



ADP® Comprehensive Services

Benefit Enrollment Instructions



Enrollment Instructions for ADP Workforce Now®

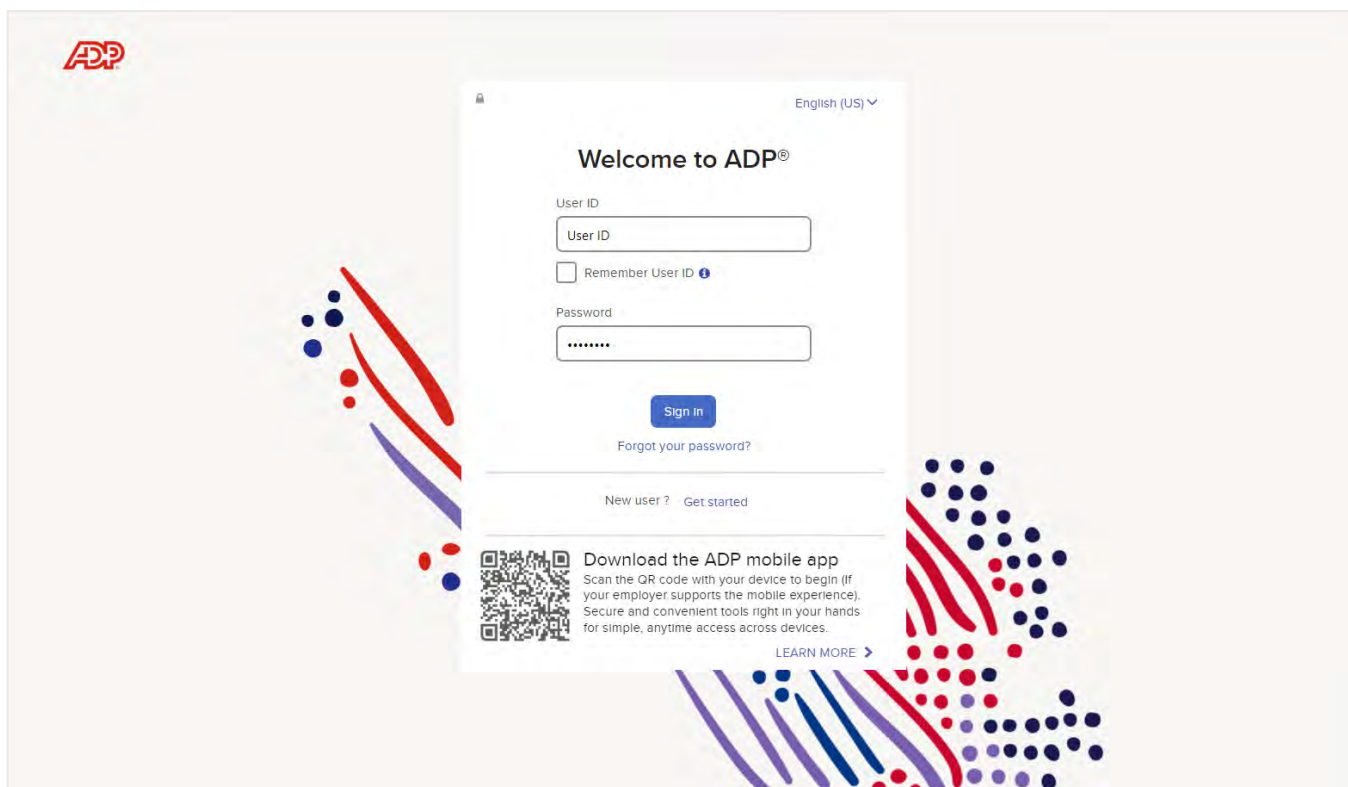


Getting Started

Welcome to ADP! It's time to enroll in your benefits.

This guide will walk you step-by-step through the benefits system, also known as the Enrollment Wizard. It will explain what you need to do to complete your enrollment.

First, let's get you logged in to the employee self-service website. Navigate to [ADP Workforce Now®](#) and sign in with your User ID and Password. If you don't have an account yet or you've forgotten your existing credentials, refer to this [quick reference guide](#).



Enrollment Page Overview

Once logged in, here are three ways to access the enrollments page:

- Simply click **Start enrollment** - as soon as you log in, you may see a pop-up display on the page.
- From the **Home** page > locate **My Benefits** > then click **Start enrollment**.
- Navigate to **Myself** > **Benefits** > **Enrollments** > **Start enrollment**.

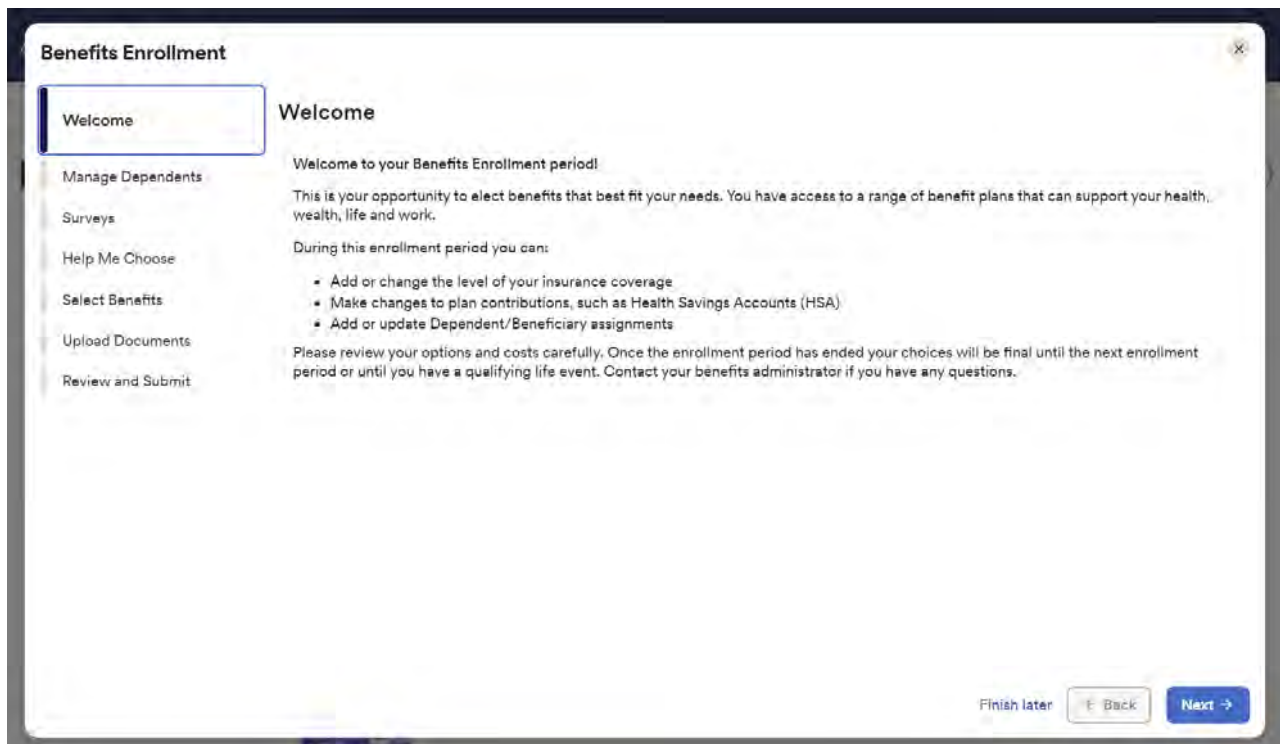
The screenshot displays a grid of six enrollment-related sections:

- Benefits Enrollment:** Features a "Not started" status, a notification for "X days left to complete this event", and a "Start enrollment" button. Text below the button reads: "Review any active enrollment events along with your submission deadline."
- Year Round Enrollment:** Features a "Submitted" status and a "Manage enrollment" button. Text below the button reads: "The Year-Round enrollment event allows you to manage your Health Savings Account and Commuter Benefit contributions only."
- Your Benefits:** Includes a "View benefits" button and text: "Review or download a copy of your current and future benefits by simply searching for your effective dates of coverage."
- Report a Life Change:** Includes a "Report a change" button and text: "Report a life event outside of your regular enrollment window, ex. add a new child or spouse to your coverage"
- Dependents and Beneficiaries:** Includes a "Manage" button and text: "Manage your dependents' personal information, as well as report a life event." A note below states: "Note: It's recommended to add new dependents during an active enrollment event."
- Wisely®:** Includes a "Learn more" button, a promotional graphic for "Need your paycheck early?", and text: "Wisely® is an optional benefit. It's a reloadable debit card that can be used for direct deposit and much more."

Navigating Enrollment

Enrollment Step: Welcome

Once you've started the enrollment, the **Welcome** screen will display important benefits information and may include a customized message from your employer.

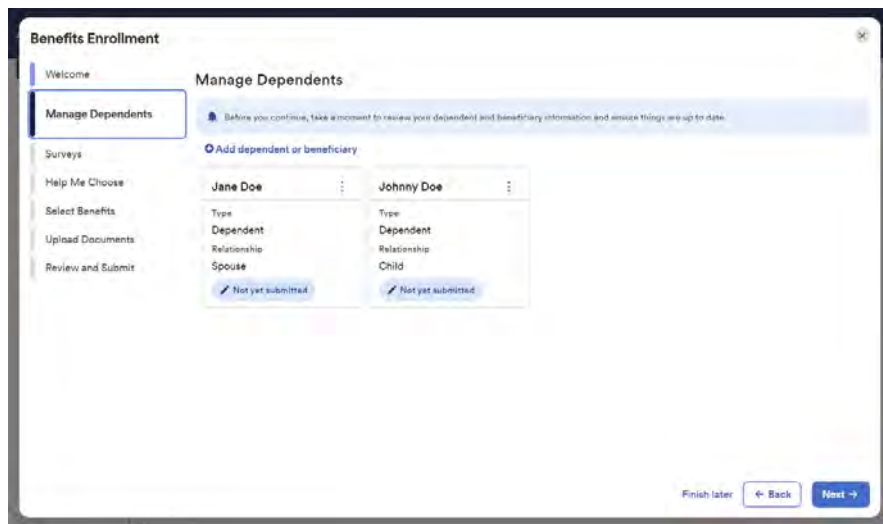


Note: The enrollment wizard steps (left) may vary on your company's setup.

Navigating Enrollment

Enrollment Step: 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.



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

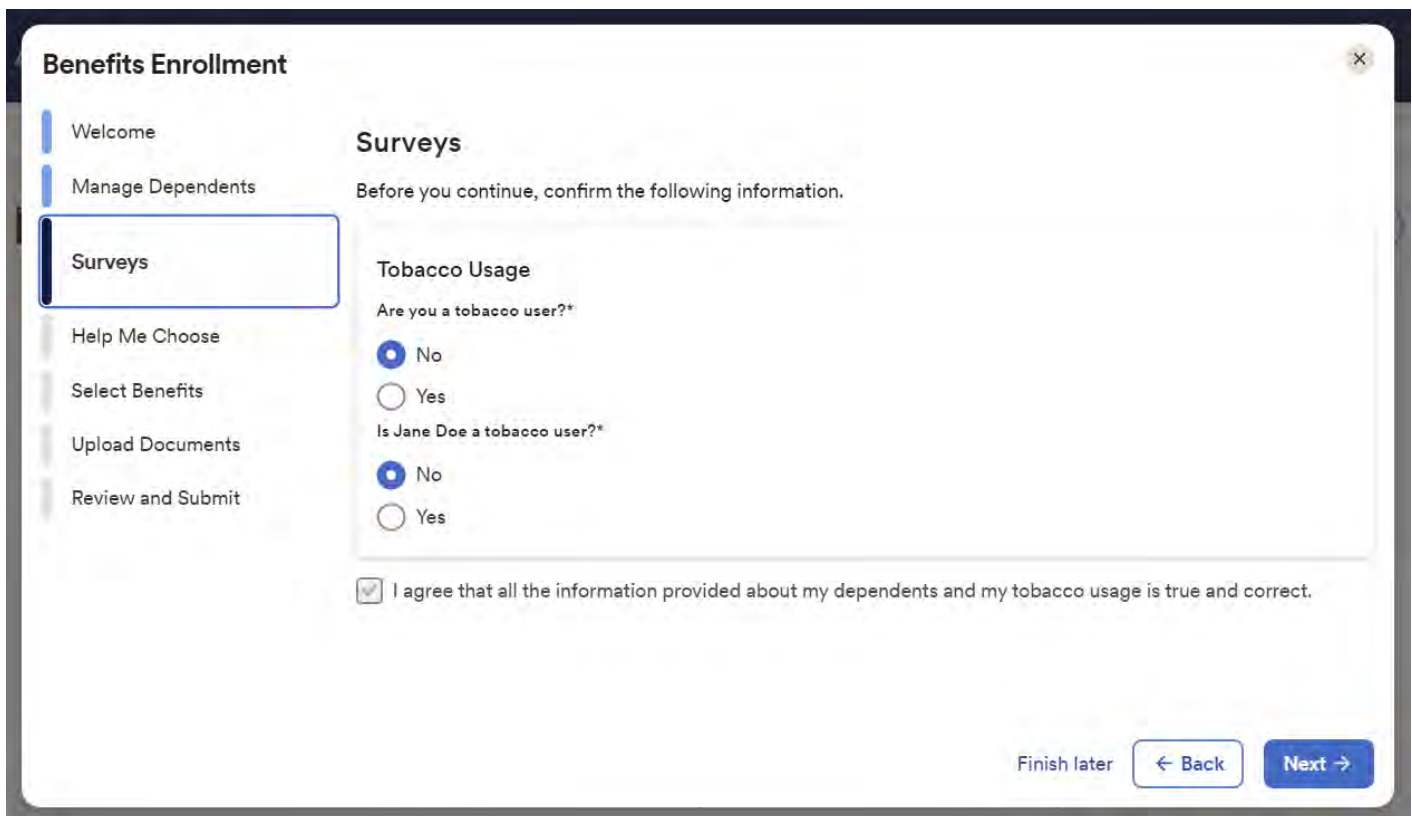
Basic Information: Name + Relation + Address + Contact Info

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

Navigating Enrollment

Enrollment Step: 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.



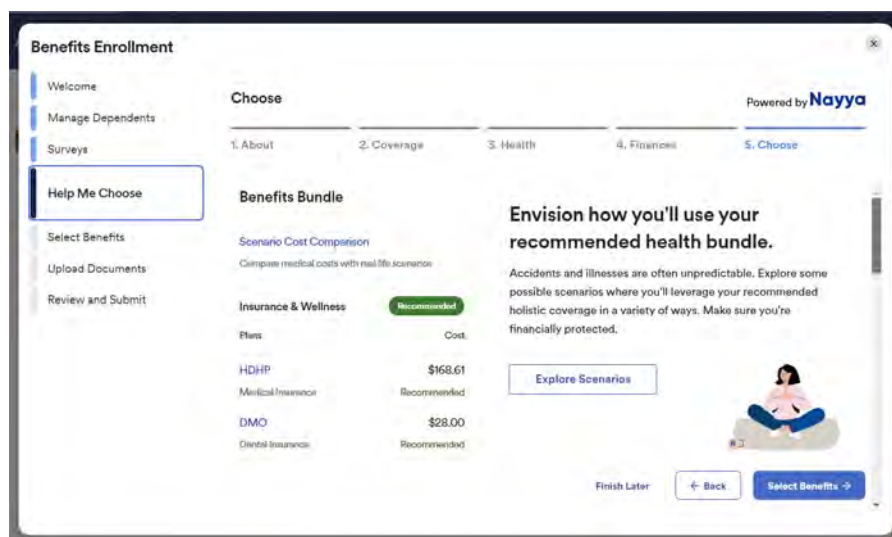
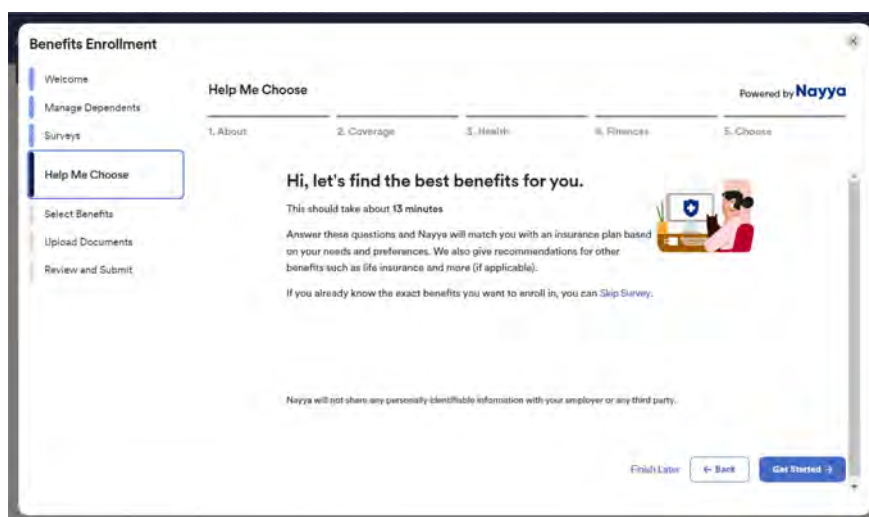
The screenshot shows a web interface for "Benefits Enrollment". On the left is a vertical navigation menu with the following items: "Welcome", "Manage Dependents", "Surveys" (highlighted with a blue border), "Help Me Choose", "Select Benefits", "Upload Documents", and "Review and Submit". The main content area is titled "Surveys" and contains the following text: "Before you continue, confirm the following information." Below this is a section titled "Tobacco Usage" with two questions: "Are you a tobacco user?*" and "Is Jane Doe a tobacco user?*", each with radio button options for "No" (selected) and "Yes". At the bottom of the form is a checkbox labeled "I agree that all the information provided about my dependents and my tobacco usage is true and correct." which is checked. In the bottom right corner, there are three buttons: "Finish later", "Back" (with a left arrow), and "Next" (with a right arrow).

Navigating Enrollment

Enrollment Step: Help Me Choose

The **Help Me Choose** screen will display only if your employer has implemented this feature. This decision support platform, powered by Nayya, walks you through an interview-based survey about your health, lifestyle and financial information. Based on what you answered, the tool will recommend the best benefit plan offerings suited for you. If you already know the exact benefits you want to enroll in, you can skip this survey.

Note: Your responses are completely confidential between you and Nayya and are never shared with your employer, ADP, or anyone else.



Navigating Enrollment

Enrollment Step: Select Benefits

The **Select Benefits** screen is where you'll view all available plans offered to you and your dependents, if applicable. You'll notice the screen is split up into three different sections and grouped by plan type.

The screenshot shows the 'Benefits Enrollment' interface. On the left is a navigation menu with 'Select Benefits' highlighted. The main content area is titled 'Select Benefits' and includes a 'Go to section' button. Below this, there's an 'Action Required' section with a 'Waive benefit' button and a 'View all plans' button. The 'Selected Plans' section shows 'Basic Life (DEMO-HRLY)' as selected. The 'Eligible Plans' section shows 'Dental' as eligible. Callouts point to these sections with the following text:

- Plans in need of attention, ex. waive or select plan
- Select a waive reason if you choose not to enroll in a plan
- Newly enrolled and already enrolled Benefit plans
- All eligible plans available to you
- View all available plans

Note: not every plan type will require a waive reason; simply skip to the next available plan if you do not wish to enroll.

The 'Waive Benefit' dialog box asks, 'Are you sure you want to waive Medical benefit?'. It includes a warning message: 'Waiving this benefit means you do not require coverage. You can still enroll in the plan while the enrollment period is open.' Below this is a 'Waive Reason' dropdown menu with the text 'Select a reason'. At the bottom are two buttons: 'No, cancel' and 'Yes, waive benefit'.

Navigating Enrollment

Enrollment Step: Select Benefits (continued)

When viewing all available plans, first select your **Covered Individuals** & review plan costs. Then click **Plan comparison** or **Additional details** to review the plan coverage. After clicking **Select plan**, you may be asked to **Confirm details**, such as adding a Primary Care Physician (PCP) or agreeing to additional attestations and surcharges.

The screenshot displays the 'Available Plans' interface. At the top, a notification 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.' Under 'Covered Individuals', there are checkboxes for 'John Doe (You)', 'Jane Doe (Spouse)', and 'Johnny Doe (Child)'. A callout box points to the 'Johnny Doe (Child)' checkbox with the text: 'Enroll or unenroll dependents from coverage.' Another callout box points to the 'Johnny Doe (Child)' checkbox with the text: 'Checking this box will update the Your Cost amount automatically'. Below the individuals, there are '5 Plans Available'. A callout box points to the 'Plan comparison' link with the text: 'Compare up to three plans at a time'. Two plan options are visible: 'HDHP, DEMO' with a 'Your Cost' of '\$108.82' and 'HMO, DEMO' with a 'Your Cost' of '\$79.00'. A callout box points to the 'Additional details' link for the HMO plan with the text: 'View additional plan info such as a Summary of Benefits & Coverage'. A yellow callout box highlights the 'Confirm details' button with the text: 'Confirm the details for this plan selection.' To the right, a 'Confirm Details' modal is shown for the 'HMO, DEMO' plan. It includes fields for 'Covered Individuals' (John Doe and Jane Doe), 'Primary Care Physician Details' (Name, Last Name, ID Number), and a 'Surveys' section with a radio button for 'I attest that I am a tobacco user' (Yes is selected). At the bottom, a table shows 'Per Paycheck Costs': Plan Cost \$97.00, Surcharges \$25.00, and Total Cost Per Paycheck \$122.00. 'Back' and 'Confirm' buttons are at the bottom right.

Navigating Enrollment

Enrollment Step: Select Benefits (continued)

For life insurance benefits, it's critical that you assign a beneficiary to your plan. You may allocate percentages to your **Primary Beneficiaries** (those who will receive the payout) and **Secondary Beneficiaries** (those next in line to receive the payout). If you plan to add beneficiaries under age 18, we recommend you speak to your legal counsel for questions.

Note: Some insurance companies may require you to complete an Evidence of Insurability form (EOI) online or by paper to be approved for additional coverage. This is usually time-sensitive.

Available Plans

Insurance - Employee Life

Select the plan that meets your needs.

Covered Individual

John Doe (You)

1 Plan Available

Voluntary Employee Life, DEMO

(1 individual selected)

Provider
Your Life Insurance Provider

Select Coverage Amount

Additional Coverage: Total Actual Coverage Amount: **\$100,000.00**

Evidence of Insurability will be required for this enrollment.

Per Paycheck Costs Your Cost: **\$8.00**

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
Jane Doe Spouse	<input type="text" value="100 %"/>	<input type="text" value="0 %"/>
Johnny Doe Child	<input type="text" value="0 %"/>	<input type="text" value="100 %"/>
Total	100.00%	100.00%

Confirm the details for this plan selection. Confirm details

Cancel

Navigating Enrollment

Enrollment Step: Select Benefits (continued)

If you wish to participate in a Health Savings Account (HSA) or Flexible Spending Account (FSA) plan, you may enter the amount you want to contribute either per year or per pay period.

Keep in mind some key differences between the two:

HSA

- Must be paired with a High Deductible Health Plan (HDHP)
- Funds carry over year-to-year
- Allows employers contributions (may vary by employer)
- Can't use all of the funds at once, only what has been accumulated

FSA

- Doesn't need to be paired with a particular medical plan
- Use it, or lose it rules apply; carry-overs are not always allowed
- No employer contributions
- Immediate access to all funds as they are

Available Plans

Health Savings Account

Select the plan that meets your needs:

1 Plan Available

HSA, DEMO Selected
Effective: January 1, 202X

Provider:
Spending Account Provider

Contributions
Enter contribution amount to view your estimated cost.
Your estimated annual contribution can be any amount from \$0.00 up to \$XXXXXX.
Your employer will contribute an annual total of \$1,000.00, distributed as Per Pay Period payment(s) to your account.

For the entire year, I want to contribute:

Maximum Yearly Goal

Custom Amount

Frequency: Per Pay Period

Contribution: 0

Payments: × 12

Annual Contribution: \$0.00

Employer Contribution: \$1,000.00

Your Contribution: \$0.00

Total Contribution: \$1,000.00

Per Paycheck Costs Your Cost: \$0.00

Unenroll

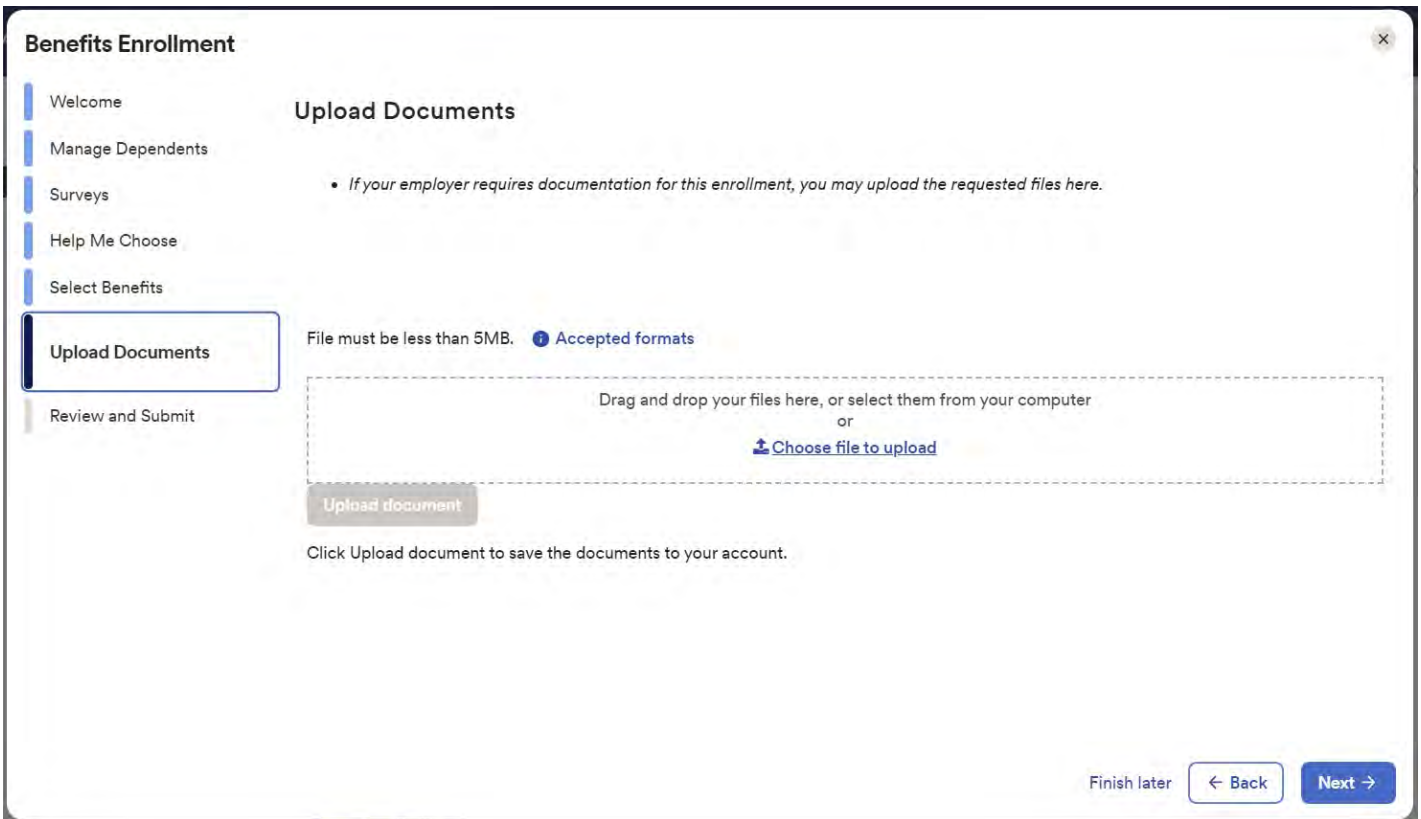
Confirm the details for this plan selection. Confirm details

Back

Navigating Enrollment

Enrollment Step: Uploading Documents

The **Upload Documents** step will display **only** if your employer requires you to upload documentation for this enrollment. The documents needed will vary by employer and you'll see a note on this screen indicating what you'll need to upload.



The screenshot shows a web interface for 'Benefits Enrollment'. On the left is a vertical navigation menu with the following items: 'Welcome', 'Manage Dependents', 'Surveys', 'Help Me Choose', 'Select Benefits', 'Upload Documents' (highlighted with a blue border), and 'Review and Submit'. The main content area is titled 'Upload Documents' and contains the following elements:

- A bullet point: *If your employer requires documentation for this enrollment, you may upload the requested files here.*
- Text: 'File must be less than 5MB. [Accepted formats](#)'
- A dashed rectangular box containing the text: 'Drag and drop your files here, or select them from your computer or [Choose file to upload](#)'
- A button labeled 'Upload document'.
- Text: 'Click Upload document to save the documents to your account.'

At the bottom right of the interface, there are three buttons: 'Finish later', '← Back', and 'Next →'.

Navigating Enrollment

Enrollment Step: Review and Submit

Take a moment to review your **Enrolled Plans, Waived Plans, Who's Covered** and your **total cost per paycheck**.

Need more time to make decisions? Click **Finish Later** to save your progress. Before the enrollment period ends, come back and click **Manage Enrollment** to resume your work.

When ready, click **Submit enrollment** followed by **Yes** to submit your benefit elections. That is all! After submitting your elections, you'll return to the Enrollments page, where you'll see a confirmation message.

The screenshot shows the 'Benefits Enrollment' interface in the 'Review and Submit' step. A sidebar on the left contains navigation links: Welcome, Manage Dependents, Surveys, Help Me Choose, Select Benefits, Upload Documents, and Review and Submit (which is highlighted). The main content area is titled 'Review and Submit' and includes:

- A 'Review and Submit' header with a timer for 'X days left to enroll' and an effective date of 'January 1, 202X'. The 'Your Cost Per Paycheck' is displayed as **\$201.61**. A yellow warning box states: 'Your benefit elections will not be effective until you click Submit enrollment.'
- An 'Enrolled Plans' section with the note: 'You are enrolled in the following plans. You can make changes until the enrollment period closes.'
- Two enrolled plans:
 - Medical**: HDHP (DEMO), Effective: January 1, 202X, Who is Covered? You, Jane Doe and Johnny Doe, Your Cost: **\$168.61**. Status: Enrolled.
 - Health Savings Account**: HSA (DEMO), Effective: January 1, 202X, Who is Covered? You, Annual Contribution: **\$396.00**, Your Cost: **\$33.00**. Status: Enrolled.
- A 'Waived Plans' section with the note: 'You waived the following benefits.'
- Two waived plans:
 - Dental**: Effective Date: January 1, 202X, Waive Reason: Coverage does not meet my needs. Status: Waived.
 - Vision**: Effective Date: January 1, 202X, Waive Reason: Do not want to be insured. Status: Waived.

At the bottom, there are three buttons: 'Finish later', 'Back', and 'Submit enrollment'.

The screenshot shows a 'Submit Enrollment' dialog box with the text: 'You are about to submit your enrollment. Do you want to continue?' and 'You can make changes until August 31, 202X 11:59 p.m. ET.' There are two buttons: 'Yes' and 'No'.

The screenshot shows the 'Enrollments' page. At the top, there is a confirmation message: 'You have completed your enrollment. You have successfully completed your Benefits Enrollment!' with a close button. Below the message, it says: 'After the enrollment period closes, you can return to Myself > Benefits > Enrollments > Your Benefits > View Benefits to download a copy of your benefits statement for your records. Contact your benefits administrator if you have any other questions.'

Below the message, there is a 'Benefits Enrollment' section with a green 'Submitted' status. It includes a timer: 'X days left to make changes' and the text: 'You can make changes to your enrollment from August 16, 202X to September 9, 202X at 11:59 p.m. ET.' A 'Manage enrollment' button is located at the bottom.