

Workday Open Enrollment: **Desktop** Step by Step Guide

IMPORTANT NOTE:

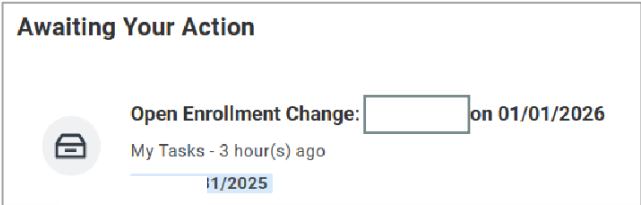
If you must step away in the middle of making your choices, Workday will save your progress. Simply re-open the enrollment task to pick up where you left off.



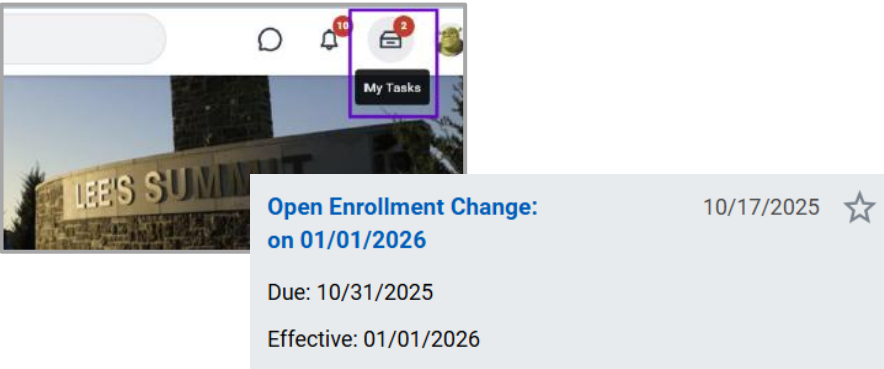
Last Updated 10/20

Starting the Process

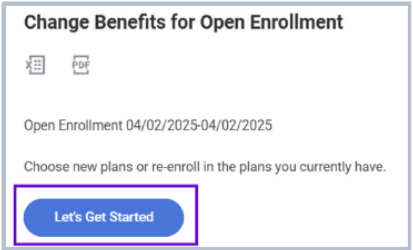
1. Select the ‘Open Enrollment Change’ task in either the ‘Awaiting Your Action’ section of your homepage or inside ‘My Tasks’.



OR



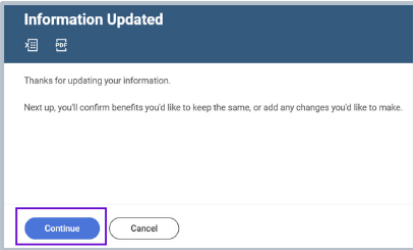
2. Select ‘Let’s Get Started’.



3. Answer ‘Tobacco Use’ question.



4. Select ‘Continue’.



Choose a Medical Plan

1. Select ‘Enroll’ in the Medical card.

2. Make your choices:

- Each Plan’s name is a link, click to review rate details.
- Choose ‘Select’ or ‘Waive’ for each option.
- Select ‘Confirm and Continue’ when ready.
- ‘Add Dependents’ will automatically appear next if you ‘Select’ any plan.

3. Provide details for dependents as needed.

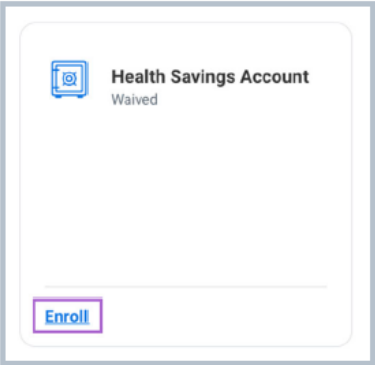
- If a dependent already exists in Workday, they may be checked. Uncheck if you don’t wish them to be covered by this plan.
- Click ‘Add New Dependent’ to add anyone not already listed.
- Click ‘Ok’ on the confirmation screen.
- Complete all required information on the detail screen (below) and select ‘Save’.

NOTE:
For the ‘Relationship’ field, the option ‘Dual Spouse’ should be selected if the dependent is also an employee of the City of Lee’s Summit.

Choose a Savings Plan

1. Select ‘Enroll’ in the desired account card on the enrollment homepage.
2. Choose ‘Select’ or ‘Waive’ for the accounts listed then click ‘Confirm’.
3. If you enroll in an account, enter what you wish to contribute per paycheck then select ‘Save’.

- Options include:
- ‘Dependent Care FSA’,
 - ‘Healthcare FSA’ or
 - ‘Health Savings Account’*

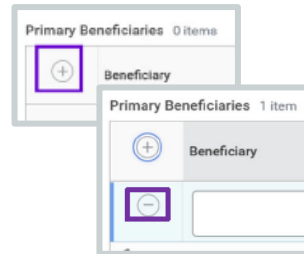
A screenshot of a web interface titled 'Health Savings Account'. It shows a table with one row for 'HSA Bank'. In the 'Selection' column, the 'Select' radio button is chosen and highlighted with a red box. Below the table, there is a section titled 'Health Savings Account Instructions' with 'Important Information'. At the bottom, there is a red button labeled 'Confirm and Continue' and a 'Cancel' button.A screenshot of a web interface titled 'Health Savings Account - HSA Bank'. It shows a 'Contribute' section with input fields for 'Per Paycheck' and 'Annual', both set to '0.00'. Below this is a 'Summary' section showing 'Annual Company Contribution' and 'Total Annual HSA Contribution' as '\$438.52'. There is a 'Beneficiaries' section with 'Primary Beneficiaries' and 'Secondary Beneficiaries' tables, both showing 'No Data'. At the bottom, there is a red button labeled 'Save' and a 'Cancel' button.

* To enroll in an HSA plan, you are required to first select a HDHP Medical plan.

Add Beneficiaries

After enrolling in a benefit plan, you can also add beneficiaries and trusts.

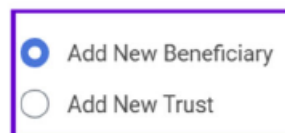
1. Select the 'add row' icon under either 'Primary' or 'Secondary' beneficiaries. To remove unwanted rows, select the 'remove row' icon.



2. Choose 'Existing Beneficiary Persons', 'Existing Trusts', or 'Add New Beneficiary or Trust'.



3. If adding new entry, select which type and click 'Continue'.



5. Complete the form (including address) and select 'Ok'.

A screenshot of the 'Add New Beneficiary or Trust' form. The form is titled 'Add New Beneficiary or Trust' and has a sub-header 'Fiona Farfaraway'. It contains several fields: 'Relationship' (set to 'Dual Spouse'), 'Use as Beneficiary' (checked), 'Date of Birth' (09/12/1976), 'Age' (48 years, 6 months, 21 days), 'Gender' (Male), 'Allow Duplicate Name' (unchecked), 'Country' (United States of America), 'Prefix', 'First Name' (Justin), 'Middle Name', 'Last Name' (Beiber), and 'Suffix'. At the bottom, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a purple box.

6. This new name is added to your list. Once the list is complete, adjust the allocation for each.

The total must equal 100%.

A screenshot of the 'Beneficiaries' table. The table has two columns: 'Beneficiary' and 'Percentage'. The 'Beneficiary' column contains one entry, 'Justin Beiber'. The 'Percentage' column contains the value '0'. A purple box highlights the 'Beneficiary' column header and the 'Percentage' column header.

Continue Picking Plans

- 1. For each additional plan card, select ‘Enroll’ or ‘Manage’ (right).
- 2. Choose ‘Select’ or ‘Waive’ for each plan election. Then select ‘Confirm and Continue’ to lock in your choices.

Insurance

REVIEWED

Basic Life

The Hartford (Employee)

Cost per paycheck

Included

Coverage

1 X Salary

Manage

Voluntary Life

Waived

Enroll

Spouse Voluntary Life

Waived

Enroll

Child Voluntary Life

Waived

Enroll

Basic AD&D

The Hartford (Employee)

Cost per paycheck

Included

Coverage

1 X Salary

Manage

Voluntary AD&D

Waived

Enroll

Family Voluntary AD&D

Waived

Enroll

Dependent Group Life

Waived

Enroll

Short Term Disability (STD)

City of Lee's Summit (Employee)

Cost per paycheck

Included

Coverage

60% of Salary

Manage

Long Term Disability (LTD)

The Hartford GAP (Employee)

Cost per paycheck

Included

Coverage

60% of Salary

Manage

Family Voluntary AD&D

Projected Total Cost Per Paycheck

\$0.00

Plans Available

Select a plan or Waive to opt out of Family Voluntary AD&D.

1 item

Benefit Plan	*Selection	You Pay (Biweekly)	Company Contribution (Biweekly)
The Hartford (EE + Family)	Select Waive		

Confirm and Continue

Cancel

NOTE:

Even though you are automatically enrolled in ‘Basic Life’ and ‘Basic AD&D’ coverage, you must still review the option and choose a primary beneficiary.

- 3. Under ‘Additional Benefits’ you find our Employee Assistance Program.
 - You are automatically enrolled in this program as well. Click ‘Close’ after reviewing.

Additional Benefits

Employee Assistance Program

CuraLinc Healthcare

Cost per paycheck

Included

Manage

6

Complete Enrollment

1. When ready, select ‘Review and Sign’ at the bottom of the enrollment homepage.

Open Enrollment

Projected Total Cost Per Paycheck
\$0.00

Enrollment Instructions

Once you make your benefit elections, these changes remain in effect until the next Open Enrollment. If you have a qualified status change or you have another allowable event, you can make changes during the plan year.

Health Care and Accounts

Medical

UPDATED

Cigna HDHP Plan

Dental

Waived

Review and Sign

Save for Later

2. Review your ‘Selected’ and ‘Waived’ benefits.

View Summary

Projected Total Cost Per Paycheck
\$0.00

Review your elections below for accuracy and scroll to review any messages and errors as well as the **Total Benefits Cost** – both the cost to you and the cost to the employer.

Selected Benefits 7 items

Plan	Coverage Begin Date	Deduction
Medical	04/04/2025	04/04/2025
Cigna HDHP Plan		
Health Savings Account	04/04/2025	04/04/2025
HSA Bank		
Basic Life	04/04/2025	04/04/2025
The Hartford (Employee)		
Basic AD&D	04/04/2025	04/04/2025
The Hartford (Employee)		
Short Term Disability (STD)	04/04/2025	04/04/2025
City of Lee's Summit (Employee)		
Long Term Disability (LTD)	04/04/2025	04/04/2025
The Hartford CAP (Employee)		
Employee Assistance Program	04/04/2025	04/04/2025
CuraLinc Healthcare		

Waived Benefits 10 items

Dental
Vision

3. Enter comments as needed, upload relevant documents*, select ‘I Accept’ to confirm your electronic signature, then ‘Submit’.

Attachments

Screenshot 2025-03-19 122517.png

Successfully Uploaded!

Comment

Upload

Electronic Signature

Payroll Deduction Authorization/Cancellation

To the best of my knowledge and belief, all statements and answers made on this form are true and correct.

I understand that omissions or misrepresentations in the information I have provided may result in denial of coverage or termination of my enrollment.

No changes to 'pre-tax' elections are allowed during the plan year unless you elect to change your benefit elections.

Upon acceptance by the insurers, I hereby authorize the City of Lee's Summit to enroll me in the health care plan.

My authorization shall continue thereafter until the earlier of (a) termination of my employment or (b) termination of the plan.

I understand that it is my responsibility to verify the deduction amounts from my paycheck.

I understand any unused balance in a Dependent Care or Health Care Reimbursement account will be forfeited at the end of the plan year.

You are encouraged to contact human resources if you have questions. This is not legal advice.

I Accept

enter your comment

Process History

Submit

Cancel

* To add a new dependent, you are required to attach a birth certificate for a baby, marriage license for marriage, or letter confirming employment/coverage loss for dependent.

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Need to Reopen your Enrollment?

Have you already submitted your choices but want to make a change?

If the enrollment window is still open, you can do this on your own:

- Click the Main Menu on the top left
- Select 'Benefits and Pay' under 'Personal'
- Find the 'Benefit Event: Open Enrollment' tile at the top of the Overview page
- Click 'Edit' to adjust your choices.

Other Questions?

Please reach out to our Benefits Specialist directly:

Christina Garside

Christina.Garside@cityofls.net

816.969.1042

OR

Submit a Support Ticket: servicedesk.cityofls.net/

Then follow these prompts...

