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Task Sheet

Open Enrollment

CATEGORY

Department: Benefits

Type: Employee Resource

OVERVIEW

Tilson proudly provides a digital experience for benefits enrollment. The following is a guide to help provide assistance and instruction with benefits enrollment.

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CONTENTS

1.0 Getting Started

1.1 Access Online HR Portal

Go to tilsonhr.com, then select "Login".

The page will refresh; select "Employee Portal" to be directed to the online HR portal.

1.2 Sign-In
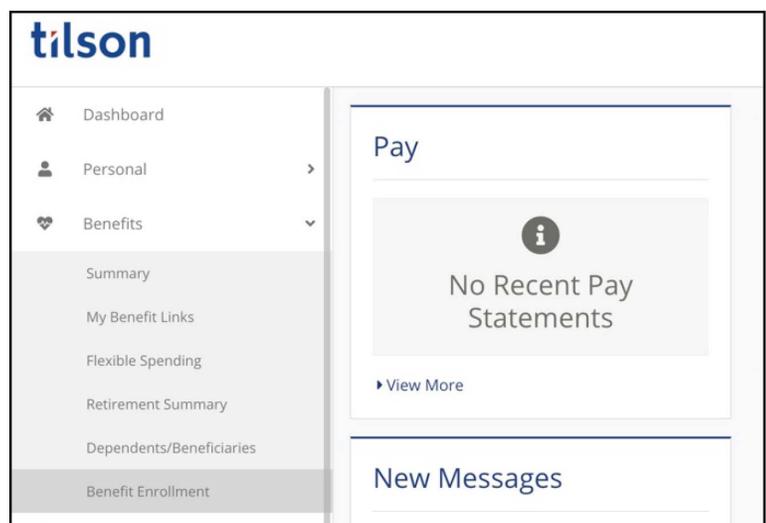
Type in Username and Password.

Select "Sign in".

1.3 Access Benefit Enrollment

The page will redirect to your online HR portal dashboard. Select the "Benefits" tab from the menu bar. A drop-down list will appear. Select "Benefit Enrollment".
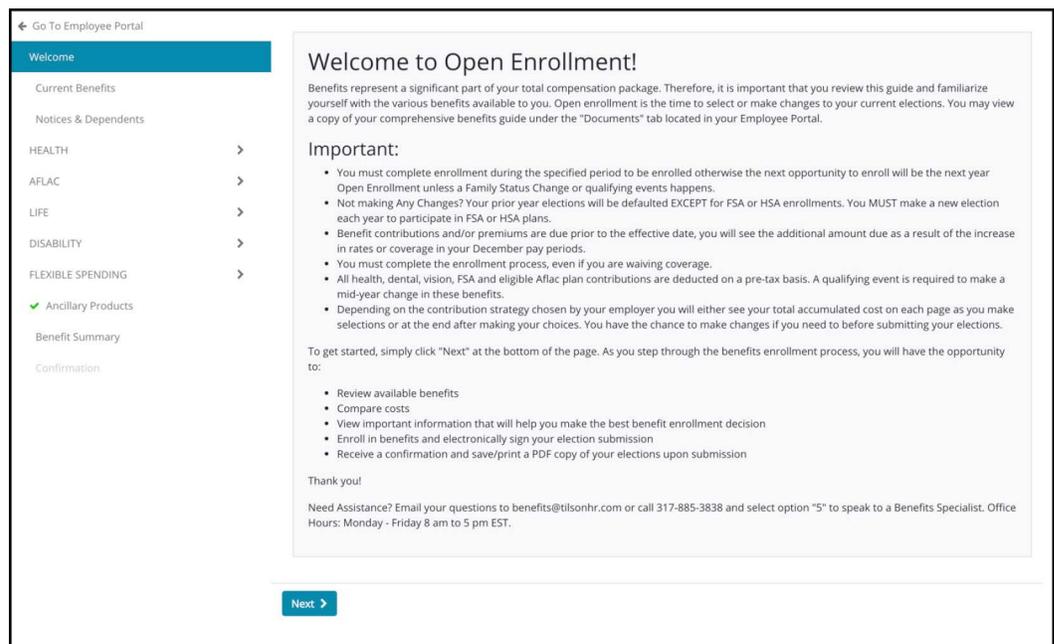
2.0 Open Enrollment

2.1 Welcome to Open Enrollment

The page will redirect to the online Benefits Enrollment portal.

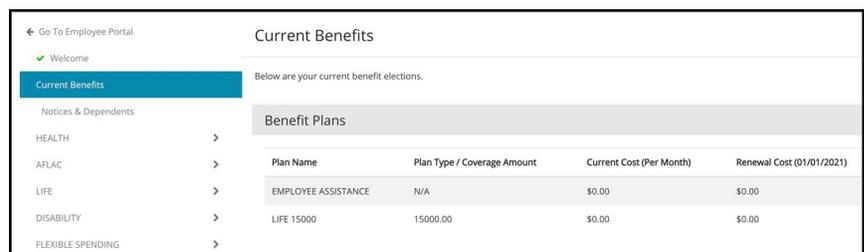Read through the "Welcome to Open Enrollment" message before starting the enrollment process.

Select "Next".

2.2 Current Benefits

The screen will refresh to display the "Current Benefits" page.

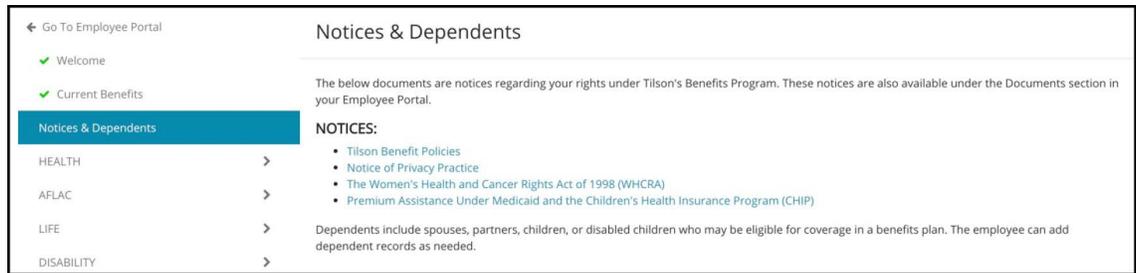Review the current benefit elections, then select "Next".

3.0 Notices & Dependents

3.1 Access/Review Notices

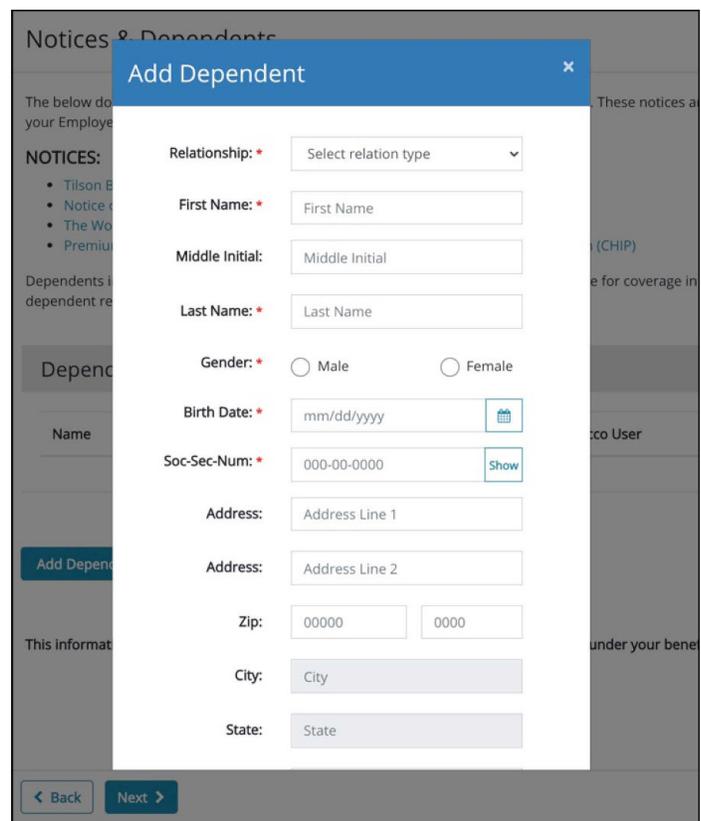The screen will refresh to display the "Notices & Dependents" page.

To review the notices, select the document by title from the list.

3.2 Add Dependents

If applicable, add dependents (spouse, partner, children, or disabled children) to your plan by selecting "Add Dependent".

A pop-up form will appear. Follow the prompts to complete the form.

3.0 Notices & Dependents

The page will refresh to display the newly added dependent.

Continue adding dependents until the list accurately depicts your dependent record.

Review the information for accuracy, then select "Next".

4.0 Health - Medical

4.1 Select Enrollees

The screen will refresh to display the benefits open enrollment health plan section: Medical.

Read and review the content on the page, including the introduction, resources, and the enrollment process instructions.

4.0 Health - Medical

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen medical plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage.*

4.21 Select Medical Plan

Important: If you do not intend to enroll in medical benefits, skip to section 4.22 on how to waive medical benefits.

To select a medical plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

4.0 Health - Medical

4.22 Waive Medical Benefits

To waive Medical benefits, scroll down to the "Waive Benefits" section.

In the provided space, select "I agree to waive Medical benefits".

To continue, select "Next".

5.0 Health - Dental

5.1 Select Erollees

The screen will refresh to display the benefits open enrollment health plan section: Dental.

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen dental plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage.*

5.21 Select Dental Plan

Important: If you do not intend to enroll in dental benefits, skip to section 5.22 on how to waive dental benefits.

To select a dental plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

5.22 Waive Dental Benefits

To waive Dental benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Dental benefits".

To continue, select "Next".

6.0 Health - Vision

6.1 Select Enrollees

The screen will refresh to display the benefits open enrollment health plan section: Vision.

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen Vision plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage.*

6.21 Select Vision Plan

Important: If you do not intend to enroll in vision benefits, skip to section 6.22 on how to waive medical benefits.

To select a vision plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

6.22 Waive Vision Plan

To waive Vision benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Vision benefits".

To continue, select "Next".

7.0 Aflac - Accident

7.1 Select Enrollees

The screen will refresh to display the benefits open enrollment Aflac insurance section: Aflac Accident.

Under the Enrollees section, use the toggle switch to select the individual's that will be on the chosen Aflac Accident plan. *Note: Toggling to green indicates selected for coverage; toggling to gray indicates non-coverage*

7.0 Aflac - Accident

7.21 Select Aflac Accident Plan

Important: If you do not intend to enroll in Aflac Accident benefits, skip to section 7.22 on how to waive Aflac accident benefits.

To select an Aflac accident plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

7.22 Waive Aflac Accident Plan

To waive Aflac accident benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Aflac accident benefits".

To continue, select "Next".

8.0 Aflac - Critical Illness

8.1 Select Aflac Critical Illness Plan

The screen will refresh to display the benefits open enrollment Aflac insurance section: Aflac Critical Illness.

Important: If you do not intend to enroll in Aflac critical illness benefits, skip to section 8.2 on how to waive Aflac critical illness benefits.

To select a Aflac critical illness plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

8.2 Waive Aflac Critical Illness Plan

To waive Aflac accident benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Aflac critical illness benefits".

To continue, select "Next".

9.0 Life - Basic Life

9.1 Select Basic Life Plan

The screen will refresh to display the benefits open enrollment Lincoln Financial section: Basic Life.

To select a Lincoln Financial basic life plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

9.2 Update Beneficiaries

The default beneficiaries will be based upon your listed enrollees. If you desire to add additional beneficiaries, select "Add Beneficiary", then follow the prompts accordingly. *Note: The newly added beneficiary will appear under the list of beneficiaries.*

9.3 Primary Amount

Once all beneficiaries have been properly added, follow the prompts to add the Primary Amount per beneficiary. Do this for each beneficiary until all Primary Amounts have been entered.

To continue, select "Next".

10.0 Life - Voluntary Life

10.1 Select Voluntary Life Plan

Important: If you do not intend to enroll in Lincoln Financial voluntary life plan, skip to section 10.4 on how to waive voluntary life benefits.

To select a Lincoln Financial voluntary life plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

10.2 Coverage Amount

Follow the prompt to add the coverage amount.

10.3 Update Beneficiaries

The default beneficiaries will be based upon your listed enrollees. If you desire to add additional beneficiaries, select "Add Beneficiary", then follow the prompts accordingly. *Note: The newly added beneficiary will appear under the list of beneficiaries.*

10.4 Coverage Amount

Follow the prompts to add the Primary Amount per beneficiary. Do this for each beneficiary until all Primary Amounts have been entered.

To continue, select "Next"

10. 5 Waive Voluntary Life Benefits

To waive voluntary life benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Voluntary life benefits".

To continue, select "Next".

11.0 Short Term Disability (STD)

11.1 Select STD Plan

The screen will refresh to display the benefits open enrollment Disability section: Short Term Disability (STD).

Important: If you do not intend to enroll in STD benefits, skip to section 11.2 on how to waive STD benefits.

To select a short term disability plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

11.2 Waive STD Benefits

To waive short term disability benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Short Term Disability benefits".

To continue, select "Next".

12.0 Long Term Disability (LTD)

12.1 Select LTD Plan

The screen will refresh to display the benefits open enrollment Disability section: Long Term Disability (LTD).

Important: If you do not intend to enroll in LTD benefits, skip to section 12.2 on how to waive LTD benefits.

To select a long term disability plan, click "select". *Note: The plan will turn green and a checkmark will appear on the plan to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

12.2 Waive LTD Benefits

To waive long term disability benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Long Term Disability benefits".

To continue, select "Next".

13.0 Health Savings Account (HSA)

13.1 HSA Annual Contribution

The screen will refresh to display the benefits open enrollment Flexible Spending section: Health Savings Account (HSA).

Important: If you do not intend to enroll in HSA benefits, skip to section 13.2 on how to waive HSA benefits.

Follow the prompt to add the annual contribution. *Note: The plan will turn green and a checkmark will appear on the HSA widget to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

13.2 Waive HSA Benefits

To waive HSA benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Health Savings Account benefits".

To continue, select "Next".

14.0 Flexible Spending Account (FSA)

14.1 FSA Annual Contribution	The screen will refresh to display the benefits open enrollment Flexible Spending section: Flexible Spending Account (FSA).

Important: If you do not intend to enroll in FSA benefits, skip to section 14.2 on how to waive FSA benefits.

Follow the prompt to add the annual contributions. *Note: The plan will turn green and a checkmark will appear on the FSA widget to indicate that it has been properly selected for enrollment.*

To continue, select "Next". |
| **14.2 Waive FSA Benefits** | To waive HSA benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Health Savings Account benefits".

To continue, select "Next". |

15.0 Commuter

| 15.1 Commuter Monthly Contribution | The screen will refresh to display the benefits open enrollment Flexible Spending section: Commuter. |

Important: If you do not intend to enroll in Commuter benefits, skip to section 15.2 on how to waive Commuter benefits.

Follow the prompt to add the monthly contributions. *Note: The plan will turn green and a checkmark will appear on the widget to indicate that it has been properly selected for enrollment.*

To continue, select "Next".

| 15.2 Waive Commuter Benefits | To waive Commuter benefits, scroll down to the "Waive Benefits" section. In the provided space, select "I agree to waive Commuter benefits". |

To continue, select "Next".

16.0 Ancillary Products

16.1 Ancillary Products

The screen will refresh to display the benefits open enrollment Flexible Spending section: Ancillary Products.

Review the provided material.

To continue, select "Next"

17.0 Flexible Spending Review

17.1 Flexible Spending Review

The screen will refresh to display the benefits open enrollment Flexible Spending section: review

Review the provided material.

To continue, select "Submit"

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18.0 Confirmation

18.1 Complete Enrollment

The screen will refresh to display the benefits open enrollment Confirmation section: Benefit Enrollment Terms and Conditions.

Review the provided material.

In the provided space, select "I acknowledge that my benefit elections have been completed for the current plan year and I agree to the corresponding payroll deductions as indicated."

In the provided space, type in your full name.

To complete the enrollment process, select "Complete Enrollment".

FINAL NOTE: Upon submitting, your Benefit Confirmation Statement will appear. We advise that you print this for your records. You may also view your Benefit Confirmation Statement one day after completing enrollment on your Employee Portal by selecting the Benefits tab then Confirmation Statement from the drop down.

Important: Because benefit contributions and/or premiums are due prior to the effective date, you will see the additional amount due as a result of the increase in rates or coverage in your December pay periods.