# ANNUAL ENROLLMENT CHECKLIST

## BENEFIT TASKS

### Prepare for enrollment

- ◯ Learn about your 2027 Benefit & Wellness Plans **https://mymethodisthsbenefits.com**
- ◯ Plan a visit to your local Roadshow to meet with our Benefit & Wellness vendors
- ◯ Print a copy of your current benefit elections from Workday as a guide to assist you with your 2027 elections
- ◯ If adding new dependents and/or beneficiaries, have their information accessible at the time you enroll (name, address, birthdate, SSN, phone number, etc.)

### Enroll for benefits (MUST BE COMPLETED BY 10/30/26)

- ◯ **Medical, dental & vision plans**: An **active** election is required if you wish to have coverage
- ◯ **Spending Accounts**: An **active** election is required if you wish to participate
  **FSA**: EPO and Choice medical plan participants only
  **HSA**: HDHP participants only
- ◯ **Basic Life and Basic AD&D:** Automatic enrollment for this company paid benefit.
  **Beneficiary information is required.** (Review, update or add, as needed)
- ◯ **Optional Life Coverages (self, spouse and child):** Your current coverage amounts will pre-populate.
  **If you increase your coverage amount**, EOI will be required. The EOI link will be sent to you before year-end. EOI is never required for child coverage.
- ◯ **Optional AD&D Coverages (self, spouse and child):** Your current coverage amounts will pre-populate. Changes to coverage can be made without any EOI requirement.
- ◯ **Short-term disability:** Your current elections will populate. If you are adding coverage, EOI will be required. The link will be provided prior to year-end.
- ◯ **Long-term disability: Full-time (1+ years of service)**
  **Basic LTD**: Company provided. No action needed.
  **Buy-up LTD**: Your current coverage will populate. If you're adding coverage now, EOI will be required. The EOI link will be provided prior to year-end.
- ◯ **Voluntary Benefits:** Your current elections will populate. Elections may be modified, as needed.

### DEPENDENT VERIFICATION

- ◯ **Submit dependent verification documents by Friday, November 13, 2026.** Unverified dependents after this date will be removed from your 2027 elected benefit plans.

## WELLNESS TASKS

### Prior to September 30th

- ◯ Check your **2026 Annual Welless Plan status** in Workday (type "Wellness" in the search bar; select "Annual Wellness Plan")
- ◯ **Complete your 2026 Annual Wellness activities by September 30, 2026** to avoid a surcharge on your 2027 medical plan premiums.

### Sept 29 - Nov 20: Wellness Status Blackout period

- ◯ **Wellness Plan updates cannot be made to Workday once the Annual Enrollment system setup has begun on September 29th.**

  If you completed your Wellness activity, but see "surcharge" noted on your record, keep in mind it could be the result of timing of the receipt of your status update by UHC or the submission of your manual form. Any approved wellness visit completed by the September 30th deadline will be honored and processed when the blackout period ends.

### Nov 20 - Dec 18: Wellness Status updates begin again

- ◯ Check your **2026 Annual Wellness Plan status** in Workday to confirm your status is showing as "Complete", if applicable.

  **If you notice a discrepancy, reach out to the Wellness Department no later than December 18th so your premium deductions are correct for the first paycheck of 2027.**

### BENEFIT & WELLNESS ROADSHOWS

October 6: Celina (11 am - 2 pm & 5:30 - 7 pm)
October 7: Southlake (11 am - 2 pm)
October 8: Dallas/Corporate (11 am - 2 pm & 5:30 - 7 pm)
October 9: Methodist Southwest (11 am - 2 pm & 5:30 - 7 pm)
October 13: Richardson (Campbell) (11 am - 2 pm)
October 14: Mansfield (11 am - 2 pm & 5:30 - 7 pm)
October 15: Richardson (Bush) (11 am - 2 pm & 5:30 - 7 pm)
October 21: CBO (12 - 3 pm)
October 22: Midlothian (11 am - 2 pm)

### ENROLLMENT HELP SESSIONS (ZOOM - COME & GO Q&A)

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|---|---|
| October 7: 11 am - 1 pm: | Click here to join |
| October 12: 1 - 3 pm: | Click here to join |
| October 16: 11 am - 1 pm | Click here to join |
| October 19: 1 - 3 pm | Click here to join |
| October 22: 1 - 3 pm | Click here to join |
| October 27: 12 - 2 pm | Click here to join |
| October 29: 12 - 2 pm | Click here to join |

### BENEFITS & WELLNESS MICROSITE:

**https://mymethodisthsbenefits.com**