

Employee Self -Service Guide

Sample Employee Open Enrollment Communication and Instruction

ADP Benefits & Talent Solutions



Overview

Open Enrollment Communication

ADP has provided a sample template for communicating Open Enrollment information to your employees. Keep in mind that Employee Self Service contains an Enrollment wizard that walks employees through Open Enrollment.

Please customize this template for your company where you find text that is formatted as follows:

- * Indicates areas where you may refer to the website in a different way. Please change the text, if appropriate.
- ** Indicates areas where you may need to enter your company-specific information.

You can also place customized instructions on the Home page, which allows you to provide your employees with additional information and directions. To customize instructions, click the **Configure homepage** icon.

Configure homepage

Here you can select **Add New Tile** to add a customized tile for your upcoming Open Enrollment.

Back

Configure homepage

Configure Homepage lets you add or change content on your company's homepage. You can create custom content, reorder the tiles on the page, resize custom tiles, or make tiles active or inactive. Any changes you make to the tiles are visible to any security profile assigned to that tile.

+ Add New Tile

✕ Reorder Tiles

Tile Name ▾	Description	Type ▾	Security Profiles	Status	Action
✓ Company Mission And Vision		Custom			+ Add Content
Open Enrollment Coming Soon!	Open Enrollment Benefits	Custom	--	Active	⋮



Sample Communication

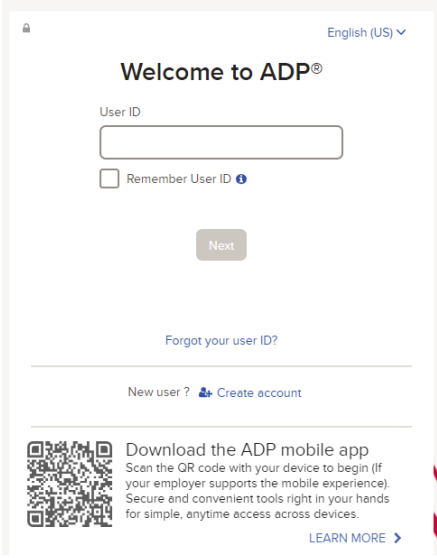
Dear Employee,

We are excited to announce the start of Open Enrollment on the *Employee Self Service** website.

This letter explains what you need to do to complete your enrollments. The Open Enrollment period will last <<**ENTER DURATION**>>, starting <<**ENTER DATE**>> and ending <<**ENTER DATE**>>. All changes to your benefits must be completed by <<**ENTER TIME and DATE**>>. The changes that you make to your benefits will take effect on <<**ENTER BENEFIT EFFECTIVE DATE****>>.

Log in to Workforce Now to access the Employee Self-Service* website.

<https://workforcenow.adp.com>



The screenshot shows the ADP login interface. At the top right, there is a language selector set to "English (US)". The main heading is "Welcome to ADP®". Below this is a "User ID" label followed by a text input field. Under the input field is a checkbox labeled "Remember User ID" with an information icon. A "Next" button is positioned below the checkbox. Further down is a link for "Forgot your user ID?". Below a horizontal separator line, there is a link for "New user ?" followed by a plus icon and "Create account". At the bottom, there is a QR code and text encouraging users to download the ADP mobile app, stating: "Scan the QR code with your device to begin (if your employer supports the mobile experience). Secure and convenient tools right in your hands for simple, anytime access across devices." A "LEARN MORE" link with a right-pointing arrow is located at the bottom right of the QR code section.

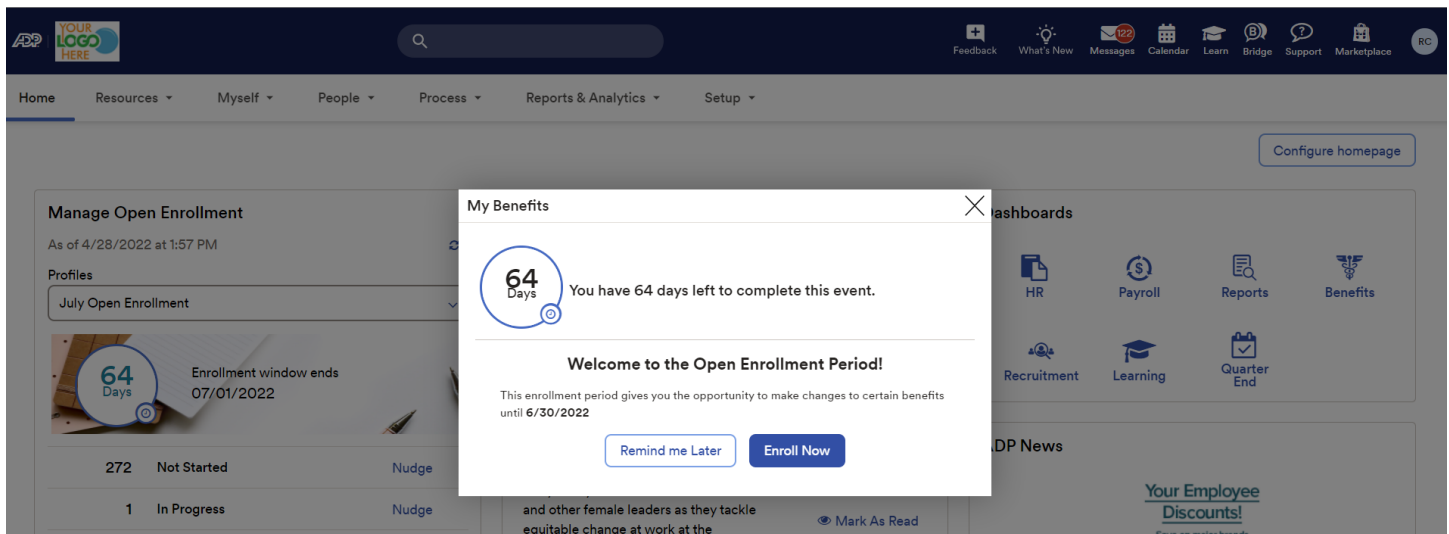
Enter your User ID and password, and then click **Sign In**.

Note: If this is your first time logging in, click **Create account**. If you are unsure of the registration code, please contact your HR team.



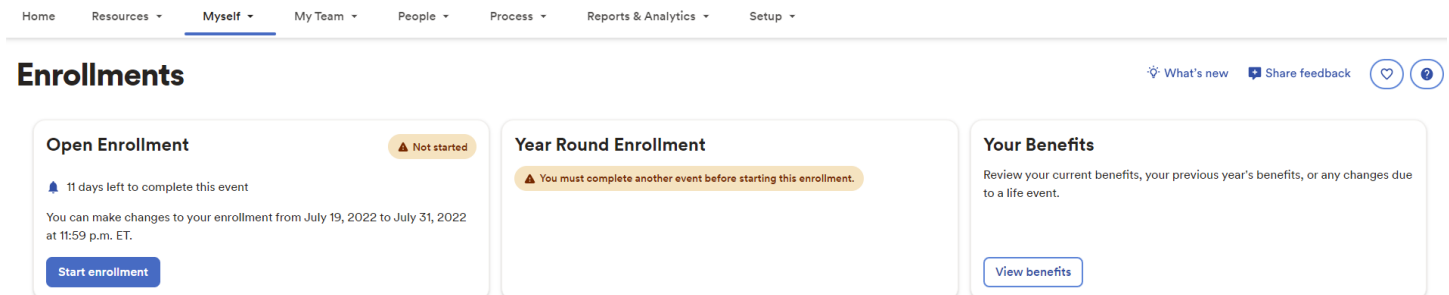
Upon logging in, you will be presented with a pop-up showing important information about this Open Enrollment period. You can click **Enroll Now** or **Remind Me Later**.

Note: This pop-up is displayed each time you log in during the Open Enrollment period. 24-hours after submitting your selections the pop-up will no longer display.



The screenshot shows the ADP My Benefits pop-up. The pop-up has a title bar "My Benefits" with a close button. Inside, it features a circular timer showing "64 Days" and the text "You have 64 days left to complete this event." Below this, it says "Welcome to the Open Enrollment Period!" and "This enrollment period gives you the opportunity to make changes to certain benefits until 6/30/2022." At the bottom, there are two buttons: "Remind me Later" and "Enroll Now". The background shows the ADP dashboard with a "Manage Open Enrollment" section and a "Dashboards" section with icons for HR, Payroll, Reports, Benefits, Recruitment, Learning, and Quarter End.

Select **Enroll Now** will bring you to the Myself – Benefits – Enrollments screen where you can click **Start Enrollment**.



The screenshot shows the ADP Enrollments screen. The page has a navigation bar with "Home", "Resources", "Myself", "My Team", "People", "Process", "Reports & Analytics", and "Setup". The main heading is "Enrollments". There are three main sections: "Open Enrollment" with a "Not started" status and a "Start enrollment" button; "Year Round Enrollment" with a status "You must complete another event before starting this enrollment."; and "Your Benefits" with a "View benefits" button. The "Open Enrollment" section also includes a bell icon and text: "11 days left to complete this event" and "You can make changes to your enrollment from July 19, 2022 to July 31, 2022 at 11:59 p.m. ET."





You will be taken to the **Welcome Note**. Please review all information on this page, as there are often important details regarding your Open Enrollment options. Click **Next** after reviewing the Welcome Note to move to **Manage Dependents**.

Open Enrollment

Welcome

Manage Dependents

Select Benefits

Upload Documents

Review and Submit

Welcome

Welcome to the Open Enrollment period. This enrollment period gives you the opportunity to make election changes for certain benefits. During this enrollment period you can:

- Make changes to plan contributions, such as health savings account (HSA) or retirement plans
- Add or change the level of your insurance coverage
- Add or update Beneficiary assignment
- Complete Beneficiary assignment

Please review your options and costs carefully. Once the enrollment period has ended your choices will be final until the next enrollment period or until you have a qualifying life event. Contact your Human Resources department if you have questions.

Back

Next

The **Manage Dependents** page is where you can add/view/edit your dependent and beneficiaries. Select **“Add dependent or beneficiary”** to add a new dependent/beneficiary. You would use the *3-dot* action icon to view/edit an existing dependent/beneficiary.

Open Enrollment

Welcome

Manage Dependents

Select Benefits

Upload Documents

Review and Submit

Manage Dependents

Review your dependents before you enroll.

Add dependent or beneficiary

Sally Snow

Type
Dependent

Relationship
Spouse

Finish later

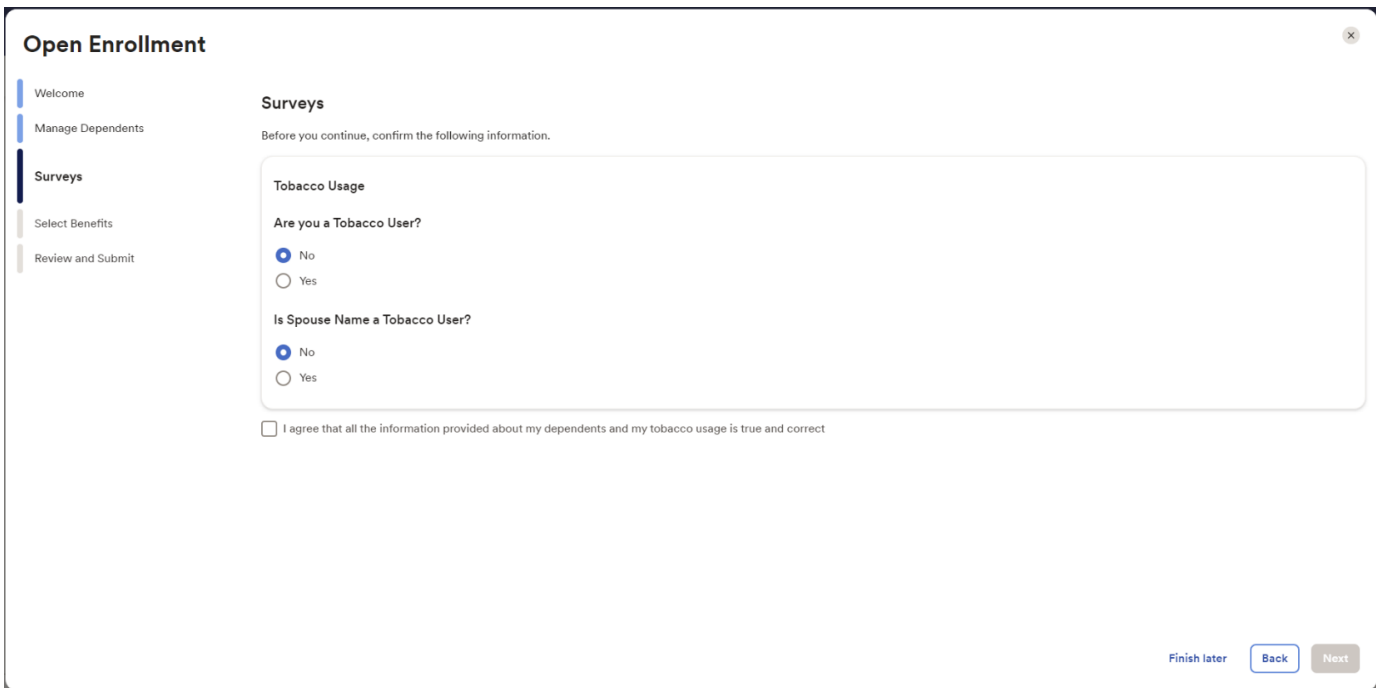
Back

Next



Click **Next** to proceed to **Surveys**.

The **Survey** screen will prompt **only** if applicable based on the settings within the enrollment profile itself. If any tobacco attestation is required you must acknowledge the attestation (“I agree that all the information provided about my dependents and my tobacco usage is true and correct”) in order for **Next** to be available and allow you to continue to the **Select Benefits** page.

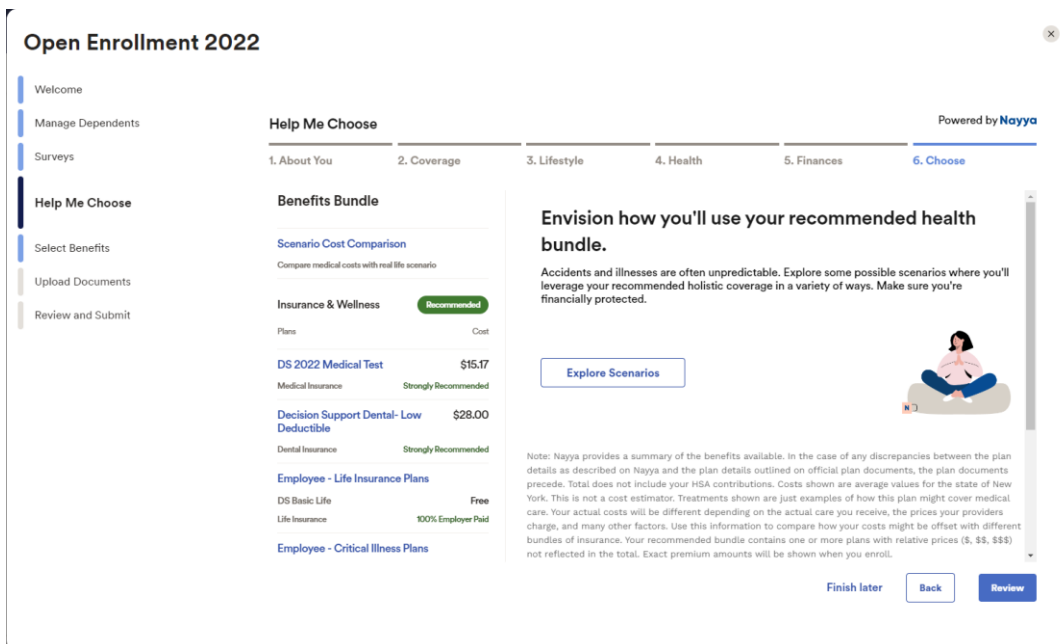
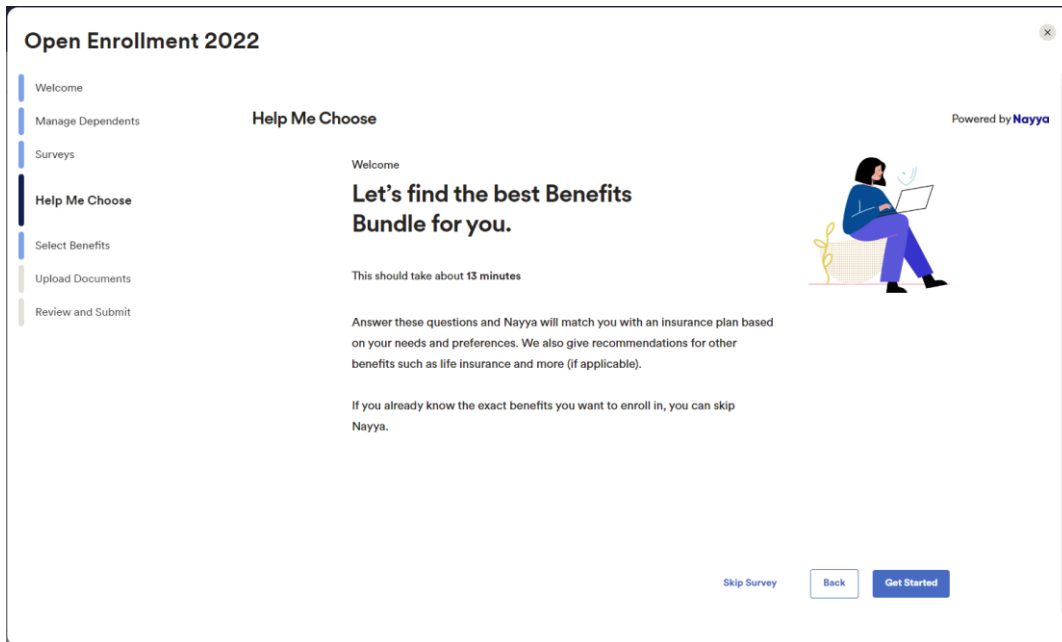


The screenshot shows the 'Open Enrollment' interface. On the left is a vertical navigation menu with five items: 'Welcome', 'Manage Dependents', 'Surveys' (highlighted with a blue bar), 'Select Benefits', and 'Review and Submit'. The main content area is titled 'Surveys' and includes a sub-header 'Before you continue, confirm the following information.' Below this is a rounded rectangular box containing two questions: 'Tobacco Usage' and 'Are you a Tobacco User?' with radio button options for 'No' (selected) and 'Yes'. A second question, 'Is Spouse Name a Tobacco User?', also has 'No' (selected) and 'Yes' options. Below the box is a checkbox for the statement 'I agree that all the information provided about my dependents and my tobacco usage is true and correct'. At the bottom right of the screen are three buttons: 'Finish later' (text), 'Back' (outline), and 'Next' (solid grey).



The below page is for clients with Decision Support enabled. Skip to pg 9 if you do not have Decision Support

The **Help Me Choose** step in the employee self-service wizard is where Decision Support (powered by Nayya) is located. It's an optional feature allowing you to walk through an interview-based questionnaire about health, lifestyle, and financial information to provide recommendations for the best benefit plan offerings, suited specifically for you. The responses you fill out are only between you and Nayya. Your employer will not be able to view any of the responses. On average, the Decision Support process will take around 13 minutes to complete.



The below page is for clients with Decision Support enabled. Skip to pg 9 if you do not have Decision Support

The next step is **Select Benefits**. You will see the plans that have been recommended by Nayya and plans that have already been selected.

You can continue to make enrollment changes outside of the recommendations. There are badges on each enrollment card, shown below, that display your enrollment status. (i.e. Selected = Enrolled, Recommended = part of recommendation)

Open Enrollment 2022

Welcome

Manage Dependents

Surveys

Help Me Choose

Select Benefits

Upload Documents

Review and Submit

Select Benefits

14 days left to enroll
Effective: September 1, 2022

Employer cost per paycheck
\$65.88

Your cost per paycheck
\$20.34

Go to section ▾

Benefit recommendations just for you!

Based on your survey responses, we selected the following benefit plans. Select the plan that best meets your needs and begin your enrollment.

Action Required

You can confirm details for the plan we selected or select another one.

Critical Illness

View all plans

DS Critical Illness
Effective: September 1, 2022

Who is covered?
You

\$30,000.00
Employee Coverage

Selected

Recommended

Per Paycheck
\$0.42

Finish later

Back

Next

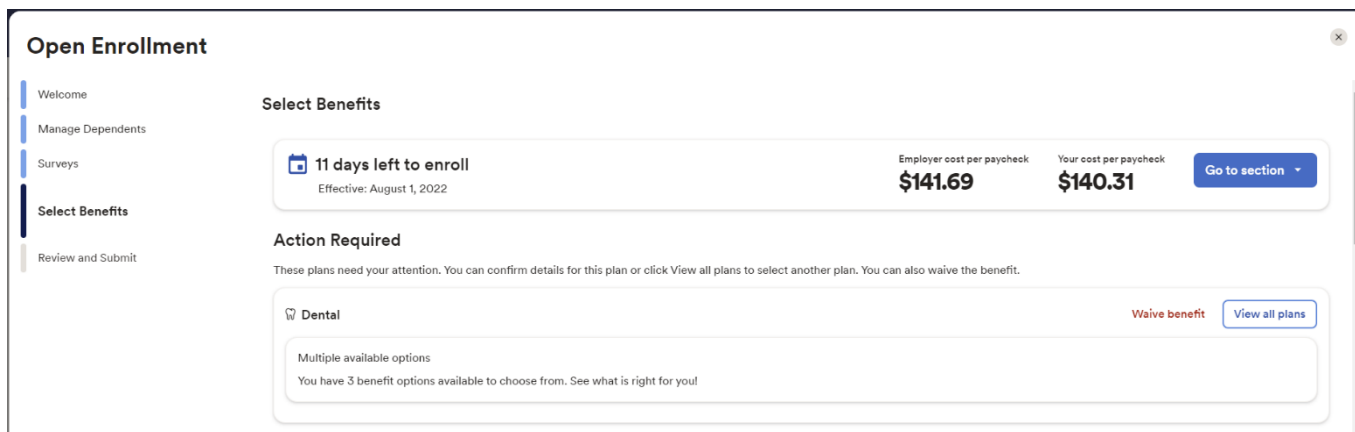
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Employee Self Service is split up into three sections: Action Required, Selected Plans and Eligible Benefits.

- **Action Required** –*These are items that need to be reviewed to move forward. These plans could require a beneficiary to be designated or a waive reason to be provided.*



Open Enrollment

Welcome
Manage Dependents
Surveys
Select Benefits
Review and Submit

Select Benefits

11 days left to enroll
Effective: August 1, 2022

Employer cost per paycheck
\$141.69

Your cost per paycheck
\$140.31

[Go to section](#)

Action Required

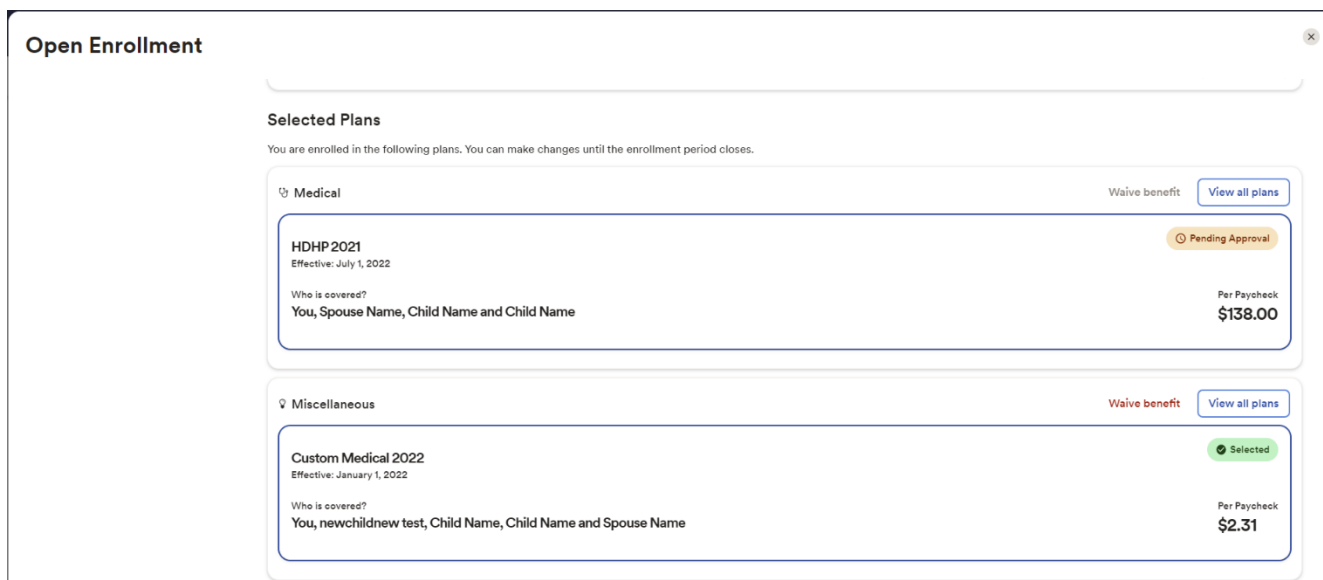
These plans need your attention. You can confirm details for this plan or click View all plans to select another plan. You can also waive the benefit.

Dental

Multiple available options
You have 3 benefit options available to choose from. See what is right for you!

[Waive benefit](#) [View all plans](#)

- **Selected Plans** –*These are benefit plans that you are already enrolled in and can make changes to. This section also displays any enrollments that are pending additional approval.*



Open Enrollment

Selected Plans

You are enrolled in the following plans. You can make changes until the enrollment period closes.

Medical

HDHP 2021
Effective: July 1, 2022

Who is covered?
You, Spouse Name, Child Name and Child Name

Per Paycheck
\$138.00

[Waive benefit](#) [View all plans](#)

Miscellaneous

Custom Medical 2022
Effective: January 1, 2022

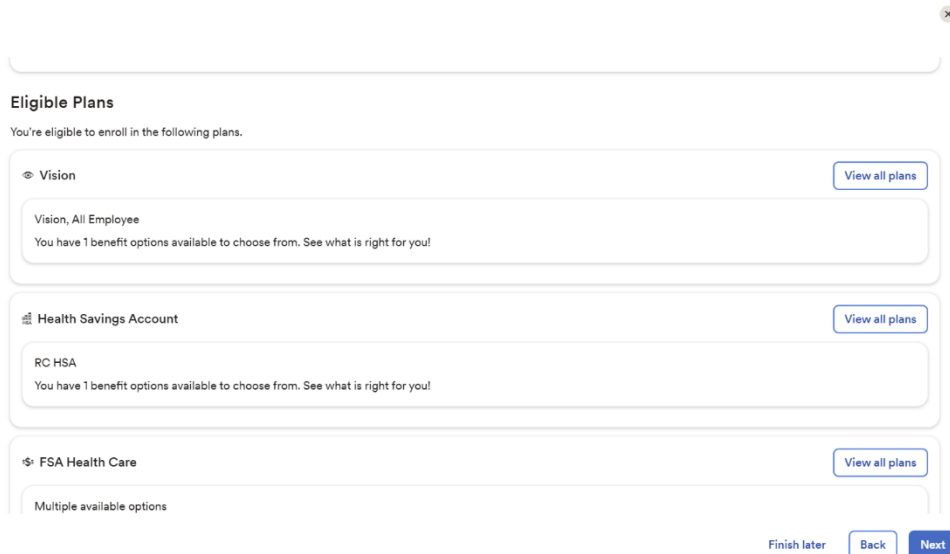
Who is covered?
You, newchildnew test, Child Name, Child Name and Spouse Name

Per Paycheck
\$2.31

[Waive benefit](#) [View all plans](#)

- **Eligible Benefits** –*These are other benefit plans that are available for you to enroll in. If you select a benefit plan in the eligible benefits section, the enrollment will be moved to the Enrolled Benefits section.*

Open Enrollment



Eligible Plans

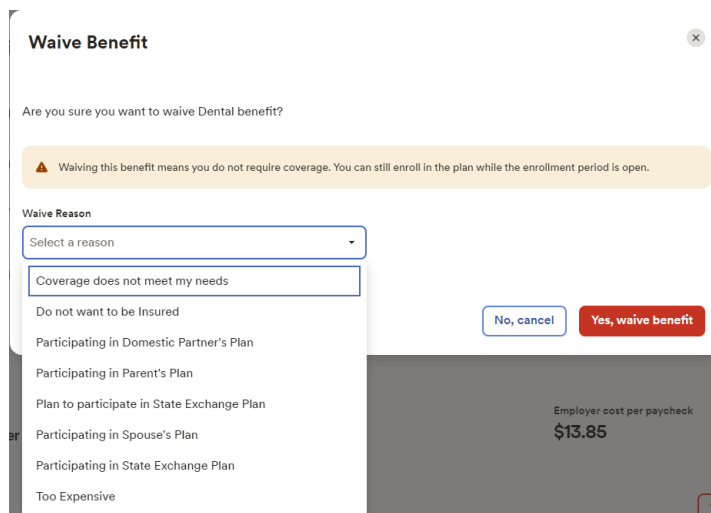
You're eligible to enroll in the following plans.

- Vision** [View all plans](#)
Vision, All Employee
You have 1 benefit options available to choose from. See what is right for you!
- Health Savings Account** [View all plans](#)
RC HSA
You have 1 benefit options available to choose from. See what is right for you!
- FSA Health Care** [View all plans](#)
Multiple available options

[Finish later](#) [Back](#) [Next](#)

Waive benefit should only display for benefit plan types that require a waive reason. Employees should only select **Waive benefit** if you do not want to continue enrollment in a benefit or are not enrolled currently and a waive reason is required.

If you chose to **waive** a benefit, you will be required to select a **Waive Reason**.



Waive Benefit

Are you sure you want to waive Dental benefit?

⚠️ Waiving this benefit means you do not require coverage. You can still enroll in the plan while the enrollment period is open.

Waive Reason

Select a reason

- Coverage does not meet my needs
- Do not want to be insured
- Participating in Domestic Partner's Plan
- Participating in Parent's Plan
- Plan to participate in State Exchange Plan
- Participating in Spouse's Plan
- Participating in State Exchange Plan
- Too Expensive

[No, cancel](#) [Yes, waive benefit](#)

Employer cost per paycheck
\$13.85



View all plans will allow the employee to view the plans that are available in that plan grouping.

Eligible Plans

You're eligible to enroll in the following plans.

🔗 Medical

Waive benefit

View all plans

Multiple available options

You have 3 benefit options available to choose from. See what is right for you!

While enrolling in a plan, please be sure to indicate which dependents should be covered in the **Covered Individuals** section, if applicable. Then proceed with your enrollment.

Available Plans

Medical

Select the plan that meets your needs and add the dependents you want to cover.

🔔 Your company requires you to enter a reason to waive this coverage.

Covered Individuals

☒ John Snow (You) ☐ Sally Snow (Spouse)

4 Plans Available

↔ Plan comparison

Aetna Choice PPO
(1 individual selected)

Provider
Aetna Inc.

Select plan

Employer cost per paycheck
\$245.90

Your cost per paycheck
\$112.52

RC HDHP
(1 individual selected)

Additional details

Waive benefit

Back

Note: The coverage level for your enrollment (Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family) is driven by which dependents you enroll.





When you choose to enroll in a plan, it will display the **Per Paycheck** cost for the employee and employer.

RC PPO, Medical PPO (1 individual selected)		
Provider Aetna Inc.	Employer cost per paycheck \$60.00	Your cost per paycheck \$57.00
Confirm the details for this plan selection or waive this benefit.		Confirm details

Confirm details may include some additional information needed (i.e. PCP-ID).

Confirm Details

Aetna Inc.: RC PPO
Medical PPO

Covered Individual
You

Primary Care Physician Details

John Snow
Enter Primary Care Physician Details

First Name	Last Name	ID Number

Per Paycheck Costs
Total Cost Per Paycheck
\$57.00

[Back](#) [Confirm](#)

Review your enrollment, costs, and covered individuals carefully before clicking on **Confirm**. Once confirmed, you will receive a confirmation message that you are now enrolled and the enrollment will be displayed under **Selected Plans**.

Select Benefits

You enrolled in RC PPO, Medical PPO.		
47 days left to enroll Effective: October 1, 2022	Employer cost per paycheck \$60.00	Your cost per paycheck \$57.00 Go to section

Selected Plans

You are enrolled in the following plans. You can make changes until the enrollment period closes.

Medical		Waive benefit	View all plans
RC PPO Effective: October 1, 2022			
Who is covered? You		Per Paycheck \$57.00	



Voluntary Life Elections and Beneficiaries:

When you elect Voluntary Life, you will also need to designate your beneficiaries. Start by clicking **View all plans**, and then choose the amount of coverage you want to elect from the drop down.

Available Plans

Covered Individual

☒ John Snow (You)

1 Plan Available

BT - Voluntary Life

(1 individual selected)

Provider

Guardian Life

Select Coverage Amount

Additional Coverage

\$240,000.00

Total Actual Coverage Amount

\$240,000.00

Evidence of Insurability will be required for this enrollment.

Over The Limit - Approval Required

The Total Actual Coverage Amount is over the guarantee issue amount of \$150,000.00. That amount requires Evidence of Insurability (EOI) and approval from the insurance carrier.

Per Paycheck Costs

Employer cost per paycheck

\$0.00

Your cost per paycheck

\$17.50

Back

If the amount selected is over the Guarantee Issue amount, additional approval will be required, and you will be asked to complete **Evidence of Insurability** (EOI) and submit it to your employer. Your full election amount will not be approved until this process is completed. Next you will want to enter your beneficiary designation. Including **Primary** and **Secondary**, if applicable. All beneficiary delegation percentages combined must equal 100% for each category (Primary or Secondary).

Beneficiaries

[Add beneficiary](#)

Allocate the percentages of your benefits payout. You can divide the percent paid to as many beneficiaries as you want, but the total must equal 100%.

Beneficiary	Primary	Secondary
Sally Snow Spouse	100%	0%
Total	100.00%	0.00%

Confirm the details for this plan selection.

Confirm details

Click **Confirm details** and review your selection and beneficiary delegations.



Then click **Confirm** to continue with your enrollment elections.

Confirm Details

Guardian Life: BT - Voluntary Life

Covered Individual	
You	
Coverage	
Total Actual Coverage Amount	
\$240,000.00	
Beneficiaries	
Sally Snow (Spouse)	Primary (100.00%)
Per Paycheck Costs	
Employer Cost	Your Cost
\$0.00	\$17.50

[Back](#) [Confirm](#)

Continue through each step until all elections are complete and all tasks under the **Action Required** section are addressed. When ready to proceed to the Summary page, click **Next** to proceed to **Review and Submit** step.

Open Enrollment

[Welcome](#)
[Manage Dependents](#)
[Surveys](#)
[Select Benefits](#)
[Review and Submit](#)

Select Benefits

46 days left to enroll
Effective: October 1, 2022

Employer cost per paycheck
\$553.26

Your cost per paycheck
\$293.17

[Go to section](#)

Selected Plans

You are enrolled in the following plans. You can make changes until the enrollment period closes.

Medical

Aetna Choice PPO
Effective: October 1, 2022

Who is covered?
You and Sally Snow

Selected

Per Paycheck
\$253.17

Waive benefit

[View all plans](#)

Dental

[View all plans](#)

[Finish later](#)

[Back](#)

[Next](#)

Review all of your selections/changes. When you have confirmed them, click **Submit Enrollment**. Note that your benefit elections will not be processed until you click **Submit Enrollment**. If you click **Save for later** instead, these enrollments will not be submitted to your HR team until you fully submit the enrollment changes.

Open Enrollment

Welcome
Manage Dependents
Surveys
Select Benefits
Review and Submit

Review and Submit

46 days left to enroll
Effective: October 1, 2022

Employer cost per paycheck
\$553.26

Your cost per paycheck
\$293.17

Your benefit elections will not be effective until you click Submit enrollment.

Enrolled plans

You are enrolled in the following plans. You can make changes until the enrollment period closes.

Medical
Effective: October 1, 2022
Aetna Choice PPO
Who is covered?
You and Sally Snow

Enrolled

\$253.17
Per Paycheck

Finish later
Back
Submit enrollment

There will be a pop-up confirming your submission notating the date and time of submission. Please ensure you receive the confirmation note indicating your elections have been submitted.

Submit enrollment

You are about to submit your enrollment. Do you want to continue?

You can make changes until September 9, 2022 11:59 PM EDT.

No
Yes

Enrollments

You have completed your enrollment.
You have successfully completed your Open Enrollment October 2022 enrollment.

Open Enrollment

46 days left to make changes
You can make changes to your enrollment from July 5, 2022 to September 9, 2022 at 11:59 p.m. ET.

Manage enrollment

Submitted

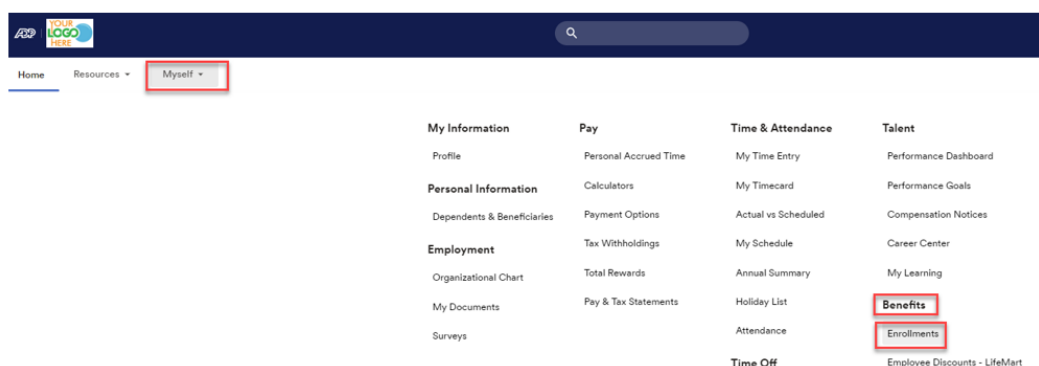
Your Benefits

Review your current benefits, your previous year's benefits, or any changes due to a life event.

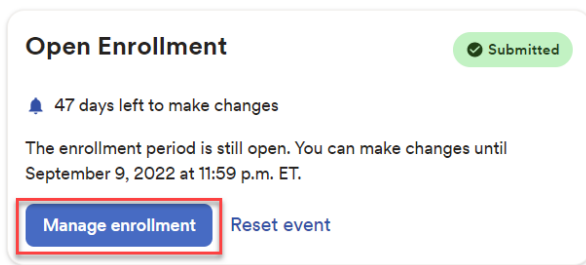
View benefits



If you would like to make additional changes or modifications during the Open Enrollment Period, you may log in and navigate to **Myself > Benefits > Enrollments** and click the **Manage Enrollment** option in the Open Enrollment box. This will bring you back to the beginning of the profile to make any desired election changes.



Enrollments



You may also navigate by finding the **My Benefits** tile on the homepage and select **Manage**. The tile will also reflect the “Submitted” status with the date and time of submission.

