

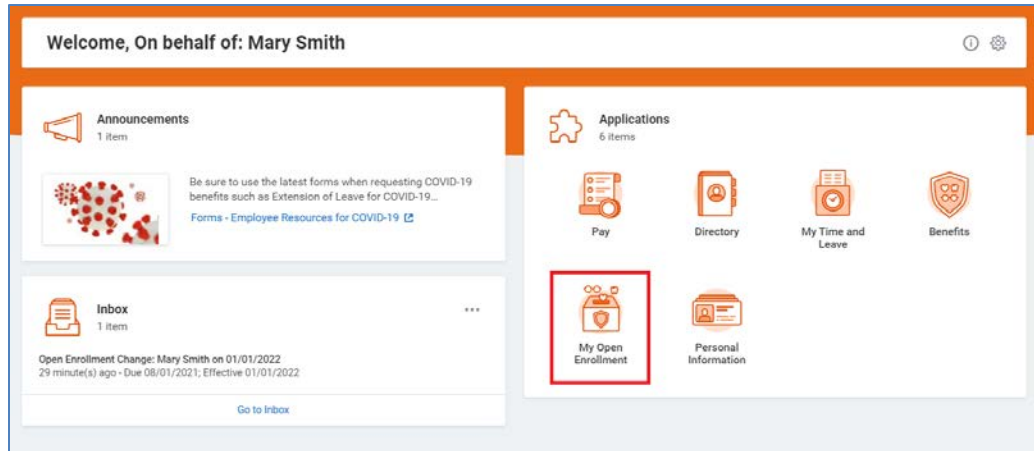
Open Enrollment Instructions



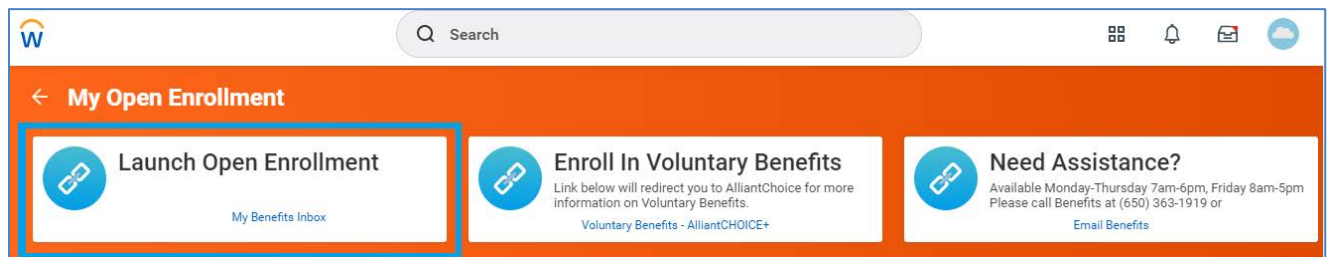
Selecting Your Benefits

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

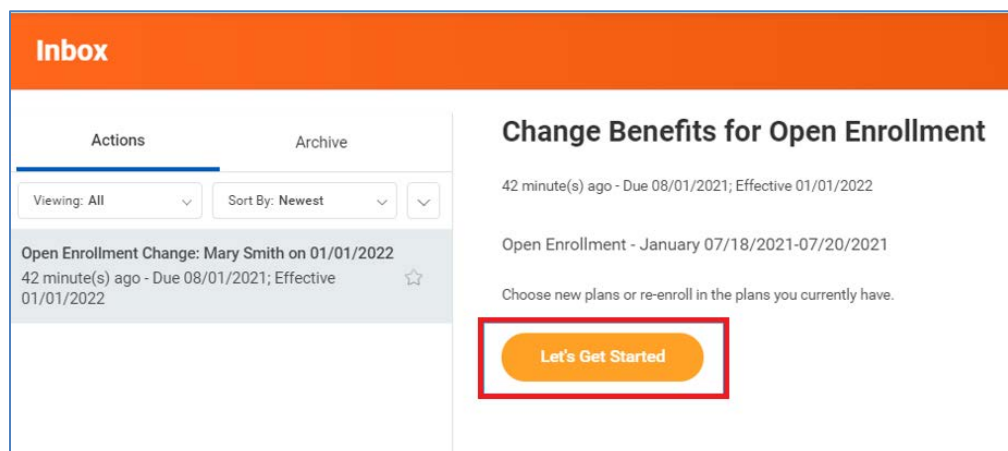
1. Go to your Workday homepage and click on your **My Open Enrollment** icon



2. Click on the first tab called **Launch Open Enrollment**.



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



Open Enrollment Instructions



- 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

Medical
Kaiser Permanente HMO SMC

Cost (Monthly) \$102.78
Coverage Employee

Manage

Dental
Delta Dental DHMO

Cost (Monthly) \$4.50
Coverage Employee

Manage

Vision
Vision Service Plan

Cost (Monthly) Included
Coverage Employee

Manage

Health Savings Account
Waived

Enroll

- 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.

8 items

*Selection	Benefit Plan	You Pay (Monthly)	Company Contribution (Monthly)	Pl.
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Blue Shield PPO Operating Engineers (Includes Dental & Vision)	\$88.90	\$800.10	
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Kaiser Permanente HDRP SMC	\$82.28	\$468.20	ht
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Kaiser Permanente HMO Operating Engineers (Includes Dental & Vision)	\$90.20	\$811.80	
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Kaiser Permanente HMO SMC	\$104.80	\$595.78	ht

Confirm and Continue **Cancel**

Health Care Instructions

Important Information

You can select either of the following plans, but not both: Medical - Blue Shield PPO Operating Engineers (Includes Dental & Vision), Medical - Kaiser Permanente HMO Operating Engineers (Includes Dental & Vision) or Dental - Cigna PPO Y12+ Represented Core w/ \$2500 Annual Max, Dental - Cigna PPO Y12+ Represented Core w/ \$2500 Annual Max and \$4000 Orthodontia, Dental - Cigna PPO Y12+ Represented Core w/ \$4000 Annual Max, Dental - Cigna PPO Y12+ Represented Core w/ \$4000 Annual Max and \$4000 Orthodontia. When you select one of the plans, Workday automatically waives any other plans.

You can select either of the following plans, but not both: Medical - Blue Shield PPO Operating Engineers (Includes Dental & Vision), Medical - Kaiser Permanente HMO Operating Engineers (Includes Dental & Vision) or Vision - Vision Service Plan, Vision - Vision Service Plan, Buy-Up. When you select one of the plans, Workday automatically waives any other plans.

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.

You and your family's health and well-being are important to the County. The County's medical benefits offer 100% coverage for preventive care as well as catastrophic coverage for the rare, exceptional instances when it is needed.

Extra Help Employees

You are eligible for the County's Kaiser High Deductible Health Plan and Health Savings Account. The [Extra Help Benefits Guide](#) can assist you in your enrollment decision.

Regular and Extra Help/Term Employees

You have several health plan options through the County. The County's [Benefit Guides](#) contains plan comparisons and eligibility information to help you make your decision.

[2021 Employee Benefits Guide](#) (Regular Employees)
[2021 Limited Term Benefits Guide](#) (Limited Term Only)

Regular dental care is an important part of your health and well-being. The County offers seven dental plans. You must select one of the dental plan options.

The County's vision benefits help keep you and your eyes healthy. Vision coverage is provided through Vision Service Plan (VSP) with no premium cost to you. Benefits include one fully covered vision exam every 12 months with a minimal co-pay.

Open Enrollment Instructions



8. 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 Deductibl
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. When selecting to **Add New Dependent**, click **OK** to continue.

Add My Dependent From Enrollment

Click OK to add dependents

OK Cancel

Open Enrollment Instructions



10. 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](#).

11. Select the name of the dependent you wish to and click **Save**. Don't forget to add the dependent to each benefit plan you would like to enroll them under.

Open Enrollment Instructions



Modifying Dependents



Click on the **My Open Enrollment Icon**

1. Under Benefits, click on Dependents.

The screenshot shows the 'My Open Enrollment' dashboard. On the left, there's a '2020 Open Enrollment At A Glance' section with links for '2019 Plan Rates', '2019 Active Benefit Rates', 'Employee Benefit Guides', and '2019 Benefit Guides'. Below that is a 'Current Benefit Elections' table with columns 'Plan' and 'Coverage'. The table shows '457 - Mass Mutual Traditional (Pre-Tax)' with '7%' coverage. On the right, there's a 'Need Assistance?' section with a phone number and an 'Email Benefits' link. Below that is an 'Open Enrollment 2020' section with a 'My Benefits Inbox' link. The 'Benefits' section on the right has links for 'Change Benefits', 'Beneficiaries', 'Dependents' (highlighted with a red box), 'Retirement Savings', and '1095-C Printing Election'. There's also a 'View' section with links for 'My ACA Forms', 'Benefit Elections', and 'Benefit Elections as of Date'. An 'External Links' section at the bottom right has a link for 'Voluntary Benefits - AlliantCHOICE+'.

2. 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).

The screenshot shows the 'Dependents' page for 'John Doe'. At the top, there's a green header with the title 'Dependents' and a sub-header 'John Doe' with an 'Actions' button. Below the header is an 'Add' button. The main section is titled 'Dependents 2 Items' and contains a table with columns 'Dependent', 'Relationship', and 'Age'. The table has two rows: 'Jane Doe' (Spouse, 22 years, 0 months, 29 days) and 'John Doe Jr' (Child, 0 years, 0 months, 2 days). The 'Edit' button next to 'Jane Doe' is highlighted with a red box.

Dependent	Relationship	Age	
Jane Doe	Spouse	22 years, 0 months, 29 days	Edit
John Doe Jr	Child	0 years, 0 months, 2 days	Edit

3. 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

4. Click the **Continue** button once you finish choosing your benefit elections. The request will need to be reviewed and approved by Benefits.

Open Enrollment Instructions



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 **Enroll** to elect the plan

Open Enrollment - January

Projected Total Cost (Monthly)
\$504.91

Health Care and Accounts

Medical	Dental	Vision
Kaiser Permanente HMO SMC	Cigna DHMO	Vision Service Plan
Cost (Monthly) \$104.80	Cost (Monthly) Included	Cost (Monthly) Included
Coverage Employee	Coverage Employee	Coverage Employee
Manage	Manage	Manage

Health Savings Account	Health Care FSA	Dependent Care FSA
Waived	Waived	Waived
Enroll	Enroll	Enroll

Insurance and Retirement

Review and Sign Save for Later

2. Click on **Select** for the FSA plan and then click on **Confirm and Continue**.

Plans Available

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

1 item

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

Confirm and Continue Cancel

3. Enter in the annual or per paycheck amount you wish to have deducted and click **Save**. If you only wish to elect the employer contribution, leave the amounts blank or set to zero.

Contribute

Per Paycheck

0.00

Annual

0.00

Total Paychecks 26

Maximum Annual Amount: \$3,650.00

Summary

Contribution (Monthly)	\$0.00
Annual Company Contribution	\$750.00
Total Annual HSA Contribution	\$750.00

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**.

Plans Available

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

2 items

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

Confirm and Continue

Cancel

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

Contribute

Per Paycheck

0.00

Annual

2,750.00

Total Paychecks 0

Minimum Annual Amount: \$26.00

Maximum Annual Amount: \$2,750.00

Summary

Contribution (Monthly)	\$0.00
Total Annual Contribution	\$2,750.00

Save

Cancel

Open Enrollment Instructions



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. **For this Open Enrollment, you may elect up to \$250,000 in employee life insurance coverage for auto-approval only if you have not been previously denied in the past.**

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**.

Plans Available

Select a plan or you can waive to opt out of Additional Life.

1 item

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

Confirm and Continue Cancel

Insurance Instructions


Important Information

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

General Instructions

Life insurance can be an important building block in your family's financial secur basic employee and dependent life insurance as well as accidental death and dis employee coverage at no cost to you. You also have the option of purchasing add and your dependents. The cost of the additional employee and spouse/domestic on the amount of coverage selected and current age. Child additional life is a flat number of dependents covered. If you elect any additional life insurance benefits through bi-weekly payroll deductions. For additional information, please review th the [Benefits Guide](#).

Any amount you elect above the guaranteed issue (GI) or any amount you elect o

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.

Coverage

Coverage * search

Calculated Coverage

Plan cost (Monthly)

Beneficiaries

Select an existing or add beneficiary.

Primary Beneficiaries

Beneficiary

Secondary Beneficiary

Beneficiary

Save Cancel

Insurance Instructions

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

General Instructions

Life insurance can be an important building block in your family's financial secur basic employee and dependent life insurance as well as accidental death and dis employee coverage at no cost to you. You also have the option of purchasing ad and your dependents. The cost of the additional employee and spouse/domestic on the amount of coverage selected and current age. Child additional life is a flat number of dependents covered. If you elect any additional life insurance benefits through bi-weekly payroll deductions. For additional information, please review t the [Benefits Guide](#).

Any amount you elect above the guaranteed issue (GI) or any amount you elect o be subject to medical underwriting and will require [Evidence of Insurability](#) (EOI). require a separate [EOI form](#). Once approved, your coverage and rates will be refle the month following approval. All completed [EOI forms](#) should be mailed directly Company. [Click here to complete it electronically](#).

Expanded Short Term Disability

Short Term Disability is designed to pay a weekly benefit to you if you cannot wo injury or pregnancy leave. Payment for approved claims begins after a specified

- Eligible non-SDI classifications are: Management, Confidential, District Attorney, SMM
- Basic Short Term Disability provides a \$95 weekly benefit

Open Enrollment Instructions



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, 2020.

Coverage

Coverage * search

Calculated Coverage

Plan cost (Monthly)

Beneficiaries

Select an existing or add beneficiary.

Primary Beneficiaries

Secondary Beneficiary

Save Cancel

Insurance Instructions

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

General Instructions

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

Any amount you elect above the guaranteed issue (GI) or any amount you elect above the guaranteed issue (GI) will be subject to medical underwriting and will require [Evidence of Insurability \(EOI\)](#). Once approved, your coverage and rates will be reflected in the month following approval. All completed [EOI forms](#) should be mailed directly to the Company. [Click here to complete it electronically](#).

Expanded Short Term Disability

Short Term Disability is designed to pay a weekly benefit to you if you cannot work due to a short-term injury or pregnancy leave. Payment for approved claims begins after a specified waiting period.

- Eligible non-SDI classifications are: Management, Confidential, District Attorney, SMM, etc.
- [Basic Short Term Disability](#) provides a \$95 weekly benefit.

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**.

Plans Available

Select a plan or you can waive to opt out of 457.

2 items

*Selection	Benefit Plan	You Contribute (Monthly)	Company Contribution (%)
<input type="radio"/> Select <input checked="" type="radio"/> Waive	Mass Mutual Roth (Post-Tax)		
<input checked="" type="radio"/> Select <input type="radio"/> Waive	Mass Mutual Traditional (Pre-Tax)	7%	

Confirm and Continue Cancel

Retirement Savings Instructions

Important Information

When you select 457 - Mass Mutual Roth (Post-Tax), 457 - Mass Mutual Traditional (Pre-Tax), Workday automatically waives any of these: 401(a) - Mass Mutual Employer Matching. If you waive any of these: 457 - Mass Mutual Roth (Post-Tax), Workday automatically waives any of these: 401(a) - Mass Mutual Employer Matching.

When you select 457 - Mass Mutual Roth (Post-Tax), 457 - Mass Mutual Traditional (Pre-Tax), Workday automatically waives any of these: 401(a) - Mass Mutual Employer Matching. If you waive any of these: 457 - Mass Mutual Roth (Post-Tax), Workday automatically waives any of these: 401(a) - Mass Mutual Employer Matching.

General Instructions

The County's 457 Deferred Compensation Plan offers employees an additional option of investment options, investment educational programs and related services. You can choose from, Traditional and Roth. Your choice of plan will depend on your consultation with your financial advisor. You can contribute to either option or both. Elections cannot exceed \$19,500 for 2019.

The Traditional 457 Plan Savings deductions are made on a pre-tax basis, earnings accumulate on the plan and are not subject to distributions.


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, 2020.

Contribute

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

Contribution Type * Percentage 

Contribution (%) select one

Minimum Percentage Amount

Maximum Percentage Percentage

Save **Cancel**

Retirement Savings Instructions

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

General Instructions

The County's 457 Deferred Compensation Plan offers employees an addition of investment options, investment educational programs and related service plans to choose from, Traditional and Roth. Your choice of plan will depend on consultation with your financial advisor. You can contribute to either option and elections cannot exceed \$19,500 for 2019.

The Traditional 457 Plan
Savings deductions are made on a **pre-tax basis**, earnings accumulate on the basis of received distributions.

The Roth 457 Plan
Savings deductions are made on an **after-tax basis**, earnings accumulate on the basis of received distributions.


Additional Savings
Age 50+ Catch-Up
Employees age 50 or older are eligible to contribute up to an additional \$6,000 per year.

Adding Additional Benefits

The additional benefits section is where you can elect to enroll in Financial Soundings.


- Click **Enroll** on the Financial Soundings icon/tile.

Additional Benefits



Employee Assistance Program
Claremont

Manage



Financial Soundings
Waived

Enroll

Review and Sign **Save for Later**

Open Enrollment Instructions



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

Plans Available

Select a plan or you can waive to opt out of Financial Soundings.

1 item

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

Additional Benefits Instructions

General Instructions

Employee Assistance Program
The County offers an [Employee Assistance Program \(EAP\)](#) through [counseling services and resources](#) to help you and your family manage relationships, stress, finances, substance abuse and other life concerns. You are entitled to up to five counseling sessions per issue per year. There is no cost for these services and all services are confidential.

Financial Soundings
Financial Soundings is a retirement readiness program which provides estimated retirement benefits, taking into account your SamCERA plan and Compensation Plan with Mass Mutual to help you determine how to best prepare for retirement. You will receive a report on the following:

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

Confirm and Continue

Cancel

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

Coverage

You will be enrolled in this plan.

Additional Benefits Instructions

General Instructions

Employee Assistance Program
The County offers an [Employee Assistance Program \(EAP\)](#) through [counseling services and resources](#) to help you and your family manage relationships, stress, finances, substance abuse and other life concerns. You are entitled to up to five counseling sessions per issue per year. There is no cost for these services and all services are confidential.

Financial Soundings
Financial Soundings is a retirement readiness program which provides estimated retirement benefits, taking into account your SamCERA plan and Compensation Plan with Mass Mutual to help you determine how to best prepare for retirement. You will receive a report on the following:

- 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 generated based on the information you provided.

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.

Open Enrollment - January

Projected Total Cost (Monthly)
\$336.19

Health Care and Accounts

Medical
Blue Shield HDHP

Cost (Monthly) \$154.16
Coverage Employee
[Manage](#)

Dental
Cigna PPO Management w/ \$4000 Orthodontia

Cost (Monthly) \$104.64
Coverage Employee + Family
Dependents 5
[Manage](#)

Review and Sign [Save for Later](#)

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.

Attachments

Drop files here

or

[Select files](#)

Electronic Signature

LEGAL NOTICE: Please Read

When you check the "I AGREE" checkbox, you acknowledge and agree to be legally bound to the following:

1. You have carefully read and reviewed the above listed benefit selections and each one is accurate.
2. You understand that your benefit elections are legal and binding transactions and that your benefit elections come at the price indicated when you made your selection. You further understand that you your pay and you authorize your employer to make such deductions. If for any reason your employer is unable to or inadvertently fails to make the correct deductions, you acknowledge you are still liable for your share of the cost of the premium.
3. You understand that if you are married, your dependent Spousal Coverage Elsewhere selection is legally binding.
4. You understand that all benefits are contingent upon your enrollment and acceptance by your HR representative and by your insurance carriers or benefit providers.

I Accept ☐

Submit [Save for Later](#) [Cancel](#)