



Always Designing
for People™

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

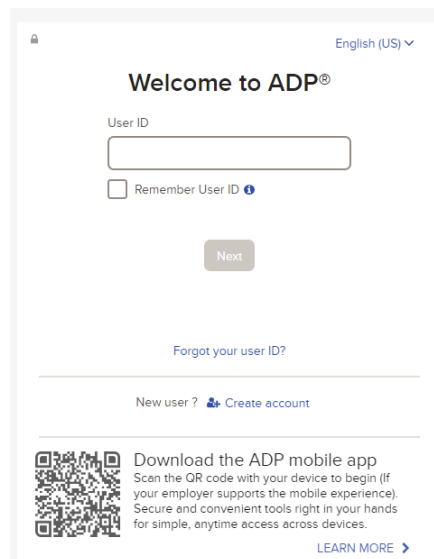
Dear Employee,

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. Underneath the input field is a checkbox labeled "Remember User ID" with an information icon. A "Next" button is positioned below the checkbox. A link "Forgot your user ID?" is located below the "Next" button. A horizontal line separates the login section from the registration section. Below the line, it says "New user ?" followed by a plus icon and a link "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 at the bottom right of the QR code area.

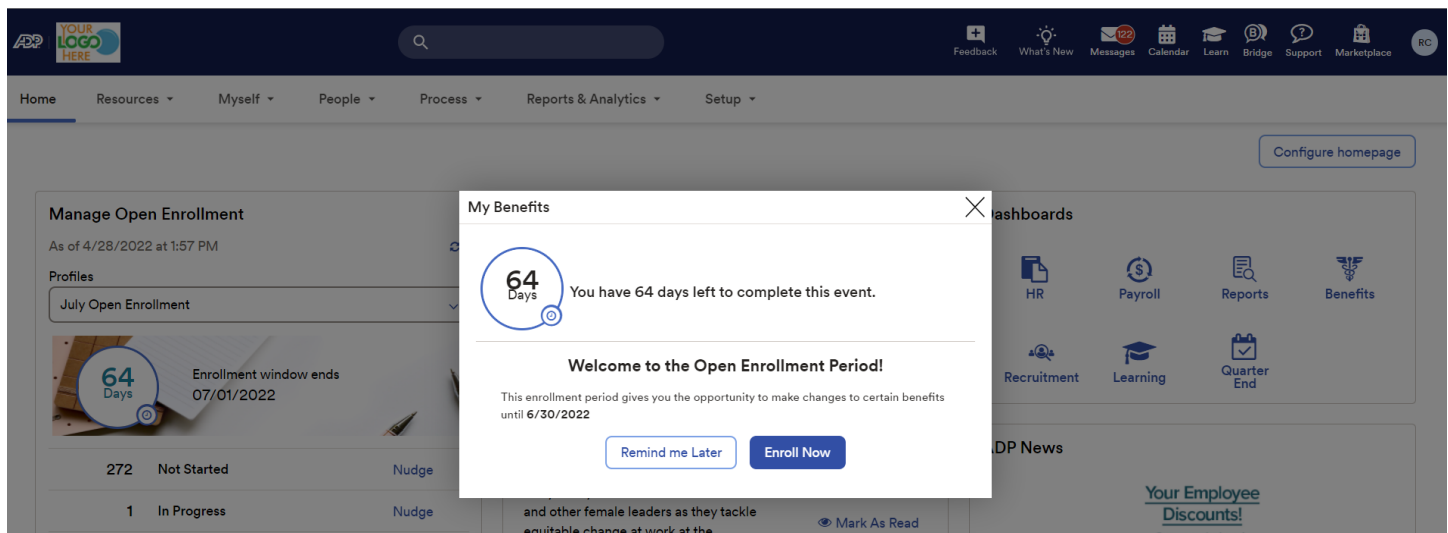
Enter your User ID and password, and then click **Sign In**.

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.



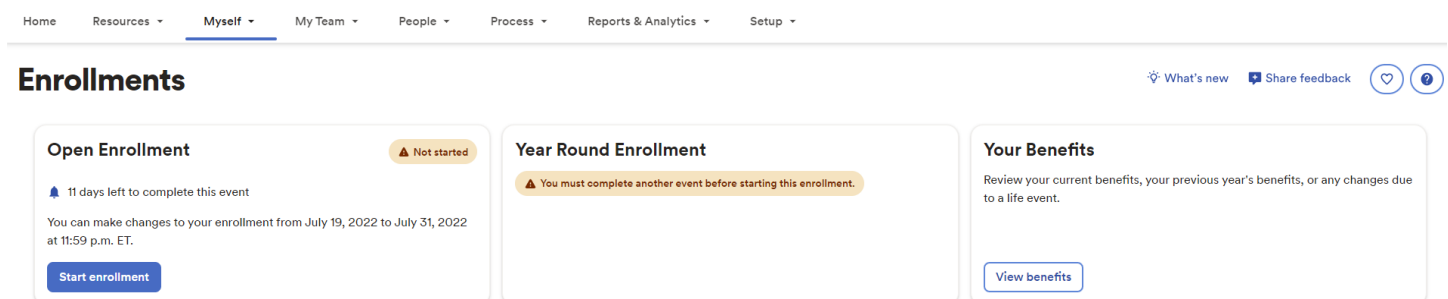
Upon logging in, you will be presented with a pop-up showing important information about this Open Enrollment period. You can click **Enroll Now** or **Remind Me Later**.

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 dashboard with a dark blue header. A search bar is in the center. On the right, there are icons for Feedback, What's New, Messages, Calendar, Learn, Bridge, Support, Marketplace, and a user profile icon. Below the header is a navigation bar with links: Home, Resources, Myself, People, Process, Reports & Analytics, and Setup. A 'Configure homepage' button is on the right. The main content area is divided into two columns. The left column has a 'Manage Open Enrollment' section with a 'July Open Enrollment' profile. It shows a '64 Days' countdown and an enrollment window ending on 07/01/2022. Below this is a table with two rows: '272 Not Started' and '1 In Progress', both with 'Nudge' buttons. The right column has a 'Dashboards' section with icons for HR, Payroll, Reports, Benefits, Recruitment, Learning, and Quarter End. Below this is an 'ADP News' section with a headline 'Your Employee Discounts!'. A 'My Benefits' pop-up is centered over the dashboard. It has a title 'My Benefits' and a close button. The pop-up shows a '64 Days' countdown and the text 'You have 64 days left to complete this event.' Below this is a 'Welcome to the Open Enrollment Period!' message, followed by a paragraph explaining the enrollment period. At the bottom of the pop-up are two buttons: 'Remind me Later' and 'Enroll Now'.

Selecting **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 header is dark blue with the same navigation bar as the previous screenshot. The main content area has a white background. At the top left is the 'Enrollments' title. On the right, there are links for 'What's new', 'Share feedback', and a heart icon. Below the title is a grid of three cards. The first card is 'Open Enrollment' with a 'Not started' status. It shows '11 days left to complete this event' and a paragraph about the enrollment window from July 19, 2022 to July 31, 2022. At the bottom is a 'Start enrollment' button. The second card is 'Year Round Enrollment' with a status 'You must complete another event before starting this enrollment.' The third card is 'Your Benefits' with a paragraph about reviewing current benefits and a 'View benefits' button.



You will then be taken to the **Welcome Note**. Please review all information on this page as there are often important details regarding your Open Enrollment options. If any tobacco attestation requirements are in place you must provide the information as indicated before clicking **Continue**.

Open Enrollment

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

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.

Are you a Tobacco User?

- ☒ No
☐ Yes

1. Are you a Tobacco User?

Continue

Finish later





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/acknowledged before you are able to move forward. These plans could require a beneficiary to be designated, a waive reason to be provided, or for PCP-ID (if applicable).*

Action Required

These plans need your attention. You can waive a benefit or click View available plans to update your information.

Medical

RC HDHP

You have 1 benefit options available to choose from. See what is right for you!

[View available plans](#)

[X Waive benefit](#)

Action Required

Dental

Dental, Dental High Deductible

You have 1 benefit options available to choose from. See what is right for you!

[View available plans](#)

[X Waive benefit](#)

Action Required

- **Enrolled Plans** – *These are benefit plans that you are already enrolled in and can make changes. If you decide that you would like to waive a benefit or unenroll from a benefit within this section, it will move that benefit to the Eligible Benefits section.*

Enrolled plans

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

Employee Life

Effective: January 1, 2022

RC Employee Life

\$100,000.00
Employee Coverage

[View available plans](#)

Enrolled

\$5.65
Per Paycheck

- **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.*

Eligible Benefits

You're eligible to enroll in the following plans.

Health Savings Account

RC HSA

You have 1 benefit options available to choose from. See what is right for you!

[View available plans](#)

Vision

RC VSP Vision

You have 1 benefit options available to choose from. See what is right for you!

[View available plans](#)

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

 **Medical**

Action Required

RC HDHP

You have 1 benefit options available to choose from. See what is right for you!

[View available plans](#) [X Waive benefit](#)

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



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. You can also add or edit dependents as needed by selecting **Manage dependents**.

Vision

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

Covered Individuals

☒ Jennifer Aniston (You) ☒ Brad Pitt (Domestic Partner)

 [Manage dependents](#)

Available Plans

RC VSP Vision

(2 individuals selected) [Additional details](#)

Provider

Vision Service Plan (VSP)

\$5.08

Employee per paycheck cost

[Preview and enroll](#)

[Cancel](#)

[Waive benefit](#)

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.





Preview and enroll may include some additional information needed (i.e., PCP-ID and beneficiary designations).

Preview and Enroll

Covered Individual

Jennifer Aniston (You)

Primary Care Physician Details

Jennifer Aniston

You

Enter Primary Care Physician Details

☒ Aetna

First Name

Last Name

ID Number

Confirm

Back

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 **Enrolled Plans**.

Open Enrollment

You enrolled in RC VSP Vision.

28 days left to enroll

Effective: November 1, 2022

Your cost per paycheck

\$18.07

Go to section



Voluntary Life Elections and Beneficiaries:

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

Voluntary EE Life

Available Plans

Voluntary EE Life
(1 individual selected)

Provider
Guardian Life

Select Coverage Amount
Additional Coverage
\$190,000.00

Total Actual Coverage Amount
\$190,000.00
\$10.74
Employee per paycheck cost

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 \$100,000.00. That amount requires Evidence of Insurability (EOI) and approval from the insurance carrier.

Preview and enroll

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.

To continue click **Preview and enroll**.



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).

Preview and Enroll

Guardian Life: Voluntary EE Life

Covered Individual

Jennifer Aniston (You)

Coverage

Total Actual Coverage Amount

\$190,000.00

Beneficiaries

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%.

	Primary	Secondary
Brad Pitt Domestic Partner	100 %	0 %

Confirm

Back

Click **Confirm** to save your enrollment election.



Continue through each plan type until all elections are complete and all tasks under the **Action Required** section are addressed. Review all selections/changes including the **Eligible Benefits** towards the bottom. When you have confirmed them, click **Submit Enrollment**.

Open Enrollment 2023


28 days left to enroll
 Effective: November 1, 2022

Your cost per paycheck
\$28.81

Go to section

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.

 Vision Effective: November 1, 2022 RC VSP Vision \$5.08 Per Paycheck Who is covered? You and Brad Pitt View available plans X Waive benefit	 Employee Life Effective: January 1, 2022 RC Employee Life \$5.65 Per Paycheck \$100,000.00 Employee Coverage View available plans
 Employee Life Back to welcome Finish later Submit enrollment	 Employee Life View available plans

Submit enrollment

You are about to submit your enrollment. Do you want to continue?
 You can make changes until August 31, 2022 11:59 PM EDT.

Yes No

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

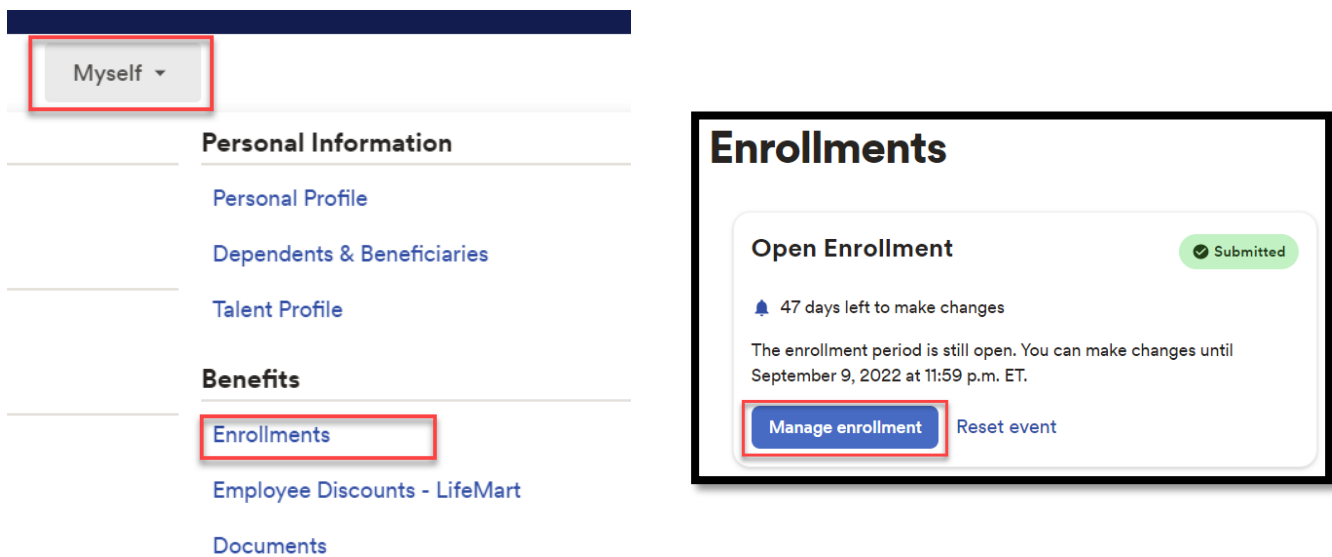
Review your current benefits, your previous year's benefits, or any changes due to a life event.

[View benefits](#)



Note that your benefit elections will not be processed until you click **Submit Enrollment**. If you click **Finish later** instead, these enrollments will not be submitted to your HR team until you fully submit the enrollment changes.

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.



Myself ▾

Personal Information

- Personal Profile
- Dependents & Beneficiaries
- Talent Profile

Benefits

- Enrollments**
- Employee Discounts - LifeMart
- Documents

Enrollments

Open Enrollment

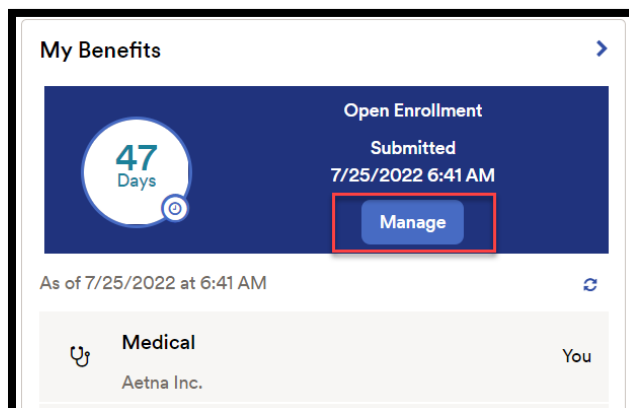
Submitted

47 days left to make changes

The enrollment period is still open. You can make changes until September 9, 2022 at 11:59 p.m. ET.

Manage enrollment
Reset event

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.



My Benefits >

47 Days

Open Enrollment
Submitted
7/25/2022 6:41 AM
Manage

As of 7/25/2022 at 6:41 AM


Medical
Aetna Inc.

You

