

# Employee Self- Service Guide

Open Enrollment  
Instructions for ADP  
Workforce Now<sup>®</sup>



Always Designing  
for People<sup>®</sup>

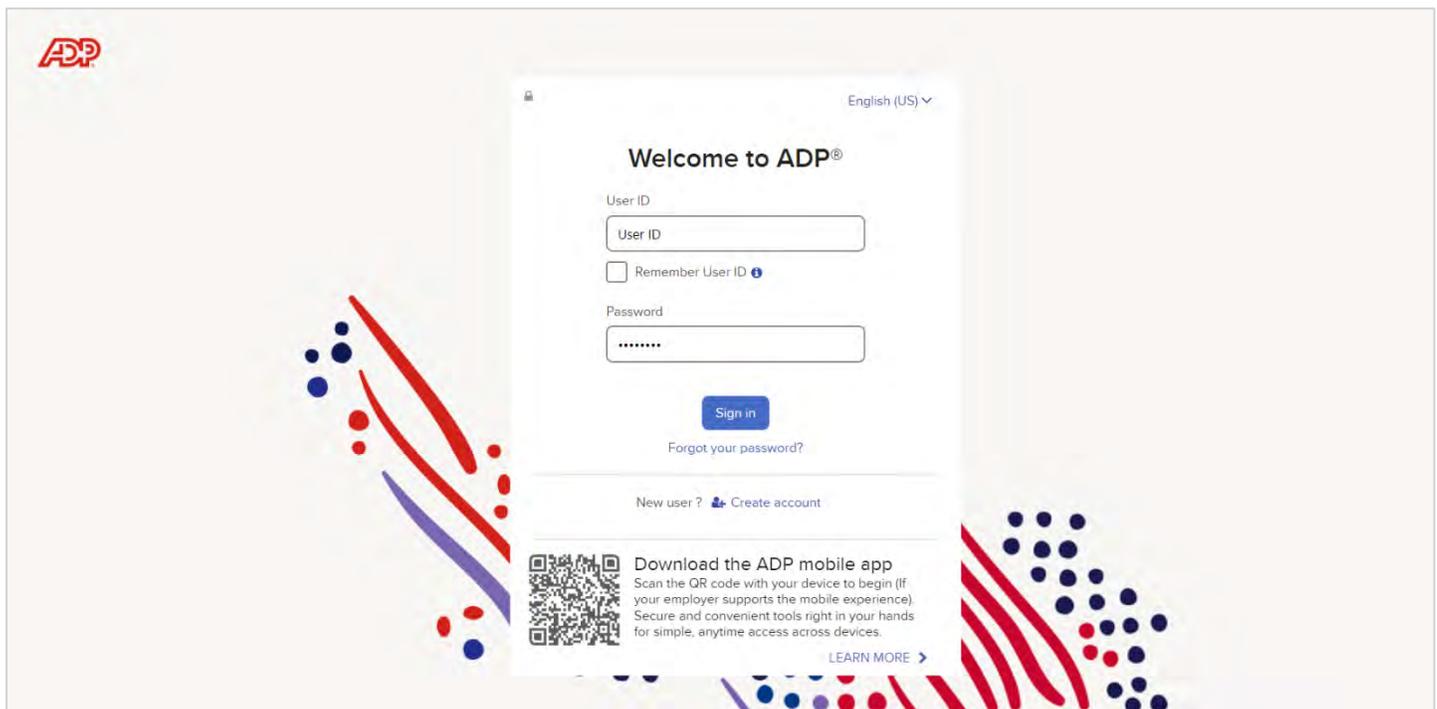
# Getting Started

## Accessing the Employee Self-Service Website

Hello!

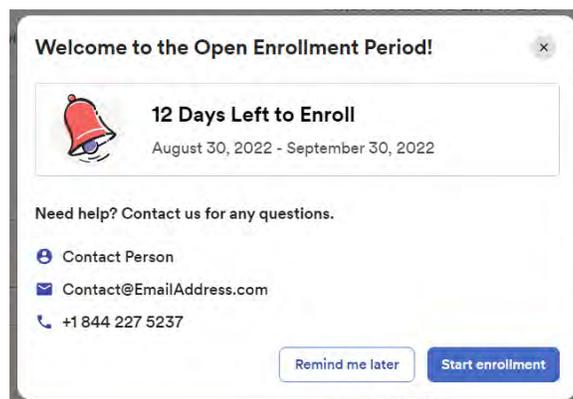
We're excited to announce the start of Open Enrollment on the Employee Self-Service website! This guide explains the steps you need to take to complete your annual enrollment tasks.

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](#).

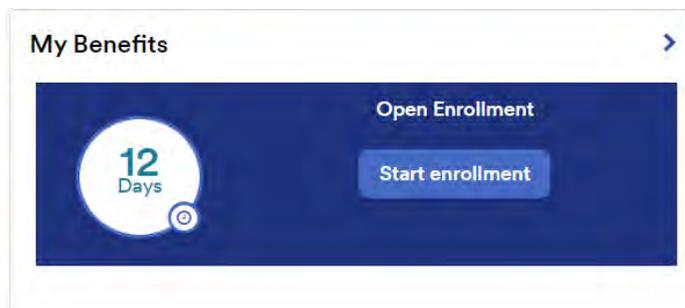


# Navigating to the Enrollments Page

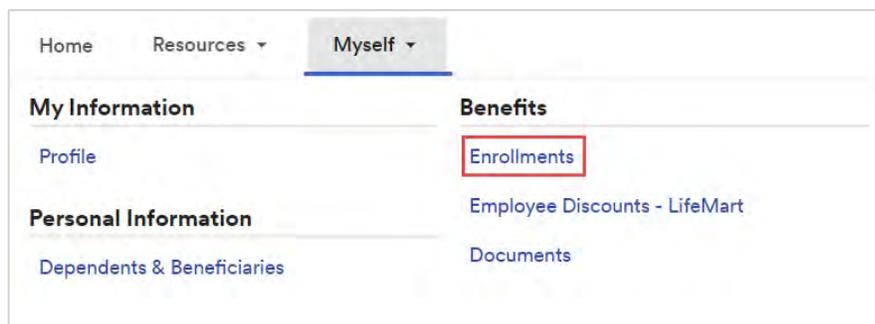
Once you've logged in, the first thing you may see is a pop-up reminding you of the Open Enrollment period. You'll see the days remaining, contact info and the **Start Enrollment** button to initiate it.



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).

The screenshot shows a user interface titled "Enrollments". At the top right, there are links for "What's new", "Share feedback", a heart icon, and a help icon. The main content area consists of six cards arranged in a 2x3 grid:

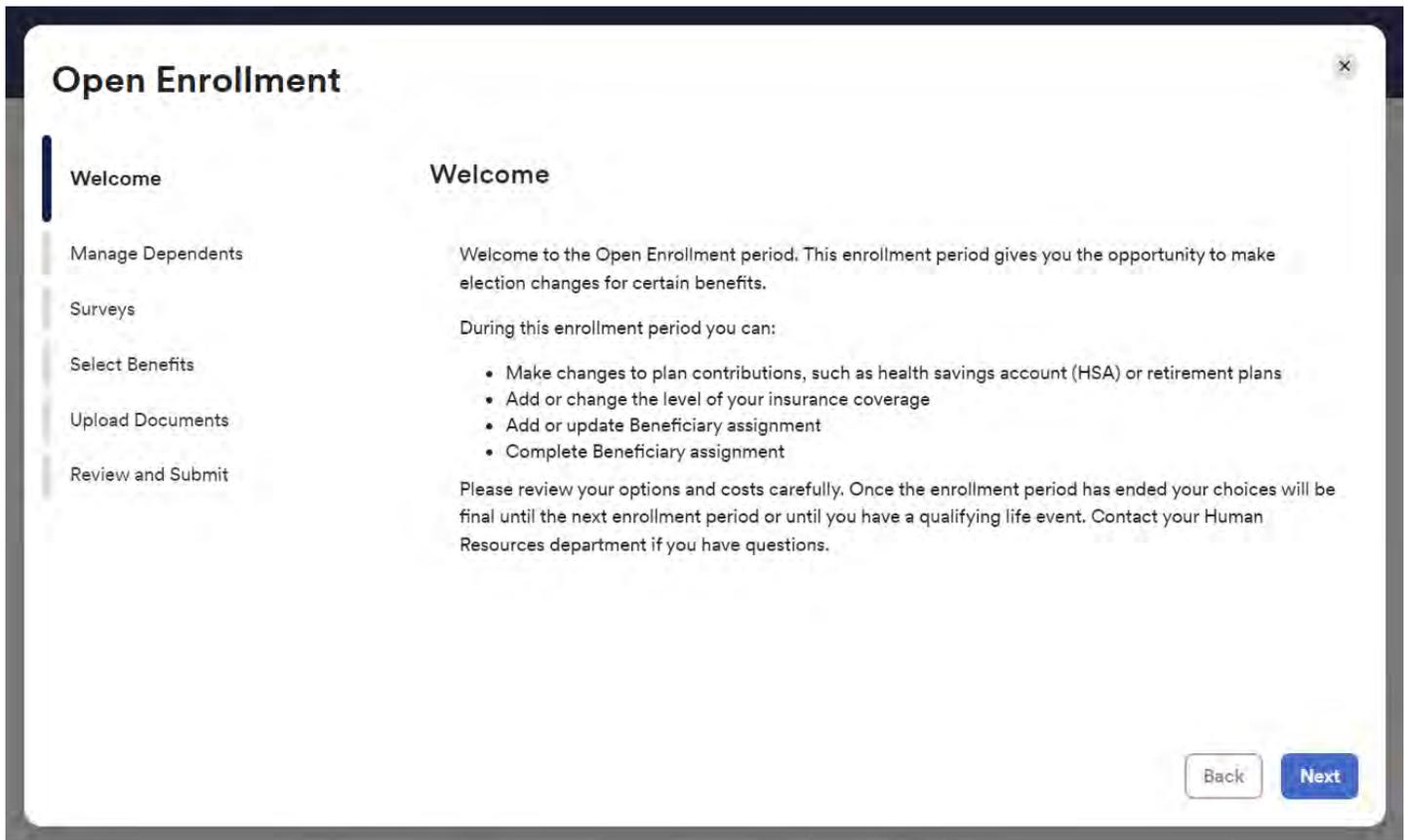
- Open Enrollment:** Features a "Not started" status, a notification that 12 days are left to complete the event, and a date range from August 30, 2022, to September 30, 2022, at 11:59 p.m. ET. A "Start enrollment" button is present.
- Year Round Enrollment:** Features a "Not started" status and the text "You can enroll or make changes at any time." A "Start enrollment" button is present.
- Your Benefits:** Text reads "Review your current benefits, your previous year's benefits, or any changes due to a life event." A "View benefits" button is present.
- Report a Life Change:** Text reads "Qualifying Events, like a marriage or losing coverage, allows you to request changes to benefits outside of Open Enrollment." A "Report a change" button is present.
- Dependents & Beneficiaries:** Text reads "View or edit dependent and beneficiary information, or add a new dependent or beneficiary." A "Manage" button is present.
- Wisely®:** Promotes a banking alternative with the text "Tired of hidden bank fees? Try Wisely, a banking alternative. No monthly or overdraft fees. No minimum balance." A "Learn More" button is present, along with an image of a smartphone displaying the Wisely app.

**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](#)

<b>Your Spouse</b> ⋮	<b>Child One</b> ⋮	<b>Child Two</b> ⋮
Type <b>Dependent</b>	Type <b>Dependent</b>	Type <b>Dependent</b>
Relationship <b>Spouse</b>	Relationship <b>Child</b>	Relationship <b>Child</b>

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.

**Open Enrollment**

Welcome

Manage Dependents

**Surveys**

Select Benefits

Upload Documents

Review and Submit

**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 a calendar icon, '11 days left to enroll', 'Effective: January 1, 2023', 'Your cost per paycheck \$0.00', and a 'Go to section' dropdown.
- An 'Action Required' section with a purple callout box: 'Plans you'll have to waive or enroll'. It contains text: '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.' Below this is a 'Medical' section with 'Multiple available options' and 'You have 5 benefit options available to choose from. See what is right for you!'. It features a 'Waive benefit' button (with a purple callout: 'Select a waive reason') and a 'View all plans' button.
- A 'Selected Plans' section with a purple callout box: 'Plans you've enrolled into'. It contains text: 'You are enrolled in the following plans. You can make changes until the enrollment period closes.' Below this is an 'Employee Life' section with a 'View all plans' button. A plan card for 'Basic Life (DEMO-HRLY)' is shown, marked as 'Selected' with a green checkmark. It lists 'Effective: January 1, 2023', '\$50,000.00' for 'Employee Coverage', and 'Your Cost \$0.00'.
- An 'Eligible Plans' section with a purple callout box: 'Optional plans you can enroll'. It contains text: 'You're eligible to enroll in the following plans.' Below this is a 'Child Life' section with a 'View all plans' button. A plan card for 'Voluntary Child Life, DEMO' is shown, with 'You have 1 benefit options available to choose from. See what is right for you!'.

At the bottom right, there are buttons for 'Finish later', 'Back', and '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 a web interface titled "Available Plans". At the top, there is a notification: "Plan costs updated." Below this, the "Medical" section instructs the user to "Select the plan that meets your needs and add the dependents you want to cover." A blue banner states: "Your company requires you to enter a reason to waive this coverage." Under "Covered Individuals", four options are listed with checkboxes: "Alex Employee (You)", "Your Spouse (Spouse)", "Child One (Child)", and "Child Two (Child)". All are checked. Below, it says "5 Plans Available" with a link to "Plan comparison". One plan is highlighted: "HDHP, DEMO (4 individuals selected)" with a link to "Additional details". The provider is "Your Health Provider" and the cost is "\$77.82". A "Select plan" button is visible. At the bottom right, there 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 details. It includes the text "(4 individuals selected)", "Additional details", "Provider: Your Health Provider", and "Your Cost: \$77.82". A yellow banner 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 located to the right of the banner.

# 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.

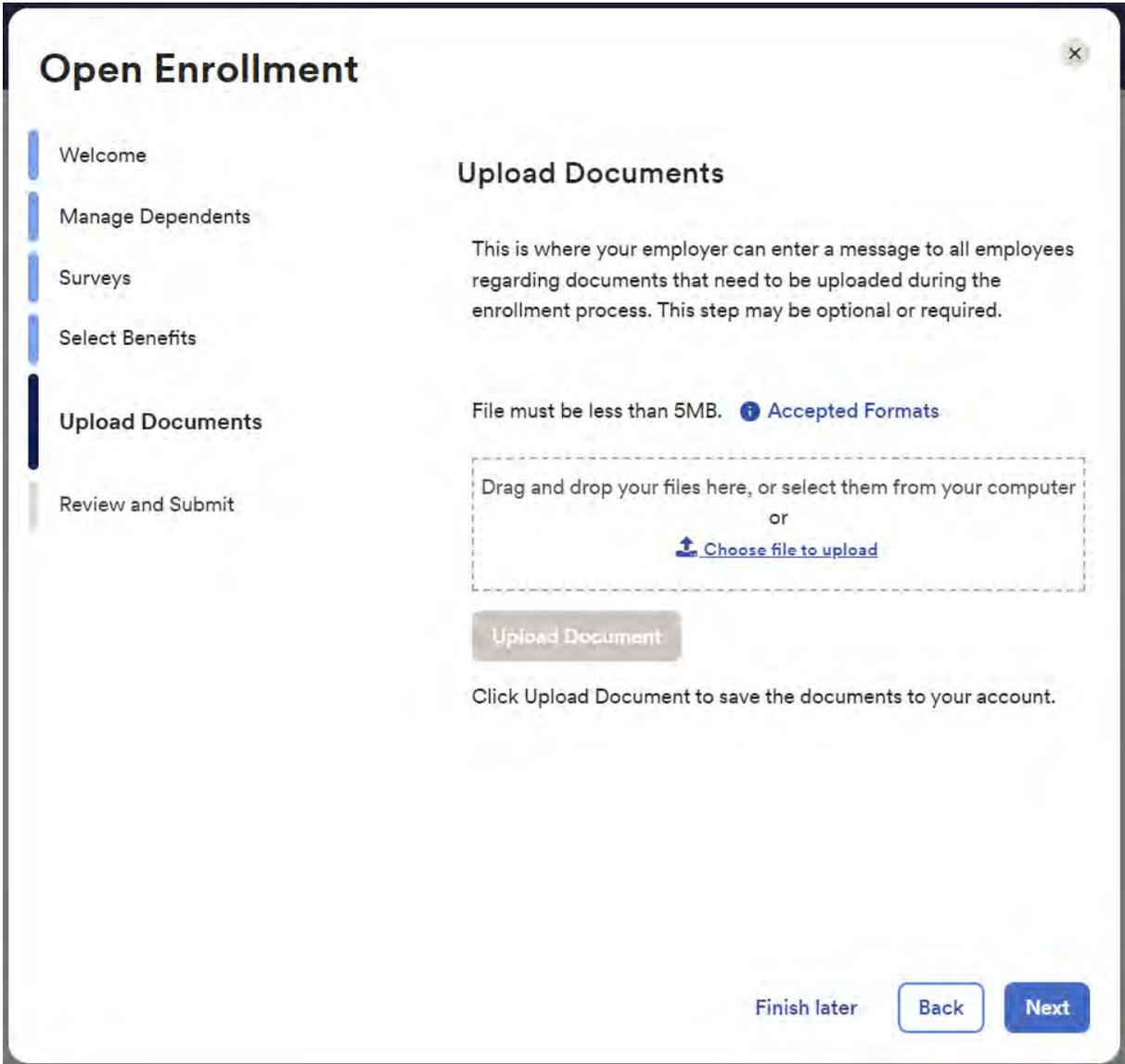
The screenshot shows a web interface for selecting an insurance plan. The main heading is "Available Plans" with a close button (X) in the top right. Below this is the section "Insurance - Employee Life" with the instruction "Select the plan that meets your needs." Underneath, there is a "Covered Individual" section listing "Alex Employee (You)". A section titled "1 Plan Available" highlights a plan: "Basic Life, DEMO-HRLY" (1 individual selected) with an "Additional details" link. The plan details include the provider "Your Life Insurance Provider" and a base amount of "\$50,000.00". A "Per Paycheck Costs" section shows a cost of "\$0.00". The "Beneficiaries" section includes an "Add beneficiary" link and instructions to allocate percentages totaling 100%. A table below shows the allocation for "Your Spouse", "Child One", and "Child Two". At the bottom, there is a "Confirm details" button and a "Cancel" button.

Beneficiary	Primary	Secondary
Your Spouse Spouse	100 %	0 %
Child One Child	0 %	50 %
Child Two Child	0 %	50 %
<b>Total</b>	<b>100.00%</b>	<b>100.00%</b>

# 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.



The screenshot shows a web interface for the 'Open Enrollment' process. On the left is a vertical navigation menu with the following items: 'Welcome', 'Manage Dependents', 'Surveys', 'Select Benefits', 'Upload Documents' (which is highlighted with a thick blue bar), and 'Review and Submit'. The main content area is titled 'Upload Documents' and contains the following text: '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.' Below this, it states 'File must be less than 5MB.' followed by a link for 'Accepted Formats'. A dashed box contains the instruction 'Drag and drop your files here, or select them from your computer or' and a link 'Choose file to upload' with an upload icon. Below the dashed box is a button labeled 'Upload Document'. At the bottom of the main area, it says 'Click Upload Document to save the documents to your account.' At the bottom right of the interface are three buttons: 'Finish later', 'Back', and '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.