

Annual Enrollment Checklist

Use this checklist to ensure you've completed all your annual enrollment tasks.

- ☐ Take some time to learn about all the benefit options available to you. Read this **2027 Benefits Guide** carefully as you consider your plan choices. Emory provides a variety of tools and resources to help you make your benefit decisions; these can be found on the annual enrollment website at www.hr.emory.edu/enrollment.
- ☐ Use the interactive **ALEX Tool**, which will guide you through the plan options and provide you with a personal, confidential recommendation.
- ☐ Attend a **Zoom webinar** to better understand the details of the three medical plan choices, get an overview of all the benefits programs, and have an opportunity to ask questions (see page 5 for dates and times). If you can't attend, you can also view a recording of the webinar on the annual enrollment website at www.hr.emory.edu/enrollment.
- ☐ Decide if you want to enroll in a **flexible spending account** (Healthcare and/or Dependent Day Care) or a Limited Healthcare FSA (for HSA plan participants). Remember: you must actively enroll each year.
- ☐ HSA plan members: decide if you want to make a contribution to your **health savings account**.
- ☐ Actively enroll online through Self-Service (leo.cc.emory.edu) during the enrollment period, **October 19 through November 2, 2026**. Changes are effective on January 1, 2027. If you are currently enrolled in medical benefits and don't make a new medical plan election, your current coverage will continue.
- ☐ Complete the **tobacco use surcharge certification**, if not already done. You can avoid or waive the surcharge. Learn more at hr.emory.edu/eu/wellness/tobacco-cessation/index.html
- ☐ **Review your beneficiary(ies)**. Make any necessary updates to ensure the accuracy of your beneficiary information for life insurance and accidental death and dismemberment insurance.
- ☐ Once you have completed your enrollment online, **save or print a copy** of your confirmation statement, review it for accuracy, and retain it for your records.
- ☐ Verify your 2027 benefits elections after **Monday, November 9, 2026**, by visiting Self-Service online at leo.cc.emory.edu. You will receive an email reminder at that time. If you notice any errors, notify the Benefits and WorkLife Department immediately at 404-727-7613 or email hrrbenef@emory.edu. After January 1, 2027, most elections cannot be changed except within 31 days of a family status change.