Open Enrollment Guide for Reappointed Graduate Assistants, Graduate Fellows and Graduate Trainees
(Graduate students who were previously appointed as a GA/GF/GT in the Spring semester and are being reappointed in the Fall semester)

Important Dates

Benefit Selection Open: July 5th
Effective Date of Benefit Changes: August 13th
Last Date to Submit Elections: September 15th

Maintaining the Same Coverage
Your current benefit elections will carry over from the Spring semester to the Fall semester. Previously, graduate students had to re-elect their benefits each academic year in the old graduate benefits system. If you do not need to make any changes to your benefit elections from the Spring semester, no further action is required. If you need to change your benefits, please follow the guide below.

Navigating to Workday
To get started, 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 below. Click on the Workday graphic (circled in orange) in the center of the page.
Requesting to Change Your Benefits

Next, click on the **Benefits** icon (circled in **orange** below).

Then under the **Change** section, click the **Benefits** icon (circled in **orange** below).
On the Change Benefits page, you will then need to select: Open Enrollment: Graduate Assistant, Fellow, Trainee as the Change Reason and enter 8/13 of the current year as the Benefit Event Date.

Once that information has been entered, click Submit and the request is sent to the Student Health Insurance Office in University Health Services.

Please note, you still must complete the remaining steps to change your benefit elections. The initial request is ONLY to notify the Student Health Insurance Office that you wish to make changes to your benefit elections. At this point, you may log out and wait for an email notification.

The Student Health Insurance Office receives the notification to review your benefit change request. They check the information you provided and make any corrections before approving the request. Once they approve the request, you will be allowed to proceed with the benefit election update/change.

After your request is approved by the Student Health Insurance Office, you will receive an action item in your Workday inbox (and a notification will be sent to your Penn State email) labeled Elect Student Health Insurance: Your Name. Click on Let’s Get Started to make changes to your benefit elections.

To waive coverage, keep reading. To enroll dependents, skip to page 7.
How to Wave 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 Open Enrollment 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 return to the Graduate Assistant, Fellow, Trainee Open Enrollment interface. Repeat this process for any other benefit on the Open Enrollment screen you wish to waive (ex. Dental or Vision).
When 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 that you chose to waive.
Scroll to the bottom of the confirmation 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.

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

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.

Click on the Add New Dependent button.
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 an 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 portion of the 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 Open Enrollment 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 Accept 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 benefits 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 in Workday anytime.

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 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.