Open Enrollment Guide for New Graduate Assistants, Graduate Fellows and Graduate Trainees

Navigating to Workday
After your background check is complete, you will receive an email notification (in your Penn State email inbox) that there is an action waiting for you in Workday. Visit Workday (workday.psu.edu) and log in.

This will take you to the WorkLion portal. Once logged in, you will see the landing page to the right. Click on the Workday graphic (circled in orange) in the center of the page.

Enrolling in Individual Coverage
If you wish to enroll in individual coverage (e.g. if you only need medical, vision and dental insurance for yourself and you have no dependents), you do not need to take any further action. You will be automatically enrolled in the Student Health Insurance Plan.
Changing Your Benefit Elections

Next, you will see that you have messages in your Workday Inbox.

Click on the **Inbox** icon in the top right-hand corner or on the **Inbox** card below the announcements to view your messages.

In your inbox, select the message titled, **Elect Student Health Insurance: Your Name**. Then click the **Let's Get Started** button to make your benefit elections.

To waive coverage, continue reading. To enroll dependents, skip to page 6.
How to Waive SHIP Coverage

If you wish to waive enrollment in the Student Health Insurance Plan, please follow the steps below. Please be aware that there are certain health insurance requirements for international students.

Clicking on the Student Health Insurance email will open up the Graduate Assistant, Fellow, Trainee New Hire interface. Each tile will have a Manage, Enroll, or View option on it. Click on Manage or Enroll at the bottom of any benefit (tile) you wish to modify.

To waive coverage, select Waive in the Selection column on the table to the left of the benefit plan you are reviewing. Then, click Confirm and Continue.

Note: Elect is selected as a default on the page.

You will then return to the Graduate Assistant, Fellow, Trainee New Hire interface. Repeat this process for any other benefit on the Hire screen you wish to waive (ex. Dental or Vision).
Once you have made all the changes you wish, click **Review and Sign**.

You will then see a confirmation page including a summary of the benefit plans you chose to waive.
Scroll to the bottom of the confirmation page, where you will see a check box.

Click I Accept and then click Submit.

This serves as your electronic signature for your benefit elections.

Next is a screen that indicates you have completed your benefit selections. If you click the View 20XX Benefit Statement button, you will be provided a summary of your benefit elections and it will include text that says, “You have successfully submitted your benefit enrollment.” This is the default text. It will say this even when you waive coverage.

You will not receive a confirmation email when you complete your benefit elections, but you do have the option to print this screen out and can access the information in Workday anytime.
How to Enroll Dependents

Clicking on the Student Health Insurance email will open up the Graduate Assistant, Fellow, Trainee New Hire interface. Each tile will have a Manage, Enroll, or View option on it. Click on the benefit (tile) you wish to add dependents to.

![Image of the Graduate Assistant, Fellow, Trainee New Hire interface]

Once you are on the Medical screen, look for the table representing the benefits available to you. In the Selection column (to the left of the benefit plan you are reviewing), click Select. Then, click Confirm and Continue. You must elect a benefit to add dependents to the coverage.

![Image of the Medical screen with selection options]

Click on the Add New Dependent button.

![Image of the Add New Dependent button on the Medical plan]

Revised: 6/28/21
Please note: When you Add New Dependent, you will then be prompted to add a beneficiary on the next screen (pictured below). This question is unnecessary, but the function cannot be turned off.

The screen also provides guidance on providing a Social Security Number (SSN) or U.S. Individual Taxpayer Identification Number (ITIN). You must provide one of these National IDs for your dependents but may bypass the field during the Open Enrollment process. These IDs are required to cover your dependents with your benefits.

Click OK.

On the next screen, you will be asked to provide information about your dependent.

The red asterisk denotes required information. When you are finished entering the information, scroll down.
Approximately halfway down on the page, you will be asked to provide a National ID for your dependent. **YOU DO NOT NEED TO ENTER AN SSN.**

If you are an international student or if you do not wish to enter a SSN for your dependent, do not click the Add button.

If you do begin the National ID process, but do not wish to provide the number at this time, click the Remove button at the bottom of the National ID screen.

Then complete the **Address** and **Phone & Email** sections below the National ID section. The **red asterisk** denotes required information.

When you are ready, click the **Save** button.

Once you have added your dependent, you will return to the Medical (or other benefit) screen. Your dependent will **automatically be checked** to be added to your benefit plan.

If you chose not to add a National ID in the previous step, click the radio button to the left of **Reason SSN is Not Available** and **enter a reason** for not including an ID with your dependent.

Click **Save**.

Don’t forget to add dependents to other benefits from the New Hire screen (ex. Dental or Vision). Dependents you previously added in the Workday system will automatically be listed in the Dependents table. You will just need to click the checkbox to add them to the benefit.
If you add dependents to the Vision and Dental screens, you will also need to enter a **Coverage**. Click the list icon and select an **option** from the dropdown list before clicking **Save**.

When you have made all the changes you wish, click **Review and Sign**.
Then, you will see a confirmation page that provides an overview of you and your dependents’ benefits.

Scroll to the bottom of the page, where you will see a check box.

Click I agree and then click Submit. This serves as your electronic signature for your benefit elections.

You can ignore the Attachments section, as you do not need to upload any documents or files.
Next is a screen that indicates you have completed your benefit selections. If you click the View 20XX Benefit Statement button, you will be provided a summary of your benefit elections and it will include text that says, “You have successfully submitted your benefit enrollment.”

You will not receive a confirmation email when you complete your benefit elections, but you do have the option to print this screen out and can access the information.

Questions?

- If you have questions about the Student Health Insurance Plan or about how to complete your benefit elections, please contact University Health Services - Student Health Insurance Office at 814-865-7467 or uhs-insurance@psu.edu.
- Questions about the terms and conditions of your graduate assistantship, graduate fellowship or graduate traineeship appointment should be directed to your graduate program staff.