Click the appropriate link to jump to the desired section:

1. Login Instructions
2. Change Health Plans, Level of Coverage, Terminate Health Plans
3. Change Existing Health Plan Coverage Level
4. Decline/Opt Out of Medical Coverage
6. Enroll in Flexible Spending Account Plan(s)
7. Update Dependent and Benefit Plan Enrollment Data
8. Review/Print Confirmation Statement

After reviewing these instructions if you have any questions or need assistance, please contact:

Babette Brooks  (973) 275-2755
Terri Demarest   (973) 761-9181
<table>
<thead>
<tr>
<th>Access Banner Self Service Open Enrollment</th>
<th>Go to the <a href="#">HR Webpage</a> and click on Open Enrollment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>Click on Open Enrollment in the Human Resources Channel.</td>
</tr>
</tbody>
</table>

![Image of a webpage with a screenshot of the Banner Self Service Open Enrollment and a link to the HR Webpage.]
Start Open Enrollment Process

Click on the Start Open Enrollment button

Select Group

Select Health to Enroll/Change/OptOut/Terminate Medical and/or Dental coverage. Select Flex Spending to enroll in Flexible Spending Plans.
### Open Enrollment Health Plan Options

<table>
<thead>
<tr>
<th>Select Plan</th>
<th>The following Health options are available during Open Enrollment. You must terminate existing plan coverage before changing plans. You will also need to update Dependent coverage after making changes.</th>
</tr>
</thead>
</table>
| To Change Plan | 1. Select your existing plan  
2. Click Stop Benefit Button  
3. Select New Plan  
4. Click the My Choice option for Level of Coverage  
5. Click Add Choice Button |
| To Change Level of Coverage | 1. Select your existing plan  
2. Click the My Choice Option for Level of Coverage  
3. Click Submit Change Button |
| To Terminate Plan | 1. Select your existing plan  
2. Click Stop Benefit Button |
| To Enroll in Plan | 1. Select New Plan  
2. Click the My Choice Option for Level of Coverage  
3. Click Add Choice Button |
| To Opt Out of Medical Coverage | 1. Select Opt Out of Medical Coverage  
2. Click Add Choice Button |

To Change Plans, Level of Coverage or Terminate a Plan select your existing plan. To enroll in a new plan select a new plan.

![Open Enrollment Group](image)
To Change or Terminate a Plan click on Stop Benefit.

To Change Level of Coverage, select the My Choice option and click the Submit Change button.

To Decline/Opt Out of Medical coverage, select the Plan and click Add Choice.
Return to Open Enrollment Screen

After completing your health plan elections, click on the Open Enrollment link at the bottom of the screen.

Enroll in Flexible Spending Account Plans for the new plan year.

Select Flex Spending to participate in the Flexible Spending Account Plans or click Complete if you are finished with Open Enrollment. Flex Plan enrollment does not carry over from one year to the next year, you must enroll/re-enroll. Select Flex Spending from the Open Enrollment screen.
Select the Flex Account you wish to participate in.

| Flexible Dependent Care Spending Account Plan | If you selected Flexible Dependent Care, enter the annual amount you wish to contribute to the plan. The Annual Goal Amount Minimum is $300.00 and Maximum is $5,000.00. After entering the data click on the Add Choice button. |

![Image of Open Enrollment Group screen](image-url)
Flexible Health Reimbursement Account

If you selected Flexible Health, enter the annual amount you wish to contribute to the Plan. The Annual Goal Amount minimum is $300.00 and Maximum is $2,650.00. After entering the data click on the Add Choice Button.
Complete the Open Enrollment Process

Click on the Open Enrollment option at the bottom of the screen.

To finish the Open Enrollment process and save your changes you must click **Complete**. You will receive an email confirming your elections after clicking Complete, you may receive multiple emails depending on the actions you have taken.
If you have elected medical and/or dental coverage for dependents or have changed plans, you will need to add your dependents and enroll them for coverage or update their coverage. If you elect Countrywide benefits, you must include your dependents as instructed below.

To add a new dependent during open enrollment you will also be required to complete a Dependent Eligibility Verification Affidavit and provide acceptable documentation in accordance with the affidavit*. The Affidavit and documentation must be presented to the Human Resources Department before coverage can begin.

*Affidavit is not required for Countrywide.

Select the Dependents link from the navigation bar at the bottom of the screen.
Add a New Dependent

NOTE: All added dependents will require verification through HR

Click on the Add a New Person link to add a new dependent.

Enter Dependent Information

Enter dependent data and click on the Submit Changes button at the bottom of the screen.
Update dependent data and click on the Submit Changes button at the bottom of the screen. If you are unable to update the SSN or Birth Date fields, contact the HR Department. These fields cannot be updated through self service if the dependent exists in Banner as a student or employee.
Update or Enroll Dependent in Benefit Plan

Select Update Coverage and Allocations

Select Coverage Details to update dependent enrollment for the plan.
Click in the Choose Benefit field for the dependent(s) you are enrolling in the benefit plan. Enter the Begin Date (01/01/2015) and click on the Choose or Update button to submit your elections.
Confirmation Statement

To view and/or print a Confirmation Statement, click on Confirmation Statement.

From the drop down list select Jan 01, 2015 and click Select.
To print a copy for your records, right click on the Confirmation Statement and select Print, use the Printer Icon on the Command Bar or select Print from the File Menu.

After reviewing the instructions if you have any questions or need assistance, please contact:

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