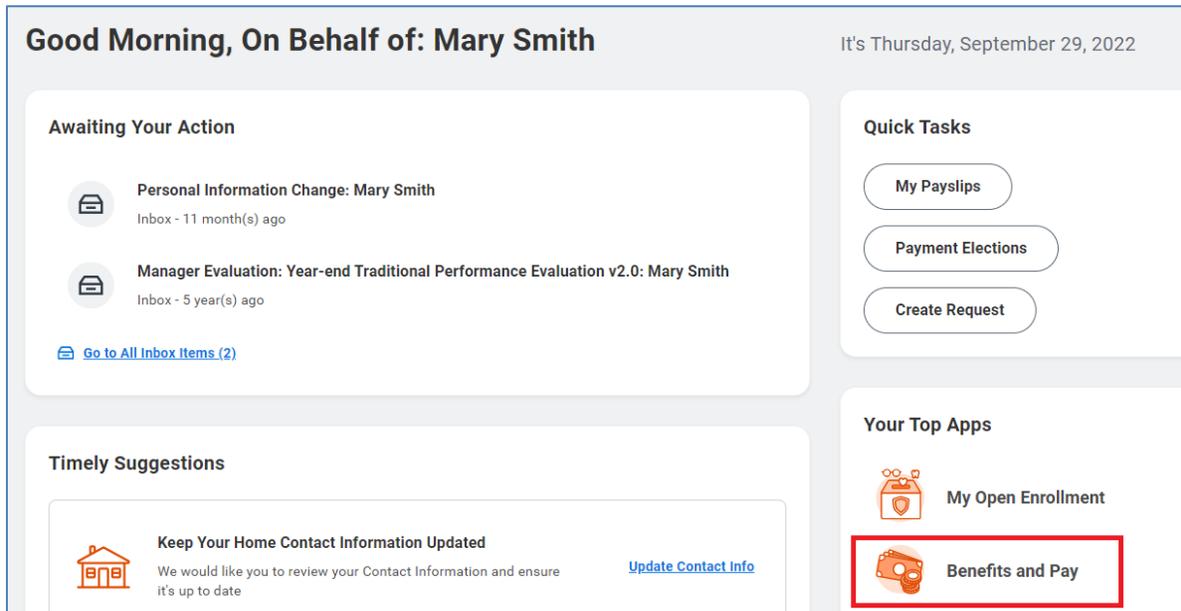
**Save** **Cancel**

# Open Enrollment Instructions



## Modifying Dependents

1. Click on the **Benefits and Pay Icon** 



**Good Morning, On Behalf of: Mary Smith** It's Thursday, September 29, 2022

**Awaiting Your Action**

- Personal Information Change: Mary Smith  
Inbox - 11 month(s) ago
- Manager Evaluation: Year-end Traditional Performance Evaluation v2.0: Mary Smith  
Inbox - 5 year(s) ago

[Go to All Inbox Items \(2\)](#)

**Quick Tasks**

- My Payslips
- Payment Elections
- Create Request

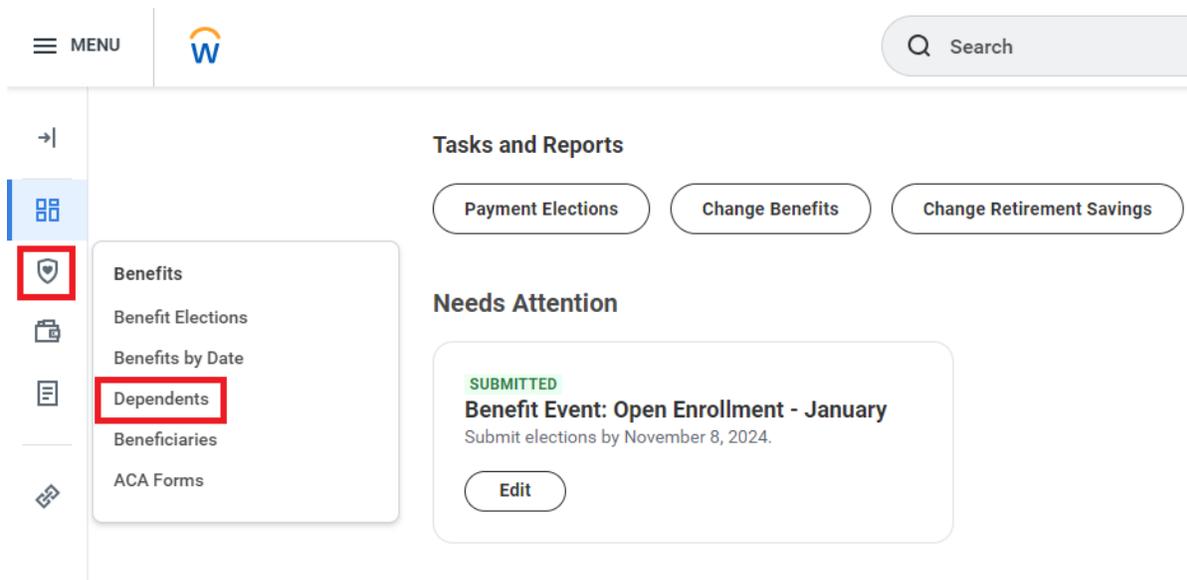
**Timely Suggestions**

- Keep Your Home Contact Information Updated**  
We would like you to review your Contact Information and ensure it's up to date. [Update Contact Info](#)

**Your Top Apps**

- My Open Enrollment
- Benefits and Pay**

2. Click on the **Benefits Icon**  then click on **Dependents**



MENU  Search

→|

**Tasks and Reports**

- Payment Elections
- Change Benefits
- Change Retirement Savings

**Needs Attention**

- SUBMITTED**
- Benefit Event: Open Enrollment - January**  
Submit elections by November 8, 2024.
- Edit

**Benefits**

- Benefit Elections
- Benefits by Date
- Dependents**
- Beneficiaries
- ACA Forms

3. Click on **Edit** next to the dependent you wish to update. (Please note this is to update demographic data for existing dependents. Please follow the proper process to add/create new dependents).



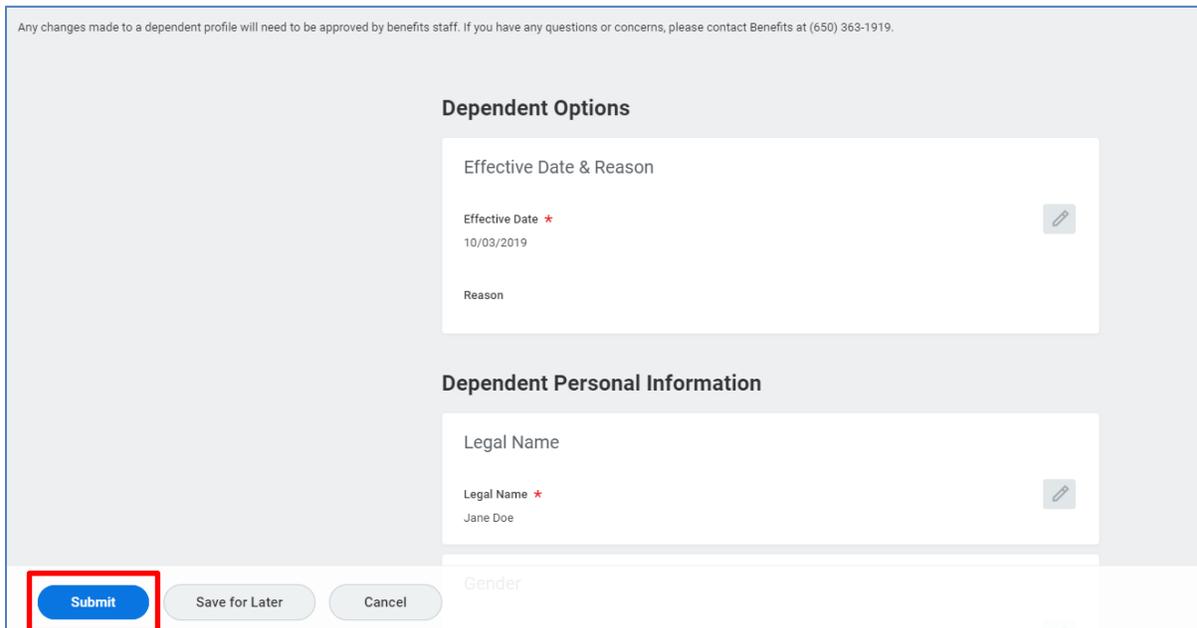
**Dependents** Mary Smith ⋮

Add

Dependents 1 item

Dependent	Relationship	Age	
Jane Smith	Child	16 years, 9 months, 28 days	<b>Edit</b>

4. Update the necessary fields and click **Submit**.



Any changes made to a dependent profile will need to be approved by benefits staff. If you have any questions or concerns, please contact Benefits at (650) 363-1919.

### Dependent Options

Effective Date & Reason

Effective Date \*  
10/03/2019

Reason

### Dependent Personal Information

Legal Name

Legal Name \*  
Jane Doe

Gender

**Submit** Save for Later Cancel

## Adding the Health Savings Election

Click on **Enroll** on the Health Savings Election tile/icon. Depending on your elections from the previous screen, you may or may not be eligible for this plan. To be eligible, you need to be enrolled in a High Deductible Health Plan.

1. Click on **Select** to enroll and click **Confirm & Continue**.

**Health Savings Account**

Projected Total Cost (Monthly)  
\$530.92

**Plans Available**

Select a plan or Waive to opt out of Health Savings Account.

1 item

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Benefit Coordinators Corporation		

**Health Savings Account Instructions**

**General Instructions**

If you chose an HDHP medical plan, you can elect to make contributions into a Health Savings Account (HSA). The IRS establishes the annual limits that can be deposited into your HSA based on individual or family coverage. The maximum contribution shown below includes the amount the County will deposit into your account. Contributions are made over 26 pay periods. If you're 55 or older as of December 31, 2022, you can contribute an additional \$1,000 catch-up contribution. For detailed information, please review the HSA section of the [Benefits Guide](#).

**2022 maximum contributions:**

- \$3,650 employee-only coverage
- \$7,300 Family coverage
- 55+ Catch-up: \$1,000

**What is the HSA referenced under the High Deductible Health Plan (HDHP) options?**

- A tax-favored account that works in conjunction with the High Deductible Health Plan (HDHP)
- Pre-tax dollars to pay for current and future eligible expenses
- Employee health contributions

**Confirm and Continue** **Cancel**

2. Enter in the annual or per paycheck amount you wish to have deducted and click **Save**.

**Health Savings Account - Benefit Coordinators Corporation**

Projected Total Cost (Monthly)  
\$739.25

**Contribute**

Per Paycheck

Annual  Total Paychecks 26

Maximum Annual Amount: \$3,850.00

**Summary**

Contribution (Monthly)	\$208.33
Annual Company Contribution	\$750.00
Total Annual HSA Contribution	\$3,250.00

**Health Savings Account Instructions**

Provider Website [My BCC](#)

**General Instructions**

If you chose an HDHP medical plan, you can elect to make contributions into a Health Savings Account (HSA). The IRS establishes the annual limits that can be deposited into your HSA based on individual or family coverage. The maximum contribution shown below includes the amount the County will deposit into your account. Contributions are made over 26 pay periods. If you're 55 or older as of December 31, 2022, you can contribute an additional \$1,000 catch-up contribution. For detailed information, please review the HSA section of the [Benefits Guide](#).

**2022 maximum contributions:**

- \$3,650 employee-only coverage
- \$7,300 Family coverage
- 55+ Catch-up: \$1,000

**What is the HSA referenced under the High Deductible Health Plan (HDHP) options?**

- A tax-favored account that works in conjunction with the High Deductible

**Save** **Cancel**

## Adding a Flexible Spending Account

Click on **Enroll** on the Health Care FSA or Dependent Care tile/icon. To be eligible for the limited Health Flexible Spending Plan, you need to be enrolled in a High Deductible Health Plan. Dependent Care does not require enrollment in a Medical plan.

1. Click **Select** for the plan you wish to enroll in and click on **Confirm & Continue**.

**Health Care FSA**

Projected Total Cost (Monthly)  
\$94.83

**Plans Available**

Select a plan or Waive to opt out of Health Care FSA.

2 Items

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Benefit Coordinators Corporation Limited		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Benefit Coordinators Corporation Traditional	\$83.33	

**Confirm and Continue** **Cancel**

2. Enter in the annual or per paycheck amount you wish to have deducted and click **Save**

**Health Care FSA - Benefit Coordinators Corporation Traditional**

Projected Total Cost (Monthly)  
\$94.83

**Contribute**

Per Paycheck

Annual  Total Paychecks 26

Minimum Annual Amount: \$26.00  
Maximum Annual Amount: \$2,850.00

**Summary**

Contribution (Monthly) \$83.33  
Total Annual Contribution \$1,000.00

**Save** **Cancel**

## Adding Group Life Insurance

If you enroll or increase any of your Additional Life Insurance Coverage, you are required to complete a physical examination and submit it directly to The Standard.

Click on the Additional Life tile/icon

1. Click on **Manage/Enroll** on the **Additional Life** tile/icon
2. Choose either **Select** or **Waive** coverage and click **Confirm & Continue**.

**Additional Life**

Projected Total Cost (Monthly)  
\$739.25

**Plans Available**

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

1 item

*Selection	Benefit Plan Details	You Pay (Monthly)	Company Contribution (Monthly)
<input checked="" type="radio"/> Select <input type="radio"/> Waive	The Standard (Employee)	\$20.00	

**Insurance Instructions**

**Important Information**

When you select Additional Life - The Standard (Employee), you can also select Dependent Additional Life - The Standard (Dependent(s)), Spouse/Domestic Partner Additional Life - The Standard (Spouse/Dom Partner). If you waive any of these: Additional Life - The Standard (Employee), Workday automatically waives any of these: Dependent Additional Life - The Standard (Dependent(s)), Spouse/Domestic Partner Additional Life - The Standard (Spouse/Dom Partner).

**General Instructions**

Life insurance can be an important building block in your family's financial security. The County provides basic employee and dependent life insurance as well as accidental death and dismemberment (AD&D) employee coverage at no cost to you. You also have the option of purchasing additional life insurance for you and your dependents. The cost of the additional employee and spouse/domestic partner coverage is based on the amount of coverage selected and current age. Child additional life is a flat amount regardless of the number of dependents covered. If you select any additional life insurance...

**Confirm and Continue** **Cancel**

3. Click on the dropdown menu icon  to view available coverage. Click on the coverage amount you would like to request then select a beneficiary.

**Additional Life - The Standard (Employee)**

Projected Total Cost (Monthly)  
\$739.25

**Coverage**

Calculated Coverage \$250,000.00

Coverage \*  

Plan cost (Monthly)

**Beneficiaries**

Select an existing or add a new beneficiary

Primary Beneficiaries 0

Beneficiary	Percentage

Secondary Beneficiaries

Beneficiary	Percentage

**Insurance Instructions**

Provider Website <https://www.standard.com/>

**General Instructions**

Life insurance can be an important building block in your family's financial security. The County provides basic employee and dependent life insurance as well as accidental death and dismemberment (AD&D) employee coverage at no cost to you. You also have the option of purchasing additional life insurance for you and your dependents. The cost of the additional employee and spouse/domestic partner coverage is based on the amount of coverage selected and current age. Child additional life is a flat amount regardless of the number of dependents covered. If you elect additional life insurance, you pay the premium through bi-weekly payroll deductions. For additional information, see the [Benefits Guide](#).

**For 2022, there is a \$250,000 Employee ONLY- Additional Life Insurance-Special Enrollment Period.**

- Employees with less than \$250,000 Additional Life Insurance can take advantage of the Special Enrollment Period.

**Save** **Cancel**

## Designating Beneficiaries

Next, under the Life Insurance tiles/icons designate your beneficiaries for your life insurance plans. Please note Basic Life, Additional Life and AD&D beneficiaries must be designated separately under each benefit.

1. Click the **+ sign** under primary beneficiary to add a new beneficiary or the **- sign** to remove a beneficiary. Click on the percentage amounts and update the allocation and click Save to complete the request. Please note all beneficiary changes made in Open Enrollment will not be effective until January 1, 2023.

**Additional Life - The Standard (Employee)**

Projected Total Cost (Monthly)  
\$47.50

**Coverage**

Your guaranteed coverage amount for Additional Life - The Standard (Employee) is \$1. Submit your Evidence of Insurability to The Standard to be considered for the coverage amount of \$150,000.

Calculated Coverage \$150,000.00

Coverage \* x \$150,000

Plan cost (Monthly) \$36.00

**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 2 Items

Beneficiary	Percentage
x Michael Smith	50
x Jane Smith	50

**Insurance Instructions**

Provider Website <https://www.standard.com/>

**General Instructions**

Life insurance can be an important building block in your family and dependent life insurance as well as accidental death and You also have the option of purchasing additional life insurance. You also have the option of purchasing additional life insurance for employee and spouse/domestic partner coverage is based on the total life is a flat amount regardless of the number of dependents, you pay the premium through bi-weekly payroll deduction section of the [Benefits Guide](#).

For 2022, there is a \$250,000 Employee ONLY- Additional Life

Save Cancel

## Adding Additional Savings

To Enroll or change your existing 457 Deferred Compensation election click on **Manage** on the 457 tile/icon

1. **Select** Deferred Compensation plan you wish to enroll into or change and click **Confirm & Continue**.

**457**

Projected Total Cost (Monthly)  
\$47.50

**Plans Available**

Select a plan or Waive to opt out of 457.

2 Items

*Selection	Benefit Plan Details	You Contribute (Monthly)	Company Contribution (Monthly)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Empower Roth (Post-Tax)		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Empower Traditional (Pre-Tax)		

**Retirement Savings Instructions**

**General Instructions**

**Please not that any retirement savings changes through December 31st, will not reflect on your changes to be reflect after January 1st, please make a Retirement Savings change with an effective date of January 1st.**

The County's 457 Deferred Compensation Plan offers employees a variety of investment options, investment education and two voluntary Deferred Compensation plans to choose from. They depend on your individual needs and should be made in consultation with either option or both, it's up to you. However, your contribution is limited to 15% of your salary.

**The Traditional 457 Plan**  
Savings deductions are made on a **pre-tax basis**, earnings are tax-deferred until you receive distributions.

**The Roth 457 Plan**  
Savings deductions are made on an **after-tax basis**, earnings are tax-free.

Confirm and Continue Cancel

# Open Enrollment Instructions



- Click on the arrow under Contribution Type to designate deduction type, a percentage or flat \$ amount. Then enter the amount you wish to elect and click **Save**. Please note all changes are effective January 1, 2023.

### 457 - Empower Traditional (Pre-Tax)

Projected Total Cost (Monthly)  
\$47.50

**Contribute**

Enter how much you want to contribute as an amount or a percentage.

Contribution Type \*

- select one
- Amount
- Percentage

**Retirement Savings Instructions**

Provider Website <http://www.massmutual.com/>

**General Instructions**

Please note that any retirement savings changes you make from January 11th through December 31st, will not reflect on your Open Enrollment or create a Retirement Savings effective date of January 2nd.

The County's 457 Deferred Compensation Plan offers employees an employer-sponsored savings plan with a variety of investment options, investment related services. There are two voluntary Deferred Compensation plans.

**Save** **Cancel**

## Adding Additional Benefits

The additional benefits section is where you can elect to enroll in Remotiv (formerly Financial Soundings.)

- Click **Enroll** on the Remotiv (formerly Financial Soundings) icon/tile.

### Additional Benefits

**Employee Assistance Program**  
Claremont

Manage

**Remotiv (formerly Financial Soundings)**  
Waived

**Enroll**

**Review and Sign** **Save for Later**

2. Click **Select** to enroll then click on **Confirm & Continue**.

### Retirement Readiness

Projected Total Cost (Monthly)  
\$739.25

#### Plans Available

Select a plan or Waive to opt out of Retirement Readiness.

1 item

*Selection	Benefit Plan Details
<input checked="" type="radio"/> Select <input type="radio"/> Waive	San Mateo County - Remotiv

#### Additional Benefits Instructions

##### General Instructions

###### Retirement Readiness

This is a retirement readiness program which provides a personalized assessment of your estimated retirement benefits, taking into account your SamCERA pension and the County's Deferred Compensation Plan with Mass Mutual to help you determine how to best prepare for retirement by showing you:

- Where you are today
- Where you want to be in the future
- What steps to take to get you closer to your goals

Each report is personalized based on your individual situation. Reports are mailed out the second quarter of the new benefit plan year.

**Confirm and Continue** Cancel

3. Click **Save** to return to the main Open Enrollment Screen.

### Retirement Readiness - San Mateo County - Remotiv

Projected Total Cost (Monthly)  
\$739.25

#### Coverage

You will be enrolled in this plan.

#### Additional Benefits Instructions

##### General Instructions

###### Retirement Readiness

This is a retirement readiness program which provides a personalized assessment of your estimated retirement benefits, taking into account your SamCERA pension and the County's Deferred Compensation Plan with Mass Mutual to help you determine how to best prepare for retirement by showing you:

- Where you are today
- Where you want to be in the future
- What steps to take to get you closer to your goals

Each report is personalized based on your individual situation. Reports are mailed out the second quarter of the new benefit plan year.

**Save** Cancel

# Open Enrollment Instructions



## Completing Your Enrollment

Benefit changes will not be reflected unless they are reviewed and finalized.

1. Click on Review & Sign at the bottom of the election screen.

2. Scroll down to the bottom of the review page to attach any supporting documentation and check the **I Agree** checkbox to complete your electronic signature. Supporting documentation may include marriage or birth certificates for newly added dependents.