

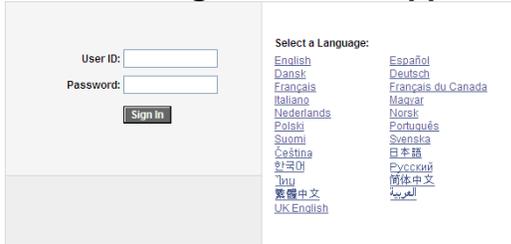
2013 NON-MEDICARE OPEN ENROLLMENT INSTRUCTIONS

Navigating PeopleSoft to Make Your Elections:

Note: The screen shots included in these instructions are examples only. The screen you actually see online will reflect what is applicable to you.

You can access PeopleSoft at <https://benefits.plano.gov/psp/BENEFITS/?cmd=login>

1. The following screen will appear:



The screenshot shows a login form with fields for 'User ID' and 'Password', and a 'Sign In' button. To the right, there is a 'Select a Language:' menu with a list of languages including English, Spanish, Danish, German, French, Italian, Dutch, Polish, Finnish, Czech, Thai, Chinese, and UK English.

2. You will need to enter your login and password.

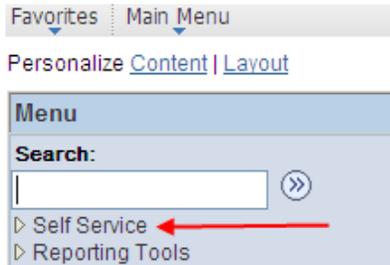
- Your login: your 5 digit employee number. If your employee number is less than 5 digits, add a lead zero(s) (i.e. 00111). (Your number can also be located on your Caremark card (i.e. ID: COPT00111).
- Your password: the first three letters of your last name in CAPS and the last four digits of your social security number (i.e. HUR9999).



The screenshot shows the login form with the User ID field containing '00111' and the Password field containing '*****'. Red arrows point to the fields with the following text: '5-Digit Employee Number (include leading zero)' pointing to the User ID field, 'First 3 letters of your last name in CAPS and last 4 digits of your Social Security Number (NO Spaces).' pointing to the Password field, and 'Select Here once information is keyed' pointing to the Sign In button.

3. Click the button.

4. Click on Self Service.



The screenshot shows the navigation menu with 'Favorites' and 'Main Menu' tabs. Below the tabs, there are links for 'Personalize Content | Layout'. A 'Menu' section contains a search box and a list of options: 'Self Service' and 'Reporting Tools'. A red arrow points to the 'Self Service' option.

5. Click on Benefits Enrollment.

Favorites | Main Menu > Self Service

Self Service

Self Service

Navigate to your self service information and activities.

 Benefits Information Review health, insurance, savings, pension or other benefits information. Health Care Summary Savings Summary Flexible Spending Accounts	 Dependents and Beneficiaries Review and update dependent and beneficiary personal information. Dependent/Beneficiary Coverage Health Care Dependent Summary	 Benefits Summary Review a summary of current, past or future benefit enrollments.
 Dependent/Beneficiary Info Review or update dependent and beneficiary information.	 Insurance Summary Review a summary of your life and AD&D insurance.	 Benefits Enrollment Enroll in benefits. 

6. Click the button to begin your enrollment.

Benefits Enrollment

Your Name Here



The only time you may change your benefit choices is during open enrollment or a qualified family status change.

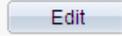
To begin your enrollment, click **Select**.

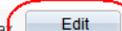
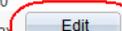
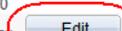
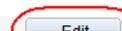
Open Benefit Events				
Event Description		Event Date	Event Status	Job Title
Open Enrollment		01/01/2013	Open	Your last job title on record, if this information is incorrect it is not necessary to correct. 

Selecting Your Open Enrollment Elections:

Please read the following carefully before proceeding

- Your current elections (plan year 2012) have been pre-entered for next year (plan year 2013). You are not required to make an election unless you are changing benefit coverage and/or dependents. You **MUST** however, submit your enrollment and make certain any dependents are enrolled.
- If you wish to continue your current 2012 coverage for 2013 plan year, you only need to click “submit” at the bottom of the page, then “submit” again to finalize. **WARNING:** Carefully check your level of coverage as well as dependent coverage prior to clicking the “submit” button.
- The system will allow Medicare eligible retirees and/or their dependents to enroll however, once Medicare eligible, retirees are no longer eligible for the UHC plan. Medicare eligible stand alone plans are offered; contact Human Resources should you have any questions related to enrolling in those plans.
- The following instructions explain how to edit your level of coverage and/or dependent coverage.

1. If you wish to make a change for 2013, click the  button beside each category to review your coverage/dependent enrollment OR waive your election coverage.

Enrollment Summary			
Medical	Before Tax	After Tax	
2012: UHC Core Retiree:Empl Only			
2013: UHC Core Retiree:Empl Only		498.00	
Dental	Before Tax	After Tax	
2012: UHC Dental Retiree:Empl Only			
2013: UHC Dental Retiree:Empl Only		33.60	
Vision	Before Tax	After Tax	
2012: Waive			
2013: Waive			
Hospital GAP	Before Tax	After Tax	
2012: Waive			
2013: Waive			

2. If making a change for 2013, after you select the  button, you need to review/change your benefit plan choice by clicking the box next to the appropriate benefit option.

You are not required to make a choice for this benefit plan. If you choose not to make an election for this page, your previous election will continue for the new plan year by selecting the continue button below.

If you or your dependent(s) have a condition (whether physical or mental) for which medical advice, diagnosis, care or treatment was recommended or received within six months of your enrollment date, you may be subject to a pre-existing condition exclusion. A pre-existing condition exclusion is the amount of time when care related to that condition will not be covered. Please see the Summary Plan Description for further details.

The system will let Medicare eligible dependents enroll in medical coverage; however, The City of Plano does not provide this benefit. Therefore, if your dependent is 65 years of age or older and would like medical coverage, they must enroll in one of the Medicare Supplement plans offered by The City.

 **Important!** Your current coverage is: UHC Core Retiree with Employee Only coverage.

Select an Option

Here are your available options with your Monthly Premium amounts. To select a plan click the radio button. The system will update your level of coverage after dependents are enrolled. Dependent information is added at the bottom of the page.

[Overview of all Plans](#)

<input checked="" type="radio"/> UHC Core Retiree	Coverage Level	Click here if you wish to enroll in coverage.	Your Costs	Tax Class
	Employee Only		\$498.00	
	Employee + Spouse		\$1,288.00	
	Employee + Children		\$921.00	
	Employee +Family	Click here if you wish to waive coverage.	\$1,856.00	
<input type="radio"/> Waive				

- a. When you elect to enroll in a plan, your eligible dependents will be listed. Follow the “enroll your dependents” instructions listed below.

UHC Core Retiree

Coverage Level	Your Costs	Tax Class
Employee Only	\$498.00	
Employee + Spouse	\$1,288.00	
Employee + Children	\$921.00	
Employee +Family	\$1,856.00	

Waive

Enroll Your Dependents

The following list displays all individuals who are eligible to be your dependents. If an individual is missing from this list, please contact the Human Resources office for more information.

You may enroll any of the following individuals for coverage under this plan by checking the **Enroll** box next to the dependent's name.

REMEMBER the system will let Medicare eligible dependents enroll in health coverage; however, The City of Plano does not provide this benefit.

Dependent Beneficiary			
Enroll	Name	Relationship	Eligibility Proof Received
<input checked="" type="checkbox"/>	Test Dependent	Spouse	<input type="checkbox"/>

The warning will only appear if the Eligibility Proof received box is not checked.

Alert: Human Resources Department needs documentation from you concerning this dependent. Dependent eligibility documentation for this dependent (ie. marriage license, birth certificate, etc) must be submitted to the Human Resources Department no later than *4PM CST on October 17, 2012*. Failure to provide the requested information by the deadline will result in **NO COVERAGE** for this dependent for Plan Year 2013.

[Add/Review Dependents](#)

- b. Once you've completed your enrollment, click [Continue](#) to store your choice.

The next page that appears will allow you to review your election choice, the estimated monthly premium, and any dependents that you enrolled. **NOTE: Your service credits will NOT be reflected in the monthly premium.** They will, however, be included in the calculation on the November confirmation statement.

3. Click [Cancel](#) if you wish to change what you just elected, or click [Continue](#) to save your election.

Your Choice

You have chosen UHC Core Retiree with Employee + Spouse coverage.

Your Monthly Premium Cost (Your service credits ARE NOT reflected)

Your Cost: \$1,288.00

Your Covered Dependents

Alert: Human Resources Department needs documentation from you concerning this dependent. Dependent eligibility documentation for this dependent (ie. marriage license, birth certificate, etc) must be submitted to the Human Resources Department no later than *4PM CST on October 17, 2012*. Failure to provide the requested information by the deadline will result in **NO COVERAGE** for this dependent for Plan Year 2013.

Name	Relationship	Proof Received
Test Dependent	Spouse	<input type="checkbox"/>

Notes

Once submitted, this choice will take effect on January 1, 2013.

[Continue](#) [Cancel](#)

Click **Continue** to store your choices.

Click **Cancel** to go back and change your choices.

- Repeat steps 1-3 for each of the remaining categories: Dental, Vision, and Hospital GAP.

NOTE: If electing GAP for the first time, select your current age and the level of coverage. You will also need to fill out a Hospital Gap Enrollment Form. Forms are located on the Retirement Center Website at www.plano.gov/Departments/HR/Retirees or you can contact Katherine McGuire at (972) 941-5019 or kathymc@plano.gov to request a form. Remember, Medicare eligible retirees and/or Medicare eligible dependents cannot enroll in GAP.

- Once all elections are made, you will see a cost summary at the bottom of the page. The cost summary does not take into account your service credits. Service credits will be displayed on your November confirmation statement.

Election Summary			
	Total	Before Tax	After Tax
Costs	1,335.60	0.00	1,335.60
Your Costs	1,335.60	0.00	1,335.60

- After you review the cost summary, select the  button at the bottom of the page.

- You will be asked one more time to confirm your elections. Select the  button again.

Benefits Enrollment
Submit Benefit Choices Below 

Your Name Here

You have almost completed your enrollment. If you have no further changes, click **Submit** at the bottom of this page to finalize your benefit choices.

Do not submit your benefit choices until you have completed your enrollment. You may store your choices on each page and return to the Enrollment Summary as many times as you'd like up until your enrollment deadline. However, once you click Submit your benefit choices will be submitted.

If you go back into the system to review your elections AFTER you click submit, you MUST click submit again, or all your elections will be lost.

Once your enrollment is processed, you may not be able to make any further benefit changes until the next Open Enrollment period or if you have a qualified family status change.

Authorize Elections

By submitting your benefit choices you are authorizing the City of Plano Benefits Department to send necessary personal information to your selected providers to initiate and support your coverage. You will be responsible for providing your monthly premium by the payment due date each month, failure to make payment by the due date will result in late penalties up to and including loss of coverage..

By submitting your benefit choices you also acknowledge the Summary Plan Descriptions for all City of Plano plans are available on the Internet and are aware that you may request a hard copy from the Human Resources Department at anytime.

Click **Submit** to finalize your elections.

Click **Cancel** if you are not ready to submit your choices and wish to return to the Enrollment Summary.

REMEMBER, your selections are not final until you click “submit”.
If you go back into the system to review your elections AFTER you click “submit”, you MUST click “submit” again, or all your elections will be lost.

All elections MUST be entered and submitted NO LATER THAN 4 pm CST, Wednesday, October 17, 2012.

Confirmation statements sent out in November, will reflect your monthly premium.