



UKG Step-by-Step Benefit Enrollment Guide

2023 New Hires

- **Review your benefit plan options and eligibility:**
 - [HealthEdge Benefit Portal](#)
 - [2023 Benefit Enrollment Guide](#)
 - [2023 Benefit Webinars](#)

- **Have your dependent information ready:**
 - Social Security Number
 - Date of Birth
 - Gender
 - Address
 - Telephone Number
 - Email Address (optional)

- **Review your personal information** (legal name, address, SSN, etc.).
 - UKG>Myself>Personal



You will be able to enroll in the following benefits in the UKG New Hire Benefit Event-

- Medical
- Dental
- Vision
- Health Savings Account
- Healthcare/Limited Purpose Spending Accounts
- Dependent Care Spending Account
- Voluntary Life and AD&D
- Critical Illness
- Hospital Indemnity
- Accident Insurance
- Legal Insurance
- ID Theft



You are automatically enrolled in these benefits

- Basic Life and AD&D
- Short- and Long- Term Disability
- Financial Planning
- Employee Assistance Program (EAP)
- Ginger
- 401k

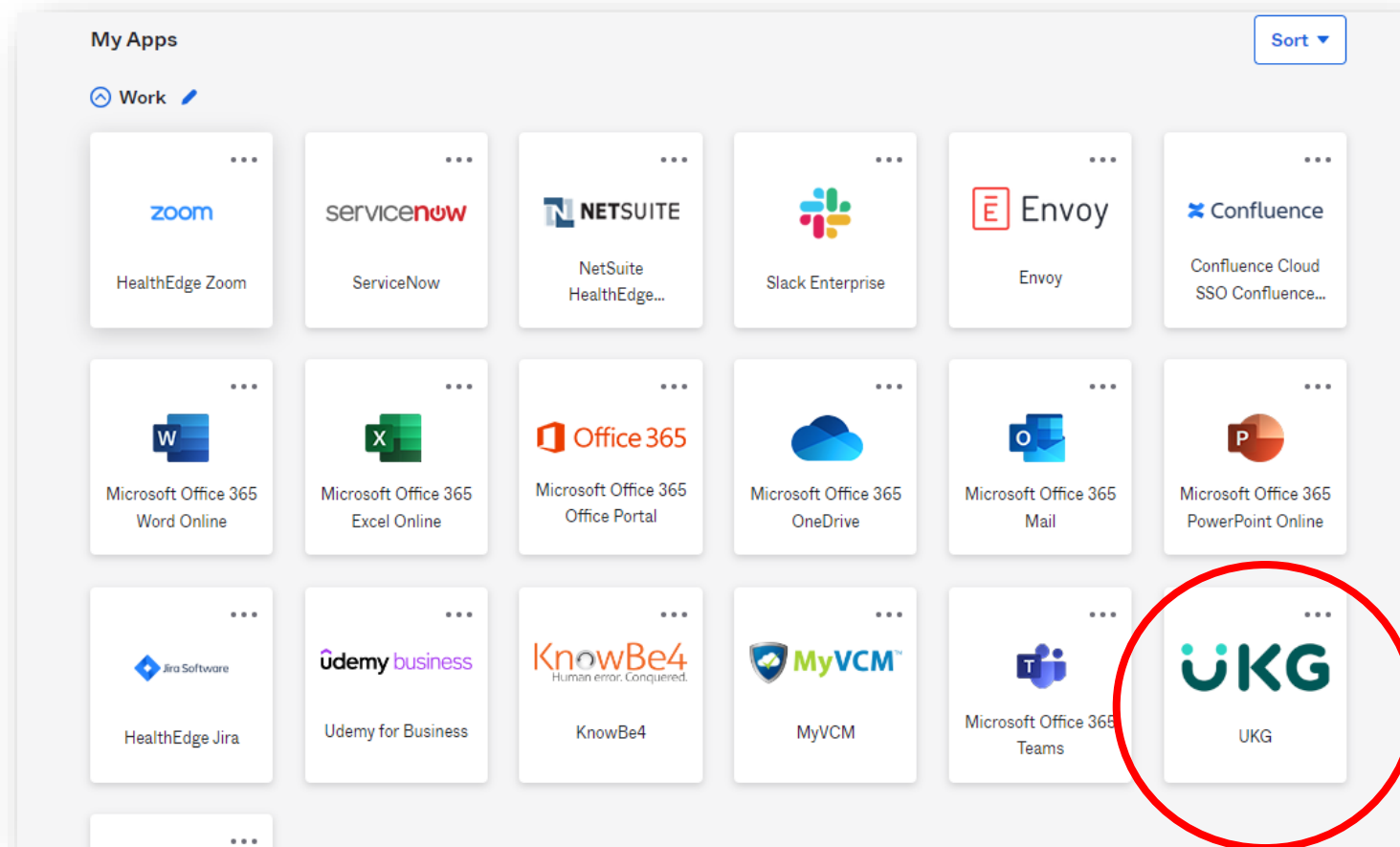


These benefits are not included in the New Hire Benefit Event:

- **Optum Rx Prescription Coverage** - If you enroll in a HealthEdge Aetna medical plan you are automatically enrolled in Rx coverage.
- **One Medical** - If you enroll in a HealthEdge Aetna medical plan you are automatically enrolled in One Medical.
- **401k/Roth 401k elections** - Enrollment is done through Empower. You will receive account information from Empower through US Mail around your 60th day of employment.
- **Pet Insurance** - Employees are eligible to enroll in Pet Insurance at any point in time throughout the year. Please fill out the quote form [here](#).
- **Financial Planning** - Available at any time. Contact Zoe Lyle at zlyle@janney.com.

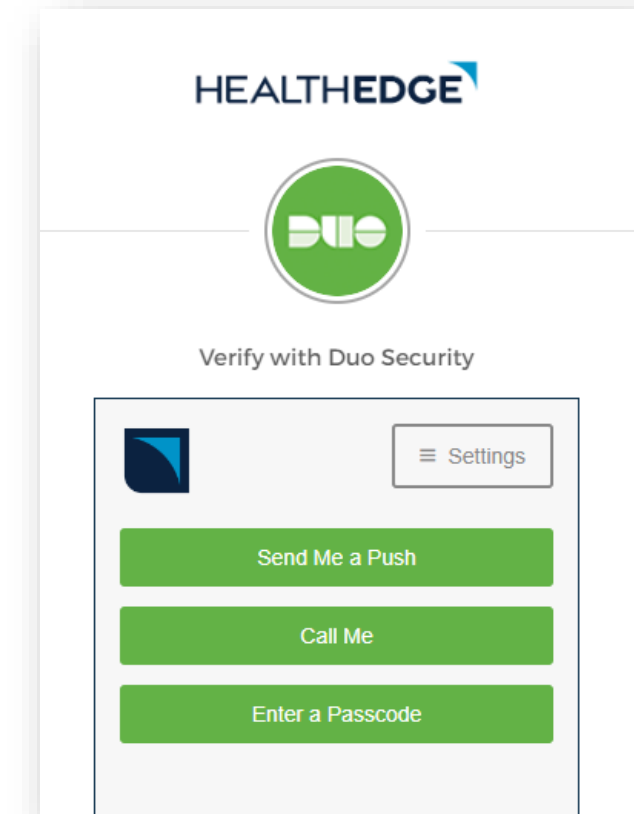
UKG is accessible through OKTA

<https://healthedge.okta.com/app/UserHome>

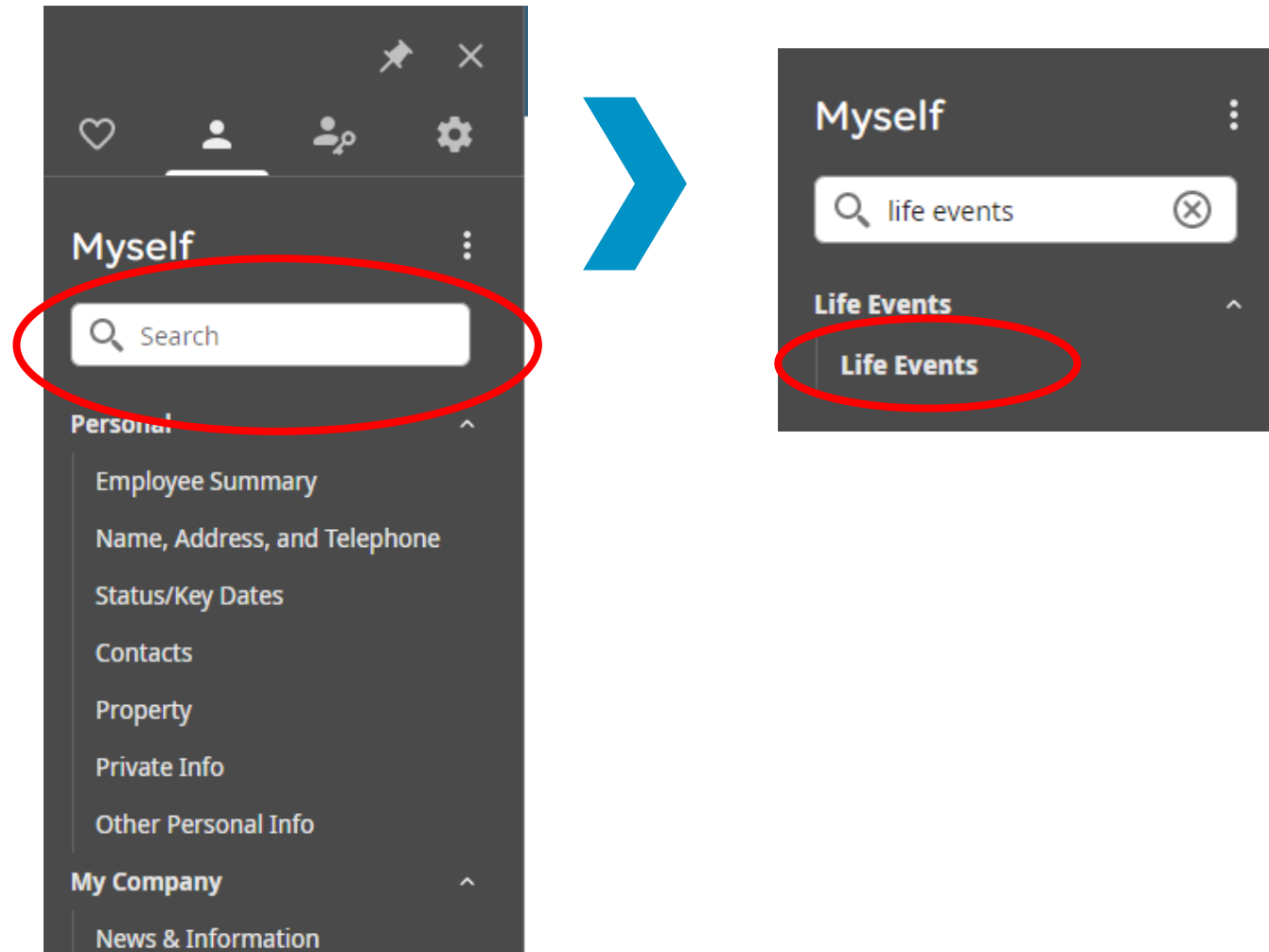


Multifactor Authentication (MFA) required for off-site access

- Install Duo Security Mobile



The 2023 New Hire Event is accessible through UKG



- Under the “Myself” tab on the left-hand side of the screen find the search bar.
- Type in “Life Events” and hit enter to search.
- Click on the “Life Events” option.
- This will populate a new page with a list of three different options
- Click “**I am a New Employee/Hire**” to get started. This will open a pop-up window with the event.

About This Life Event

Life Event Effective Date 04/10/2023

What was the reason? LifeEvent-Hire

Whether you are a new hire, rehire or a company transfer, you are eligible to enroll in benefit plans for yourself and any eligible dependents. You can also provide the names of your dependents and select the plan types.

Navigation buttons: back, next, submit, draft, reset, cancel, print, help. The 'next' button is circled in red. A zoomed-in view of the 'back' and 'next' buttons is shown below, with the 'next' button circled in red.

- The “Life Event Effective Date” should auto-populate as your hire date.
- “What was the reason?” should reflect as LifeEvent-Hire.
- Once you enter the event you will navigate through the event by hitting next.
- You may also hit the back button at any time to go through the previous pages as you progress through the event.

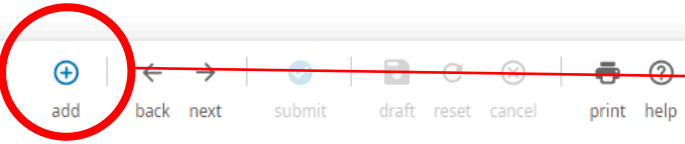
Verify Beneficiary and Dependent Information

Verify Beneficiary and Dependent Information

Before moving forward, please review your existing contact information below. To modify, click on the contact name, select "edit", update the contact form and "save". To add a new contact, click on the green "+" button at the top right of the page, complete the contact form and "save".

Find by

Name ↑	Relationship	Designation
<input type="text" value="Name"/>	Spouse	<input checked="" type="checkbox"/> Beneficiary <input checked="" type="checkbox"/> Dependent <input checked="" type="checkbox"/> Emergency contact



To Add a Beneficiary/Dependent

- Click on the plus sign within the circle to add a new beneficiary or dependent.

Tip: If you do not have a plus sign log out of the event and add your first contact by going to UKG>Myself>Personal>Contacts.

Verify Beneficiary and Dependent Information

Before moving forward, please review your existing contact information below. To modify, click on the contact name, select "edit", update the contact form and "save". To add a new contact, click on the green "+" button at the top right of the page, complete the contact form and "save".

Find by

Name ↑	Relationship	Designation
<input type="text" value="Name"/>	Spouse	<input checked="" type="checkbox"/> Beneficiary <input checked="" type="checkbox"/> Dependent <input checked="" type="checkbox"/> Emergency contact



To Edit an Existing Beneficiary/Dependent

- Click on their name to edit information.

Adding New Beneficiary or Dependent

Step 1: Personal Information

- Enter their personal information such as name, date of birth, SSN, and gender.

The screenshot shows the 'Add/Change Contact' form with the 'Personal' section expanded. It includes a 'Contact is active' checkbox, a toolbar with delete, save, reset, cancel, print, and help icons, and input fields for First, Middle, Last, Former last, Suffix, SSN, Date of birth (with a calendar icon), Gender, and Date of marriage (with a calendar icon).

Step 2: Designation

- Assign a relationship such as spouse or child.
- Assign a designation of beneficiary, dependent and/or emergency contact.

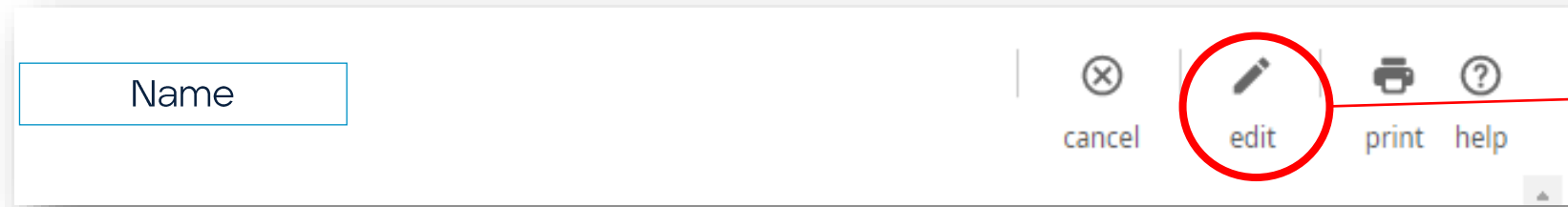
The screenshot shows the 'Designation' section of the form. It contains a note: 'Select at least one designation for this contact. Note: Identifying this record as a **Dependent** or **Beneficiary** only makes them eligible for consideration, it does not automatically add them to any benefit plans.' Below this is a 'Relationship' dropdown menu set to 'None' and a 'Designation' section with three checkboxes: 'Dependent', 'Beneficiary', and 'Emergency contact'.

Step 3: Contact

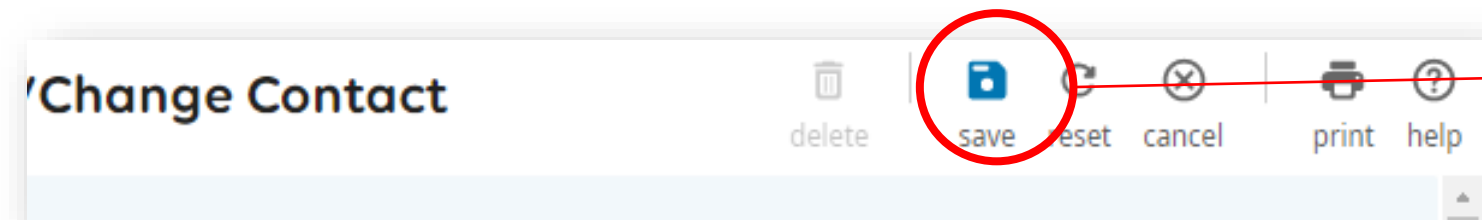
- Enter their address, telephone number and email address, if applicable.

The screenshot shows the 'Address' section of the form. It includes a checkbox for 'Address is different from employee', a 'Country' dropdown menu set to 'United States', and input fields for Address, Address 2, City, State/Province, Zip/Postal code, and County.

Edit Existing Beneficiary or Dependent



- Click on edit to change personal information, designation, and contact information.



- Click save to save your changes.

- Read through the plan options carefully. Find the plan you wish to elect.

High Deductible Health Plan
\$104.31 Semimonthly*

Options

Options

- | | |
|--|----------|
| <input type="radio"/> Employee Only | \$51.85 |
| <input type="radio"/> Employee + Child(ren) | \$99.43 |
| <input type="radio"/> Emp + Domestic Partner | \$104.31 |
| <input checked="" type="radio"/> Employee + Spouse | \$104.31 |
| <input type="radio"/> Emp + Dom Partner Family | \$143.96 |
| <input type="radio"/> Employee + Family | \$143.96 |

Enroll Dependents

You must enroll between 1 and 1 dependents in the plan.

Step 1: Selecting the plan type

- Find the plan type you would like to elect.
- Click on the radial button. It is selected when it turns blue.

Step 2: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 3: Enroll the correct dependents

- Click on the radial button next to the desired dependent(s). It is selected when it turns blue with a white check mark.
- Check to make sure SSN, date of birth, and gender are reflecting accurately in the menu that appears

I Waive Medical

I decline Dental plans.

I decline Vision plans.

Waiving coverages

- For any coverage you wish to waive you must choose "I Waive" or "I Decline", depending on the plan.

If you are declining coverages, please keep in mind that the next opportunity to enroll in coverage will be the next Open Enrollment period, or if you have experienced a qualifying life status change.

IMPORTANT: You must select the HSA and contribute your own dollars in order to receive the Employer Contribution. If you waive the HSA, you are also waiving the employer contribution which will require completion of the waiver acknowledgement.

I decline Health Savings Account plans.

HSA Individual plan

Enter amount for:

Contribution per pay check

\$0.00

Annual contribution

\$0.00

Enter a value that is less than or equal to \$3,350.00

Coverage start date*: 01/01/2023

Remaining pay checks*: 24 ⓘ

Declining coverages

- If you would like to decline coverage, choose "I decline Health Savings Account plans."
 - Remember you are not eligible for an HSA if you choose the Aetna Core or Buy-Up Plan.

Step 1: Selecting the plan type

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 2: Contribution Amount

- You may enter your contribution amount as an annual contribution or input as contribution per paycheck; the system will automatically calculate your total contribution.
- The amount you enter will always be funded as a per paycheck contribution.

Healthcare/Limited Purpose/Dependent Care

I decline the FSA - Healthcare plan.

FSA - Healthcare

Enter amount for:

Contribution per pay check

\$0.00

Annual contribution

\$0.00

Enter a value that is less than or equal to \$3,350.00

Coverage start date*: 01/01/2023

Remaining pay checks*: 24 ⓘ

Declining coverages

- If you would like to decline coverage, choose "I decline the FSA."
 - Remember you are not eligible for a Healthcare – FSA if you choose the Aetna HDHP Plan. You may still elect a Limited Purpose – FSA and Dependent Care FSA.

Step 1: Selecting the plan type

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 2: Contribution Amount

- You may enter your contribution amount as an annual contribution or input as contribution per paycheck; the system will automatically calculate your total contribution
- The amount you enter will always be funded as a per paycheck contribution.



next

Employee/Spouse/Child

I Decline Employee Vol Life

Enroll Beneficiaries

Name	Primary	Secondary
<input checked="" type="checkbox"/> Name	<input checked="" type="radio"/> 100	<input type="radio"/>
	100.00 %	0.00 %

Declining coverages

- If you would like to decline coverage, choose "I decline."
- Due to a system limitation, you will still need to enter a beneficiary into the plan. This is a required placeholder but added beneficiary(s) will not receive any benefits.
 - Select any beneficiary from your list and assign them as primary, 100%
- **If you are declining coverages, please keep in mind that the next opportunity to enroll in coverage will be the next Open Enrollment period or if you have experienced a qualifying life status change.**

Employee/Spouse/Child

Supplemental Life - EE 25K
\$1.12 Semimonthly*

Benefit Amount

Benefit amount

The maximum benefit amount value is \$25,000.00

Enroll Beneficiaries

Name	Primary	Secondary
<input checked="" type="checkbox"/> Name	<input checked="" type="radio"/> 100	<input type="radio"/> <input type="text"/>
	100.00 %	0.00 %

Enroll Dependents

You must enroll between 0 and 1 dependents in the plan.

Name

Step 1: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 2: Enroll Beneficiaries

- Enter your beneficiaries for the plan
- Primary Beneficiary: is the person or persons first in line to receive your life insurance proceeds if you were to pass away. You may have more than one primary beneficiary.
- Secondary Beneficiary: is entitled to receive your insurance benefits if the primary beneficiaries can't be located or have passed away as well. You may have more than one secondary beneficiary.
- Your percentages must add up to 100%.

Step 3: Remember your election amount

- Our plan rules state that if you elect Voluntary Life, you must also elect the same amount of Voluntary AD&D

Tip: If you are enrolling in Spouse or Child Life you must enroll the correct dependent in the plan.

I decline the Voluntary Accident plan.

Voluntary Accident

Options

- Employee Only \$51.85
- Employee + Child(ren) \$99.43
- Emp + Domestic Partner \$104.31
- Employee + Spouse \$104.31
- Emp + Dom Partner Family \$143.96
- Employee + Family \$143.96

Enroll Dependents

You must enroll between 1 and 1 dependents in the plan.

Declining coverages

- If you would like to decline coverage, choose "I decline."
- **If you are declining coverages, please keep in mind that the next opportunity to enroll in coverage will be the next Open Enrollment period or if you have experienced a qualifying life status change.**

Step 1: Selecting the plan type

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 2: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 3: Enroll the correct dependents

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue with a white check mark.
- Check to make sure SSN, date of birth, and gender are reflecting accurately in the menu that appears

I decline Theft plans.

ID Theft
\$6.48 Semimonthly*

Options

<input type="radio"/> Employee Only	\$3.48
<input type="radio"/> Emp + Dom Partner Family	\$6.48
<input type="radio"/> Emp + Domestic Partner	\$6.48
<input type="radio"/> Employee + Child(ren)	\$6.48
<input type="radio"/> Employee + Family	\$6.48
<input checked="" type="radio"/> Employee + Spouse	\$6.48

Enroll Dependents
You must enroll between 1 and 1 dependents in the plan.

Declining coverages

- If you would like to decline coverage, choose "I decline."
- **If you are declining coverages, please keep in mind that the next opportunity to enroll in coverage will be the next Open Enrollment period or if you have experienced a qualifying life status change.**

Step 1: Selecting the plan type

- Click on the radial button next to the plan option you would like to elect. It is selected when it turns blue.

Step 2: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.

Step 3: Enroll the correct dependents

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue with a white check mark.
- Check to make sure SSN, date of birth, and gender are reflecting accurately in the menu that appears

I decline the Legal plan.

Legal

\$10.63 Semimonthly*

Declining coverages

- If you would like to decline coverage, choose "I decline."
- **If you are declining coverages, please keep in mind that the next opportunity to enroll in coverage will be the next Open Enrollment period or if you have experienced a qualifying life status change.**

Step 1: Selecting the plan type

- Click on the radial button next to the plan type option you would like to elect. It is selected when it turns blue.

This benefit is provided to you by HealthEdge at no cost to you. You must elect the benefit in UKG to complete the event.

GTL - Life
\$0.00 Semimonthly*
Benefit Amount
Benefit amount \$125,000.00

Step 1: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.
 - You cannot waive this coverage

Step 2: Enroll Beneficiaries

- Enter your beneficiaries for the plan
- Primary Beneficiary: is the person or persons first in line to receive your life insurance proceeds if you were to pass away. You may have more than one primary beneficiary.
- Secondary Beneficiary: is entitled to receive your insurance benefits if the primary beneficiaries can't be located or have passed away as well. You may have more than one secondary beneficiary.
- Your percentages must add up to 100%.

Enroll Beneficiaries

Name	Primary	Secondary
<input checked="" type="checkbox"/> Name	<input checked="" type="radio"/> 100	<input type="radio"/>
	100.00 %	0.00 %

Employer Paid Short- and Long-Term Disability

This benefit is provided to you by HealthEdge at no cost to you. You must elect the benefit in UKG to complete the event.

STD

\$0.00 Semimonthly*

Benefit Amount

Benefit amount \$1,500.00 Per week

Coverage start date*: 01/01/2023

**Estimated values*

Step 1: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.
 - You cannot waive this coverage

This benefit is provided to you by HealthEdge at no cost to you. You must elect the benefit in UKG to complete the event.

Ginger Mental Health

Benefit Amount

Benefit amount \$0.00

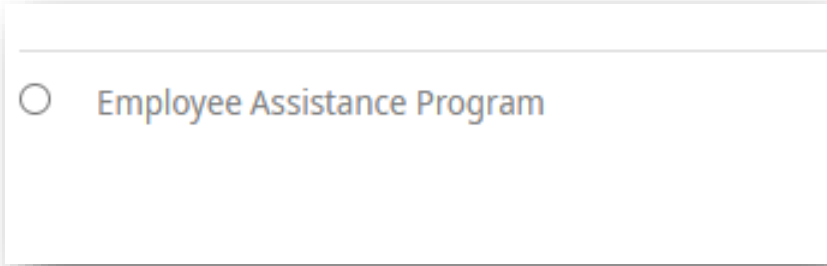
Step 1: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.
 - You cannot waive this coverage

Your dependents age 18 years or older are automatically covered under the plan.

Employer Paid Employee Assistance Program (EAP)

This benefit is provided to you by HealthEdge at no cost to you. You must elect the benefit in UKG to complete the event.



Employee Assistance Program

Step 1: Selecting the plan options

- Click on the radial button next to the coverage option you would like to elect. It is selected when it turns blue.
 - You cannot waive this coverage

Information

- Your elections cannot be submitted until elections for the required plan type(s) have been completed:

Flexible Spending Account

- FSA - Limited Purpose
- FSA - Dependent Care

▼ **New Benefits - As of 01/01/2023** Estimated Total Cost: \$162.32 ⓘ

Plan Type	Plan Details	Your semi-monthly cost
Medical	High Deductible Health Plan Coverage: Employee + Spouse Covered Family Members	\$104.31

▼ **Declined Benefits - Annual Open Enrollment**

Plan Type	Plan Details
Health Savings Account	HSA Individual plan

Step 1: Check for Errors

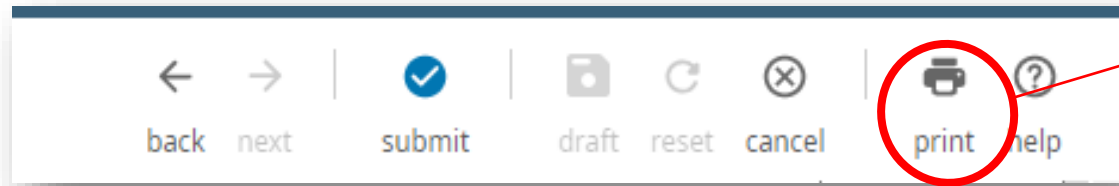
- If you have forgotten to make an election the system will indicate that your event cannot be submitted.
- For any plans listed, use the left-hand navigation bar to find and click on the benefit to take action on.

Step 2: Review Your Elections

- In the "New Benefits" section double check that all plans and dependents are reflected as you intended.
- If a benefit needs correcting, use the left-hand navigation bar to find and click on the benefit to take action on.

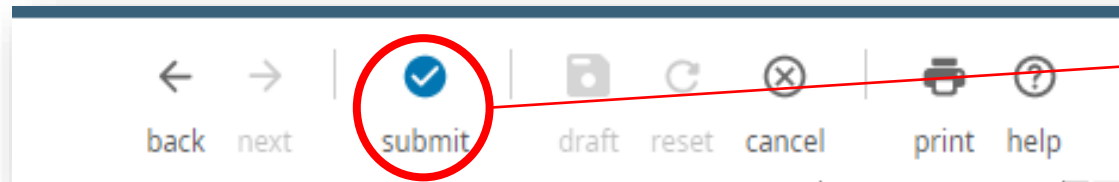
Step 3: Review Your Declined Benefits

- In the "Declined Benefits" section, double check that there are no plans listed that you had intended to elect.
- All benefits in this section are declined and you will not have the benefit as of 1/1/2023.
- If a benefit needs correcting, use the left-hand navigation bar to find and click on the benefit to take action on.



Step 1: Print Your Confirmation Page

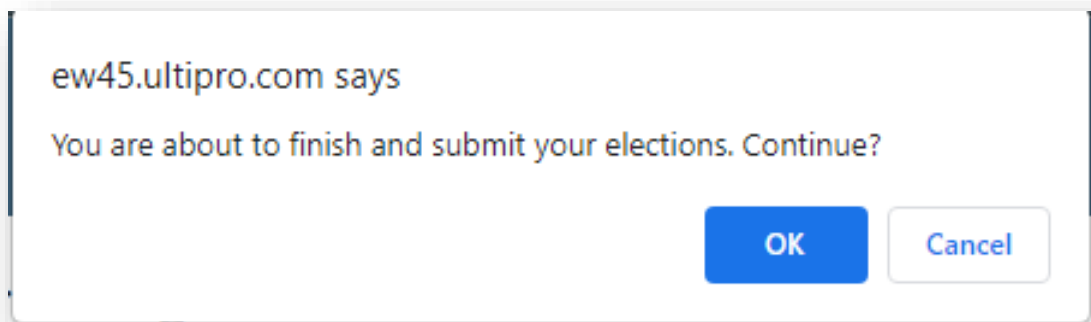
- Once you have confirmed that you have elected or waived all benefits and checked that all dependents have been correctly added – print your confirmation page and save for your records.



Step 2: Submit

- Once you have confirmed your elections and printed your confirmation page you may hit submit!
- You will get a pop-up warning – hit OK to submit.

Congratulations you have completed your enrollment!



Questions?

Email: hr@healthedge.com

Slack: #askHR

- After successful submission of your benefit enrollment, your elections will be reviewed and approved within 5 business days.
- Once approved, it may take up to two (2) weeks for vendors to receive your information.
- Your eligibility will retro-back to your date of hire.
- After the vendors receive your information, it will take up to 10-14 days for you to receive your I.D. cards, along with your HSA/FSA cards (if applicable).
 - Review: [Where are my ID Cards?](#)

What if I need to visit a physician before receiving my insurance cards?

- **Option 1:** If your provider's office does not require payment at time of service, we advise that you inform them of how your information is being processed. You can then submit to them your policy information (digitally or once you receive your card) and request that they reprocess your claim.
- **Option 2:** If payment is required at time of service, you may pay out of pocket at the time of service and then file a claim with the insurance company for reimbursement.