# Quick Start Guide: Navigate Open Enrollment (US Employees)

This quick start guide provides step-by-step instructions on how to navigate Open Enrollment in Workday. Open Enrollment starts November 10, 2020 and ends November 25, 2020. **All changes are effective January 1, 2021**

OPEN ENROLLMENT STEPS

1. Click on the **Open Enrollment Announcement** on your homepage in Workday. For more information on our 2021 benefits details, go to our US benefits portal at benefits.proofpoint.com
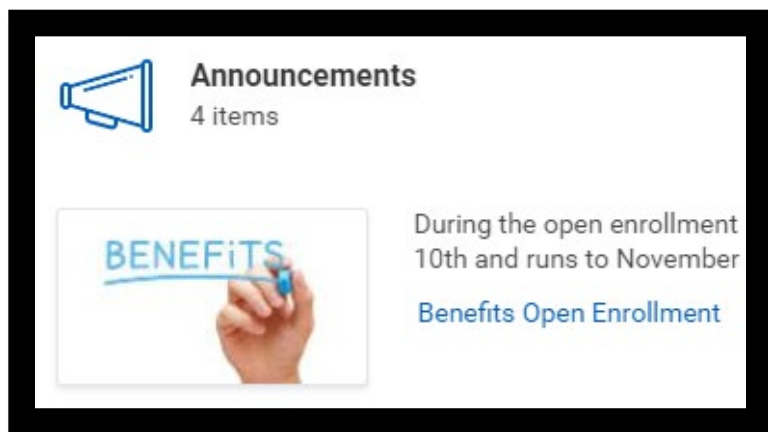
2. The **Employee Benefits Open Enrollment** Selection page will display. Click on the **Continue** button.

3. The **Open Enrollment** page will display. Click on **Manage/Enroll** for each **Health Care and Accounts**, **Insurance**, and view **Additional Benefits** plan choices.

   Note: Be sure to enroll in FSA benefits during Open Enrollment if you would like to participate in 2021.

4. Click the **Plan Description** or **Provider Website** links to review. Modify your coverage, if needed.

5. Click **Confirm and Continue**.

6. The **Dependents** page will display. For more information about adding or dropping a dependent from plans, see the next section. Click **Save**.
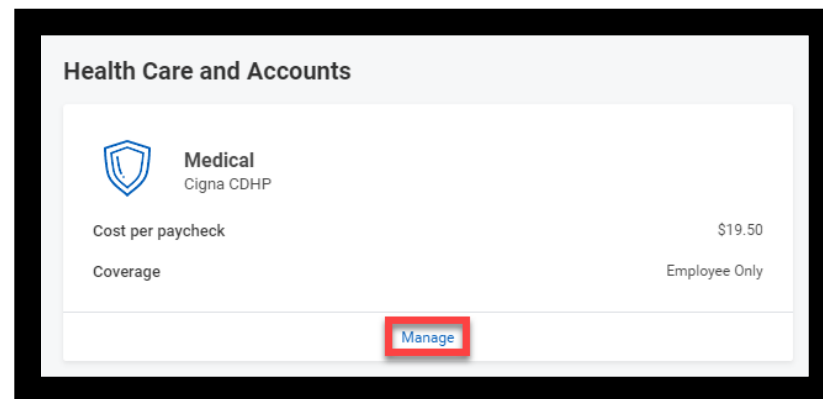
ADD OR DROP DEPENDENTS

If you **Manage** or **Enroll** in a benefit plan during Open Enrollment, you can also add or drop dependents on the plans.

   Note: Adding or dropping a dependent to one plan will not automatically make this change to each of your plans. You will need to repeat this process for each of your plan.

1. Click the **Manage/Enroll** hyperlink in the desired plan.

2. Under Plans Available, **Waive/Select** for the **Benefit Plans**.

3. Click on **Confirm and Continue**.

4. The **Dependents** page will display. Click on **Add New Dependent**.

5. Review the instructional text and click **OK** to add dependent(s).

6. Complete all required information. Click **Save**.

7. You will be returned to the **Dependents** page. Click on **Save**.

   Note: You can also remove a dependent by unchecking the box next to the name on the list of dependents.

DESIGNATE BENEFICIARIES

The **Company Paid Life Insurance** plan and the **Accidental Death and Dismemberment** plan require beneficiaries. This means that you must designate one or more beneficiaries to each plan.

> Note: If you do not designate beneficiaries to these plans, then you will get an error message when you try to submit your **Open Enrollment** elections.

1. Click on **Manage/Enroll** hyperlink for the plan.
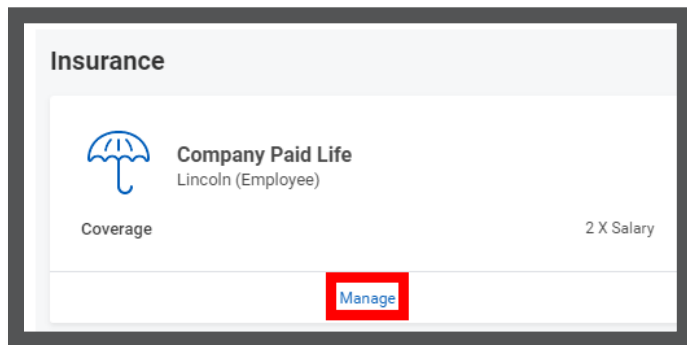
2. The **Select** option will default. Click on **Confirm and Continue**.

3. Click the **Add Row** icon ⊕ to add a beneficiary.

4. Click the **prompt** icon ⋮☰ in the **Beneficiary** field to select from a list of **Existing Beneficiary Persons** or **Existing Trusts**. Or, select **Add New Beneficiary or Trust** to add a new beneficiary.

   To remove a beneficiary, click the **Remove Row** icon ⊖ next to that beneficiary.

5. Enter the **Percentage** of benefits for each beneficiary in the **Primary Beneficiary** and **Secondary Beneficiaries** section. Your **Primary Beneficiary** and **Secondary Beneficiaries** percentages must add up to 100%.

> Note: Only a Primary Beneficiary is required. However, we encourage you to identify a Contingent beneficiary.

SHORT-TERM DISABILITY (STD), LONG-TERM DISABILITY (LTD), AND EMPLOYEE ASSISTANCE PROGRAM

The **Short-Term Disability**, the **Long-Term Disability**, and the **Employee Assistance Program** plans are available for all US employees at no additional cost. All employees are enrolled by default. This does not require any action from the employee.

COMPLETE YOUR ENROLLMENT

1. Click on **Review and Sign** to submit your elections.

2. The **View Summary** page will display. Review your selected benefits coverage levels, beneficiaries, and the cost associated with the selected benefits. You can **Save for Later** if you would like to come back to this task later.

3. Scroll to the bottom of the page, check the box next to **I Accept**, and click **Submit**.

4. The Submitted page will display. Click on **View 2021 Benefits Statement** button.

5. Click **Print** to generate a PDF version for your records.

6. Click on the **Download** prompt.

7. The document will download. Review and save this document to your computer. You may also want to email yourself a copy.

> Note: You can update your elections by clicking on the **2021 Open Enrollment Announcement** on your homepage until November 25, 2020. If you have any questions, reach out to benefits@proofpoint.com