Benefits Enrollment Process

Before you begin: **Reminder – Tableau employees will have access to Concierge after receiving their Salesforce device and/or are enabled on Salesforce systems.**

Step 1a (Enrolling prior to April 1 and using a non-Salesforce Laptop): Log in to Workday with your credentials. **Note:** Prior to April 1, Tableau employees should refer to their onboarding notifications. You will get a notification via onboarding in Workday that directs you to benefits enrollment. Tableau employees do not need to be on VDI prior to April 1. Tableau employees may not have access until March 18 to enroll at the earliest.

Step 1b (Enrolling after April 1 and using a Salesforce Laptop): Log in to Workday located in Aloha. **Note:** After April 1, Tableau employees can log in to Workday via Aloha. Tableau employees will need to be on VDI.

Step 2: If you are **enrolling in Salesforce benefits for the first time,** check your Workday Inbox to see if any benefits-related tasks require your attention. It is critical that you monitor your Workday Inbox upon hire to ensure you receive your initial enrollment task. You should see a task for **New Benefits Enrollment** that will look like this:
Step 3: After clicking the **New Benefits Enrollment** task, enroll in the various Benefit Election sections as applicable and select **Continue** to move through the task.

When electing medical, dental, and vision, click on the blank space under **Coverage** to select a type of coverage (i.e. Employee Only, Employee + Spouse, etc). If you are enrolling any dependents to a plan, click on the blank space under **Enroll Dependents** to add your dependent to the plan. You will be prompted to enter your dependent’s name, gender, DOB, SSN, and home address.

![Image of benefits enrollment screen](image)

**Note:** For **FSA**, please note that ConnectYourCare (CYC) will be the new FSA administrator effective April 1, 2020. If you're currently enrolled in a Tableau FSA, your enrollment will continue and your account will be transferred to CYC effective April 15, 2020. Per IRS rule, if you’re currently enrolled in the PPO with Health Care FSA, you...
**CANNOT** enroll in a HDHP with HSA (and will not receive any employer contributions) as your FSA elections remain in effect.

For **HSA**, please note that ConnectYourCare (CYC) will be the new HSA administrator effective April 1, 2020. Unless you elect to opt-out, your HSA balance at Discovery Benefits will be transferred to a new account at CYC starting in May. You must elect a HDHP and the HSA during the Benefits Enrollment period to participate in the transfer. If you do not make such an election, your HSA will not be transitioned to CYC and will remain at Discovery Benefits. If you elect the Premera HDHP or Aetna or UHC HDHP Premium plan, the Salesforce HSA contributions will be frontloaded.

If you have any questions about FSA/HSA, please go to **Wayfinder** (if you are making an election prior to April 1, 2020) or contact Employee Success via **Concierge** (if you are making an election on or after April 1, 2020).
Step 5: On the Insurance Plan enrollment section, you will be automatically enrolled in MetLife Basic Life and AD&D insurance. You can also choose to elect Supplemental Life insurance plans for you and your family. After electing insurance plans, you will be able to designate a beneficiary in the next step. You will be prompted to designate one of your dependents as a beneficiary, create a new beneficiary, or create a trust. Make sure to assign the percentage of benefit amount for primary and contingent beneficiaries. The percentages must add up to 100%.

Note:

- **MetLife Basic Life and AD&D insurance** is 100% employer paid.
- **Supplemental Life insurance for you**: Purchase this coverage in increments of $10,000, up to $1,500,000 (or 5x your OTE - whichever is less) for life insurance.
- **Supplemental AD&D insurance for you**: Purchase this coverage in increments of $10,000, up to $1,500,000 (or 10x your OTE - whichever is less) for AD&D.
- **Life insurance for your spouse**: Purchase this coverage in increments of $5,000, up to $250,000 (total can’t be more than 50% of your Basic and Supplemental Life Insurance coverage).
- **Life insurance for your children**: Purchase in the amount of $10,000.

Enrollment Instructions:

- Employee Supplemental Life - MetLife (Employee): Purchase this coverage in increments of $10,000, up to $1,500,000 (or 5x your On-Target Earnings (OTE) - whichever is less). During this special enrollment, you can elect up to the guaranteed issue amount of $1,500,000 (or 5x your On-Target Earnings (OTE) - whichever is less) without having to submit evidence of insurability.
- Supplemental AD&D - MetLife (Employee): Purchase this coverage in increments of $10,000, up to $1,500,000 (or 10x your On-Target Earnings (OTE) - whichever is less).
- Employee Supplemental Life - MetLife (Children): Purchase this coverage in the amount of $10,000.

For more benefits information, please visit [www.mylifeyourbenefits.com](http://www.mylifeyourbenefits.com).

Insurance Plan Dependencies and Coverage Limitations

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<tr>
<th>Benefit Plan</th>
<th>Elect / Waive</th>
<th>Coverage Level</th>
<th>Covers Dependents</th>
<th>Calculated Coverage</th>
<th>Employee Cost (Monthly)</th>
<th>Employer Contribution (Monthly)</th>
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<tr>
<td>Basic Life - MetLife (2 x OTE) (Employee)</td>
<td>Elect</td>
<td>2 X Salary</td>
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<td>Basic AD&amp;D - MetLife (2 x OTE) (Employee)</td>
<td>Elect</td>
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<td>Elect</td>
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</tbody>
</table>
### Beneficiary Designations

<table>
<thead>
<tr>
<th>Benefit Plan</th>
<th>Requires Beneficiary</th>
<th>Beneficiary Persons</th>
<th>Primary Percentage / Contingent Percentage</th>
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<tr>
<td>Basic Life - Med.Lik (2 x OTE)</td>
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Step 6: After making your benefit elections, make sure to review then provide your Electronic Signature by clicking the I Agree box and click Submit.
Step 7: Click Print for the confirmation page for your records, or Done to complete your changes.

Note: If you noticed you made an error after submission, you have until April 30, 2020 to modify your benefit elections. Prior to April 1, 2020, please go to Wayfinder to request to make changes to your benefits. On or after April 1, 2020, please contact Employee Success via Concierge to request to make changes to your benefits. Reminder: Tableau employees will have access to Concierge after receiving their Salesforce device and/or are enabled on Salesforce systems.

After April 30, 2020, the only exception to change your benefits is when you have a qualifying “life event”. This allows you to make changes to your benefits outside of being a new hire or during Open Enrollment. Please make sure the qualifying life event is reported within 30 days of the event. The effective date must correspond with the date the event occurred.

Examples of qualifying life events include:

- Marriage
- Birth or adoption of a child
- Divorce or legal separation
- Changes in a spouse’s employment status
- A change to your employment status (For example: part-time to full-time)
- Death of a spouse or a child
- A child reaching the maximum age for dependent coverage
- A court order that requires a change related to a dependent child

If you are unsure if you have a qualifying life event or need assistance with submitting a qualifying life event, please contact Employee Success via Concierge.