

# 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**


Current Benefit Elections

Review Profile      Review Benefits      Confirm Elections

- To change an election, click directly on the name of the benefit.
- To complete enrollment, click continue at the bottom of the page.

## New Enrollment Plan Year Effective from 01/01/2023 to 12/31/2023


### Medical

 Standard PPO Plan	\$267.00 Per Pay Period	<a href="#">View or Change</a>
---	----------------------------	--------------------------------

### Health Savings Account

 Ineligible for coverage

### Flexible Spending Account

 Surency Life and Health      Healthcare FSA	\$118.75 Per Pay Period	<a href="#">View or Change</a>
--	----------------------------	--------------------------------


You must select or decline all coverages before moving on

[Review & Confirm](#)

## 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

 **\$487.07**  
Per Pay Period

Verify your Personal Information and make changes if needed

**This information is used for:**

- reporting to the benefit carriers
- to issue your ID cards and process your claims
- to process your payroll, taxes, etc.

If any of the information is incorrect, you are unable to change on this page and will need to update in Ultipro or contact your Payroll Representative.

[EDIT INFO](#)

Basic Information	
First Name Rachel	Middle Name
Last Name Sporleder	Name Suffix
SSN	

Contact Information	
Address 1 123 Main Street	Address 2
City Evermore	State Colorado
Zip	Country United States
Home Phone	Cell
Office Phone	E-mail test@PStest.com
Alternate E-mail alternate_test@PStest.com	

Personal Information	
Birthdate	Gender Female
Marital Status Married	Preferred Spoken Language

Other

## 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.