



## Open Enrollment Checklist

### Medical Coverage

- ☐ Do you [waive medical coverage](#)? If yes, you **MUST** select the correct waiver option annually during Open Enrollment.
- ☐ If you're enrolling in medical coverage, are all of your desired dependents listed under your medical plan?
  - ☐ If selecting UnitedHealthcare (UHC) HMO, have you reviewed the available [networks](#)?
    - For example, Scripps and Sharp are in two different networks.

### Dental & Vision Coverage

- ☐ If enrolling in dental and/or vision coverage, are all of your desired dependents listed under your plans in PeopleSoft Open Enrollment?
  - The Dental PPO/Premier Plan will now cover all orthodontists, do you want to enroll in or change your dental plan?

### Critical Illness Coverage

- ☐ If enrolling, are all of your eligible dependents listed under your critical illness plan in PeopleSoft Open Enrollment?

### Supporting Documentation

- ☐ If you added new dependents to any of these plans (medical, dental, vision, and/or critical illness), did you submit supporting documentation via the [Document Upload in PeopleSoft](#)?
  - Reminder: just because you previously created a profile does not mean you previously submitted your supporting documentation. You can check your Dependent Profiles in PeopleSoft to see who has supporting documentation on file.

### Life & AD&D Insurance

- ☐ Are your [beneficiaries](#) up to date with MetLife and other programs?
  - Remember, beneficiary designations are not recorded in PeopleSoft and change must be made with each program individually.
  - Beneficiary designations may be updated at any time during the year.
- ☐ If you are enrolling in Supplemental Life Insurance for the first time, or increasing coverage, MetLife will email a Statement of Health questionnaire will be emailed to you after Open Enrollment.
- ☐ The County is now offering Supplemental Spousal Life insurance for \$10,000 coverage, do you want to enroll in this new benefit?

## Short & Long-Term Disability

- ☐ Review the [plan](#) options.
  - Check out your [Flex Credit/Benefit Summary](#) to determine what plans you are eligible for.
  - Employees who **DO NOT pay into CA/SDI**:
    - If enrolling in a Short Term-Disability plan, consider your Long-Term Disability plan and waiting period.
    - If enrolling in a Voluntary Short-Term Disability, please note there is a Paid Family Leave (PFL) benefit included.

## Spending Accounts

### *Health Care Flexible Spending Account*

- ☐ Do you want to contribute out of pocket funds to this plan? Funding amounts need to be actively re-elected annually.
  - Note: Only select this option if you want to contribute **out of pocket** money.

### *Dependent Care Flex Spending Account*

- ☐ Did you specify an Annual Pledge amount? Funding amounts need to be actively re-elected annually.
  - Note: An annual pledge must be actively made every year, even if the account is flex credit funded.

### *Health Savings Account*

- ☐ Did you specify an Annual Pledge amount? Funding amounts need to be actively re-elected annually.
  - Note: You must be enrolled in a High Deductible Health Plan (HDHP) in order to enroll in a Health Savings Account
  - If you have any excess flex credits, they will be directed to your HSA and any remaining amount will be out of pocket. Please view your Enrollment Summary to view your out of pocket cost.

## ADDITIONAL OPEN ENROLLMENT RESOURCES

- Find out [What's New!](#)
- Here's [What You Need to Know About Spending Accounts.](#)
- Plan information, the Benefits Guide, rates, and Open Enrollment Login Instructions are all on the [Open Enrollment Website.](#)