Benefits Open Enrollment for Desktop

2027 Open Enrollment is October 26, 2026 through November 15, 2026.

Action Required: Enroll or Waive

This year is an active enrollment, which means **all benefits-eligible employees must log in to Workday and enroll in or waive medical, dental, and/or vision coverage.**

If no action is taken, your current medical, dental, and vision elections will not continue for 2027.

Also, be sure to make your FSA or HSA election as they must be made each year in accordance with IRS regulations.



Quick Tips!

- ✓ Dependents currently covered do not need to be re-entered. Eligible dependents will automatically appear on the Dependents screen to select.
- ✓ Adding new dependent(s) to be covered? See **Adding NEW Dependents for Coverage** in the Appendix for instructions. You will need to add any new dependents to Workday ***before*** enrolling.
- ✓ Employees are encouraged to review ALL benefit tiles to confirm their elections.
- ✓ After reviewing a tile, a label will appear above its title: **REVIEWED** if no changes were made or **UPDATED** if edits were made.
- ✓ When electing coverage, be sure to review covered dependents. Workday will automatically update your coverage tier (i.e. individual, family etc.) based on who you are covering.
- ✓ At the top left of the enrollment screen, you will see your **Projected Total Cost Per Paycheck**. This will update automatically as you make your selections through the enrollment event.

No benefits or changes needed?

To submit Open Enrollment with the elections currently displayed (all Health Care and Accounts waived and other insurance options enrolled as shown), click **"Review and Sign"** at the bottom of the screen.

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1 Starting the Open Enrollment Event

From your Workday home page:

- Click the Inbox in the top right corner.

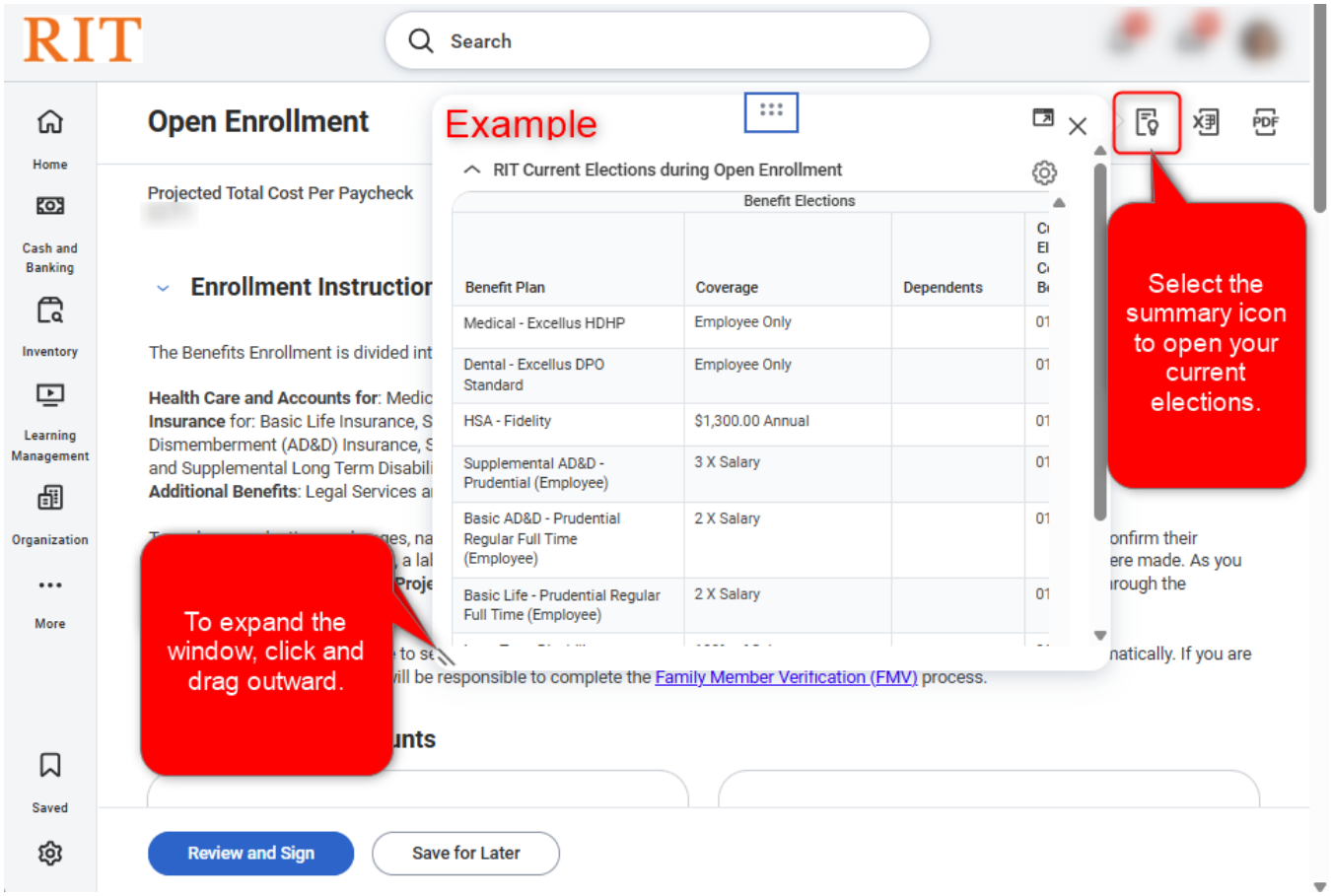


- Select the Open Enrollment Change action.
- To begin, click **Let's Get Started.**



A summary of your 2026 benefit elections will automatically pop open.

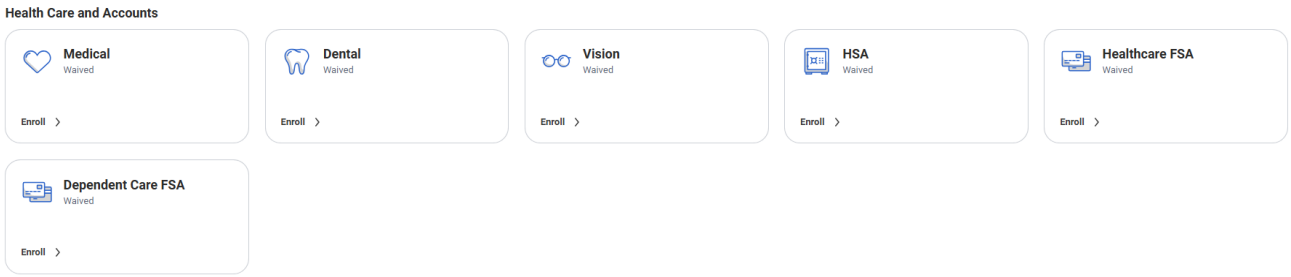
- ✓ Click the X in the upper right corner to minimize.
- ✓ Reopen the summary with the light bulb icon.



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2 Enroll in or Change Your Benefit Elections:

Health Care and Accounts

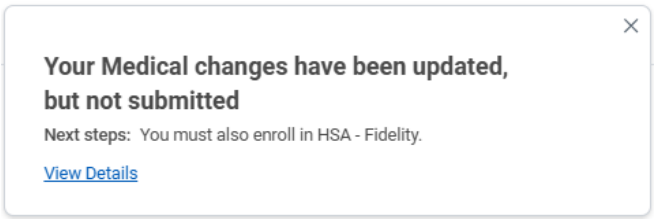


Enroll in Medical, Dental, or Vision option(s):

- Click **Enroll** on the benefit tile.
- **Select** the plan option you want to enroll in for 2027.
- Click **Confirm and Continue** to move to the next page.
- On the **Dependents** screen, click the checkbox next to the dependent(s) you would like to cover.
- Click **Save** to return to main enrollment screen**.**

Note: Your coverage level and plan cost per paycheck will automatically adjust as you select dependents.

✓ If you select the HDHP plan, you will receive this message:



This is a reminder that you must enroll in the HSA. If you do not want to contribute, you can set your contribution amount to $0.

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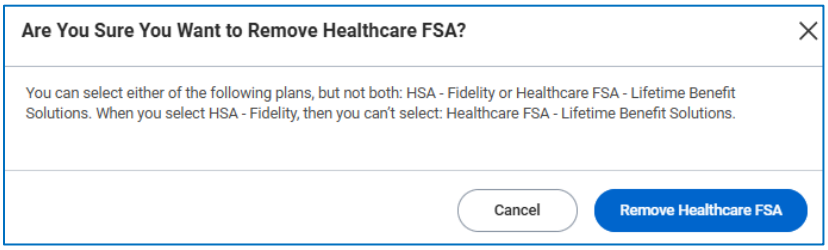
Enroll in Spending Account option(s):

- Click **Enroll** on the benefit tile.
- **Select** the plan to continue.
- Click **Confirm and Continue.**
- Enter your contribution amount, either **per paycheck** or as an **annual election**.
- Click **Save** to return to main enrollment screen.

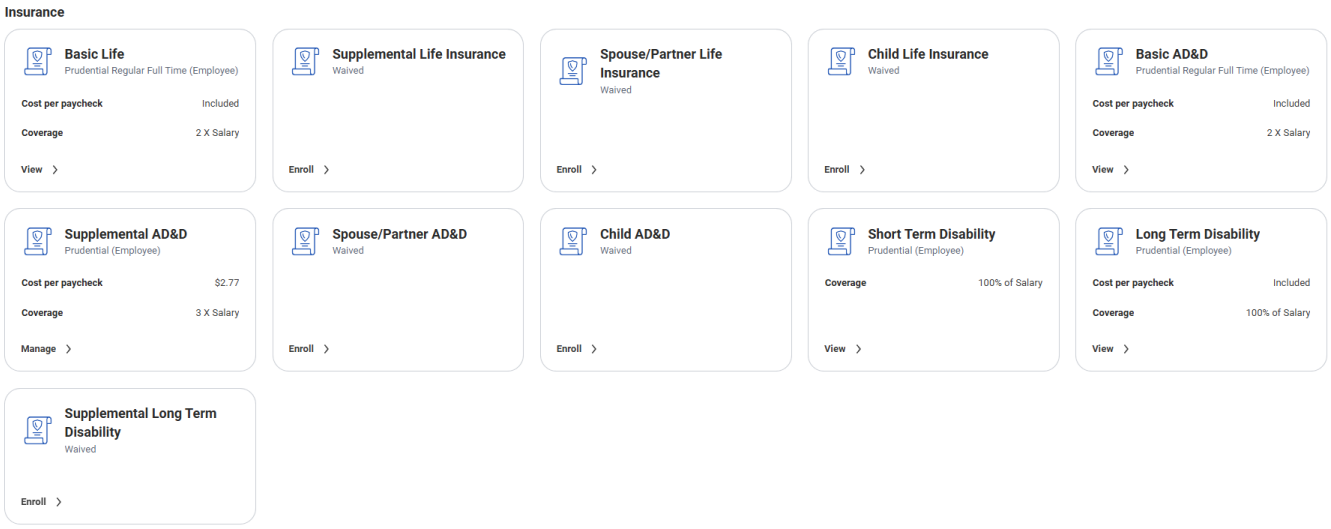
✓ If you are not enrolled in the HDHP medical plan, you may view the HSA option but will not be able to elect.

✓ **REMINDER:** If you have elected the HDHP, you **MUST** enroll in the HSA. If you do not want to contribute, you can set your contribution amount to $0.

Please note: Per IRS regulations, you cannot be enrolled in both a Health Savings Account (HSA) and a Healthcare Flexible Spending Account (FSA) at the same time. If you elect an HSA and then select a Healthcare FSA, or vice versa, you will receive a popup warning that will remove the other election for you.



Insurance



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Enroll in or **Change** Your Insurance Options:

- ✓ Your current elections are shown in the insurance tiles.
- ✓ No action is required for Basic Life, Basic AD&D, or Long Term Disability coverage. These are paid for by RIT and enrollment is automatic.

Supplemental Life Insurance – Employee, Spouse/Partner and/or Child

- Select Enroll or Manage to add or update supplemental life insurance.
  - Choose **Select** or **Waive**.
  - Select **Confirm and Continue**.
  - Review the plan options and costs, choose your desired coverage amount.
  - Click **Save** to return to main enrollment screen.
- After Open Enrollment closes, if you need to complete Evidence of Insurability (EOI) for Prudential, you will receive a "To Do" task in your Workday inbox to complete the EOI process.

Supplemental AD&D - Employee, Spouse/Partner and/or Child

- Select Enroll or Manage to add or update Supplemental AD&D.
  - Choose Select or Waive for each benefit plan.
  - Select **Confirm and Continue**.
  - Review the plan options and costs, choose your desired coverage amount.
  - Click **Save** to return to main enrollment screen.

✓ **REMINDER!** New elections and changes to AD&D do not require Evidence of Insurability (EOI).

Short Term Disability and Long Term Disability

- No action required – RIT paid coverage.

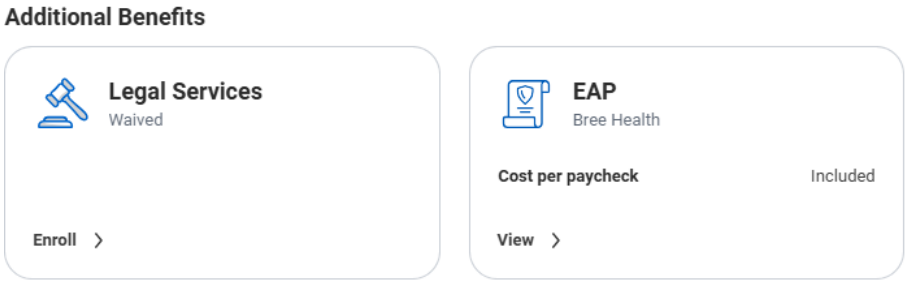
✓ Beneficiaries are entered and maintained in Prudential's site - Go to www.Prudential.com/mybenefits. Register and use Control Number 50757.

Supplemental Long Term Disability (LTD):

- Select Enroll or Manage to add or cancel Supplemental LTD insurance.
- A new Supplemental LTD election will require Evidence of Insurability (EOI) to be completed with Prudential. After Open Enrollment closes, if you need to submit EOI, you will receive a "To Do" task in your Workday inbox to complete the EOI process.

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Additional Benefits



Legal Services:

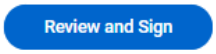
- Select Enroll or Manage to add or cancel the Legal Services plan.
- Click Select or Waive, then **Confirm and Continue**
- Click **Save** to return to main enrollment screen.

Employee Assistance Program (EAP):

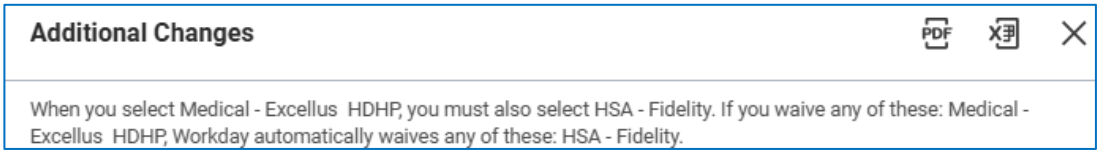
- No action required – RIT provided coverage.

3 Review and Sign

Once all elections have been made, click the **Review and Sign button** (bottom of screen).



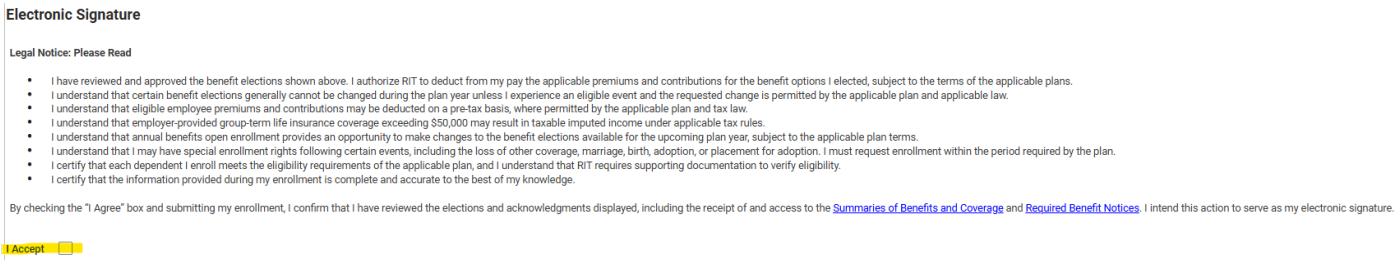
If you receive this message…



…you have elected the HDHP plan, but waived the HSA. If you are enrolled in the HDHP, you must enroll in the HSA. If you do not want to contribute, you can set your contribution to $0.

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- On the View Summary screen, carefully review all of your selections.
- If you would like to make changes, click **Cancel** and you will be returned to the selection screen.
- Read the Electronic Signature section:



Electronic Signature

Legal Notice: Please Read

- I have reviewed and approved the benefit elections shown above. I authorize RIT to deduct from my pay the applicable premiums and contributions for the benefit options I elected, subject to the terms of the applicable plans.
- I understand that certain benefit elections generally cannot be changed during the plan year unless I experience an eligible event and the requested change is permitted by the applicable plan and applicable law.
- I understand that eligible employee premiums and contributions may be deducted on a pre-tax basis, where permitted by the applicable plan and tax law.
- I understand that employer-provided group-term life insurance coverage exceeding $50,000 may result in taxable imputed income under applicable tax rules.
- I understand that annual benefits open enrollment provides an opportunity to make changes to the benefit elections available for the upcoming plan year, subject to the applicable plan terms.
- I understand that I may have special enrollment rights following certain events, including the loss of other coverage, marriage, birth, adoption, or placement for adoption. I must request enrollment within the period required by the plan.
- I certify that each dependent I enroll meets the eligibility requirements of the applicable plan, and I understand that RIT requires supporting documentation to verify eligibility.
- I certify that the information provided during my enrollment is complete and accurate to the best of my knowledge.

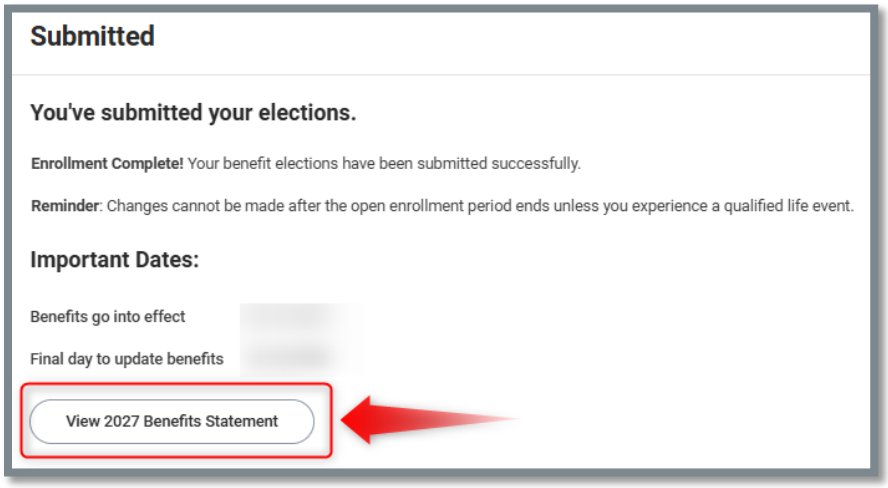
By checking the "I Agree" box and submitting my enrollment, I confirm that I have reviewed the elections and acknowledgments displayed, including the receipt of and access to the Summaries of Benefits and Coverage and Required Benefit Notices. I intend this action to serve as my electronic signature.

I Accept ☐

- Click the **"I Accept**" checkbox, then click **Submit.**
- If you receive the error below, you missed checking the checkbox!



- Once Submitted, you will be taken to a confirmation screen:

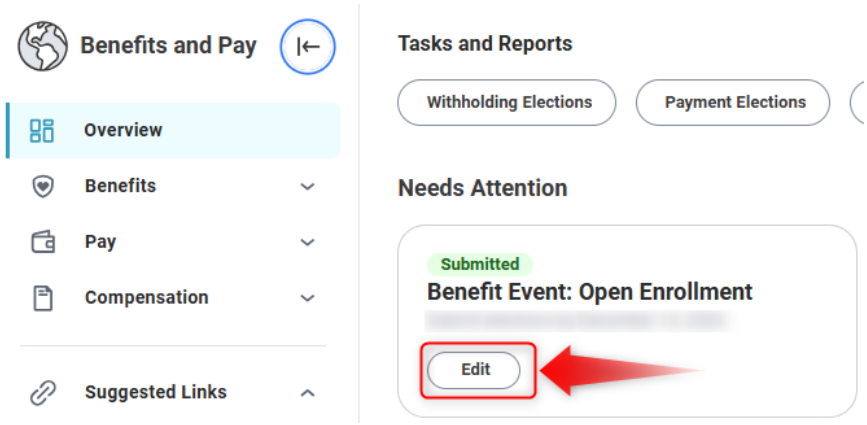


- Click **View 2027 Benefits Statement** to view and **print** your elections – an email *will not* be sent with this information.
    - The 'Print' button is on the bottom left corner of the Submit Elections Confirmation Page.

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Making Changes after Submitting

Employees can reenter the event to change their benefits as many times as needed through Nov. 15th.



- From your Workday homepage, on the left side bar, click on **Personal**, then **Benefits & Pay**.
- On the Benefits & Pay screen, click the **Edit** button under the Open Enrollment Event. This will take you to **Change Open Enrollment,** click **Let's Get Started** to edit your elections.
- **NOTE:** If you do not see the **Edit** button, you did not successfully submit your elections, or the Open Enrollment period has ended.

To print a confirmation statement after submitting your enrollment:

- From the profile icon in the upper-right corner of Workday, select View Profile
- Click on **Related Actions:** next to your name
- Go to **Benefits** from the menu
- Select **View My Benefit Election History**.
- Click on **Benefits Elections Active on 01/01/2027** link to see your Open Enrollment elections.
- Click the **PDF icon** in the upper right corner and **Download** the document.
- Open the document from your browser downloads and print.

If you have questions on how to complete Open Enrollment in Workday, please join us at a Staffed Computer Lab Session or contact the RIT Service Center for assistance.

✓ Computer Lab Sessions drop-ins are welcome! No registration required.
✓ Find the Computer Lab Session schedule on the Open Enrollment website under Resources.

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Appendix: Adding NEW dependents for coverage

You need to add new dependents to Workday before enrolling them in benefits during Open Enrollment.

To add new dependent(s): From the home 

page, click on **Personal**, then **Benefits & Pay** tab.

1. Under Benefits, click on **Dependents**.
2. Click the **"Add"** button to begin.
3. In the Effective Date & Reason tile, click the **edit** (pencil) icon. 
   - For effective date, use today's date.
   - For reason, select **"Add Dependent > Open Enrollment"**
   - Select the checkmark in the upper right hand of the box to continue.
4. Complete the required Dependent Personal Information by selecting the **edit** (pencil) icon. All fields marked with an (*) are required.
   - ✓ The section "Use your new dependent as a beneficiary" is part of the template but is not currently an active feature. Employees should continue to maintain their beneficiaries with Prudential, Fidelity, and TIAA.
   - ✓ To add a dependent social security number, which is important for medical, dental, and/or vision insurance but not required, click on **'Add'** under National IDs which is near the bottom of the screen under the section 'Identifier Information'.
5. Lastly, under **Attachments**, upload the required Family Member Verification (FMV) documentation (i.e. birth certificate, marriage certificate, or other accepted documentation).
   - Select file or drag and drop files to add attachment(s).
   - Use Dependent Verification in the description
   - Select the Category - **"Benefits"**
   - All dependent verification documents must be submitted and approved before January 1.
6. Click **Submit**.

✓ Your FMV documentation will be reviewed by the HR-Benefits team. If additional information or documentation is needed, HR-Benefits will reach out to you directly.

NOTE: See the Manage your Benefits job aid for further instructions on adding or editing your dependents.

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