YOUR 2023 OPEN ENROLLMENT CHECKLIST

REVIEW YOUR CURRENT BENEFIT SELECTIONS

☐ Review your current benefit selections via Working@Chapman.
  - Navigate to the Employee/Manager Self-Service square and click on Employee/Manager Self-Service to be directed to log-in with your Chapman University username and password.
  - In the middle of the screen, toggle to Employee Self-Service and click the My Benefits tab, and go to the Benefits Enrollment tab, located in the left-hand side margin.

☐ Consider all benefit coverages available that may impact your selection for the upcoming year.

REVIEW THE 2023 OPEN ENROLLMENT SITE

☐ Need a refresher on the university plans? Watch the presentations on Open Enrollment, Health Savings Account (HSA), and Voluntary Benefits here. These recorded presentations are designed to offer you greater flexibility to review during a time that meets your needs.

☐ Review your current Flexible Spending Account elections vs. your actual expenses to help you decide your contributions for 2023. Remember that 2022 elections DO NOT roll over into 2023.

☐ Flexible Spending Accounts (FSAs) require annual re-enrollment should you wish to continue these benefits for the upcoming plan year. The 2023 maximum annual election amount is $3,050 for the Healthcare FSA and $5,000 per household for the Dependent Care FSA.

☐ NOTE: The age limit for Dependent Care FSA is for eligible dependents under the age of 13 years as per IRS guidelines. Contributions may not exceed $5,000 per household in 2023.

  Reimbursement request must meet the IRS criteria for qualified health and dependent care expenses. To review a list of qualified expenses, please click WEX Eligible Expenses.

☐ Review your current Health Savings Account (HSA). HSAs require annual re-enrollment during Open Enrollment.

☐ Funding your HSAs: The maximum total combined annual contribution for 2023 is:

<table>
<thead>
<tr>
<th>Coverage Level</th>
<th>CHAPMAN*</th>
<th>You</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Only</td>
<td>$750</td>
<td>Up to $3,100</td>
<td>$3,850</td>
</tr>
<tr>
<td>Employee +1 or more</td>
<td>$1,500</td>
<td>Up to $6,250</td>
<td>$7,750</td>
</tr>
</tbody>
</table>

Individuals age 55 and over may also contribute an additional $1,000 per year in catch-up contributions.

*Chapman’s contribution will be made in the month you become eligible and have enrolled.
PREPARE- GATHER REQUIRED DOCUMENTATION

☐ If you are enrolling a new dependent: spouse, registered domestic partner, or eligible children, you must provide supporting documentation. For example, if you are adding any eligible children, you will provide a birth certificate to the Benefits Department. Failure to provide documentation can delay your enrollment.

EXPLORE, MAINTAIN, OR MODIFY

☐ Maintain or change your medical, dental, vision, or voluntary life insurance benefits changes
☐ Add or remove coverage for a dependent (spouse, registered domestic partner, or eligible children)
☐ Add social security numbers when prompted
☐ Enroll in or update your Flexible Spending Account (FSA)
☐ Opt out of Chapman’s medical, dental or vision plans
☐ Add or change your life insurance beneficiaries (SSN must be provided prior to Wednesday, November 16 to update in Working@Chapman Employee Self Service. After this date, a form will be required to add SSN for beneficiary information)
☐ If you do not have any changes, please verify, and acknowledge that there will be no changes and select SAVE.

UPDATE BENEFICIARIES

☐ It is important to update/review your Primary and Contingent Beneficiary(ies) information for the Basic Life and AD&D plans.

OTHER REMINDERS FOR 2023

☐ Set it and forget it! Consider or elect to receive your 1095-C Electronically. Find this tab under the Employee Self-Service area in the left-hand corner, find the FORM 1095-C Consent tab.
☐ To update any payroll forms; such as, income tax withholding or direct deposit forms, please visit the Payroll Forms page.

If you need additional assistance, please do not hesitate to contact us at benefits@chapman.edu.