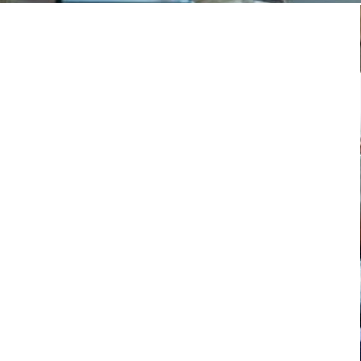




# Navigating the enrollment wizard



How to enroll on your computer  
and mobile device



Enroll with our mobile app.  
It's not complicated.



Always Designing  
for People®

# Enroll on your computer

1. Access the enrollment wizard
2. Review your dependents and beneficiaries
3. Status (enrolling in benefits)
4. Complete your enrollment

# Welcome!



This page contains important details about your benefit offerings, coverage dates, and resources to help you through enrollment

The screenshot shows the 'Enrollments' page with a 'Welcome to New Client Implementation' banner. A progress bar indicates '53 days left to complete this event'. The navigation flow is: Welcome (active) → Select Benefits → Summary. The main content area contains the following text:

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

This is your opportunity to elect benefits that best fit your needs. You have access to a range of benefit plans that can support your health, wealth, life and work.

You must enroll within your enrollment window. If you don't, your benefit plans may automatically be chosen for you, or you may not have benefits coverage at all. The benefits Plan Year is June 1- May 31.

Your next opportunity to review and change our benefit elections will be during the next annual Open Enrollment period or if you experience an IRS-qualified family status change or HIPAA special enrollment event.

**Examples of Qualifying Events**

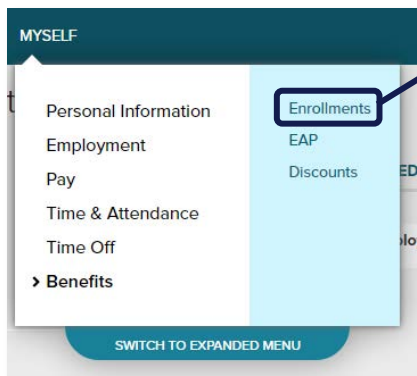
- Change in legal marital status, including marriage, death of spouse, divorce or legal separation.
- Change in number of dependents, including birth, adoption or death.
- Change in employment status, including beginning or termination of employment

Please refer to the Summary Plan Description (SPD) or contact a MyLife Advisor for more information on this list of events that are IRS-qualified reasons in the events.

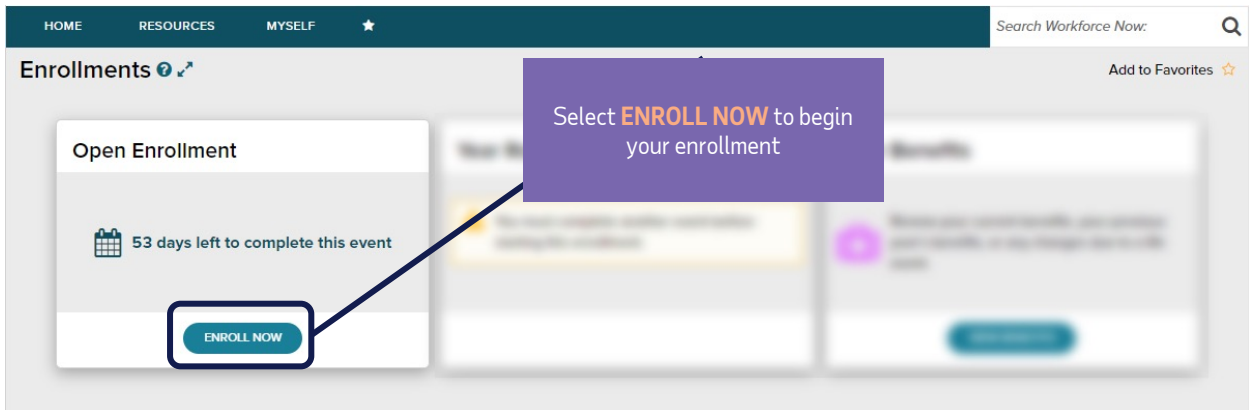
At the bottom of the page, there is a 'CONTINUE' button and a 'Need Help?' link. A dark blue callout box with white text says 'Click here to move forward' pointing to the 'CONTINUE' button.



# Plan enrollment



You can find your benefit enrollment wizard here



# Plan enrollment (continued)



Selecting the Plan Name will provide you with a **Summary of Benefits Coverage** and more details about the plan

Click **SELECT PLAN** to enroll

View the cost of the benefit **Per Pay Period, Monthly, or Annually**

**VIEW PLAN COMPARISON** allows you to compare up to 3 plans side by side

Select **WAIVE THIS BENEFIT** if you are waiving coverage. You will need to provide a waive reason for Medical, Dental, or Vision plans if you are not enrolling in any of these benefits

The screenshot shows the 'Medical' enrollment section. On the left, there is a sidebar with 'Available Benefits' including options like 'HEALTH AND WELFARE - DENTAL', 'HEALTH AND WELFARE - VISION', 'EMPLOYEE LIFE', 'VOLUNTARY TERM LIFE', 'SPOUSE LIFE', 'CHILD LIFE', 'LONG TERM DISABILITY', 'SHORT TERM DISABILITY', 'VOLUNTARY SHORT TERM DISABILITY', 'AD&D', and 'LEGAL'. The main area is titled 'Medical' and contains two questions: '1. Which plan would you prefer?' and '2. Who do you want to cover?'. Under question 1, there is a 'Per Pay Period' dropdown menu. Below this is a table for 'Currently Enrolled In' with columns: PLAN, PROVIDER, PER PAYCHECK, EMPLOYER COST, and EFFECTIVE DATE. The table shows one row: 'HDHP, All FT Employees' with provider 'LHCO7', a cost of '\$', and an effective date of 'November 1, 2020'. Below the table is an 'Other Options' section with a row for 'LHCO7NAVEPO-BTWF-500-90-M-F, ALL FT EMPLOYEES' with provider 'LHCO7' and a cost of '\$'. This row has three buttons: 'VIEW PLAN COMPARISON', 'SELECT PLAN', and 'WAIVE THIS BENEFIT'. At the bottom, there is a 'MANAGE DEPENDENTS' link and a 'Need Help?' icon.



# Add dependents and beneficiaries

Available Benefits

- HEALTH AND WELFARE - MEDICAL
- HEALTH AND WELFARE - DENTAL
- HEALTH AND WELFARE - VISION
- INSURANCE - EMPLOYEE LIFE
- INSURANCE - VOLUNTARY TERM LIFE
- INSURANCE - SHORT TERM DISABILITY
- INSURANCE - VOLUNTARY SHORT TERM DISABILITY
- INSURANCE - AD&D
- CUSTOM - LEGAL
- CUSTOM - GROUP ACCIDENT
- CUSTOM - HOSPITAL INDEMNITY

## Medical

1. Which plan would you prefer?

Currently Enrolled In

PLAN	PROVIDER	PER PAYCHECK	EMPLOYER COST	EFFECTIVE DATE	
HDHP All FT Employees	UHC07	\$191.61	—	November 1, 2020	SELECT PLAN
	UHC07	\$191.61	—	—	SELECTED

2. Who do you want to cover?

You Daffy Duck Spouse

[MANAGE DEPENDENTS](#)

Need Help?

Newly Added Dependents & Beneficiaries will show here with a + icon.

Click here to Add or Edit Dependents & Beneficiaries

Select the icon to add the dependent to a plan. The icon will light up Green when they've been added.



You will need a **social security number** and **date of birth** to add a dependent or beneficiary. Adding a dependent will automatically update the **plan cost** based on your coverage level.

# Click forward to complete your elections

(including available voluntary benefits)



Save Your Election

YOU ARE ENROLLING IN  
UHC07: HDHP, All FT Employees

PER PAYCHECK	COSTS	COVERED INDIVIDUALS
PLAN COST	\$	SG You
TOTAL PER PAYCHECK	\$	

PCP IDENTIFIER NUMBER  
789

SAVE AND CONTINUE TO NEXT BENEFIT

CONTINUE TO PREVIEW

Select **CONTINUE TO PREVIEW** to review your elections and continue to the next benefit.

## Available Benefits

✓ HEALTH AND WELFARE - MEDICAL

✗ HEALTH AND WELFARE - DENTAL

HEALTH AND WELFARE - VISION

The left navigation pane will show your progress as you move through enrollment:

- ✓ = Enrolled
- ✗ = Waived Coverage
- 🚩 = Needs Attention
- | = You've viewed this section



# Sign up for the Optum HSA

(if you elected a qualified plan)

\*To open an HSA, enter the amount you want to contribute either per year or per pay period and click **ENROLL**.

\*If you are not contributing but your employer is, enter \$0 and **CONTINUE TO PREVIEW**

CONSUMER HEALTH AND SAVINGS ACCOUNTS - HEALTH SAVINGS ACCOUNT

- HEALTH AND WELFARE - DENTAL
- HEALTH AND WELFARE - VISION
- INSURANCE - EMPLOYEE LIFE
- INSURANCE - VOLUNTARY TERM LIFE
- INSURANCE - SPOUSE LIFE
- INSURANCE - CHILD LIFE
- INSURANCE - LONG TERM DISABILITY
- INSURANCE - SHORT TERM DISABILITY
- INSURANCE - VOLUNTARY SHORT TERM DISABILITY
- INSURANCE - AD&D
- CUSTOM - LEGAL
- CUSTOM - GROUP ACCIDENT
- CUSTOM - HOSPITAL INDEMNITY

### 1. Which plan would you prefer?

PLAN	PROVIDER	PER PAYCHECK	EMPLOYER COST	EFFECTIVE DATE	
✓ HSA	OPTUM	---	---	---	SELECTED

REMOVE ENROLLMENT

### How much would you like to contribute?

Your estimated annual contribution can be any amount from **\$0.00** up to **\$2,750.00**.

For the ENTIRE YEAR, I want to contribute:

Maximum yearly goal

Enter a different amount

Annual (dropdown menu)  
Per Pay Period

TOT : CONTRIBUTION **\$0.00**

SAVE FOR LATER **CONTINUE TO PREVIEW**

Need Help?





# Choose your Health Care FSA and enter contribution amount

(If you wish to participate)

## REMINDERS

\*Limited FSA only covers basic dental and vision expenses if also enrolled in an HSA.

\*Contribution amount will be based on the plan year, not calendar year.

### Available Benefits

- ✓ HEALTH AND WELFARE - MEDICAL
- HEALTH AND WELFARE - DENTAL
- HEALTH AND WELFARE - VISION
- ✓ INSURANCE - EMPLOYEE LIFE
- INSURANCE - VOLUNTARY TERM LIFE
- INSURANCE - SPOUSE LIFE

## FSA Health Care



### 1. Which plan would you prefer?

PLAN	PROVIDER	PER PAYCHECK	EMPLOYER COST	EFFECTIVE DATE	
LPFSA	OPTUM	--	--	--	<input type="button" value="SELECT PLAN"/>
HCFSA	OPTUM	--	--	--	<input type="button" value="SELECT PLAN"/>

Select the **Health Care FSA** if **NOT** enrolled in HSA

Select the **Limited Health Care FSA** if enrolled in HSA

# Choose your Health Care FSA and enter contribution amount


(If you wish to participate)



**Available Benefits**

- HEALTH AND WELFARE - MEDICAL
- HEALTH AND WELFARE - DENTAL
- HEALTH AND WELFARE - VISION
- INSURANCE - EMPLOYEE LIFE
- INSURANCE - VOLUNTARY TERM LIFE
- INSURANCE - SPOUSE LIFE

### FSA Health Care



1. Which plan would you prefer?

PLAN	PROVIDER	PER PAYCHECK	EMPLOYER COST	EFFECTIVE DATE	
LPFSA	OPTUM	---	---	---	<input type="button" value="SELECT PLAN"/>
<b>HCFSA</b>	OPTUM	---	---	---	<input type="button" value="SELECT PLAN"/>

Select the **Health Care FSA**

# Review and complete enrollment



Enrollments Add to Favorites

Welcome to New Client Implementation 53 days left to complete this event

Welcome Select Benefits Summary

Please review this summary of your New Client Implementation. Download

Your benefit elections will not be processed until you click "SUBMIT ENROLLMENT". You will still be able to make changes until November 30, 2020 11:59 PM EST SAVE FOR LATER  **SUBMIT ENROLLMENT**

**Enrollment Summary** Per Pay Period

Plan	Effective Date	Coverage	Your Cost
Medical			<b>\$191.61</b>
UHC07: HDHP: All FT Employees	November 1, 2020	You	
Employee Life			<b>\$0.00</b>
METLDT: Basic \$10,000, All FT Employees <b>\$10,000.00</b>	November 1, 2020		
Long Term Disability			<b>\$0.00</b>
METLDT: LTD Basic 50% \$1,000/mo-180, All FT Employees <b>\$0.00</b>	November 1, 2020	You	
Short Term Disability			<b>\$0.00</b>

SAVE FOR LATER  **SUBMIT ENROLLMENT**

Need Help?

Review then select  
**SUBMIT  
ENROLLMENT** to  
submit your elections



# Your benefits enrollment is complete!

Make additional changes to your enrollment during the enrollment period

**Enrollments** 🔍 🔖 Add to Favorites

- Open Enrollment**  
📅 53 days left to make changes  
[ENROLL NOW](#)
- Year Round Enrollment**  
📅 Make changes anytime  
[ENROLL NOW](#)
- Your Benefits**  
📋 Review your current benefits, your previous year's benefits, or any changes due to a life event.  
[VIEW BENEFITS](#)

View or Download your benefits statement for your records

Update or Enroll in Year Round benefits such as HSA

**Your Benefits**

This information is your benefits coverage as of the date below. Select a different date to view other coverage.

11/01/2024 📅 Download

Plan	Effective Date	Coverage	Your Cost
<b>Medical</b>			
UNICF HQR4 All FT Employees	November 1, 2024	Yes	\$0.00
<b>Employee Life</b>			
METLDR Basic \$10,000 All FT Employees <b>\$10,000.00</b>	November 1, 2024		\$0.00
<b>Long Term Disability</b>			
METLDR LTD Basic 50% \$1,000/mo 180 All FT Employees <b>\$0.00</b>	November 1, 2024	Yes	\$0.00
<b>Short Term Disability</b>			
METLDR STD 60% \$2,500/mo 30/7,260 All FT Employees <b>\$0.00</b>	November 1, 2024	Yes	\$0.00

Per Pay Period: \$0.00

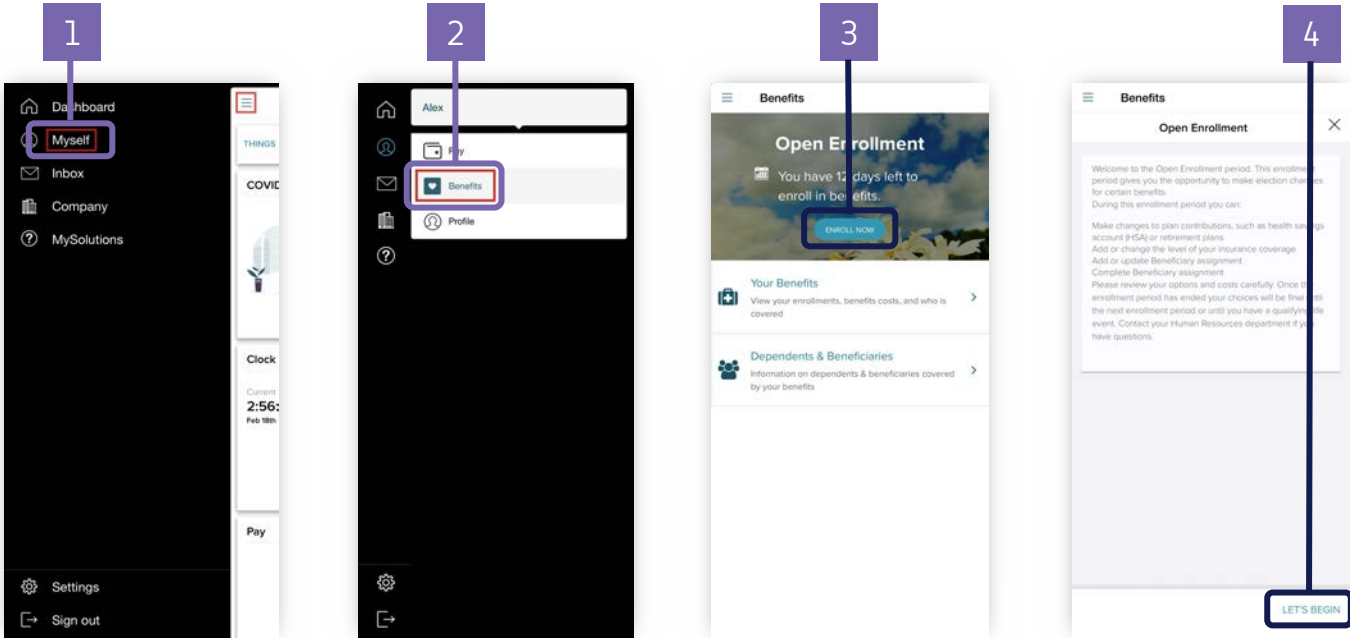
**Waived Benefits**

- Vision: Waived because I am covered on my spouse's plan
- Dental: Waived because I do not want to be insured

# ADP TotalSource Mobile Benefits Experience



# Access the enrollment wizard





# Add dependents and beneficiaries

The image displays two screenshots of the ADP Open Enrollment app interface. Both screens show the 'Step 1: Select Who's Covered' section with a list of dependents and beneficiaries. The left screenshot shows the 'Dependents' tab selected, with a callout box pointing to the 'ADD DEPENDENT' button. The right screenshot shows the 'Beneficiaries' tab selected, with a callout box pointing to the 'ADD PERSON' and 'ADD ORGANIZATION' buttons.

**Click here** to add dependents. You must enter their First and Last names, Relationship, Gender, Tax ID, Birth Date, etc.

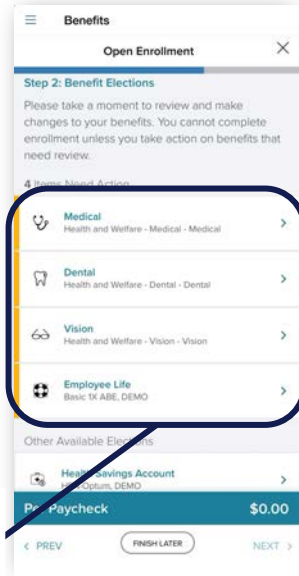
With this tab selected, you can add individuals (Person) or a trust, charity, etc. (Organization).

# Enrolling in benefits

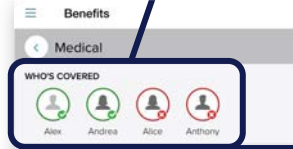


Take a moment to review the offered benefit elections. Items Needing Action will be prioritized at the top. All other available elections will be listed underneath.

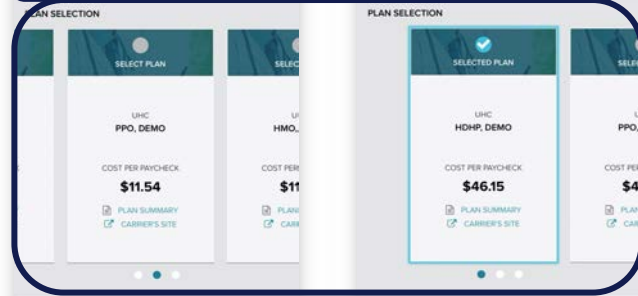
Tap on the desired benefit to view the details.



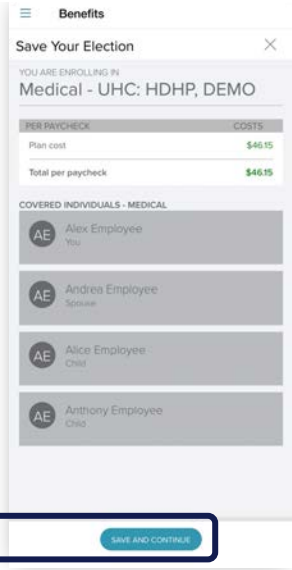
Tap on each dependent you want to cover on the plan.



Scroll from right to left to view all plans offered. Tap **Select Plan** to enroll in the one that best fits your needs.



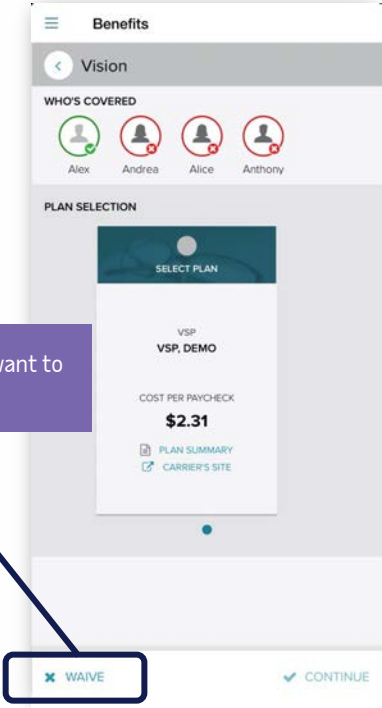
Save your election by tapping **Continue**, then **Save and Continue**.



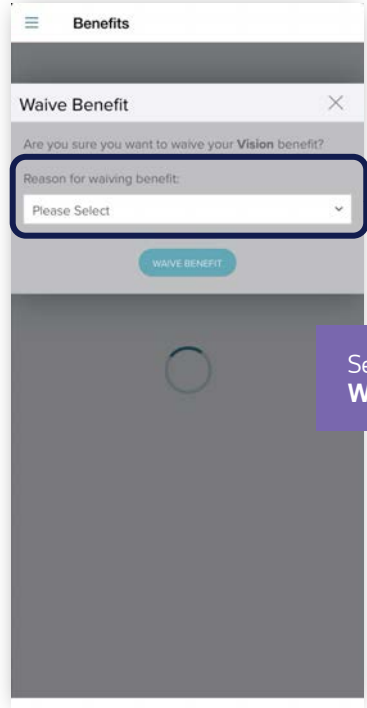




# Waiving benefits



Tap here if you do not want to enroll into a benefit.



Select a reason, then tap **Waive Benefit**.

# Spending accounts



Under **Other Available Elections**, take a look at the spending accounts offered.

**Benefits**

Open Enrollment

Other Available Elections

- Health Savings Account  
HSA-Optum, DEMO
- FSA Health Care  
Limited Purpose FSA, DEMO
- FSA Health Care  
Health Care FSA, DEMO
- FSA Dependent Care  
Dependent Care FSA, DEMO
- Parking  
OCB-Parking, DEMO
- Transit  
OCB-Transit, DEMO
- Employee Life  
Voluntary Term Life - Employee, DEMO

Per Paycheck **\$0.00**

PREV FINISH LATER NEXT

**Benefits**

Health Savings Account

HSA-Optum, DEMO

CARRIER'S SITE

Your employer will contribute an annual total of \$ [redacted] distributed as Monthly payment(s) to your account.

**Set up Allocation**  
Input the amount you would like to add to your spending account.

Per Pay Period \$ Enter amount

Maximum Employee Contribution: \$ [redacted] /year

**IMPORTANT NOTE:** In order to receive the employer contribution to your Health Savings Account, you must enter an amount of \$0 or higher for your contribution.

Enrolled in an Optum HSA? Allocate any contribution amounts here (not exceeding the maximum, including your employer contribution, if any).

**Benefits**

FSA Health Care

Health Care FSA, DEMO

CARRIER'S SITE

**Set up Allocation**  
Input the amount you would like to add to your spending account.

Per Pay Period \$ Enter amount

Maximum Employee Contribution: \$ [redacted] /year

Minimum Employee Contribution: \$ [redacted] /year

WAIVE CONTINUE

Enrolled in an FSA? Allocate contribution amounts here (not exceeding the maximum).

# Designating beneficiaries



Whether you're offered an employer-paid basic life insurance, or you decide to enroll in a voluntary life insurance plan, you'll be required to designate your beneficiaries.

**Benefits**

Employee Life

Voluntary Term Life - Employee, DEMO

WHO'S COVERED

Alex

CARRIER'S SITE

**Choose a Coverage Level**

Choose the level of coverage that meets your needs and budget.

\$100,000.00

**\$100,000.00** Total Coverage

PER PAYCHECK COSTS

You Pay **\$2.77**

Evidence of Insurability will be required for this enrollment.

**Select Beneficiaries (REQUIRED)**

Divide the proceeds of your benefits between as many beneficiaries as you like.

WAIVE CONTINUE

**Benefits**

**Select Beneficiaries (REQUIRED)**

Divide the proceeds of your benefits between as many beneficiaries as you like. **Primary** beneficiaries are mandatory but **secondary** beneficiaries are optional. The total proceeds must equal 100%.

**Andrea Employee**  
Spouse

PRIMARY 100 % SECONDARY 0 %

**Alice Employee**  
Child

PRIMARY 0 % SECONDARY 50 %

**Anthony Employee**  
Child

PRIMARY 0 % SECONDARY 50 %

**TOTAL** 100.00% 100.00%

WAIVE CONTINUE

Divide the proceeds to **Primary** beneficiaries (required) or to **Secondary** beneficiaries (optional).



# Completing your enrollment

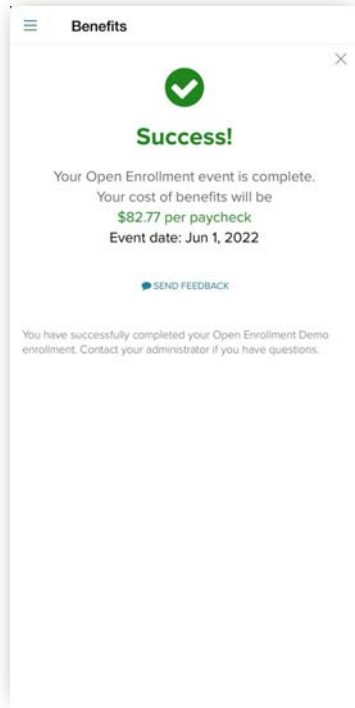
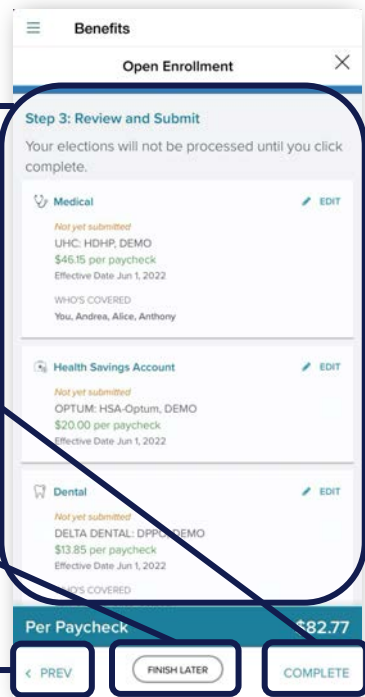
Once you're ready to submit your enrollment, review your elections and tap **Complete**. A confirmation screen will display, providing your per paycheck cost and effective date (event date).

Review your elections before you submit.

Submit your elections here. You'll see a confirmation screen like this with your pay per check amount and effective (event) date.

Tap here if you need to finish later.

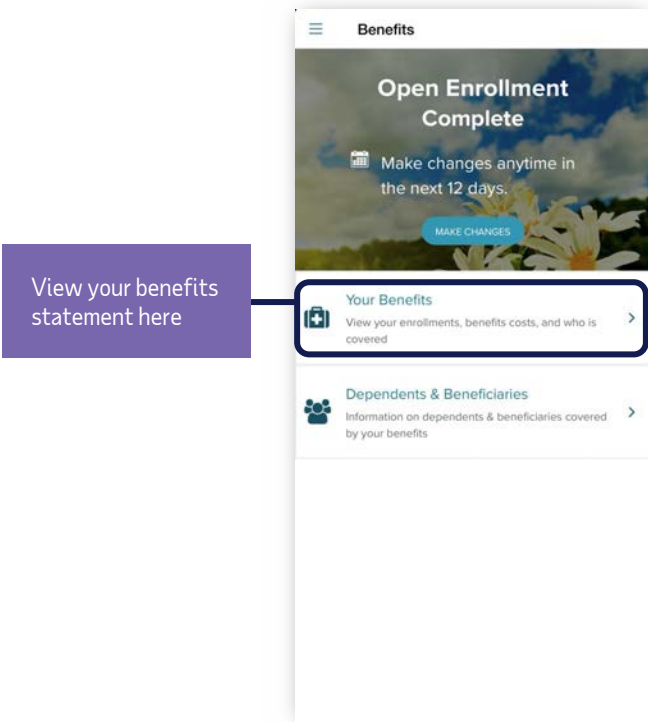
Tap here to go back.



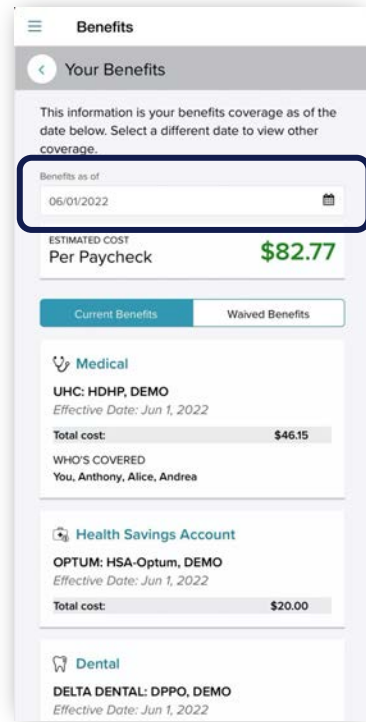


# Viewing your benefits statement

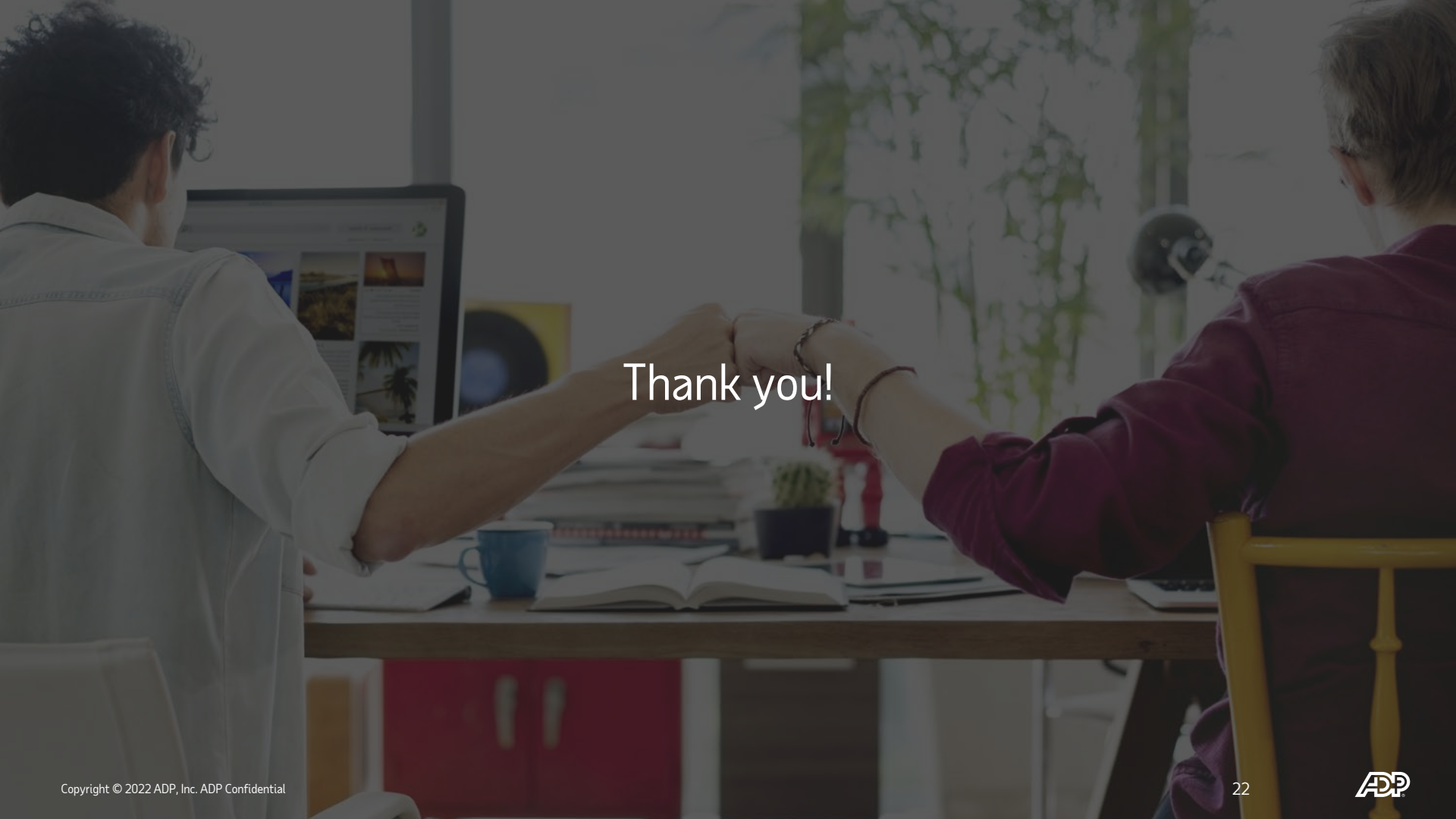
To view your benefits statement, tap on **Your benefits**, then select your effective date on the **Benefits as of** field. The screen will display your benefit elections, waived benefits, per paycheck cost, and who's covered.



View your benefits statement here



Select your effective date to see your benefit elections, waived benefits, per paycheck cost and who's covered.

A photograph of two people shaking hands across a desk in an office setting. The person on the left is wearing a white shirt, and the person on the right is wearing a maroon shirt. On the desk, there is a computer monitor displaying a website, a blue mug, an open book, and a small potted plant. The background shows a window with greenery outside.

Thank you!