



Employee Self- Service Guide

Open Enrollment
Instructions for ADP
Workforce Now®



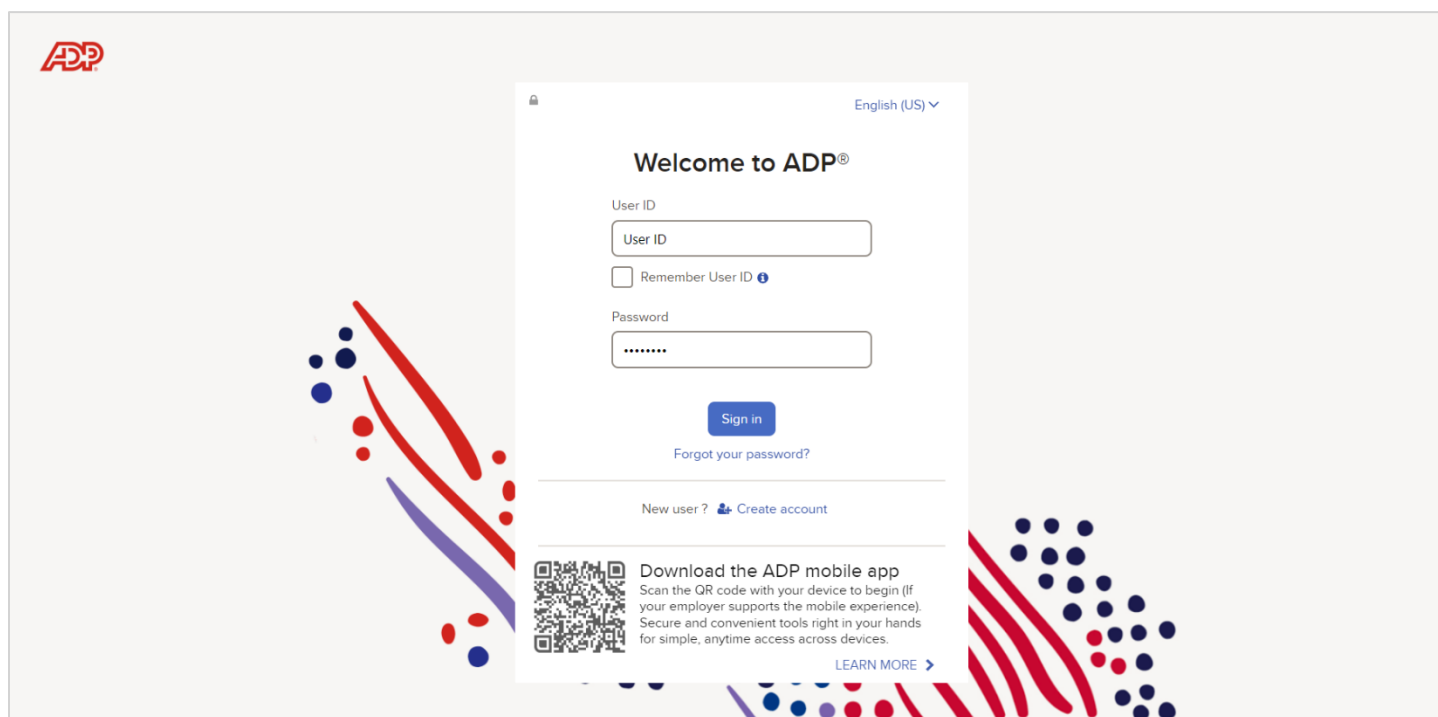
Getting Started

Accessing the Employee Self-Service Website

Hello!

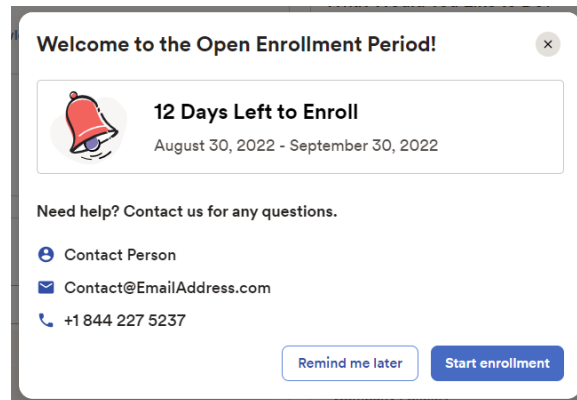
We're excited to announce the start of Open Enrollment on the Employee Self-Service website! This guide explains the steps you need to take to complete your annual enrollment tasks.

First, log into ADP Workforce Now® using your current User ID and Password. If you do not have an account or have forgotten your existing credentials, refer to this [quick reference guide](#).

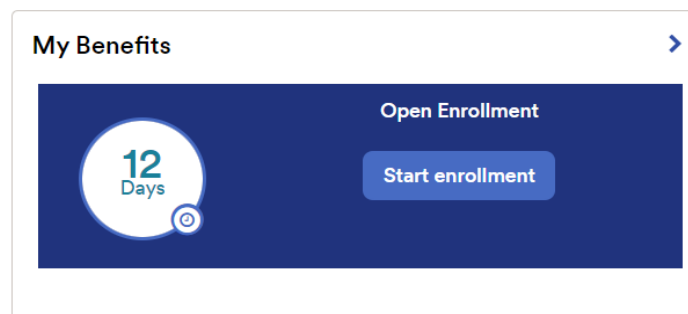


Navigating to the Enrollments Page

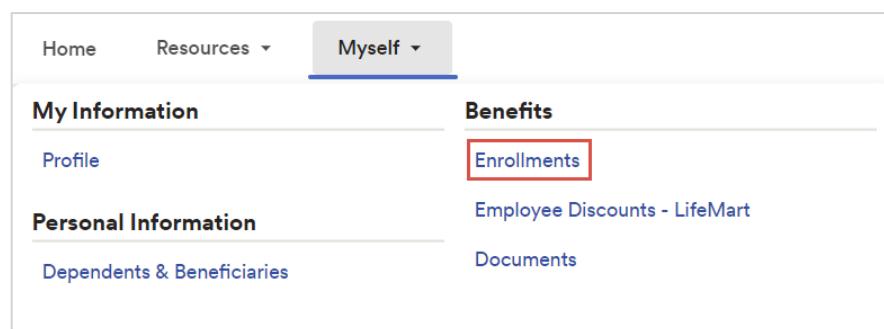
Once you've logged in, the first thing you may see is a pop-up reminding you of the Open Enrollment period. You'll see the days remaining, contact info and the **Start Enrollment** button to initiate it.



Another way to access your enrollment is through the **Home** page > **My Benefits** > **Start enrollment**.



Lastly, you can use the top menu to navigate to **Myself** > **Benefits** > **Enrollments**.



Enrollment Page Overview

This page will contain several benefit-related cards, such as **Open Enrollment** (where you can start your enrollment), **Your Benefits** (where you can view your current benefits), and **Dependents & Beneficiaries** (where you can review and edit your dependent/beneficiary information).

Enrollments

[What's new](#) [Share feedback](#) [Heart](#) [Help](#)

Open Enrollment

Not started

🔔 12 days left to complete this event

You can make changes to your enrollment from August 30, 2022 to September 30, 2022 at 11:59 p.m. ET.

[Start enrollment](#)

Year Round Enrollment

Not started

You can enroll or make changes at any time.

[Start enrollment](#)

Your Benefits

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

[View benefits](#)

Report a Life Change

Qualifying Events, like a marriage or losing coverage, allows you to request changes to benefits outside of Open Enrollment.

[Report a change](#)

Dependents & Beneficiaries

View or edit dependent and beneficiary information, or add a new dependent or beneficiary

[Manage](#)

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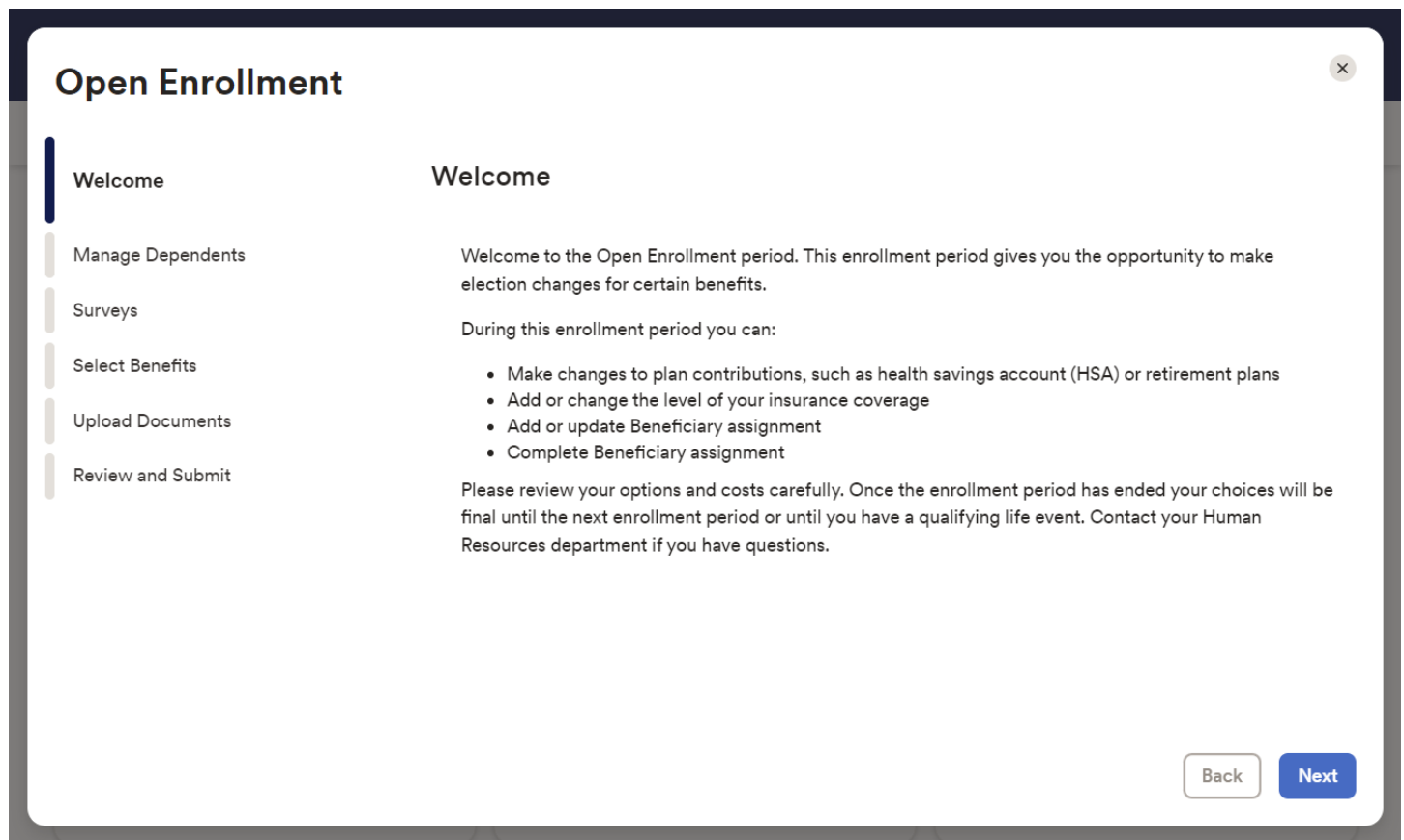
[Learn More](#)

Note: We recommend that you add new dependents/beneficiaries within the Open Enrollment card.

Navigating the Enrollment Process

Step 1: Welcome

Once you've started your enrollment, the **Welcome** screen will be the first thing you see. Your employer may customize this message and include essential benefits information. On the left side, you'll also notice there are steps to help you navigate the enrollment from start to finish.



Note: the enrollment wizard steps (left) may vary on your company's setup.

Navigating the Enrollment Process

Step 2: Manage Dependents

Take a moment to review your dependents and beneficiaries on this screen. Click **add dependent or beneficiary** should you need to add anyone else to coverage.

Open Enrollment

Welcome

Manage Dependents

Surveys

Select Benefits

Upload Documents

Review and Submit

Manage Dependents

Before you continue, take a moment to review your Dependent and Beneficiary information and ensure things are up to date.

[Add dependent or beneficiary](#)

Your Spouse	Child One	Child Two
Type Dependent	Type Dependent	Type Dependent
Relationship Spouse	Relationship Child	Relationship Child

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

Requirements for Dependents

Select a Relationship: Spouse; Domestic Partner; Child; Child of Domestic Partner

Basic Information: First & Last Name + Birth Date + Gender + Tax ID (SSN) + Address + Contact Info

Note: Domestic Partner and Child of Domestic Partner will only display if they are recognized by your employer.

Requirements for Beneficiaries

Select a Relationship: Organization or Person

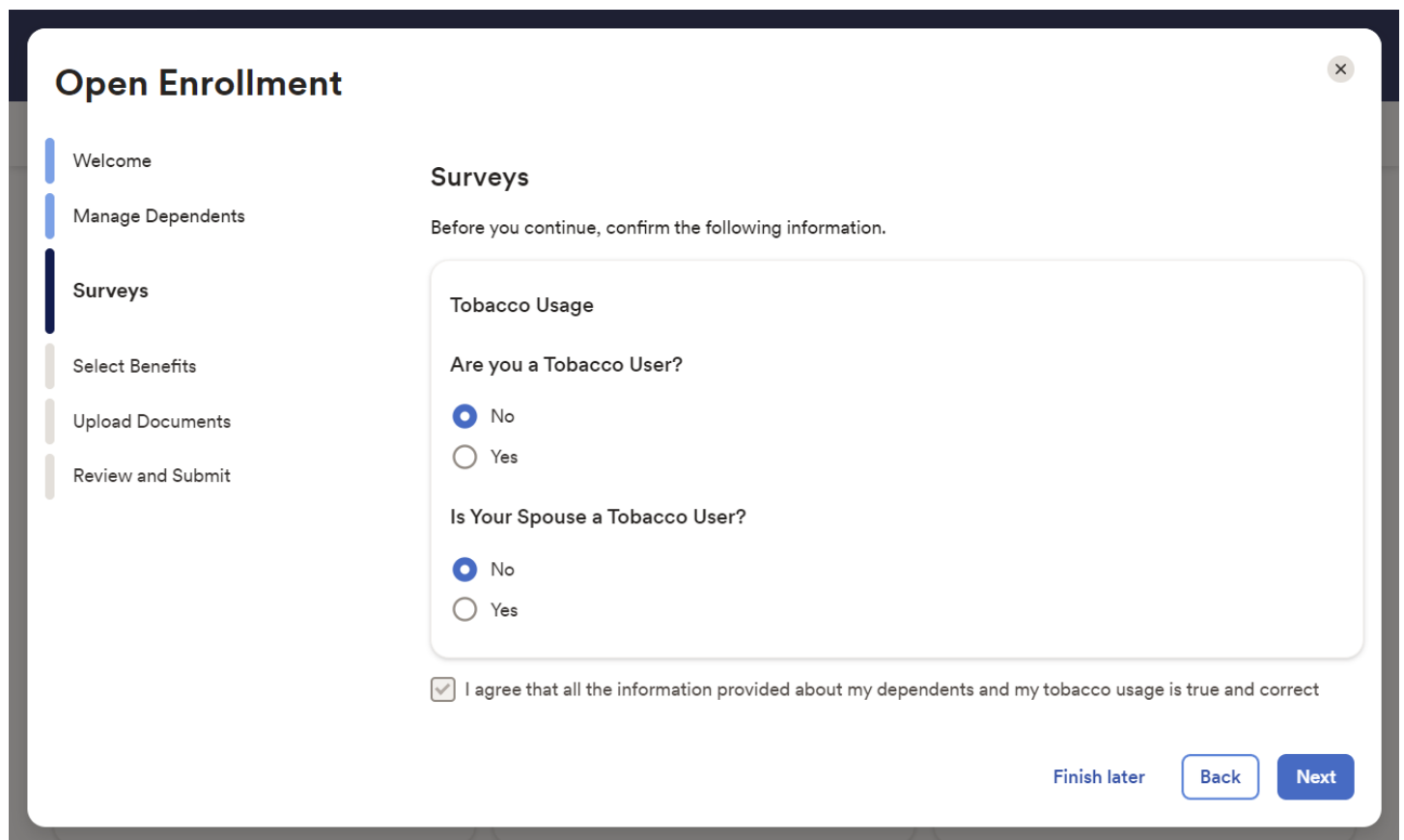
Basic Information: Name + Relation + Address + Contact Info

Note: Please include as much information as you can about a beneficiary.

Navigating the Enrollment Process

Step 3: Surveys

The Surveys screen will only display if your employer requires a tobacco attestation for yourself and your dependents (over age 18). Simply answer **Yes/No** and agree to the disclosure before proceeding.



The screenshot shows a web interface for the 'Open Enrollment' process. On the left is a vertical sidebar with six items: 'Welcome', 'Manage Dependents', 'Surveys' (which is highlighted with a dark blue bar), 'Select Benefits', 'Upload Documents', and 'Review and Submit'. The main content area is titled 'Open Enrollment' at the top left and has a close button (X) at the top right. Below the title, the section is labeled 'Surveys'. A prompt reads: 'Before you continue, confirm the following information.' Below this is a rounded rectangular box titled 'Tobacco Usage'. Inside this box are two questions: 'Are you a Tobacco User?' and 'Is Your Spouse a Tobacco User?'. Each question has two radio button options: 'No' (which is selected with a blue dot) and 'Yes'. Below the 'Tobacco Usage' box is a checkbox that is checked, with the text 'I agree that all the information provided about my dependents and my tobacco usage is true and correct'. At the bottom right of the main content area are three buttons: 'Finish later' (text link), 'Back' (outline button), and 'Next' (solid blue button).

Open Enrollment

Surveys

Before you continue, confirm the following information.

Tobacco Usage

Are you a Tobacco User?

☒ No
☐ Yes

Is Your Spouse a Tobacco User?

☒ No
☐ Yes

☒ I agree that all the information provided about my dependents and my tobacco usage is true and correct

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

Navigating the Enrollment Process

Step 4: Select Benefits

The **Select Benefits** screen will group your benefits into different sections and categorize them by plan type, such as Medical, Dental, Vision, etc.

The screenshot shows the 'Open Enrollment' interface with a sidebar on the left containing: Welcome, Manage Dependents, Surveys, **Select Benefits**, Upload Documents, and Review and Submit. The main content area is titled 'Select Benefits' and includes a top summary bar with '11 days left to enroll' (Effective: January 1, 2023), 'Your cost per paycheck \$0.00', and a 'Go to section' dropdown. Below this, the 'Action Required' section states: '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.' It features a 'Medical' category with a 'Waive benefit' button and a 'View all plans' button. A callout box 'Plans you'll have to waive or enroll' points to the 'Waive benefit' button. The 'Selected Plans' section shows 'Employee Life' with 'Basic Life (DEMO-HRLY)' selected (Effective: January 1, 2023, \$50,000.00, Employee Coverage, Your Cost \$0.00). A callout box 'Plans you've enrolled into' points to this section. The 'Eligible Plans' section shows 'Child Life' with 'Voluntary Child Life, DEMO' (You have 1 benefit options available to choose from). A callout box 'Optional plans you can enroll' points to this section. A 'View all available plans to choose from' callout box points to the 'View all plans' button in the Medical section. At the bottom are 'Finish later', 'Back', and 'Next' buttons.

Open Enrollment

Select Benefits

11 days left to enroll
Effective: January 1, 2023

Your cost per paycheck
\$0.00

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.

Select a waive reason

Medical

Multiple available options
You have 5 benefit options available to choose from. See what is right for you!

Waive benefit View all plans

Plans you'll have to waive or enroll

Selected Plans

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

Employee Life

View all plans

Basic Life (DEMO-HRLY)
Effective: January 1, 2023
\$50,000.00
Employee Coverage
Your Cost **\$0.00**

Plans you've enrolled into

Eligible Plans

You're eligible to enroll in the following plans.

Child Life

View all plans

Voluntary Child Life, DEMO
You have 1 benefit options available to choose from. See what is right for you!

Optional plans you can enroll

View all available plans to choose from

Finish later Back Next

Navigating the Enrollment Process

Step 4: Select Benefits (continued)

When viewing all available plans, you can select whom you want to cover and which plan you'd like to enroll in. As you select or deselect your dependents, the plan costs will update automatically.

To view plan details, select **plan comparison** or **additional details** to compare coverage differences.

The screenshot shows the 'Available Plans' section of an enrollment portal. At the top, a notification bar states 'Plan costs updated.' Below this, the 'Medical' section prompts the user to 'Select the plan that meets your needs and add the dependents you want to cover.' A light blue banner indicates a requirement: 'Your company requires you to enter a reason to waive this coverage.' Under 'Covered Individuals', four checkboxes are shown, all of which are checked: 'Alex Employee (You)', 'Your Spouse (Spouse)', 'Child One (Child)', and 'Child Two (Child)'. Below this, it states '5 Plans Available' with a link to 'Plan comparison'. The first plan listed is 'HDHP, DEMO' with '(4 individuals selected)' and a link to 'Additional details'. The provider is listed as 'Your Health Provider' and the cost is '\$77.82'. A 'Select plan' button is located below the plan details. At the bottom right of the interface are 'Waive benefit' and 'Cancel' buttons.

After deciding on a plan, click **select plan** followed by **confirm details**. Some plans may require additional information, such as a Primary Care Physician (PCP), in order to **confirm** your selection.

This close-up shows the 'HDHP, DEMO' plan selection. It includes the text '(4 individuals selected)', 'Additional details' link, 'Provider: Your Health Provider', and 'Your Cost: \$77.82'. A yellow confirmation bar at the bottom contains a warning icon and the text 'Confirm the details for this plan selection or waive this benefit.' A 'Confirm details' button is positioned on the right side of this bar.

Navigating the Enrollment Process

Step 4: Select Benefits (continued)

For life insurance benefits, it is critical that you assign your beneficiaries to the plan. When enrolling, you may divide percentages to Primary Beneficiaries (individuals who will receive the payout) and Secondary Beneficiaries (individuals next in line should the primary be ineligible for payout). If you need to add more, click **add beneficiary**.

Note: Some voluntary insurance plans may require that you complete an **Evidence of Insurability (EOI)** form online or by paper to be approved for additional coverage. It is also recommended that you speak to your legal counsel should you have questions about adding an organization or person under age 18.

Available Plans

Insurance - Employee Life
Select the plan that meets your needs.

Covered Individual

☒ Alex Employee (You)

1 Plan Available

Basic Life, DEMO-HRLY
(1 individual selected) [Additional details](#)

Provider

Your Life Insurance Provider

Base Amount

\$50,000.00

Per Paycheck Costs

Your Cost

\$0.00

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
Your Spouse Spouse	100 %	0 %
Child One Child	0 %	50 %
Child Two Child	0 %	50 %
Total	100.00%	100.00%

Confirm the details for this plan selection.

Confirm details

Cancel

Navigating the Enrollment Process

Step 5: Uploading Documents

Depending on your employer, the upload documents step can be optional or required. This is where your employer can enter a message to all employees regarding documents that need to be uploaded during the enrollment process. Simply choose a file to upload and click **Upload Document** before proceeding to the next step.

Open Enrollment

Welcome

Manage Dependents

Surveys

Select Benefits

Upload Documents

Review and Submit

Upload Documents

This is where your employer can enter a message to all employees regarding documents that need to be uploaded during the enrollment process. This step may be optional or required.

File must be less than 5MB. [Accepted Formats](#)

Drag and drop your files here, or select them from your computer
or
[Choose file to upload](#)

Upload Document

Click Upload Document to save the documents to your account.

Finish later

Back

Next

Navigating the Enrollment Process

Step 6: Review and Submit

Take a moment to review all your elections and plan costs. Once you're ready to finalize your elections, click **Submit Enrollment**.

If you still need time to make decisions, click **Finish Later**. Be sure to come back before the enrollment period ends and click **Manage Enrollment** to continue finalizing your changes.

Open Enrollment

Welcome

Manage Dependents

Surveys

Select Benefits

Upload Documents

Review and Submit

Review and Submit

10 days left to enroll
Effective: January 1, 2023

Your cost per paycheck
\$77.82

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: January 1, 2023
Enrolled

HDHP
DEMO
Your Cost
\$77.82
Who is covered?
You, Your Spouse, Child One and Child Two

Waived Plans

You waived the following benefits.

Dental
Effective Date: January 1, 2023
Waive Reason: Do not want to be insured
Waived

Vision
Effective Date: January 1, 2023
Waive Reason: Participating in Spouse's Plan
Waived

Finish later Back **Submit enrollment**

Now you're done! You'll receive a confirmation message after successfully completing your Open Enrollment.