UKG ENROLLMENT INSTRUCTIONS

NEW HIRE ENROLLMENT OPTION

The New Hire Enrollment option enables newly hired individuals to elect benefit options, such as health insurance, for the current plan year. Employees can access the New Hire Enrollment page, as follows:

Menu > Myself > Benefits > Manage My Benefits > Benefits > Open Enrollment or Shop Benefits > Get Started

MAKE A CHANGE TO MY BENEFITS OPTION

The Make a Change to My Benefits option enables employees to change their benefits outside of the open enrollment period due to a life event.

A life event refers to a change in life circumstances such as getting married or having a baby. A birth, for example, may require medical plan coverage to change from single to family. It is important for employees to report the type of life event and the event date, so that the appropriate benefit changes are completed. Employees can access the Life Event action, as follows:
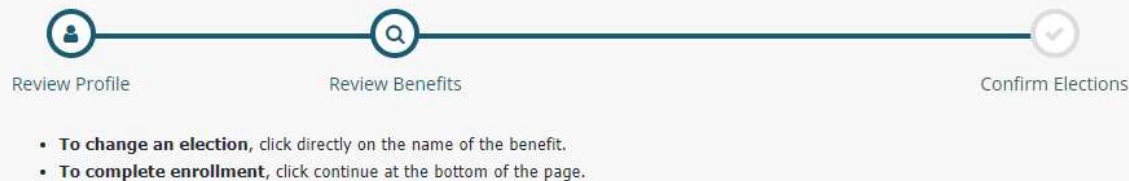
Menu > Myself > Benefits > Manage My Benefits > Update Your Current Benefits

VIEW CURRENT BENEFITS SUMMARY OPTION

The Current Benefits Summary option enables employees to view coverage details for their active elections for the current plan year. Employees can use the links at the top of the page to download a PDF, email, or print a copy of the confirmation statement.

Menu > Myself > Benefits > Manage My Benefits > Benefits > Current Benefits

VIEW MY PROFILE OPTION

The My Profile option enables employees to view and update personal information on the My Profile page.
This personal information on this page is taken from the Employee Summary page (Menu > Personal > Employee
Summary). If any information on the My Profile page is incorrect, update the Employee Summary in the UKG Pro solution

Menu > Myself > Benefits > Manage My Benefits > Profile > My Profile

UPDATE MY BENEFICIARIES OPTION

Beneficiary information must be kept up-to-date to ensure the right individuals receive designated benefits in case of an
employee death.

As a best practice, an employee should review beneficiary information on an annual basis or when a life event occurs. The
Review Current Beneficiaries page lists all current beneficiaries. Primary and secondary beneficiaries can be designated.
More than one beneficiary can be entered, although allocations for all beneficiaries in each group must total 100%.

Note Typically, in the event all primary beneficiaries die before the employee, the contingent beneficiaries take the role
of the primary beneficiaries. Refer to the applicable plan documents for any plan-specific information on beneficiary
succession.

Menu > Myself > Benefits > Manage My Benefits > Profile > My Beneficiaries

1. Select Add Beneficiary.
2. When the card appears, select the beneficiary from the drop-down list, or you can create a new one by
   completing the name, relationship, and allocation fields. If you select the Add to all benefits box, this
   beneficiary copies to all plans and becomes the primary or secondary beneficiary on all plans.
3. Select Add.