Benefits Enrollment Checklist

The purpose of this checklist is to help prepare you to have a smooth benefits enrollment experience. It is highly recommended that you complete your benefits enrollment as soon as possible, especially if you have any pending medical/dental appointments or prescriptions that need to be filled.

BENEFITS ENROLLMENT INFORMATION:
- All US employees MUST make their benefits enrollment in the Salesforce Workday instance to obtain benefits (including health insurance) coverage
- Enrollment starts on March 18, 2020 and will end on April 30, 2020
- Benefits will be effective April 1, 2020

PRE-ENROLLMENT CHECKLIST:

☐ Navigate to your current benefits statement from the Tableau Workday instance and review your current elections. This is available in Benefits > View > Benefit Elections. This may be helpful for your Salesforce benefits enrollment.

☐ Gather your dependent(s) information if you are enrolling them in your benefits. You will need to enter their information into the Salesforce Workday Instance, including:
  - Name
  - Gender
  - Date of Birth
  - Social Security Number
  - NOTE: You MUST enter the exact dependent information you currently have under the Tableau Workday instance. If there are discrepancies (such as spelling, typo, name change, etc.), this may result in an error and/or delay in processing your medical benefits enrollment.
    (Example: Dependent name on Tableau Workday instance: Mary E Doe; your entry in the Salesforce Workday instance: Mary Elizabeth Doe, the info will error out).

☐ If electing an HDHP/HSA, include any previous HSA contributions for this year when making your HSA contributions so you don’t go over the IRS limit. You can review your Tableau YTD HSA contributions from your March 31 Tableau pay stub.

☐ Gather your beneficiary information for Life, Accidental Death & Dismemberment (AD&D), and supplemental life, if applicable.
ENROLLMENT CHECKLIST:

- Go to the Salesforce Workday instance. Enrollment must be completed by April 30, 2020.
- Review your personal information, enter your dependent(s) information, and emergency contact information.

Reminder: Enter the exact dependent information you currently have under the Tableau Workday instance to Salesforce Workday instance.

- Make your benefits elections, review the information and submit your elections.

Note:

- To make changes to your benefits elections after you submitted your enrollment, you will need to log a Wayfinder or Concierge ticket (available starting April 1) before April 30, 2020.
- If you submitted your enrollment between March 18 - March 31, you will not be able to view your election in Workday until April 1. However, you can print your elections upon submission.

Reminder:

- If you’re enrolling in an HDHP plan, be sure to account for any HSA contribution made this year (employee and employer contributions) so you don’t go over the IRS limit and avoid penalty and extra paperwork.
- If you’re currently enrolled in a healthcare FSA and Tableau PPO plan, you must elect a PPO plan as you will not be eligible to receive HSA employer contribution and contribute to your HSA when you elect an HDHP plan.
- Be sure to designate your beneficiary for your Life and AD&D benefits.
- For supplemental spouse/domestic partner or child life, you will be the primary beneficiary and you don’t need to enter your information or designate another beneficiary.
POST ENROLLMENT CHECKLIST:

☐ Check your ID card in the mail: If you switch medical plans to Aetna, UHC, or Kaiser, your new medical and pharmacy ID card (Aetna & UHC enrollee) will arrive 10-15 days after April 3 or benefits enrollment completion.

☐ Check your paystub in Salesforce Workday: Be sure that your personal and banking information are accurate and correct benefits deductions are taken out of your paycheck.

☐ Register to Delta Dental website: To print out your dental ID card, you must register to Delta Dental website using your name, date of birth, and SSN. Once you logged in, you can print your ID cards as well as download the app with a digital ID card.

☐ Register to VSP website: There is no ID card necessary to see a VSP doctor - all you need to do is provide your name, SSN and DOB to confirm your eligibility. If you’d like a card as a reference, you can visit vsp.com and print your Member Vision Card.

☐ ConnectYourCare(CYC) HSA debit card: If you enroll in an HDHP plan, you will receive (CYC) your HSA debit card in mid-May. Be sure to check your mail.