





# 2020 Benefit Open Enrollment Directions

Benefit open enrollment begins Monday, October 28 and ends Monday, November 11 2019. Current benefit elections will not carryover to the new plan year.

- 1) Go to your Company Website and select 'Employee Login':
- 2) The 2020 Benefit Open Enrollment landing page will open in a new window, select 'Enroll' to get started.
- 3) Enter in your UltiPro login credentials:
  - a. Username: Legal First Name + Date of Birth (MMDDYYYY)
  - **b.** *Ex:* James12011972
  - If you have already logged into UltiPro, enter your password
  - If you forgot your password, select 'Forgot your password?'
  - If you have never logged into UltiPro, enter the default password:
    - c. Password: Legal First Name + Home Zip Code
    - **d.** *Ex:* James60514
- 4) Select Login

5) The Benefit Portal will launch in a new window, on the right hand side, select 'Click Here to Enroll in your 2020 Benefits'

| QuickLinks                      | Hi Jessica,  | Enroll Now!                                |
|---------------------------------|--|--|
| 2020 Enrollment<br>Instructions | Use the link to your right to enter your Open Enrollment Session. Remember, you<br>can only access this page directly through your Homepage in UlinPho under the<br>Myself tab. If you experience any issues with the enrollment process, please reach<br>out to your local Human Resource Same Member or contact the Benefit Solution<br>Center. Trained representatives are ready to assist you! Also, please remember to<br>complete the survey at the end of your enrollment session so we can continue to<br>enhance your groud Human technice. | Click Here to Enroll in your 2020 Benefits |
|                                 | Thank you.<br>Your Human Resources Team  | 2020<br>Open<br>Enrollment                 |
|                                 | Questions?   |  |
|                                 | Questions?   | 4  |
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#### 6) Review the Benefit Guide for information of the benefit program then select 'Get Started.'

Welcome to the Heico Companies Open Enrollment!

Important Reminders:

Dependent Verification is required for any newly added dependents.

Evidence of Insurability(EOI) is required if you're adding or increasing your Voluntary Life Insurance. Please visit www.mylincoInportal.com and register using company code "HEICO-EE" to complete the form.

If you need assistance, contact the Benefits Solutions Center by phone at 855-847-6066 or by email at heicobenefits@benefitfocus.com.

When you're ready click get started!

CFA 2020 Benefits Guide - English

Get Started >

7) Before you enroll, you'll add eligible dependents to your plan by selecting Add Dependent. Click '*Next*' to Continue. \**You will be required to upload Dependent Verification for newly added dependents after completing enrollment*.

| Before you enroll in benefits Do you need to add any dependents to your profile?                                    |   |  |  |  |
|---|---|--|--|--|
| Note: You'll also be able to add dependents an<br>To add a dependent, click <b>'Add Dependent'</b><br>Add Dependent | nd select who you want to cover when you enroll in or edit your benefits. |  |  |  |
| Next Previous   |   |  |  |  |

| Dependent Relationship  | Dependency Proof Documentation  |
|---|---|
| Spouse – Your legal spouse, including<br>same-sex spouse  | Marriage certificate<br>Marriage license  |
| Child under age 26 - Your natural,<br>legally adopted child, or child in the<br>process of being adopted: | State or county issued birth certificate showing employee's name or signed<br>court order. If birth certificate lists employee's maiden name, please<br>provide marriage certificate. |
| Step-Child under age 26   | State or county issued birth certificate showing parents' names and a<br>copy of your marriage certificate  |
| Adopted Child under age 26  | Adoption certificate or qualified medical support order (QMCSO)   |
| Child for whom you are the legal guardian under age 26  | Signed court order and last year's tax return claiming the child as a dependent   |
| Foster Child under age 26   | Signed letter from social service agent confirming child has been placed<br>under your care   |
| Disabled Child - Your child who has<br>been deemed disabled   | Birth certificate, and supporting medical documentation from an attending physician   |

## **Medical Enrollment**

8) First, select 'Begin Enrollment', 'View your current plan', or 'Decline coverage'.



The following options are available from the Medical enrollment screen.

- a. Select Dependent you'd like to enroll (Box will appear green when selected)
- b. Add Dependents not already listed
- **c.** Review Plan Details
- 9) Once you've reviewed your options, click '*Select Plan*' to Enroll or '*Decline Coverage*' to decline and go to the next plan.



**10)** If you decline Medical coverage, a window will pop up asking you to confirm. Once declined, the option to Edit coverage is available. Click 'Save'.



**11**) To complete Medical benefits, review your elections on the Accounts Summary page and click '*Save*' to continue.

### **Dental Enrollment**

12) Select Begin enrollment, view your current plan, or decline coverage

| Choose your Dental coverage<br>P BenefitSAIGE recommends Dental |                        |                  |  |  |
|---|------------------------|------------------|--|--|
| Begin enrollment  | View your current plan | Decline coverage |  |  |

- 13) The following options are available from the Dental enrollment screen
  - **a.** Select Dependent you'd like to enroll (Box will appear green when selected)
  - **b.** Add Dependents not already listed
  - c. Review Plan Details
- 14) Once you've reviewed your options, click '*Select Plan*' to Enroll or '*Decline Coverage*' to decline and go to the next plan.

| 2020 - Dental PPO Plan - SunLife |            |      | Plan Cost<br>Employer Cost | \$12.11<br>(\$0.00) |
|----------------------------------|------------|------|----------------------------|---------------------|
| Individual Deductible            |            | N/A  |                            | You Pay             |
| Preventative & Diagnostic Care   |            | 100% | (Four                      | Times a Month Cost) |
| Basic Restorative Care           |            | 80%  |                            | \$12.11             |
| Major Restantives Care           |            | 10%  |                            |                     |
| Belestplan Plan estady           |            |      |                            |                     |
| 2020 - Dental HMO Plan - SunLife |            |      | Plan Cost<br>Employer Cost | \$1.29<br>(\$0.00)  |
| Industrual Deductible            | Copayment  |      |                            | You Pay             |
| Preventative & Diagnostic Care   | Copayment  |      | (Four                      | Times a Month Cost) |
| Basic Restorative Care           | Coparyment |      |                            | \$3.29              |
| Major Restaustive Care           | Coparyment |      |                            |                     |
| Select plan                      |            |      |                            |                     |
|                                  |            |      |                            |                     |

**15**) To complete Dental benefit enrollment, review your elections on the accounts summary page and click 'Save' to continue.

### Short & Long Term Disability Coverage



17) Review your Short Term Disability coverage by clicking 'Plan Details' and click 'Next' to continue.



**18)** You'll be automatically directed to the Long Term disability plan, review your coverage by clicking '*Plan Details*' and click '*Next*' to continue.

| Enroll in your Long Term Disability Plan<br>Please which or decline your Long Term Daubility benefit   |                                   |
|--|-----------------------------------|
| 2020 - Long Term Disability - SunLife<br>Disability insurance protects you and your tamily if you are usable to work due to an illness or non-work related injury. Long term disability (LTD) is intended to protect your income for a long duration after you have exhausted any STD or sick leave that you may have. | \$5,43<br>Four Times a Month Cost |
| Long term disability (LTD) coverage provides a monthly benefit equal to 60% of your monthly earnings to a maximum of \$6,000. LTD payments may begin after a 90-day waiting period.<br>Givenage answert: \$3,000,00 per monthly collary maximum of \$6,000,00 per month)   |                                   |
| Control V Schedure     There details      Descripe Coverage     I would like to declare Long Term Deability soverage.  |                                   |

19) Review your elections and click 'Save' to continue.

# Life Insurance

20) Select 'Begin enrollment', or 'View your current plan'.



21) Basic Life Insurance is a FREE benefit, review your coverage by clicking 'Plan details' and click 'Next' to continue.

| Basic Life Insurance  |                            |                                |
|---|----------------------------|--------------------------------|
| Employer provided benefit                                       |                            |                                |
| 2020 - Basic Life Insurance - SunLife                           | Plan Cost<br>Employer Cost | \$0.64<br>(\$0.64)             |
| Coverage amount: \$15,000.00                                    | You<br>(Four Times<br>\$C  | u Pay<br>a Month Cost)<br>).00 |
| Please Note:<br>This lament be declined.<br>Next Pressue Concer |                            |                                |

- 22) Life Insurance requires a Beneficiary, select an option from the picklist, complete the required fields, assign an Allocation, then click 'Next' to proceed.
- 23) Review your elections and click 'Save' to continue.

### Voluntary Life Insurance – Self, Spouse, Children

24) Select 'Begin enrollment', 'View your current plan', or 'Decline coverage'.



**25**) Voluntary Life Insurance can be selected in coverage amounts of increments of \$10,000. Select an amount then click *'Next'* or click *'Decline Coverage'* to continue.

\*You are required to complete an EOI (Evidence of Insurability) if you increase the percentage amount from the prior year OR exceed \$300,000 in coverage.

| Choose your Voluntary Employee Life                                     | e Insurance Plan          |
|---|---------------------------|
| lease review your options and choose the coverage amount that bes       | at meets your needs.      |
| 2020 - SunLife - Voluntary Life Insurance                               |                           |
| Coverage amount   | Four Times Per Month Cost |
| © \$10,000.00   | \$0.31                    |
| © \$20,000.00   | \$0.62                    |
| © \$30,000.00   | \$0.93                    |
| © \$40,000.00   | \$1.24                    |
| © \$50,000.00   | \$1.55                    |
| © \$60,000.00   | \$1.86                    |
| © \$70,000.00   | \$2.17                    |
| © \$80,000.00   | \$2.48                    |
| \$90,000.00   | \$2.79                    |
| 8   |                           |
| Select plan   |                           |
|   |                           |
| Decline Coverage I would like to decline Voluntary Employee Life Insura | ance coverage.            |

**26**) You will automatically be directed to Voluntary Spouse coverage, select or add a spouse to enroll and click '*Next*', or click '*Decline Coverage*'.

| o one, click<br>igible F | "Decline Coverage" to contl<br>or Coverage | nue to enroll. |               |        |         |
|--------------------------|--|----------------|---------------|--------|---------|
| ielect                   | Name                                       | Relationship   | Date of Birth | Gender | Actions |
| e .                      |  | Spouse         |               | Male   | Edit    |

### 27) If you chose to enroll, select a coverage amount and click 'Next' to continue.

| Who do you want to cover on this plant           |                          |
|--|--------------------------|
|  |                          |
| 2020 - SunLife - Voluntary Spouse Life Insurance |                          |
| Coverage amount                                  | Four Times Per Month Cos |
| © \$10,000.00                                    | \$0.31                   |
| © \$20,000.00                                    | \$0.62                   |
| ◎ \$30,000.00                                    | \$0.93                   |
| © \$40,000.00                                    | \$1.24                   |
| ◎ \$50,000.00                                    | \$1.55                   |
|  |                          |

**28)** You will automatically be directed to Voluntary Child Life Insurance, select or add a dependent to enroll and click *'Next'* or click *'Decline Coverage'*.

| Voluntar        | y Child Life Insu              | rance: Who do you wa                     | nt to cover?                        |        |         |
|-----------------|--------------------------------|--|-------------------------------------|--------|---------|
| Note: You'll    | also be able to add dependen   | ts and select who you want to cover when | 1 you enroll in or edit your benefi | ts.    |         |
| If no one, clic | k "Decline Coverage" to contin | ue to enroll.                            |                                     |        |         |
| Eligible        | For Coverage                   |  |                                     |        |         |
| Select          | Name                           | Relationship                             | Date of Birth                       | Gender | Actions |
| 380             |                                | Child                                    |                                     | Female | Edit    |
| Add Depend      | lent                           |  |                                     |        |         |
| Decline Co      | verage I would like to decline | Voluntary Child Life Insurance coverage. |                                     |        |         |
| Next            | Previous                       |  |                                     |        |         |

### **29)** If you chose to enroll, select the coverage amount and click '*Next*' to continue.

| Choose your Voluntary Child Life Insurance Plan                                       |                           |
|---|---------------------------|
| Please review your options and choose the coverage amount that best meets your needs. |                           |
| Who do you want to cover on this plan?  |                           |
| 2020 - SunLife - Voluntary Child(ren) Life Insurance                                  |                           |
| Coverage amount   | Four Times Per Month Cost |
| © \$2,500.00  | \$0.13                    |
| © \$5,000.00  | \$0.25                    |
| ☺ \$7,500.00  | \$0.38                    |
| © \$10,000.00   | \$0.50                    |
| © \$12,500.00   | \$0.63                    |
| © \$15,000.00   | \$0.75                    |
| © \$17,500.00   | \$0.88                    |
| \$20,000.00   | \$1.00                    |
| © \$22,500.00   | \$1.13                    |

### **Employee Assistance Program**

30) Select 'Begin enrollment' or 'View your current plan'.



31) The Employee Assistance program is a FREE benefit, review the plan and click 'Next' to continue.



32) Review all elections you've made and click 'Complete Enrollment' to finish enrollment.